



**GOLDEN
HORSESHOE**
FOOD AND FARMING
ALLIANCE



Agri-Food Asset Mapping

Janet Horner
Executive Director

Golden Horseshoe Food & Farming Alliance (GHFFA)

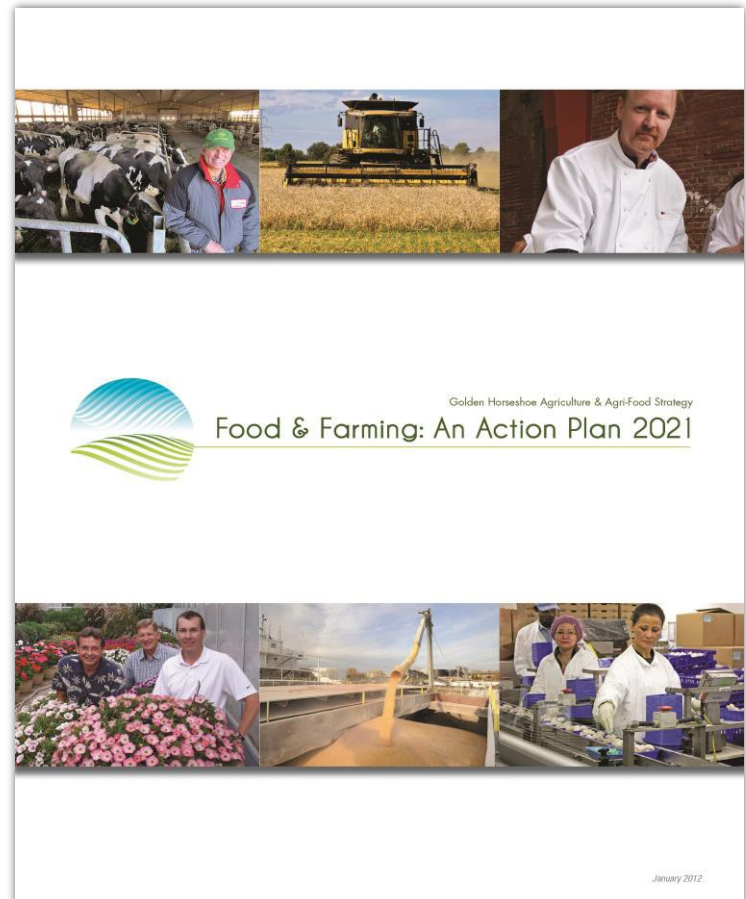
- Elected Municipal Officials from the 5 Regions and the Cities of Hamilton & Toronto
- Public Health in the Golden Horseshoe
- Federations of Agriculture in the Golden Horseshoe
- Toronto & Region Conservation Authority
- Vineland Research & Innovation Centre
- Durham College and Niagara College
- Friends of the Greenbelt Foundation
- Holland Marsh Growers Association
- Food Industry



Left Field Farms

Golden Horseshoe Food & Farming Action Plan 2021

- First ever regional food system plan for the Golden Horseshoe
- Integrates land use planning, economic development and food, nutrition & health
- Five opportunity areas with 62 actions
- 25 actions completed or in progress



Key Accomplishments

Projects:

- Food & Farming Asset Mapping
- Municipal Local Food Procurement
- Golden Horseshoe Agriculture & Agri-Food Profile Study



Significant Engagement Initiatives:

- Queens' Park Days to engage Ministers & MPP's
- Workshop series for planners & economic development officers
- 'Linking Food, Farming & Health' annual meeting with Public Health

Engagement, Policy Review & Communication Initiatives:

- Response to Parks Canada's Rouge Park Management Strategy
- Response to the Provincial Co-ordinated Plans Review and Advisory Panel report, Local Food Act, and other policy proposals
- Online e-newsletters & stories



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Agri-Food Asset Mapping

Marilyn Bidgood
Project Manager

Why Asset Mapping?

Best Business & Leadership Practices:

- a sortable database and mapping
- support municipal strategies and decision making that increase investment, productivity, jobs
- partnerships to increase capacity for Ontario grown food products
- assist others to replicate the methodology

Access New & Emerging Markets:

- Increase awareness of the size and scope of the food and farming sector and its economic impact
- identify trends to respond to new/emerging market opportunities

Why Asset Mapping

Retain & Expand Existing Markets:

- identify sectors at risk, target investment
- understand the impact of investment in one part of the region on other parts of region
- encourage new entrants, support growth in existing businesses with positive municipal policy
- create more business to business connections

Respond Quickly & Effectively to Risk:

- plan appropriate emergency response measures that may be required at the municipal level (i.e. avian influenza, food safety issues)

What are the Assets?

The Agri-Food value chain from production to consumption

Farms



What are the Assets?

Suppliers



What are the Assets?

Processing



What are the Assets?

Distribution



What are the Assets?

Access



Concept → Data → Results

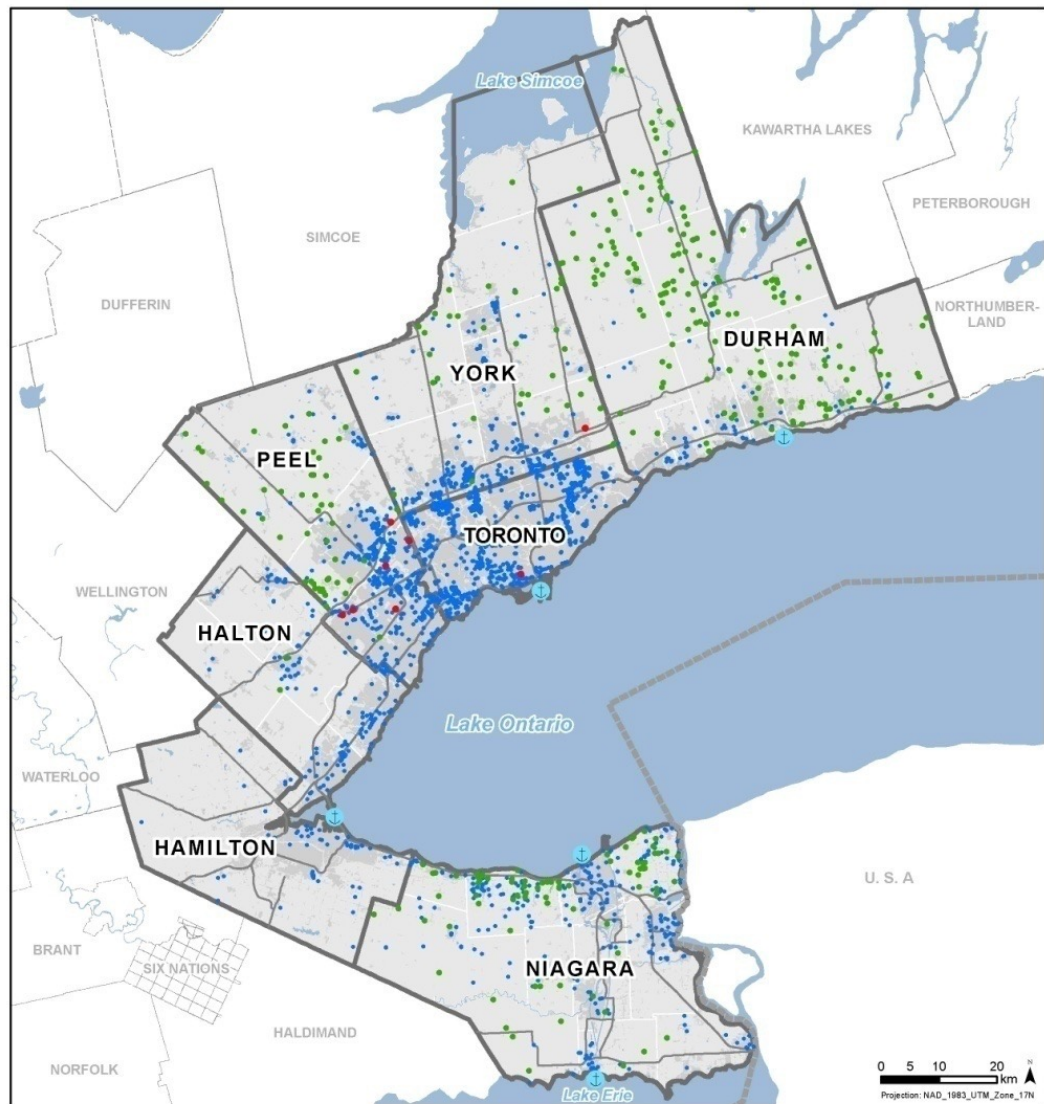
- 4DM to develop process, data management, website
- Synthesis Agri-Food Network for analysis and recommendations

Building A Path Forward

- approach needed to be pragmatic, accessible, and scalable to grow/adapt
- data integrity is the corner stone of the initiative, in order to build confidence with the users of the data – standardized input, NAICS, system checks
- create a complete, comprehensive picture of the entire supply chain from farm to table
- ROLE OF STEERING COMMITTEE IS VITAL - Build collaboration and “big picture” ideas through sharing of the agri-food asset data with the municipalities

Pilot Phase Project Results

- Identify, inventory, and profile the Regions' food and farming infrastructure
- Include business, education, research, development, and innovation assets
- Analyze the strengths and weaknesses of the existing assets & identify existing gaps
- Develop & document a translatable process



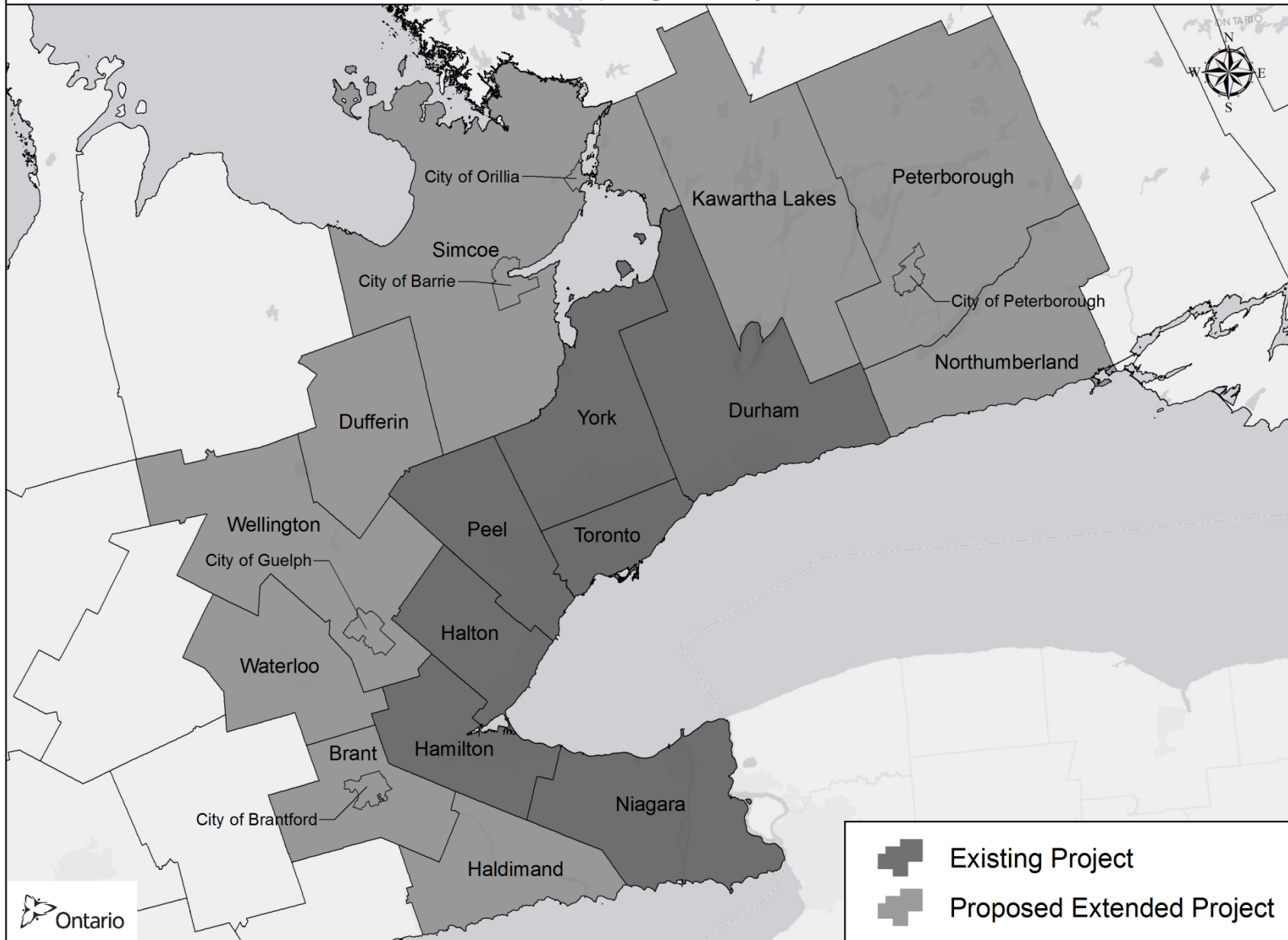
Types of Agri-Food Assets

Agri-Food Asset Mapping

Golden Horseshoe Farming and Food Alliance

- Farming Asset
- Processing Asset
- Distribution Asset
- Highway
- Built Up Area
- Port

Asset Mapping Study Areas



Greater Golden Horseshoe Project Results

- All 14 GGH municipalities submitted data
- Farm and food processing data was added from OMAFRA
- Approximately 60,485 records have been collected, 40,000 during the GGH phase
- Data Sharing Agreement has been developed, signed by OMAFRA, project partners and is in sign off stage by municipalities

Livestock Production Assets

Agri-Food Asset Mapping

Golden Horseshoe Farming and Food Alliance

4-Digit NAICS Codes

- Cattle Ranching and Farming (1121)
- Hog and Pig Farming (1122)
- Poultry and Egg Production (1123)
- Sheep and Goat Farming (1124)
- Aquaculture (1125)

- ⚓ Port
- 🛣️ Highways
- ✈️ Airport
- 🏠 Built-Up Area
- 🚂 Railway
- 🗺️ Border Crossing

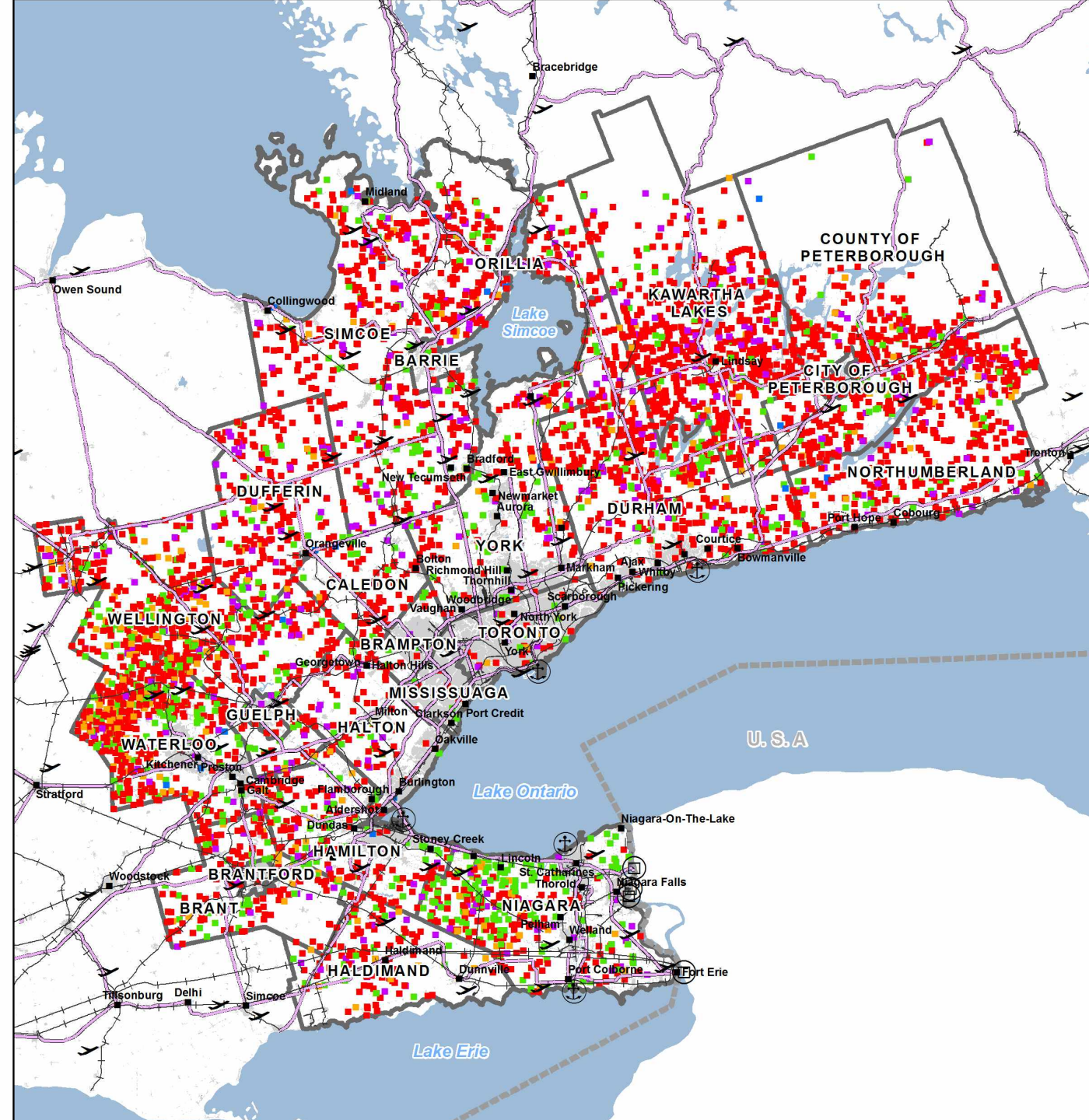
0 12.5 25 50 km
Projection: NAD_1983_UTM_Zone_17N

SYNTHESIS
Agri-Food Network

4DM
Providing solutions through mapping technology...

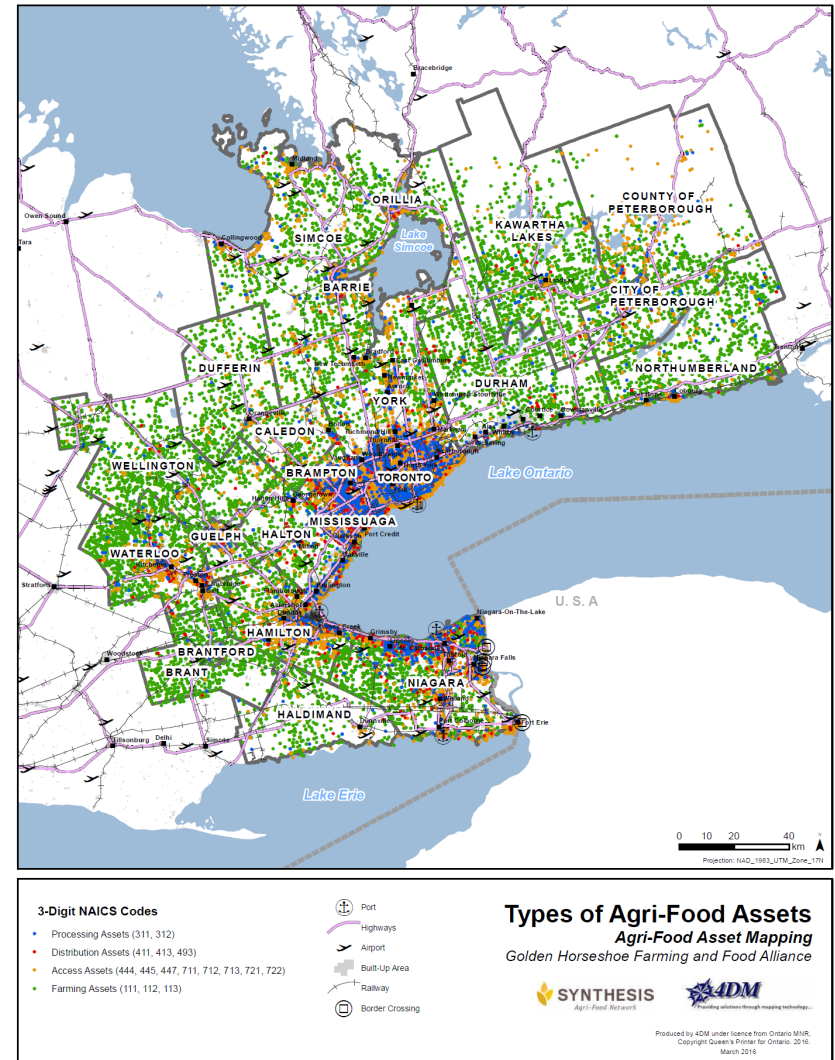
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March 2016



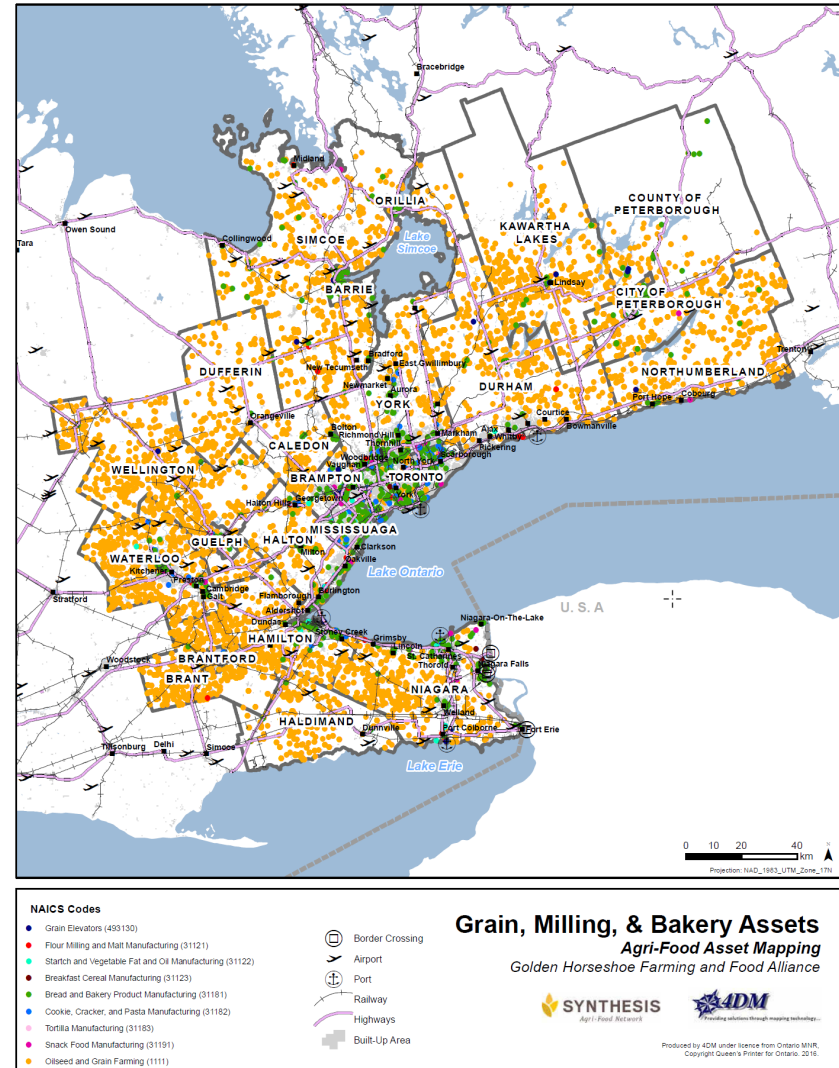
How can it be used?

- **Support communications promote the industry through maps and tables**
- **Monitor the evolution of the agri-food industry**



How can it be used?

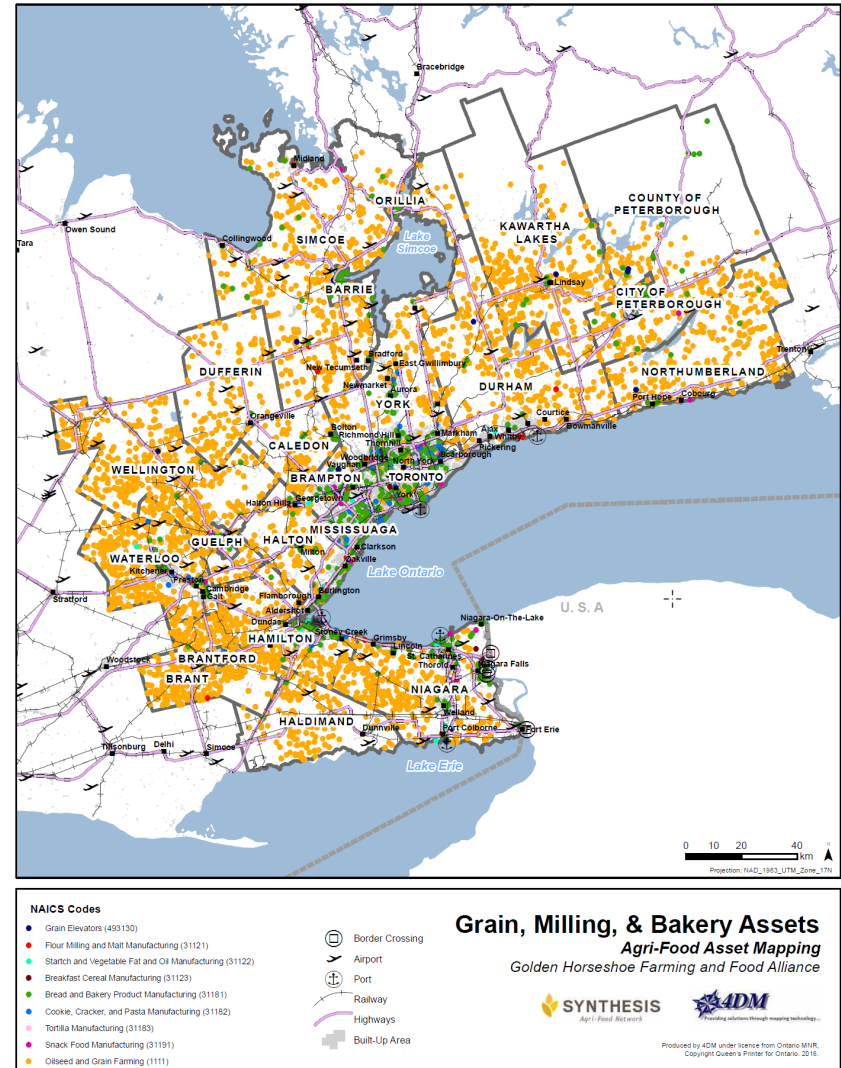
- **Provide siting and trade area analysis for starts up and re-locating businesses**
- **Use the information to support economic development programs, planning studies, and policies**



How can it be used?

Website

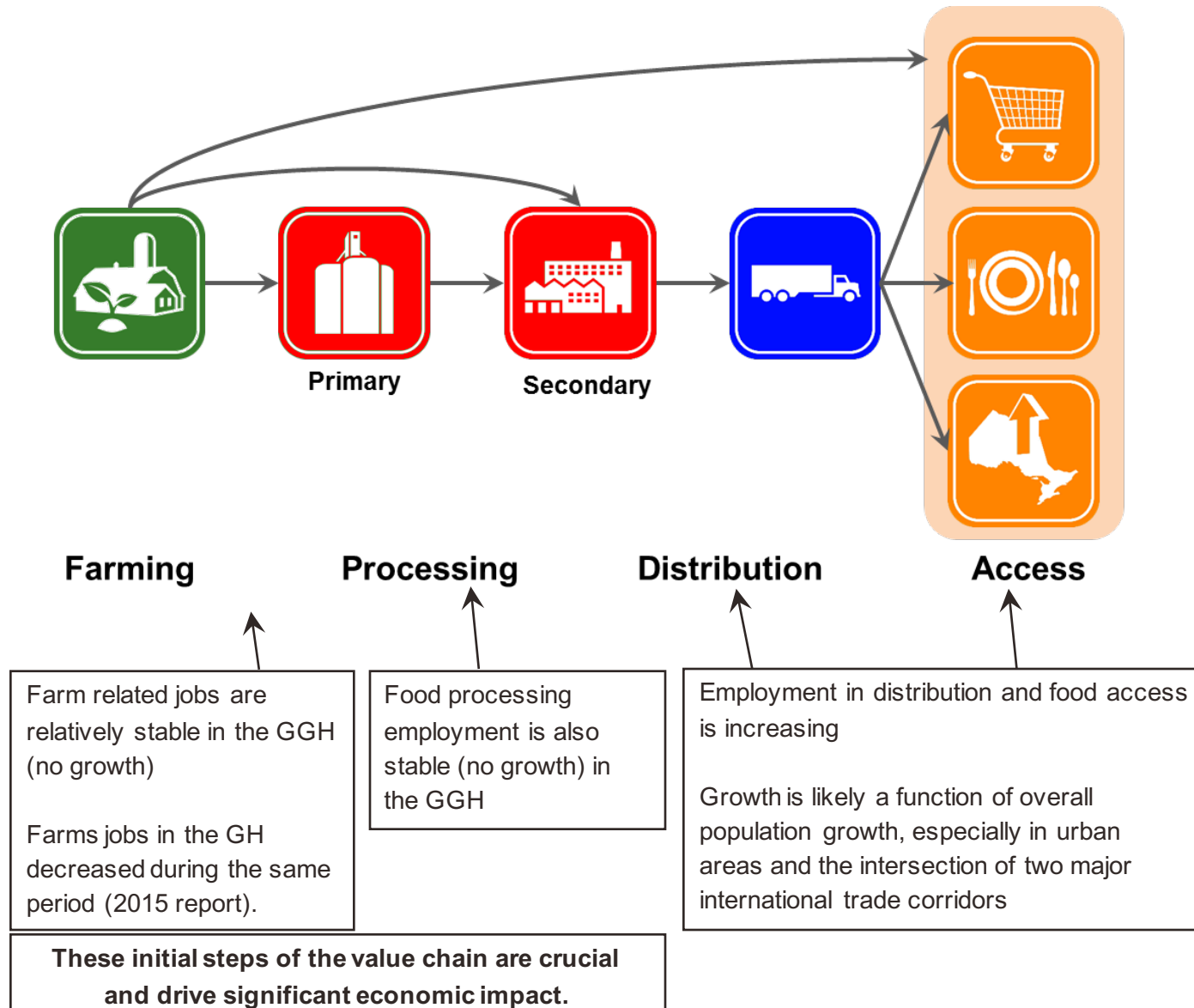
Demonstration



ANALYSIS: Our Approach

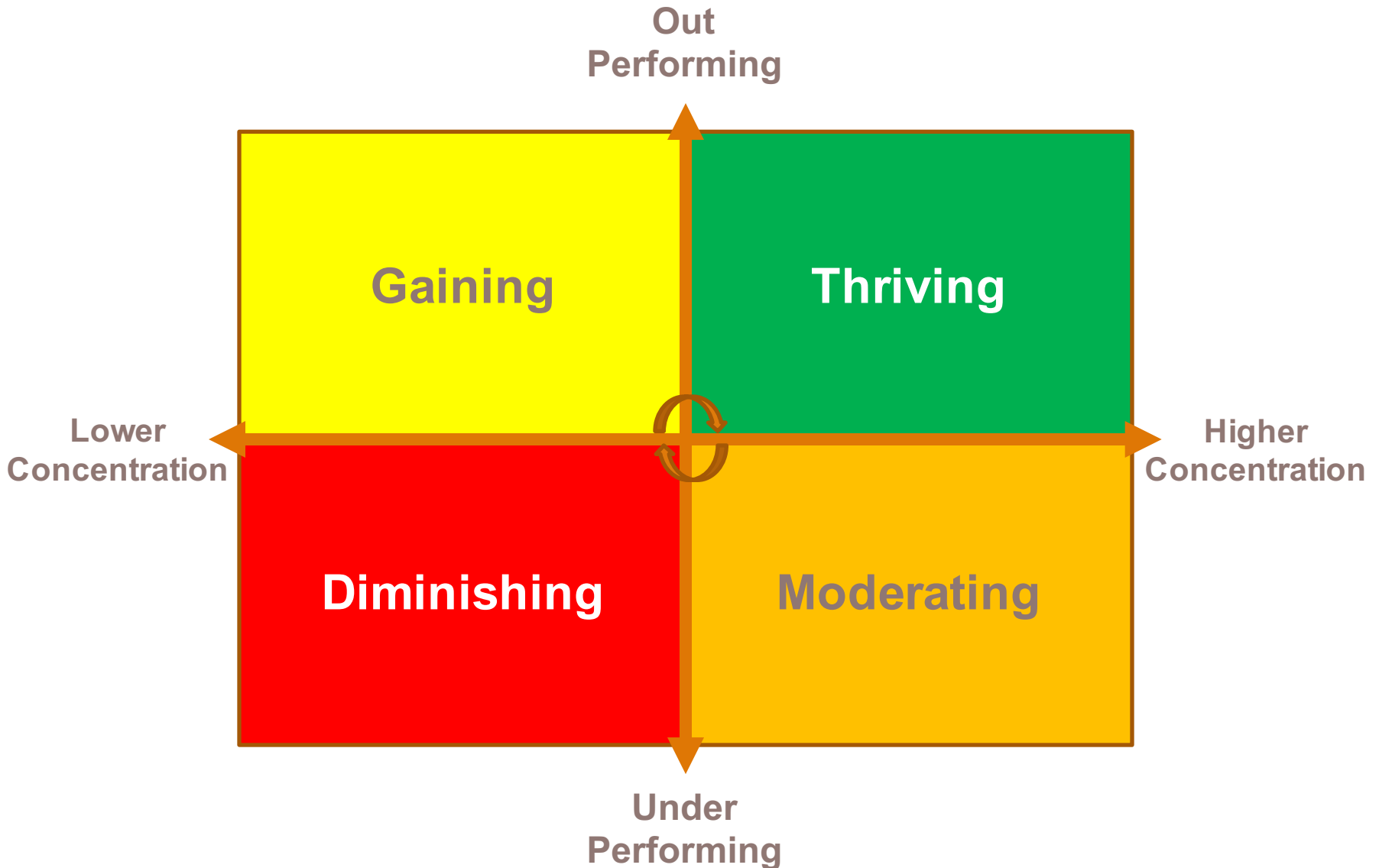
- Combine Asset Map with other economic information
 - Employment Trends
 - Sector Competitiveness
 - Enablers, Inhibitors and Trends
- Sub-sector Mapping and Analysis
 - Identify key sectors for further analysis
- Observations and Recommendations

Agri-food Value Chain Segments

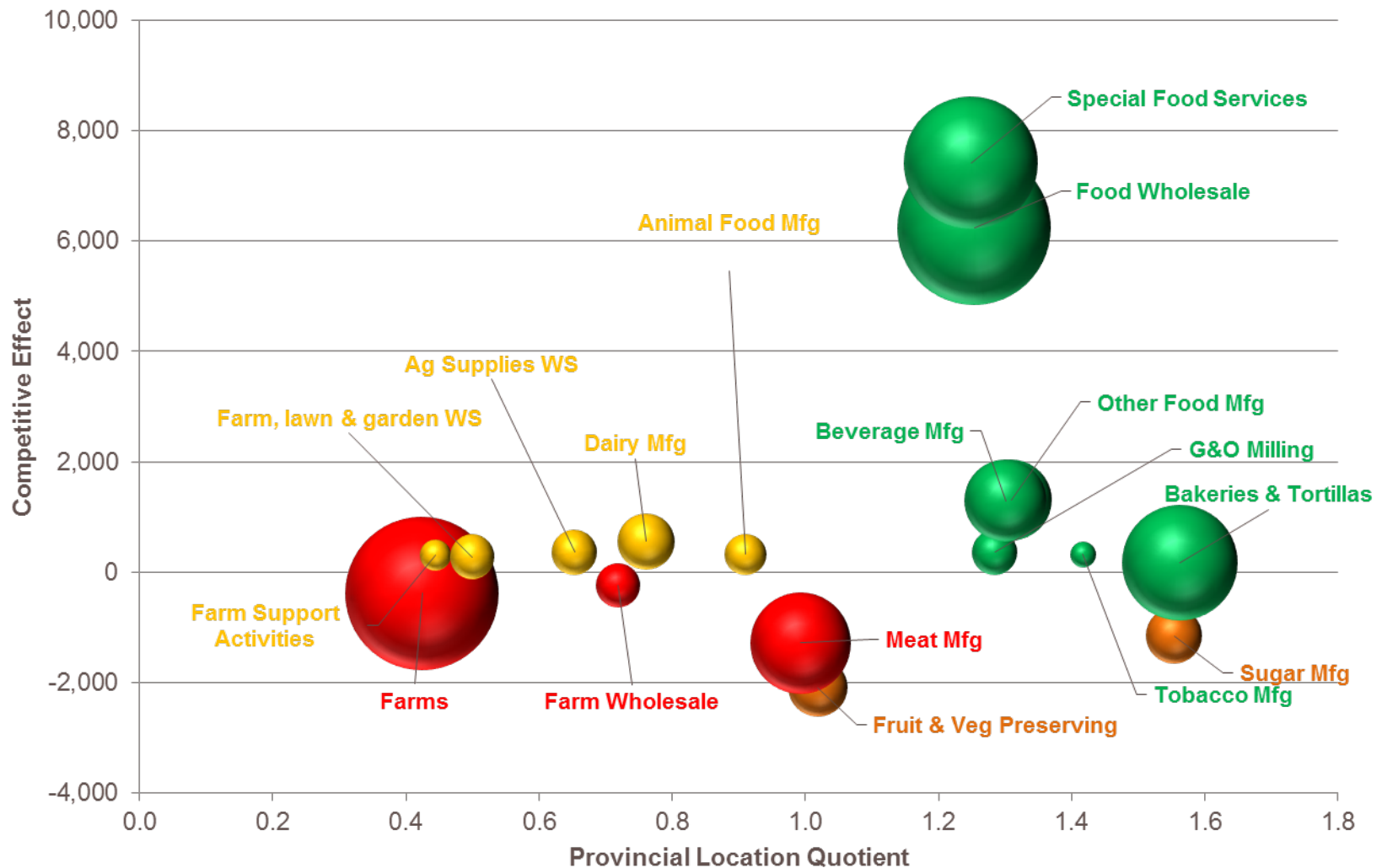


Shift Share

Competitive Effect vs. Provincial Location Quotient



Shift Share - GGH 2010-2015



Cattle Production Assets

Agri-Food Asset Mapping

Golden Horseshoe Farming and Food Alliance

Total Sales per Sq Km



4 - Digit NAICS Code (1121)

-  Port
-  Highways
-  Airport
-  Built-Up Area
-  Railway
-  Border Crossing

0 12.5 25 50 km
Projection: NAD_1983_UTM_Zone_17N

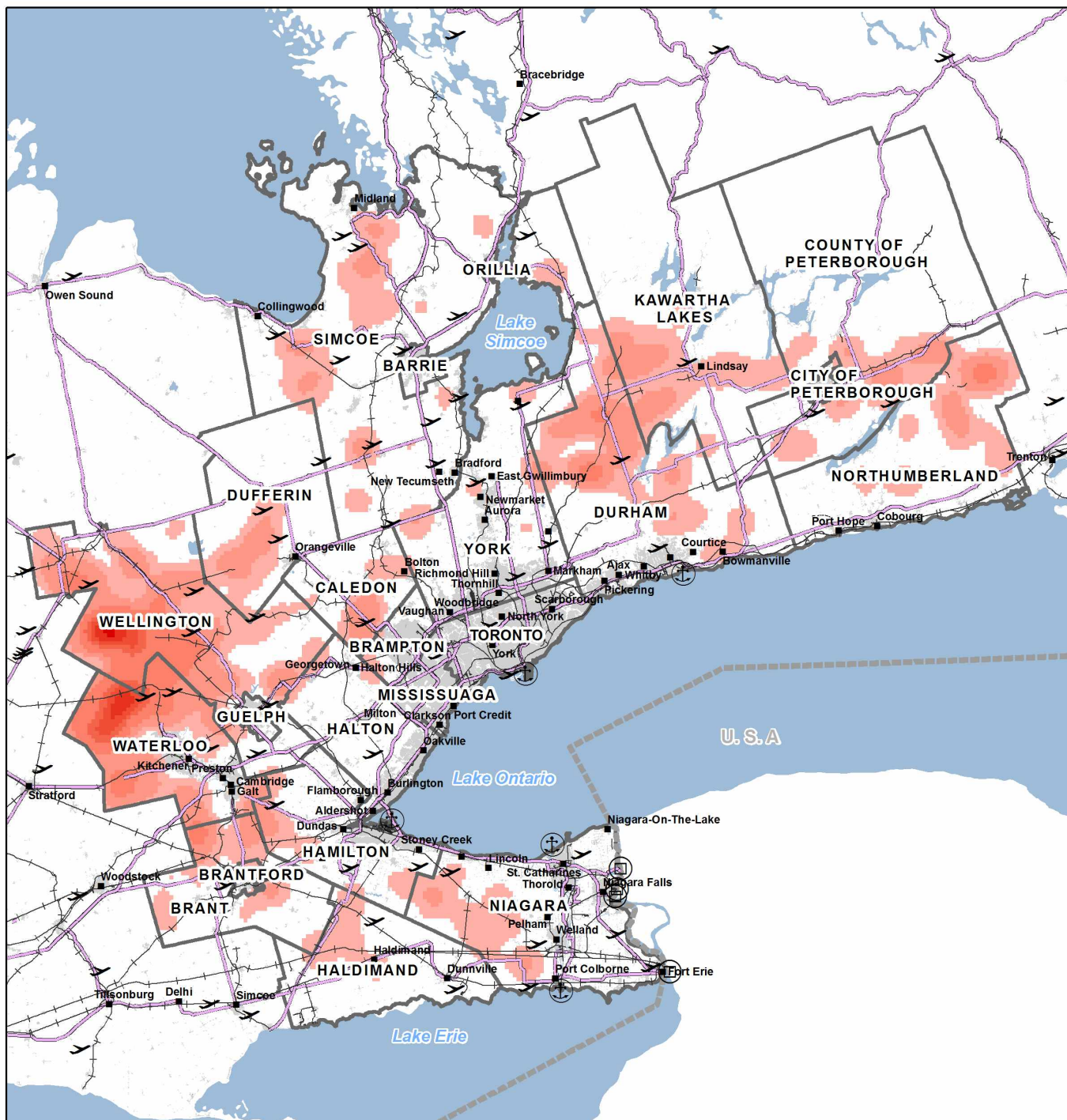


SYNTHESIS
Agri-Food Network

4DM
Providing solutions through mapping technology...

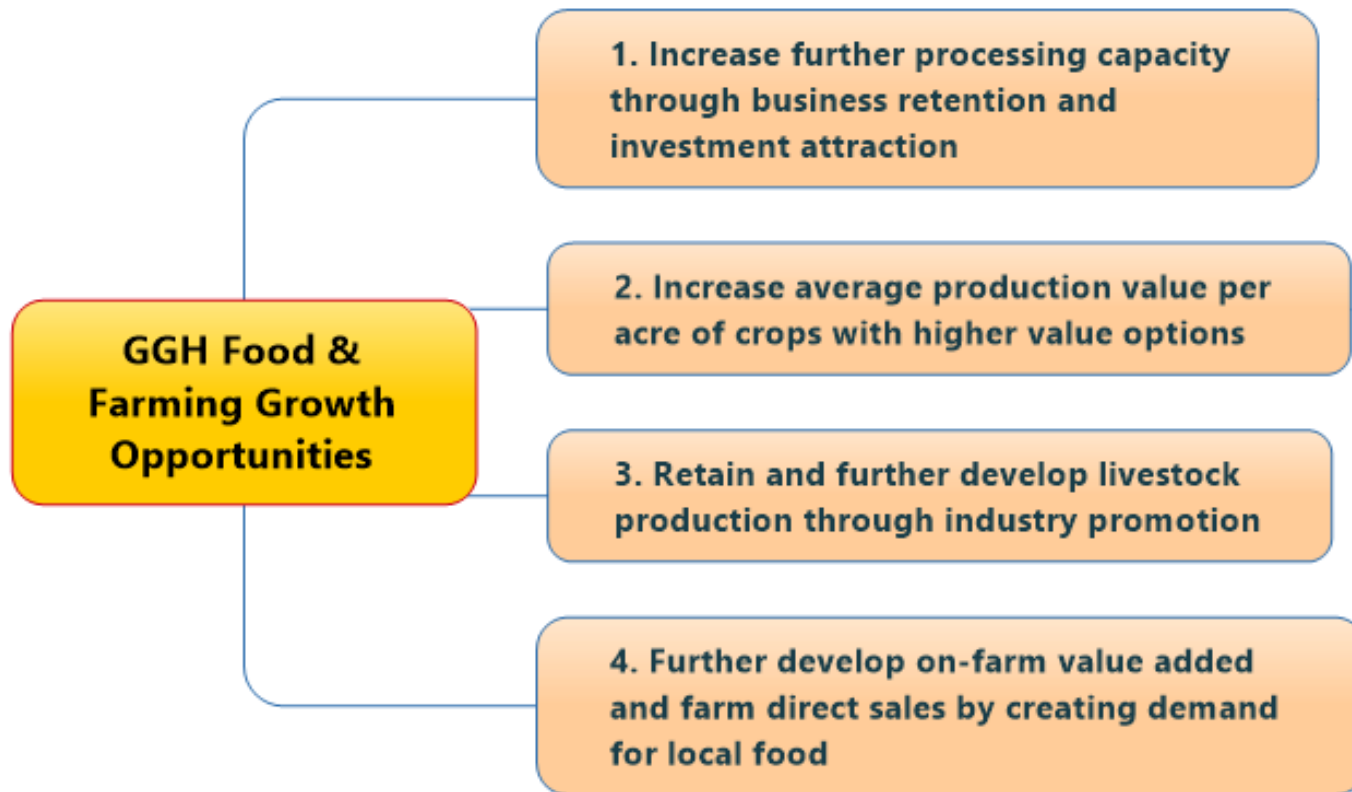
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Grow the Cluster

Increase agri-food production, investment and employment on a shrinking land base in a sustainable manner.



ANALYSIS: Our Approach

- Full Report is available at:

<http://www.foodandfarming.ca/research>



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Agri-Food Asset Mapping

Brian Morris
Business Development Consultant
City of Hamilton

Why Agri-food Asset Mapping?

- Agriculture is a \$900 million economic driver in the City of Hamilton... but what does that look like?
- Food processing is Hamilton's second largest subset of manufacturing in terms of employment and revenues
- What are the linkages between the two and more importantly, where are the gaps?

Practical Example - Hamilton

- *End of the day, needed a useful tool for economic development practitioners*
- *Business Retention & Expansion and Investment Attraction*
- *What am I selling, who should I be selling it to?*

Practical Example – Hamilton

Initiatives underway include:
Farm Map & Directory



Practical Example - Hamilton

- Targeted Investment attraction proposal and collateral (value proposition)

THE AMBITIOUS CITY

Hamilton is an ambitious city, beginning with the past, re-energizing Hamilton's infrastructure and innovative use to meet the requirements that firms in the food processing sector need to thrive in this highly competitive and ever-changing industry. It is a city that continues to re-emerge from its strong and respected industrial roots, taking that same determination, hard work and dedication to the food industry, surrounded by more than 20 of North America's food processors and eatery companies and strategic partners leads to Hamilton for emerging food, leading food processing technology and business solutions.

DRIVING INNOVATION

As a food center in research and food technology processing, Hamilton provides space with specialty sets in leading in areas of food research, innovation, food safety and science.


IDEAL STRATEGIC LOCATION


The city is an ideal location for the advanced manufacturing industry. Hamilton's unique positioning connects with global firms worldwide due to their strategic location within less than an hour's drive to the nearest U.S. market.

PROUD HERITAGE HISTORY

From award-winning, highly acclaimed businesses to forward-thinking business leaders and entrepreneurs to business communities and dedicated, from the workers, Hamilton has the academic knowledge, the required infrastructure and the determined and diverse labor force companies demand for success.

HAMILTON IS THE #1 PLACE TO INVEST IN CANADA
According to the Global Infrastructure Institute





HAMILTON

THE AMBITIOUS CITY

DELIVERING FOOD & BEVERAGE PROCESSING SUCCESS

GET CONNECTED WITH

CONNECTION 905.546.4222
email: info@hamilton.ca

CONNECT www.hamilton.ca

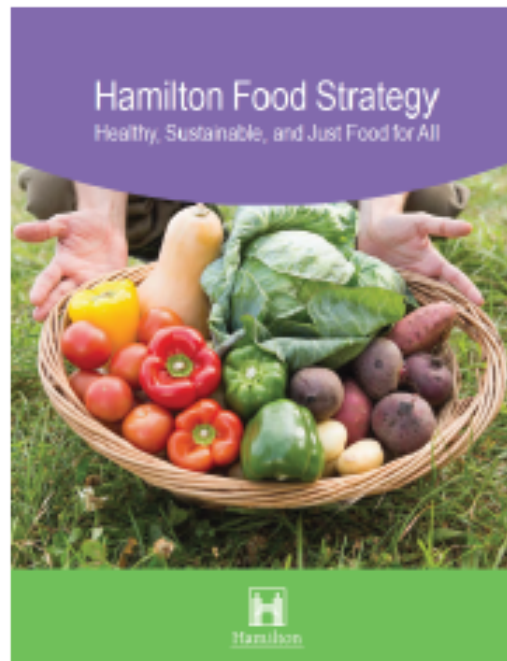
COLLABORATION Economic Development Office
City of Hamilton
11th Floor, 11th Street West, 11th Floor
Hamilton, Ontario L8N 4B7 Canada






Practical Example - Hamilton

- Feasibility Study for Full Service Food and Beverage Warehouse
- Food Strategy Work and consultation





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Asset Mapping in Ontario East




ONTARIO EAST
ECONOMIC DEVELOPMENT

www.ontarioeast.ca
1-866-641-EAST (3278)

Ontario East Project Commitment

- Project funded by Ontario East Economic Development Commission & delivered in partnership with GHFFA
- No additional cost to municipalities at this time – from membership
- Commitment of municipal staff time: data coordination and input
- Support from project manager & Ontario East staff and data consultant

OMAFRA & Asset Mapping

- Supports the Premier's Agri-Food Growth Challenge:
 - Asset mapping is invaluable to growing the sector
- Informs the coordinated reviews of planning documents: Eastern Ontario Growth Plan, Oak Ridges Moraine, Greenbelt, etc.
- OMAFRA is contributing data to the Asset Mapping database and financially supported GGH phase of project
- Links to and supports Regional Economic Development objectives for strong, vibrant rural economies

Project Schedule

- Initial data collection: June 2016
- Complete data collection: Dec 2016
- Data Processing: February 2017
- Data report: June 2017
- Data analysis: June – September 2017
- Results meeting: September 2017

Where are we going?

- Finish the work of Ontario East project pending funding
- Expand database to Northern and Southwestern Ontario
- Development of long term sustainability plan for database
- Continue relationships with participating municipalities for upgrading data
- Development of licensing agreements with other agencies and organizations

Thank You

***Janet Horner
Brian Morris
Marilyn Bidgood***



CHOOSING ONTARIO EAST IS EASY!



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