



Workforce Multiplier Effect Study of Local Farms and Food Processors in Northwestern Ontario

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North Superior Workforce Planning Board
Northwest Training and Adjustment Board

Introduction

- Growing demand for locally produced food in Northwestern Ontario
- Increasing awareness of health, environmental, and economic implications of eating local food
- Competitive advantage of lower land prices
- Ability to support a variety of crops and access to a large regional market
- Not much known about the workforce multiplier effect of local food production in Northwestern Ontario.



Study Objectives

- To study the current state of food production in each of the three districts of Northwestern Ontario
- To compare the changes in the state of food production between 2006 and 2011
- To explore the workforce multiplier effect of local food production
- To provide a forecast of workforce multiplier effect of local food production for the next 5 years

Number of Farms in Northwestern Ontario

Annual Sales Revenue	Thunder Bay District	Rainy River District	Kenora District	Total
<\$10,000	105	79	36	220
\$10-25,000	52	67	22	141
\$25-50,000	25	51	7	83
\$50-100,000	11	39	8	58
\$100-250,000	9	25	6	40
\$250-500,000	15	15	3	33
\$500-1,000,000	17	2	0	19
>\$1,000,000	5	0	0	5
Total	239	278	82	599

Source: Statistic Canada 2012

Study Methodology

- Community Service Learning(CSL) Approach
- Data Collection from Statistics Canada and other government sites
- Site visits
 - Thunder Bay District
 - Rainy River District
 - Kenora District
- Focus group discussions
- Survey questionnaire
- Individual interviews
- Data compilation and Analysis
 - Estimated direct jobs for food production and processing
 - Estimated indirect jobs related to food production
 - Predicted future jobs

Thunder Bay District



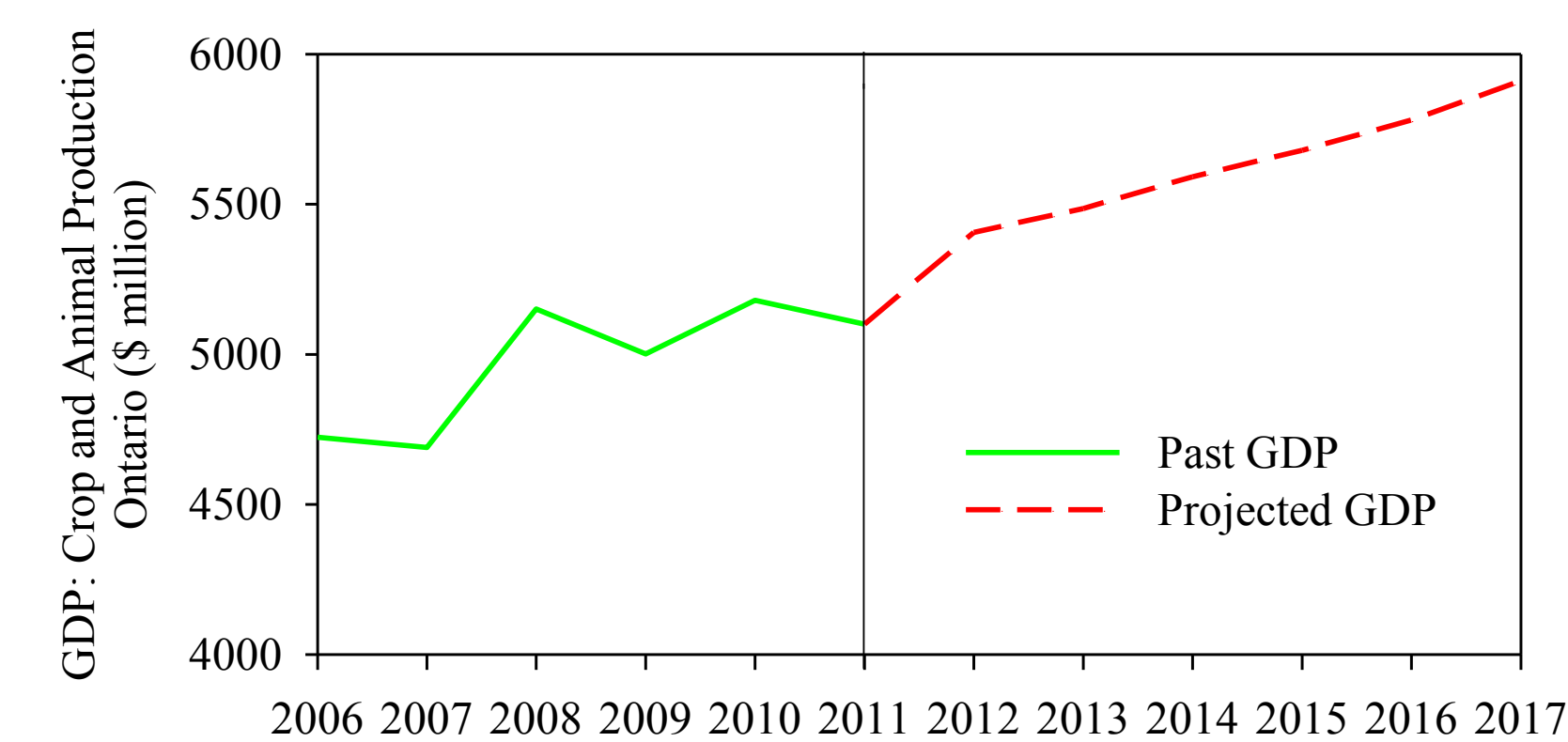
Rainy River District



Kenora District



GDP in Food Production Sector



Source: Conference Board of Canada e-Data

Jobs in Food Production in Northwestern Ontario

Aggregate Jobs in Food Production Sector					Jobs in Food Production Sector by Producers				
Annual Sales	FT	PT	Seasonal	Total	Annual Sales	FT	PT	Seasonal	Total
<\$10,000	220	117	0	337	<\$10,000	220	117	0	337
\$10-25,000	141	85	0	226	\$10-25,000	141	85	0	226
\$25-50,000	125	55	33	213	\$25-50,000	125	50	33	208
\$50-100,000	116	54	23	193	\$50-100,000	174	70	23	267
\$100-250,000	133	40	16	189	\$100-250,000	133	32	16	181
\$250-500,000	132	46	26	205	\$250-500,000				
\$500-1,000,000	95	61	38	194	\$500-1,000,000				
>\$1,000,000	29	20	14	63	>\$1,000,000	40	20	14	74
Total	991	478	151	1620	Total	833	373	86	1292

Jobs in Food Production Sector by Suppliers					Jobs in Food Production Sector by Retailers				
Annual Sales	FT	PT	Seasonal	Total	Annual Sales	FT	PT	Seasonal	Total
<\$10,000					<\$10,000				
\$10-25,000					\$10-25,000				
\$25-50,000					\$25-50,000	83			83
\$50-100,000					\$50-100,000				
\$100-250,000					\$100-250,000	40	16		56
\$250-500,000	83	26	13	122	\$250-500,000	33	26		59
\$500-1,000,000	95	61	38	194	\$500-1,000,000				
>\$1,000,000	29	20	14	63	>\$1,000,000				
Total	207	107	65	379	Total	156	42	0	198

Projected Jobs in Food Production Sector

	2011	2012	2013	2014	2015	2016	2017
Thunder Bay District	717	760	771	786	798	813	831
Rainy River District	721	764	775	790	803	817	836
Kenora District	182	193	196	200	203	206	211
Northwestern Ontario	1,620	1,717	1,742	1,776	1,804	1,836	1,877

Average Age of Farm Operators

	2006			2011		
	Thunder Bay	Rainy River	Kenora	Thunder Bay	Rainy River	Kenora
under 35 years	35	45	5	35	45	10
35 to 54 years	205	205	65	155	140	65
55 years and over	135	180	65	170	190	45
Total # of operators	375	420	130	360	380	120
Average on farms with one operator	53.6	54.6	54.2	56	58	58.5
Average on farms with two or more operators	49.4	49.4	53.2	50.6	50	48.8
Average of all operator	51	52	53.6	52.5	54	52.8

Conclusions

- The stability of the agriculture sector levels out the cyclical highs and lows of other natural resource activities in Northwestern Ontario
- The agriculture sector can have a significant impact on the economy and provide both direct and indirect jobs through suppliers and market channels
- Our study demonstrates a multiplier impact of 1.7 on direct jobs in food production sector in Northwestern Ontario
- Addressing current infrastructure gaps can enhance the speed and volume of agriculture growth in Northwestern Ontario: regional distribution system, processing facilities and storage
- Develop specialized agriculture training with a northern focus in post-secondary institutions and other training facilities to enhance northern youth engagement
- Need to sustain northern place-based research to ensure viable crops for northern conditions such as TBARS (Thunder Bay Agriculture Research Station)
- Need programs that encourage self-sufficiency in both cultivated and forest food sources in the First Nation communities
- Our study is based on a relatively small sample size within a limited time, and it demonstrates the viability of additional data collection and study of the agriculture sector in Northwestern Ontario

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