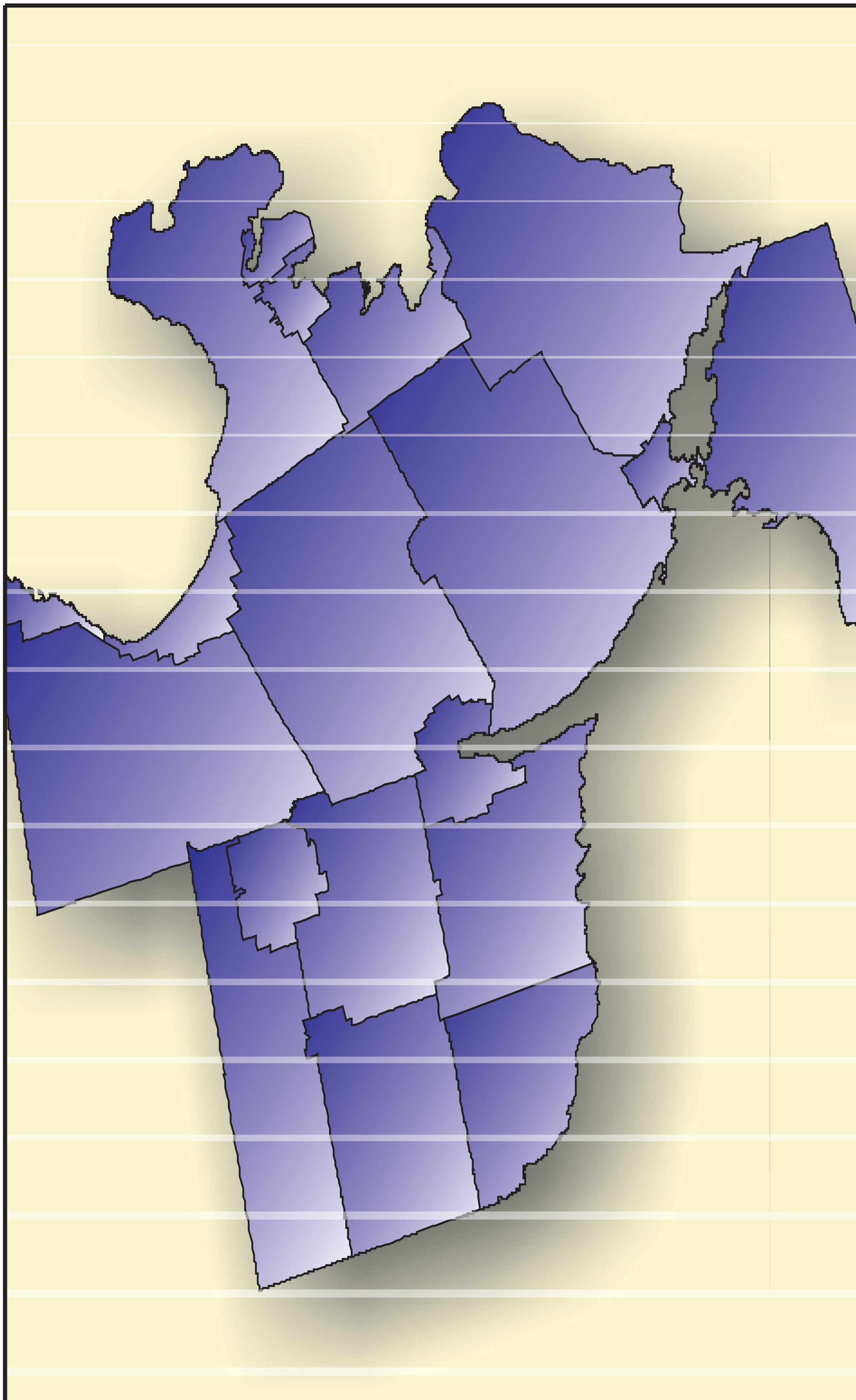
May
2006

Intergovernmental Action Plan for Simcoe, Barrie & Orillia



Existing Capacities Assessment
Rural Development Potential Report

DILLON CONSULTING
Ainley Group
Bourrie & Associates
Caldwell Consulting
Clara Consulting
EDP Consulting
Enid Slack Consulting
Lapointe Consulting
TeraTrends
Will Dunning Inc

TABLE OF CONTENTS

Rural Development Potential: Simcoe County

EXECUTIVE SUMMARY

1.0 Introduction

This Rural Development Potential Report is one component of the Phase II Existing Capacities Assessment (ECA) for the IGAP. The IGAP comprises four phases: Phase I is an analysis of assimilative capacity of the Nottawasaga River and Lake Simcoe watersheds by the Lake Simcoe Region (LSRCA) and Nottawasaga Valley (NVCA) Conservation Authorities. Phase II is an Existing Capacities Assessment, Phase III a Growth Potential Assessment and Phase IV an Implementation Assessment of the IGAP.

The purpose of the ECA is to:

- Assemble a sound and defensible database on infrastructure and services; and
- Determine existing capacity to accommodate approved development and growth.

The ECA includes a review of:

- Approved development and planned land use in settlement areas;
- Physical potential for intensification in settlement areas;
- Existing and planned water and sanitary sewage infrastructure;
- Natural and cultural heritage resources;
- Transportation facilities;
- Public service facilities;
- Economic indicators;
- Rural development potential;
- Short term housing market pressures; and
- Longer term population and employment trends in the study area.

The results of the review are documented in seven foundation reports: this Rural Development Potential Report and the following reports under separate cover: Communities Report, Resources Report, Infrastructure Assessment Report, Physical Intensification Potential Report, Housing Market Pressures Report and Population and Employment Trends Report. The results of the review are synthesized with the results of the Assimilative Capacity Study in an Existing Capacities Assessment Report. The overall objective for the ECA is to provide a defensible foundation for Phases III – Growth Potentials Assessment and IV Implementation Assessment of the IGAP process.

This Rural Development Potential Report documents information on current trends and future rural development potential in the County of Simcoe. It focuses on development potential in both the agricultural and tourism related industries and also reviews residential development outside of the settlement areas.

This Rural Development Potential Report is divided into four main sections as shown in the Table of Contents. The Introduction provides the context and purpose of this report in regards to IGAP. Section 1 provides a detailed overview of the agricultural industry. It reflects on the current state of agriculture in the county, evaluates the relationship to the county economy and concludes with an overview of key aspects of the future of agricultural development in Simcoe County. Section 2 reviews the role of tourism in Simcoe County and Section 3 provides some insights into current and future development trends.

2.0 Overview

The rural community of Simcoe County is a vibrant community of more than 100,000 people. While dramatically different than its urban counterpart the rural community, nevertheless, makes important contributions to the economic, social and cultural fabric of Simcoe County. It provides an attractive landscape, environmental resources, recreational opportunities and food production that is of value to all county residents. It is dominated by extensive areas of rural land uses- agriculture, natural areas, small towns and villages and recreational lands.

The rural community requires supportive policy and action to ensure long-term and on-going rural development. Relative to the urban community population density is much less and as a result there are different needs. Roads, schools, and libraries are examples of services that have specific rural needs. There is a need for policies, and standards that are reflective and supportive of rural livelihoods.

2.1 Key Findings

Key findings from this report are summarized below. Additional detail is provided in the text of the document.

Key Findings: Agriculture and Rural Development

1) Agriculture in Simcoe County remains a productive and dynamic industry. Declines in the number of farms, acres of farmland and number of farm operators during the 1990s are consistent with provincial trends.

2) The municipalities of Simcoe County can be divided into three categories.

   Category 1 includes municipalities in the most southerly part of the County. These municipalities share the highest values of farm capital per acre, the gross farm receipts and expenses. These townships account for about half of the farm sales and farm capital in the County. Potential for growth of the agricultural industry remains strongest in this area. Assuming a secure land base, aspects of agriculture in this area will remain provincial leaders.

   Category 2 includes the central part of the county. Indicators of long-term agricultural activity are positive. This area has the highest level of agricultural activity, including acres of farmland, number of farms and farm operators. Relative to category 1, the area is less intensively farmed, corn heat units are less and the area has less flexibility in terms of cropping choice and proximity to markets. There is strength in the livestock sector.

   Category 3 includes the more northerly areas. These townships share the lowest values of farm capital, gross farm receipts and expenses per acre. This area does not have the same climate or soil capability that benefits municipalities elsewhere within the County. While a commercial farming industry is likely to continue, this area, because of soil quality and a more limiting climate is likely to be more attractive for farmers who are more dependent on off-farm income.

3) Agricultural Employment

   Although farm numbers continue to decline (between 1971 and 2001 there was a decrease of 1298 farms in Simcoe County) gross farm revenue continues to go up. On a per farm worker basis average farm receipts/worker increased from $55,555 in 1996 to $72,658 in 2001.

   It is expected that there will be a continued decline in agricultural employment, with fewer farms, approximately the same number of workers per farm and a continued increase in the value of farm sales.

4) Farm Size

   It is expected that farm size will continue to increase reaching an average farm size of approximately 332 acres in the year 2031.

5) Off-farm work remains critical for many farmers. In the future two categories of farms are expected- those that are large enough to provide full-time employment and those which are much smaller and supported by off-farm employment. There will be some small farms that find a niche that allows for profitability on a smaller acreage/ specialty market.

6) An unknown in all of the above forecasts are the responses that may occur as conventional energy supplies are diminished.

7) Agriculture and Evaluating Options for Greenfield Development
Further detailed local analysis is required to help determine the impact of any future urban expansions on the agricultural industry.

Key Findings: Tourism and Recreation

8) Most of the shoreline area in Simcoe County is already developed. It was originally designed for cottages. Much of it is currently used for permanent dwellings.

9) Much of the existing shoreline development occurred prior to the 1950s with minimal (if any) planning review. Related issues include substandard lots, private services and poorly designed and inefficient roads.

10) Further intensification of the existing rural lakeshore is restricted by the absence of full services. This means that any development that does occur is likely to be at low densities.

11) Many of the local official plans (and residents) wish to see existing character and residential densities maintained as opposed to change brought about by new developments.

12) Recreational commercial development in proximity to the lakeshore includes existing marinas, condominiums and resorts. The establishment of new facilities is likely to be limited except were full services are available.

13) Conversion of seasonal accommodations to permanent residences is a trend that is likely to continue. There are related environmental concerns.

14) Recreational demand is largely based on economic, continued good quality environment and perceptual factors. The absence of vacant shoreline frontage makes it difficult to predict new tourist related development in Simcoe County. Servicing extensions may increase the ability of given areas to accommodate additional development.

15) Employment opportunities in Tourism related industries are likely to increase. While much of the vacant shoreline frontage has been developed further growth and development in tourism related activities and employment can be expected.

16) The extent of existing shoreline development means that opportunities for additional substantial development are limited. Official plan policies for each of the rural townships recognize this and have policies discouraging further inland expansion of shoreline areas (Meridian, 2002

17) The tourism industry in Simcoe County benefits from a diversity of attractions. Shoreline areas are of key importance, and there are many outdoor activities (golf, skiing etc.) that contribute to the industry, however, evolving trends related to lifestyle communities, and resorts would benefit from further data collection, analysis and evaluation.

Key Findings: Rural Development

18) On an annual basis there is considerable residential construction in rural areas. Much of this is located in shoreline areas and in small hamlets and villages.

19) Despite agriculture's challenges there continues to be significant investment in construction of agricultural buildings.

20) The new Provincial Policy Statement will significantly limit residential development in Prime Agricultural Areas. Severances for residential uses will be limited to surplus residences.

21) There is potential for additional development on existing "lots of record" and for additional surplus residential severances.

22) There is significant potential for limited residential development on non-prime lands. There are significant acreages of non- prime (rural) lands in Simcoe County although there are constraints on this form of development that need to be considered.

23) Commercial and industrial development takes many forms in rural Simcoe County. Significant investment and building permit activity was documented.

1.0 INTRODUCTION

Context for this Report

The Province and municipalities in Simcoe County, as well as the Cities of Barrie and Orillia, recognize the need to plan for long-term population growth and a healthy environment. Since August 2004, the Province has been in discussions with the municipalities in Simcoe. The purpose of these discussions was to determine how best to address common concerns in a cost effective and timely manner. Resulting from the discussion was the development of an ***Intergovernmental Action Plan*** (IGAP) for the County of Simcoe, and the Cities of Barrie and Orillia.

The four desired outcomes of the IGAP are:

1. A defined growth (assimilative) capacity of the Lake Simcoe and Nottawasaga River watersheds;

2. Development (servicing) certainty for intensification and approved growth;

3. Defined capacity for Barrie and area's additional growth; and,

4. Effective and sustainable municipal governance.

The purpose of the IGAP is to provide the affected municipalities with the proper tools to assist them in their planning and development decision-making. Upon completion of the IGAP, it is expected that the participating governments will have a basis for:

- A long-term urban structure plan for Simcoe County and the Cities of Barrie and Orillia;

- A sustainable infrastructure strategy for Simcoe, Barrie and Orillia;

- Development certainty for affected stakeholders; and,

- A suitable governance structure and/or service coordination mechanisms to manage future growth and development.

The Province's Strong Communities program includes developing long-range planning solutions for Central Ontario. Multiple interrelated initiatives are in-place, including, the Growth Plan for the Greater Golden Horseshoe, Planning Reform, Watershed-based Source Water Protection Planning, Golden Horseshoe Greenbelt, and the 10-Year Strategic Infrastructure Investment Plan.

Unique growth and development challenges exist in Simcoe County and the Cities of Barrie and Orillia (study area). South Simcoe and Barrie, in particular, are experiencing increased development pressure, and are expected to continue to have rapid growth. A number of the municipalities in the study area rely on inland water systems which have been demonstrated to be under strain (for example the Lake Simcoe watershed has known issues as a result of phosphorous loadings). Without intervening action, the available potable water and aquaculture of these watersheds are threatened.

Through their approved official plans, the municipalities in the study area make provision for a significant amount of growth. At the same time, several major developments are being proposed that involve the establishment of new urban settlement areas or the expansion of existing urban areas. Based on current conditions, there may be insufficient existing sewer and/or water capacity to accommodate approved development and/or planned land uses within existing settlement areas.

In order to accommodate planned growth, several major infrastructure municipal class environmental assessments are underway and/or nearing completion. However, these studies have not been undertaken in a comprehensive or coordinated fashion.

The municipalities in the study area are also under increasing administrative and financial capacity constraints.

By February 2005, the Province and the municipalities in the study area had agreed to partner in the IGAP, which has resulted in the commissioning of this study.

The partnership is made up of the following Provincial Ministries and municipalities:

Provincial Ministries include:

- Municipal Affairs and Housing
- Environment
- Public Infrastructure Renewal
- Natural Resources

Municipalities include:

- Simcoe County
- Township of Adjala-Tosorontio
- Town of Bradford West Gwillimbury
- City of Barrie
- Township of Clearview
- Town of Collingwood
- Township of Essa
- Town of Innisfil
- Town of Midland
- Town of New Tecumseth

- City of Orillia
- Township of Oro-Medonte
- Town of Penetanguishene
- Township of Ramara
- Township of Severn
- Township of Springwater
- Township of Tay
- Township of Tiny, and
- Town of Wasaga Beach

The partners want to further their common interests in:

- Protecting the environment, including the water quality and quantity of the Nottawasaga River and Lake Simcoe watersheds.

- Fiscally sustainable growth, through efficient, cost-effective development and land use patterns.

- Effective municipal governance and service delivery, through inter-governmental cooperation and coordination.

The IGAP proposes a four-phase approach to address the above-noted matters of common interest. Phase I of the IGAP is an analysis of assimilative capacity of the Nottawasaga River and Lake Simcoe watersheds by the Lake Simcoe Region (LSRCA) and Nottawasaga Valley (NVCA) Conservation Authorities. Phase II of the IGAP is an Existing Capacities Assessment, Phase III a Growth Potential Assessment and Phase IV an Implementation Assessment of the IGAP. Phases II - IV are being undertaken by Dillon Consulting in association with the Ainley Group, Clara Consulting, Bourrie & Associates, EDP Consulting, Enid Slack Consulting, Caldwell Consulting, Lapointe Consulting, TeraTrends and Will Dunning Inc.

This Rural Development Potential Report is one component of the Phase II Existing Capacities Assessment (ECA) for the IGAP. The purpose of the ECA is to:

- Assemble a sound and defensible database on infrastructure and services; and

- Determine existing capacity to accommodate approved development and growth.

The ECA includes a review of:

- Approved development and planned land use in settlement areas;

- Physical potential for intensification in settlement areas;

- Existing and planned water and sanitary sewage infrastructure;

- Natural and cultural heritage resources;
- Transportation facilities;
- Public service facilities;
- Economic indicators;
- Rural development potential;
- Short term housing market pressures; and
- Longer term population and employment trends in the study area.

The results of the review are documented in seven foundation reports: this Rural Development Potential Report and the following reports under separate cover: Communities Report, Resources Report, Infrastructure Assessment Report, Physical Intensification Potential Report, Housing Market Pressures Report and Population and Employment Trends Report. The results of the review are synthesized with the results of the Assimilative Capacity Study in an Existing Capacities Assessment Report. The overall objective for the ECA is to provide a defensible foundation for Phases III – Growth Potentials Assessment and IV Implementation Assessment of the IGAP process.

Purpose of this Report

This Rural Development Potential Report documents information on current trends and future rural development potential in the County of Simcoe. It focuses on development potential in both the agricultural and tourism related industries and also reviews residential development outside of the settlement areas. The report provides an important focus on rural including information on existing and anticipated future trends.

Format of the Report

This Rural Development Potential Report is divided into four main sections as shown in the Table of Contents. The Introduction provides the context and purpose of this report in regards to IGAP. Section 1 provides a detailed overview of the agricultural industry. It reflects on the current state of agriculture in the county, evaluates the relationship to the county economy and concludes with an overview of key aspects of the future of agricultural development in Simcoe County. Section 2 reviews the role of tourism in Simcoe County and Section 3 provides some insights into current and future development trends.

Rural Overview

The rural community of Simcoe County is a vibrant community of more than 100,000 people. While dramatically different than its urban counterpart the rural community, nevertheless, makes important contributions to the economic, social and cultural fabric of Simcoe County. It provides an attractive landscape, environmental resources, recreational opportunities and food production that is of value to all county residents. It is dominated by extensive areas of rural land uses- agriculture, natural areas, small towns and villages and recreational lands.

The rural community requires supportive policy and action to ensure long-term and on-going rural development. Relative to the urban community population density is much less and as a result there are different needs. Roads, schools, and libraries are examples of services that have specific rural needs. There is a need for policies, and standards that are reflective and supportive of rural livelihoods.

Part 1: Agriculture and Rural Development

1.1 Agriculture in Simcoe County: Introduction and Background

Agriculture is a key land use in Simcoe County. It dominates much of the landscape and provides many economic, social and environmental benefits. It is also of importance from a provincial perspective. Simcoe has a land base, climate and a skilled farm community that make agriculture highly productive. It is important that there is a clear understanding of the role that agriculture can play in the context of rural development. Agricultural development has historically been the catalyst and key component of rural development for much of Simcoe County. While other aspects of the economy may be growing at a rate that surpasses agriculture, it is probable that agriculture will be a key component of the long term future of Simcoe County. This report therefore provides a detailed discussion of agriculture in Simcoe County and concludes with a discussion of some of the long-term agricultural trends in Simcoe and the related implications for rural development.

<u>Agriculture in Simcoe County – Context</u>

Simcoe County is one of the largest counties in the Province of Ontario, with an approximate area of 1,064,320 acres[1]. The County is made up of sixteen municipalities - eight towns and townships. The Cities of Barrie and Orillia are the largest urban areas within the County. These Cities are administered separately from the rest of the County. The location of the municipalities is illustrated in Figure 1.1.

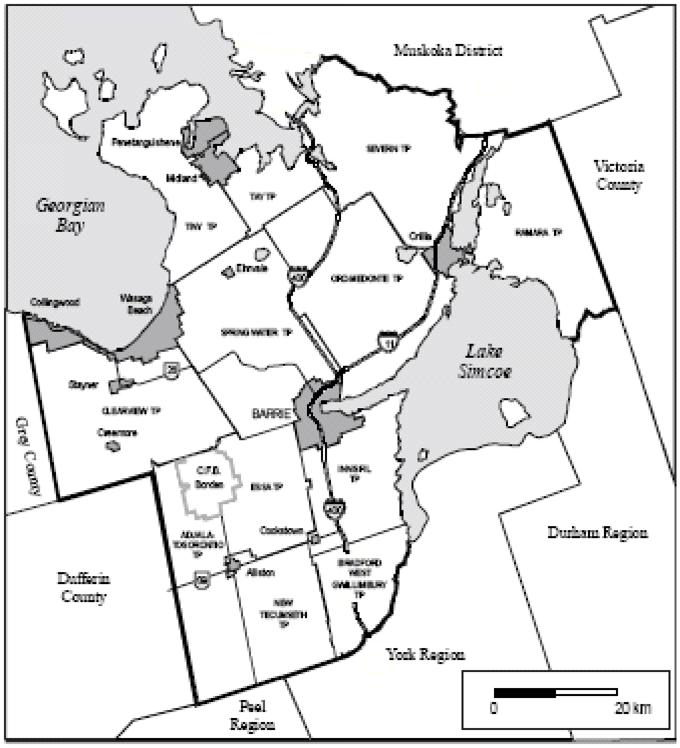
The County has one of the most diverse landscapes in Ontario, extending from the Canadian Shield in the north, to the Oak Ridges Moraine in the south, and from Georgian Bay in the west to Lake Simcoe in the east. The varied environment combined with a long growing season, provides an opportunity for a highly productive and diverse agricultural industry.

There is great variation in the soil type in Simcoe County[2]. There are vast areas of Class 1, 2, and 3 soils throughout the south and central municipalities in Simcoe County. The northern Townships of Severn and Ramara have lower potential agricultural lands, as the Canadian Shield is the predominant landform in this area.

Simcoe County has a number of unique features that allow for the production of specialty crops. The northern half of New Tecumseth and Adjala-Tosorontio is known as a major potato growing area, due primarily to the sandy soils in this area. The organic soils of the Holland Marsh in Bradford West-Gwillimbury are well suited to vegetable production. The classification of agricultural land in Simcoe County is illustrated in Figure 1.2.

[1] Hoffman, Wicklund & Richards. 1962. Soil Survey of Simcoe County. Report No. 29, Ontario Soil Survey, Research Branch, Canada Department of Agriculture and Ontario Agricultural College.
[2] Hoffman, Wicklund & Richards. 1962

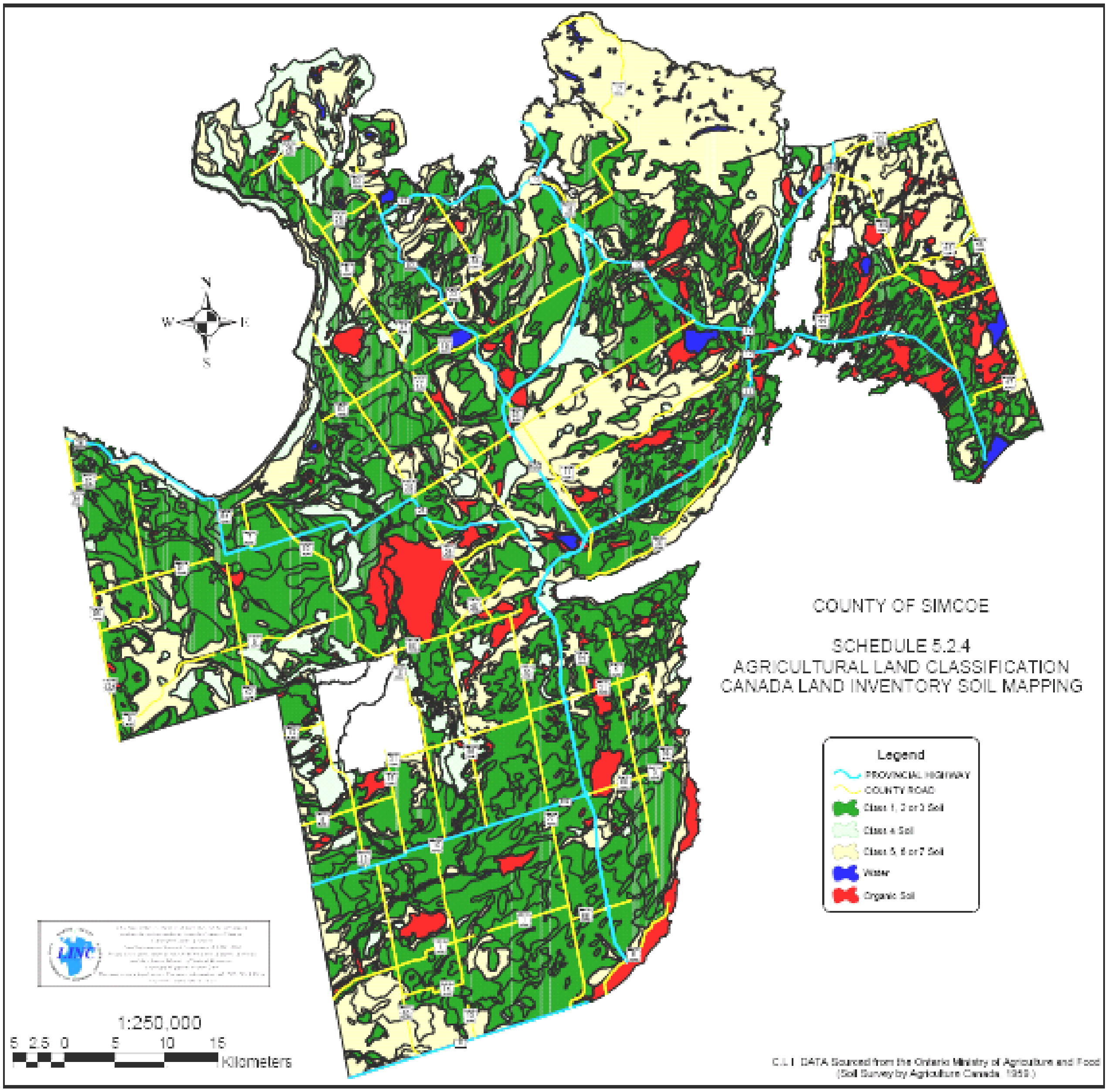
Figure 1.1: County of Simcoe Municipalities, 2001



Source: Cummings and Associates, May 1999, Economic Impact of Agriculture on the Economy of Simcoe County.

<u>Simcoe County Population Growth and Agriculture:</u>
Agricultural development has a strong relationship to population growth. While population growth can provide agricultural opportunities it can also be destabilizing. From a positive perspective population growth can enhance certain agricultural activities- direct farm sales and agri-tourism for example tend to benefit from nearby urban communities. Conversely, population growth, if not properly managed can be destabilizing – it often competes for farmland inflating land values, it can create an element of uncertainty for the farm community and can be a source of conflict for existing farming operations. In some instances population growth is accompanied by “greenfield development’ adjacent to existing urban centers and in other instances it may include scattered rural non-farm development (i.e. severances). While this section of the report focuses on agriculture it is important to consider agriculture in the context of key population trends.

Figure 1.2: Agricultural Land Classification, County of Simcoe



Source: Simcoe County Official Plan, Consolidated February 2006, http://www.county.simcoe.on.ca/municipal-and-corporate-services/planning-1/policy-planning/county-of-simcoe-official-plan/

Simcoe County Population by Urban - Rural Split

Simcoe County has a combination of large urban areas, such as the Cities of Barrie and Orillia, and smaller rural communities. In 2001, 71% of Simcoe County's population was considered urban and 29% of the population was considered rural by Statistics Canada. When compared to the overall urban – rural population split for the Province (urban, 84.7% – rural,15.3%), Simcoe County has a considerably larger rural population than the provincial average.

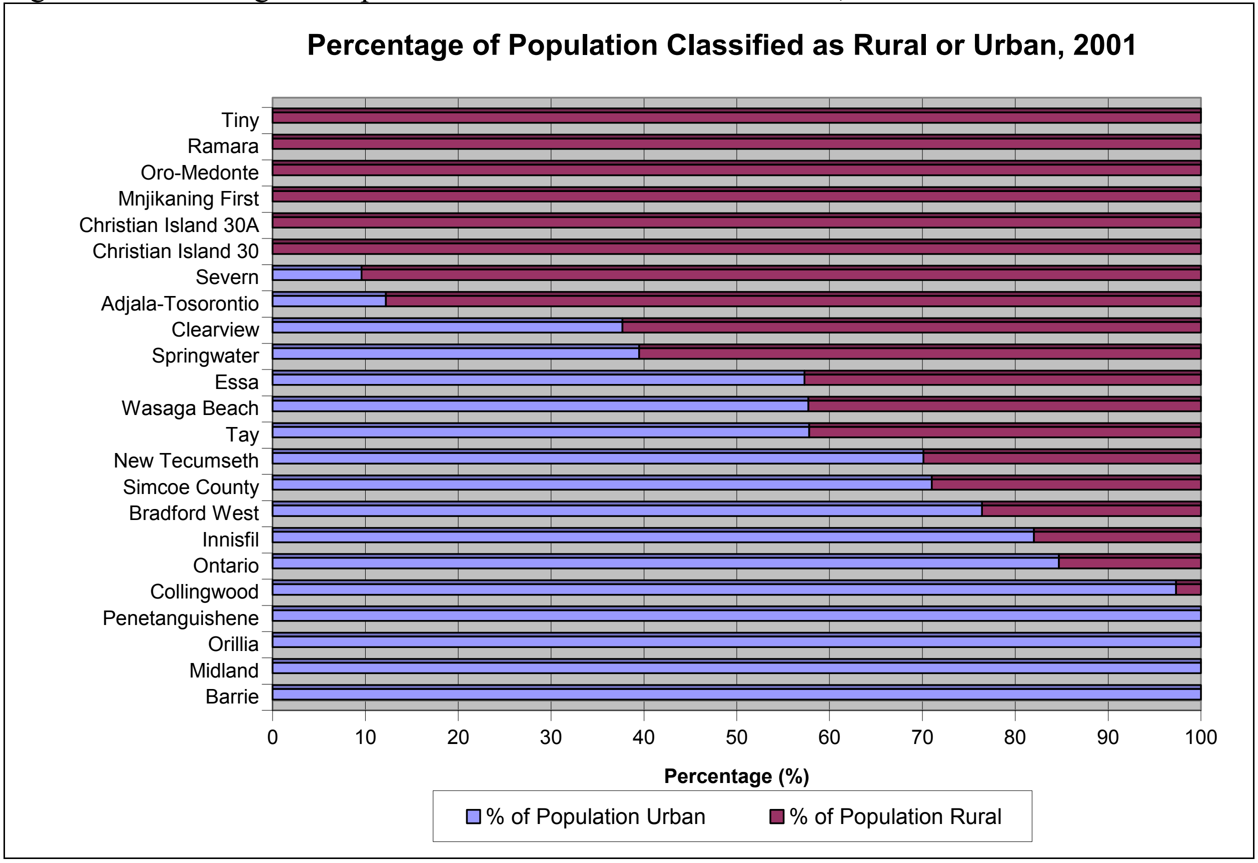
Table 1.1 presents the urban – rural split of the Simcoe County population by municipality. The classification of the population as urban or rural is made by Statistics Canada. Figure 1.3 illustrates the percentage of population classified as urban or rural in 2001 by municipality.

Table 1.1: Simcoe County Population, by Urban - Rural Split, 2001

Name	Type	Total Population	Urban Population		Rural Population	
			Total	% of Total	Total	% of Total
Ontario	PROV	**11,410,046**	**9,662,547**	**84.7**	**1,747,499**	**15.3**
Simcoe County	CTY	**377,050**	**267,750**	**71.0**	**109,300**	**29.0**
Adjala-Tosorontio	TP	10,082	1,233	12.2	8,849	87.8
Barrie	C	103,710	103,710	100.0	0	0.0
Bradford West Gwillimbury	T	22,228	16,978	76.4	5,250	23.6
Christian Island 30	R	515	0	0.0	515	100.0
Christian Island 30A	R	32	0	0.0	32	100.0
Clearview	TP	13,796	5,202	37.7	8,594	62.3
Collingwood	T	16,039	15,605	97.3	434	2.7
Essa	TP	16,808	9,635	57.3	7,173	42.7
Innisfil	T	28,666	23,511	82.0	5,155	18.0
Midland	T	16,214	16,214	100.0	0	0.0
Mnjikaning First Nation 32 (Rama First Nation 32)	R	597	0	0.0	597	100.0
New Tecumseth	T	26,141	18,330	70.1	7,811	29.9
Orillia	C	29,121	29,121	100.0	0	0.0
Oro-Medonte	TP	18,315	0	0.0	18,315	100.0
Penetanguishene	T	8,316	8,316	100.0	0	0.0
Ramara	TP	8,615	0	0.0	8,615	100.0
Severn	TP	11,135	1,070	9.6	10,065	90.4
Springwater	TP	16,104	6,367	39.5	9,737	60.5
Tay	TP	9,162	5,294	57.8	3,868	42.2
Tiny	TP	9,035	0	0.0	9,035	100.0
Wasaga Beach	T	12,419	7,164	57.7	5,255	42.3

Source: Statistics Canada, Census Data 2001

Figure1.3: Percentage of Population Classified as Rural or Urban, 2001



Source: Statistics Canada, 2001 Census

Six municipalities had populations that were classified as 100% rural by Statistics Canada. The municipalities were Tiny, Ramara, Oro-Medonte, Mnjikaning First Nation 32, Christian Island, 30A and Christian Island 30. Each municipality is located in northern Simcoe County and each of these have a lesser agricultural community compared to the southern part of the county.

The municipalities of Adjala–Tosorontio, Clearview, Springwater and Severn had between 60% and 90% of their population classified as rural.

The municipalities of Essa, Tay and Wasaga Beach had a similar percentage of urban and rural population. These municipalities ranged from 40% to 60% of their population being classified as rural.

Municipalities in southern Simcoe County, close to the 400 highway, had a higher percentage of their population classified as urban. New Tecumseth, Bradford West Gwillimbury and Innisfil had over 70% of their population classified as urban.

Four municipalities, Barrie, Orillia, Penetanguishene, and Midland, were classified as 100% urban. Barrie and Orillia are the largest urban areas in Simcoe County. In 2001 Barrie had a population of 103,710 and Orillia had a population of 29,121. Together, Barrie and Orillia account for 50% of the total urban population in Simcoe County.

Penetanguishene and Midland are both towns located in the northern half of Simcoe County. The population of Collingwood was almost entirely considered urban, with only 2.7% of the population considered rural.

The population growth that has occurred across the County has a number of implications for agriculture. For example, there have been higher growth rates in the more dominant agricultural townships in the south half of the county than in the north. The balance of this report provides a detailed overview of the agricultural industry. Issues associated with population growth will be identified throughout this discussion.

1.2 Agriculture in Simcoe County:

Agriculture in Simcoe County faces many of the same challenges that confront the industry across North America. Uncertain commodity prices, dwindling farm incomes, crippling international competition, unpredictable markets, environmental concerns, urbanizing pressures and on-going concerns related to international trade and related marketing all contribute to a future that is neither certain nor secure. For most farmers there is a constant cost-price squeeze that forces them to get larger, live with dwindling returns, find off-farm income or get out of the industry. At the same time agriculture is arguably more removed and less understood by the rest of society.

Despite these challenges and uncertainties the agricultural economy is and will likely remain a main driver of the economy of rural Simcoe County and the County itself. Agriculture also provides a host of other benefits to society. Besides important food production, agriculture offers a host of environmental goods and services, social benefits and a way of life for those who choose this livelihood. For much of Simcoe County it is a dominant activity. The challenge is to develop policies that respect agriculture's difficulties while providing the flexibility to allow it to evolve within an appropriate land use framework. As farmers respond to challenging economic circumstances some will pursue strategies that lead to growth and success within their particular area of production.

While many of the broader issues confronting agriculture are outside the jurisdiction of local authorities a sound understanding of agriculture and its connection to the local community can help with the development of a framework that respects agriculture and provides flexibility for innovation and growth.

The Simcoe County Official Plan identifies agriculture as an important and productive land use. It also recognizes the importance of agriculture as a key resource for economic development in the County.

Agriculture has had a long and productive history in Simcoe County. A comprehensive study of the agricultural industry in Simcoe County was undertaken by Harry Cummings and Associates in 1999[3]. This study documented the importance of the agricultural

[3] Cummings and Associates, May 1999, Economic Impact of Agriculture on the Economy of Simcoe County, http://www.ofa.on.ca/site/PDFs/EconomicImpactStudies/Simcoe/SimcoeReport.pdf

industry on the Simcoe County economy. Based on 1996 Census Data, the study found that there were "14,014 jobs tied to agriculture in Simcoe County (9.2 percent of the County's total jobs of 152,595) and $783.6 million in sales per annum. The multipliers indicate that for every job on the farm, there are an additional 1.9 jobs outside of agriculture." The study also estimated that for "each dollar in sales in agriculture, there is $1.95 in agricultural sales in Simcoe County businesses".

Number and Area of Census Farms, 1991-2001

In 2001, Simcoe County farms represented 4 percent of farms in the Province, and 12 percent of the farms in Western Ontario. Based on the total land area of Simcoe County (1,064,320 acres), approximately 50% of the County's area was reported farmland in 2001.

All counties in Western Ontario experienced a decline in the number of farms over the period 1986 to 2001. In 1986, there were 3,007 farms in Simcoe County. The number of farms declined to 2,463 in 2001. While Simcoe County experienced a decline in the number of farms over this time period like the other counties in Western Ontario, Simcoe County experienced an increase in the number of farms between 1991 (2,709 farms) and 1996 (2,773). Only one other County, Grey, experienced a similar trend during this period.

Simcoe County had 13 percent of the farmland in Western Ontario and 4 percent of the farmland in Ontario in 2001. While many counties saw fluctuation in the acreage of farmland that was reported each census year between 1986 and 2001, 8 of the 10 counties in Western Ontario reported less farmland in 2001 compared to 1986. Simcoe County experienced this trend. In 1986, Simcoe County had 550,073 aces, and in spite of an increase of almost 44,000 acres between 1991 and 1996, the acreage of farmland had declined to 540,870 acres in 2001.

Table 1.2 describes how the changes in the number and area of census farms in Simcoe County compare to other counties in Western Ontario.

Table 1.2: Number and Area of Census Farms by County in Western Ontario, 1986, 1991, 1996, and 2001

Counties & Districts	1986	1991	1996	2001	1986	1991	1996	2001
	- number -				- acres -			
Bruce	2,623	2,613	2,568	2,345	609,242	599,528	627,799	611,461
Dufferin	1,079	1,023	1,039	898	213,403	190,961	222,183	193,162
Grey	3,358	3,146	3,134	2,834	632,609	592,581	600,416	593,121
Halton	834	744	720	619	118,805	115,036	109,187	98,758
Huron	3,416	3,260	3,150	2,880	714,610	711,525	733,924	719,066
Peel	824	711	689	522	129,476	115,352	120,026	104,433
Perth	2,927	2,894	2,832	2,570	485,212	491,465	510,327	502,926
Simcoe	3,007	2,709	2,773	2,463	550,073	506,424	550,393	540,870
Waterloo	1,642	1,618	1,590	1,444	237,954	229,467	234,406	225,800
Wellington	2,851	2,849	2,810	2,616	472,085	468,993	484,516	471,389
Western Ontario	22,561	21,567	21,305	19,191	4,163,469	4,021,332	4,193,177	4,060,986
The Province	72,713	68,633	67,520	59,728	13,953,009	13,470,653	13,879,565	13,507,357

Source: Statistics Canada Census of Agriculture, 1986, 1991, 1996 and 2001

Over the decade 1991 to 2001, Simcoe County experienced a decline of 10% in the number of farms. The decline in the number of farms in Simcoe County (10%) over the decade 1991 to 2001 was less than the overall decline in farms in the Province (15%).

At the municipal level, seven of the twelve municipalities in Simcoe County experienced some decline in the number of farms between 1991 and 2001. The Town of New Tecumseth in southern Simcoe experienced the largest decline (42%). The remaining five municipalities either experienced no change (Tiny) or saw a modest increase in the number of farms over the decade. Severn Township in northern Simcoe experienced the highest increase in the number of farms (17%) over the decade.

Between 1996 and 2001, eleven of twelve municipalities in Simcoe County experienced a decline in the number of farms. The twelfth, Severn Township experienced no change between 1996 and 2001. The overall decrease in the number of farms in Simcoe County between 1996 and 2001 reflected the overall change in farms at the provincial level.

This data is presented in Table 1.3.

Table 1.3: Change in Number of Farms in Simcoe County, 1991 - 2001

	Number of Farms - 2001	Number of Farms - 1996	Number of Farms - 1991	% Change 1996-2001	% Change 1991-2001
Ontario	59,728	67,520	68,633	-13%	-15%
Simcoe County	2,463	2,773	2,709	-13%	-10%
Adjala-Tosorontio	198	231	232	-17%	-17%
Bradford - W. Gwill	171	202	199	-18%	-16%
Clearview	361	430	432	-19%	-20%
Essa	173	188	185	-9%	-7%
Innisfil	163	180	193	-10%	-18%
New Tecumseth	162	177	230	-9%	-42%
Oro-Medonte	370	389	350	-5%	5%
Ramara	173	191	160	-10%	8%
Severn	187	187	155	0%	17%
Springwater	298	339	358	-14%	-20%
Tay	73	92	72	-26%	1%
Tiny	134	167	134	-25%	0%

Source: Statistics Canada Census of Agriculture, 1991, 1996 and 2001.

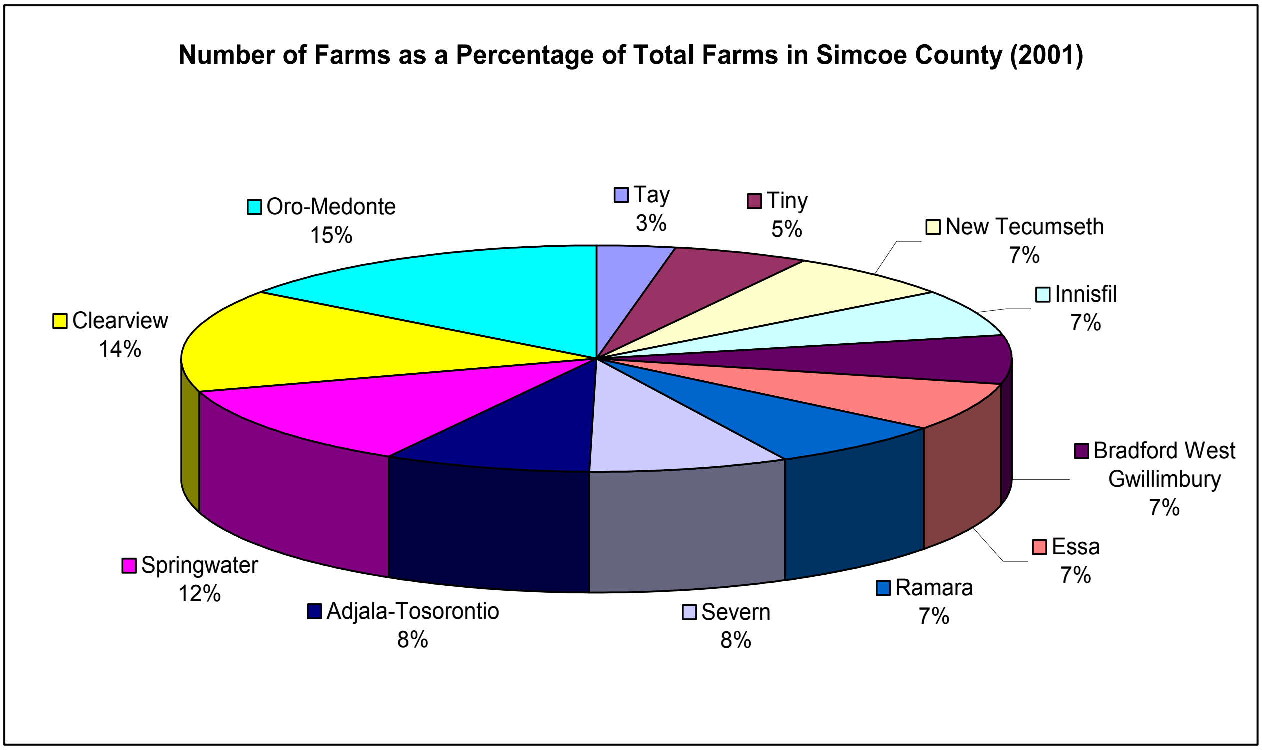
Figure 1.5 illustrates the geographic distribution of the number of farms in Simcoe County, by municipality (2001).

Over 40% of the farms in Simcoe County are concentrated in three municipalities, Oro-Medonte (15%), Clearview (14%) and Springwater (12%). Each of these municipalities is located within the north-central area of Simcoe County.

It is noted that New Tecumseth, Innisfil, Bradford West Gwillimbury, Essa, Ramara, Severn and Adjala-Tosorontio all represent a virtually equal share of the number of farms within Simcoe County in 2001.

The fewest number of farms are located in Tiny (5%) and Tay (3%) Townships. This may be explained by the presence of lower quality farmland, a smaller population, and other environmental features dominating the landscape.

Figure 1.5: Number of Farms as a Percentage of Total Farms in Simcoe County, 2001



Source: Statistics Canada, Census of Agriculture, 2001

Simcoe County experienced an overall decrease of 2.8% in the area reported as farmland between 1996 and 2001. Between 1991 and 1996, there was an increase of almost 44,000 acres of farmland reported. The gain in the amount of farmland reported in the early 1990s outweighs the loss of farmland in the late 1990s to report an overall increase in farmland of 6.4% for the decade (1991-2001).

Between 1996 and 2001, Ramara, Severn and Oro-Medonte experienced increases in area reported as farmland by 37.4%, 24.8% and 15.1% respectively. These municipalities are located in northern Simcoe and have lower quality farmland than municipalities located in southern Simcoe County. This trend may signify that farmers are farming lower capability farmland, potentially connected to a sizable beef industry (i.e. relatively high concentrations of pasture and hay).

The largest losses in farmland experienced between 1996 and 2001 were in New Tecumseth and Innisfil. These areas are both located in southern Simcoe County, near Highway 400, and located between York and Peel Region and the City of Barrie. Some of the loss in these municipalities is likely related to residential, commercial and development pressure.

Table 1.4: Area of Farmland in Simcoe County, by municipality, 1991 to 2001

	Acres of Farmland (2001)	% of Simcoe County Total (2001)	Acres of Farmland (1996)	Acres of Farmland (1991)	% Change 2001-1996	% Change 2001-1991
Ontario	13,507,357		13,879,565	13,470,653	-2.8%	0.3%
Simcoe County	540,870	100%	550,393	506,424	-1.8%	6.4%
Adjala-Tosorontio	47,411	9%	45,204	49,767	4.7%	-5.0%
Clearview	83,452	15%	84,123	90,244	-0.8%	-8.1%
New Tecumseth	40,559	7%	48,256	44,403	-19.0%	-9.5%
Springwater	68,829	13%	70,224	66,616	-2.0%	3.2%
Bradford West Gwillimbury	32,564	6%	30,837	35,576	5.3%	-9.2%
Severn	32,434	6%	24,375	31,815	24.8%	1.9%
Innisfil	39,254	7%	41,395	41,383	-5.5%	-5.4%
Ramara	58,215	11%	36,423	53,379	37.4%	8.3%
Essa	40,719	8%	38,733	39,373	4.9%	3.3%
Oro-Medonte	63,059	12%	53,517	61,868	15.1%	1.9%
Tiny	22,357	4%	21,943	22,696	1.9%	-1.5%
Tay	12,017	2%	11,394	13,273	5%	-10.5%

Source: Statistics Canada, Census of Agriculture, 2001, 1996, 1991

Farm Size in Simcoe County

The average farm size in Simcoe County has increased by 10% between 1996 and 2001. This increase at the County level is reflective of the trend towards larger farms across the Province.

Between 1996 and 2001, the average farm size increased in nine of the twelve municipalities. The average farm size stayed the same in New Tecumseth and Oro-Medonte over the period.

The average farm size increased in Adjala–Tosorontio, Bradford West Gwillimbury, Clearview, Essa and Tay Township between eight and twelve percent. The increase in these municipalities most closely reflected the average increase in Simcoe County of 10% between 1996 and 2001.

There were two municipalities that experienced a change that was significantly different than the rest of the County. The most significant change in average farm size was in Ramara Township, where the average farm size increased by 53% between 1996 and 2001. The only municipality that saw a decline in farm size was in Severn, which saw a 60% decline in the average farm size over the period.

The change in the average farm size in Simcoe County between 1996 and 2001 is illustrated in Table 1.5. Figure 1.6 shows the amount of farmland by municipality.

Table 1.5: Average Farm Size in Simcoe County, 1996 to 2001

	Average Farm Size 2001 (acres)	Average Farm Size 1996 (acres)	Change in Farm Size 2001-1996
Ontario	226	205	9%
Simcoe County	220	199	10%
Adjala-Tosorontio	239	215	10%
Bradford West Gwillimbury	190	176	8%
Clearview	231	210	9%
Essa	235	209	11%
Innisfil	241	230	4%
New Tecumseth	250	251	0%
Oro-Medonte	170	170	0%
Ramara	337	159	53%
Severn	173	280	-61%
Springwater	231	197	15%
Tay	165	144	12%
Tiny	167	135	19%

Source: Statistics Canada, Census of Agriculture, 2001 and 1996

Municipality	Acres of Farmland (2001)	% of Simcoe County
Adjala-Tosorontio	47,411	9%
Clearview	83,452	15%
New Tecumseth	40,559	7%
Springwater	68,829	13%
Bradford West Gwillimbury	32,564	6%
Severn	32,434	6%
Innisfil	39,254	7%
Ramara	58,215	11%
Essa	40,719	8%
Oro-Medonte	63,059	12%
Tiny	22,357	4%
Tay	12,017	2%
TOTAL	540,870	100%

Intergovernmental Action Plan for Simcoe, Barrie and Orillia

Figure 1.6. Agricultural Land Capability

LEGEND

- IGAP Study Boundary[2]
- Area Municipalities[2]
- Provincial Highways[1]
- County Roads[1]
- Ponds and Lakes[1]
- Class 1, 2 and 3 Soil[6]
- Class 4, 5, 6, 7 and 8 Soil[6]
- Organic Soil[6]
- Agricultural Enterprise

Ainley Group
Clara Consulting
Bourrie & Associates
Caldwell Consulting
EDP Consulting
Enid Slack Consulting
Lapointe Consulting
TeraTrends
Will Dunning Inc.

Ontario

Projection: UTM zone 17N NAD83
Data Sources: 1. Ontario Ministry of Natural Resources
2. Ontario Ministry of Municipal Affairs and Housing
6. Ontario Ministry of Agriculture and Food

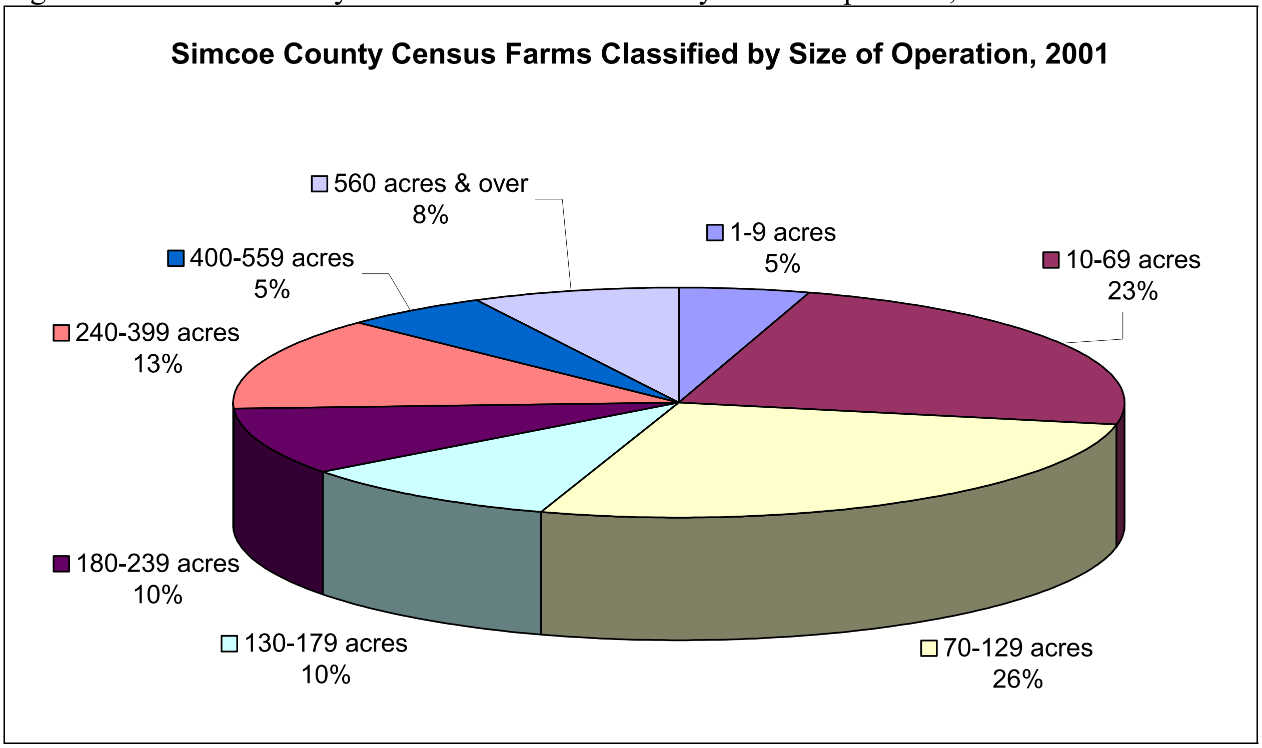
Created by: CCK
Checked by: R.S.

Last Modified April 28,2006

Dillon Project No. 06-5925

In 2001, there were 2,463 census farms in Simcoe County and 55% of these were under 130 acres. This is similar to the regional (51%) and provincial (50%) level. In Simcoe County, 13% of farms are larger than 400 acres. This compares to 12% at the regional level of Western Ontario and 15% at the Provincial level. The percentage of census farms classified by size is presented in Figure 1.7.

Figure 1.7: Simcoe County Census Farms Classified by Size of Operation, 2001



Source: Statistics Canada, Census of Agriculture, 2001

Profile of Farm Operators in Simcoe County, 2001

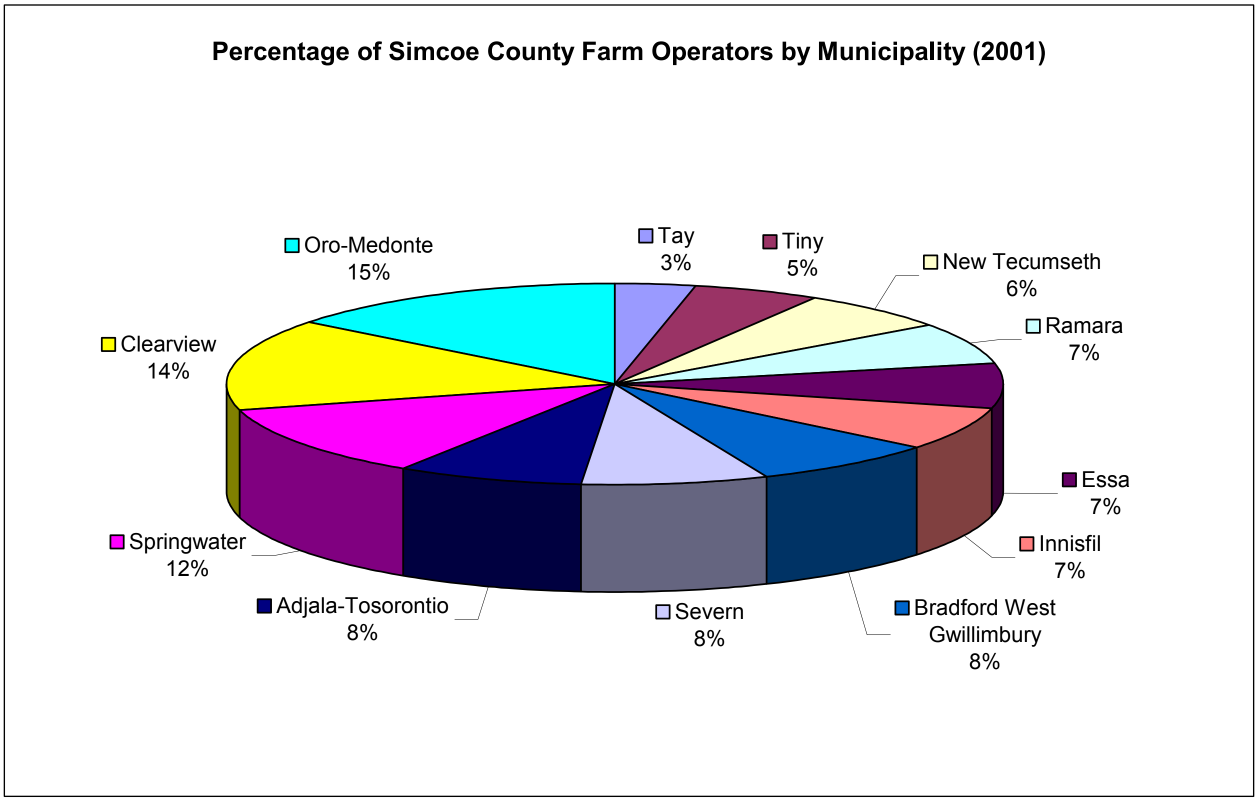
In 2001, there were 3,440 farm operators in Simcoe County (Figure 1.8).

The largest numbers of operators are concentrated in the municipalities of Springwater (405), Clearview (500) and Oro-Medonte (500). Together the farm operators in these municipalities represent 41% of Simcoe County's farm operators

Tiny (110) and Tay (185) Townships had the fewest number of farm operators, representing 8.5% of the total number of operators in Simcoe County.

The remaining municipalities have between 200 and 300 farm operators in each municipality, and represented a relatively equal share of the total number of operators at the County level.

Figure 1.8: Percentage of Simcoe County Farm Operators by Municipality, 2001



Source: Statistics Canada, Census of Agriculture, 2001

There is of course a relationship between the area of farmland in a given municipality, the number of farmers and total farm receipts. More farmland, tends to lead to more farmers which can lead to a correspondingly high level of total farm receipts. As will be demonstrated later, however, this does not necessarily equate to the highest levels of productivity on a per acre basis (see Table 1.18).

The number of operators by municipality in Simcoe County is presented in Table 1.6.

Table 1.6: Farm Operators by Municipality in Simcoe County, 2001

	Total Number of Operators (2001)	Male Operators (2001)	Female Operators (2001)	% of Operators that are Male (2001)	% of Operators that are Female (2001)
Ontario	85,020	62,215	22,800	73%	27%
Simcoe County	3,440	2,535	905	74%	26%
Tay	110	80	30	73%	27%
Tiny	185	135	50	73%	27%
New Tecumseth	220	170	50	77%	23%
Ramara	235	175	55	74%	23%
Essa	240	175	70	73%	29%
Innisfil	245	175	70	71%	29%
Bradford West Gwillimbury	265	190	75	72%	28%
Severn	265	180	80	68%	30%
Adjala-Tosorontio	270	195	75	72%	28%
Springwater	405	315	90	78%	22%
Clearview	500	375	125	75%	25%
Oro-Medonte	500	370	130	74%	26%

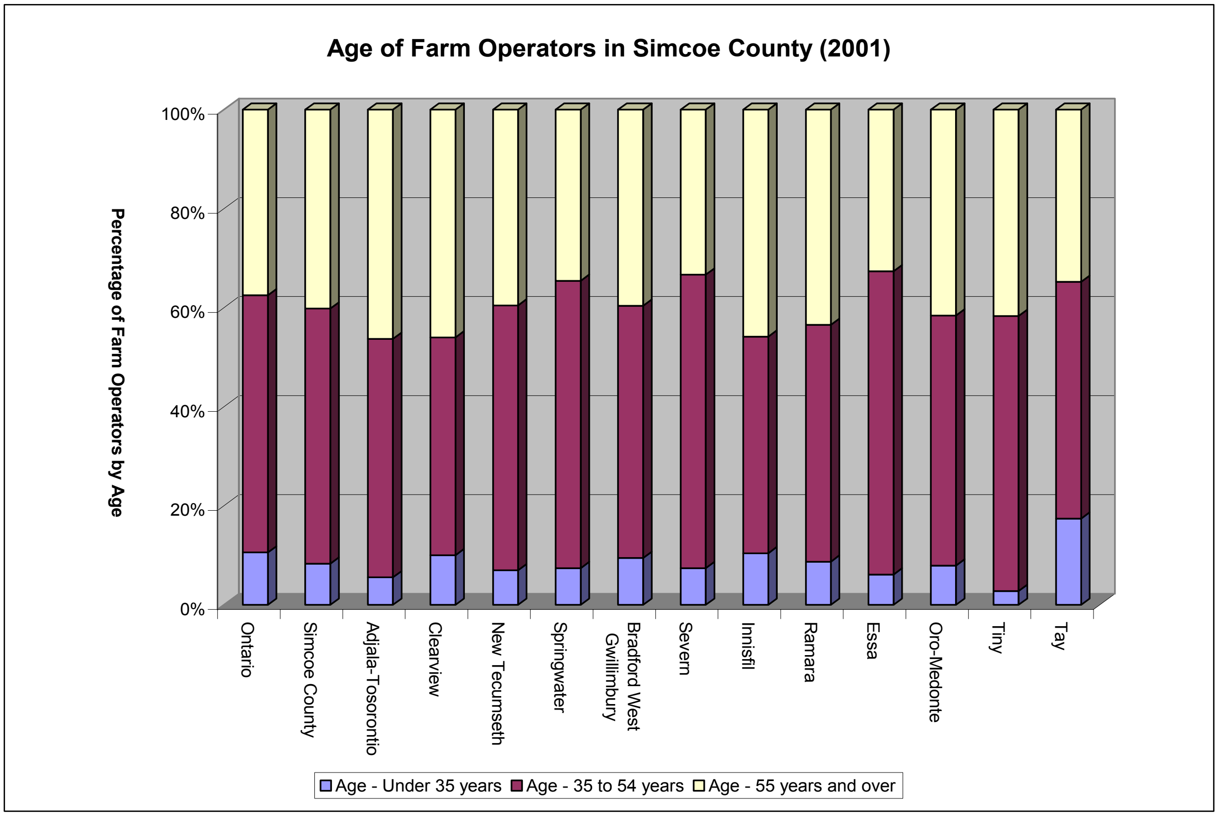
Source: Statistics Canada, Census of Agriculture, 2001

Table 1.6 also documents the number of farm operators by gender. In Simcoe County, 74% of farm operators are male and 26% are female. This trend is reflected at both the provincial and the municipal level.

Age of Farm Operators:

The trend at both the provincial and county level is towards an aging farming population. The age characteristics of farm operators in Simcoe County certainly reflect that trend. In 2001, approximately 40% of farmers were 55 years or older. Approximately 50% of farmers at the County level are in the 35 to 54 year category. Only 10% of farmers are under 35 years of age. Figure 1.9 illustrates the trend at the municipal level in Simcoe County.

Figure 1.9: Age of Farm Operators in Simcoe County, 2001



Source: Statistics Canada, Census of Agriculture, 2001

In 2001, the average age of farm operators in Simcoe County was 51.7. This is slightly older than the provincial average of 50.7 years. There is some variation across the County. The average age ranges from 49 in Tay Township to 53.5 in Adjala-Tosorontio. Table 1.7 summarizes the average age of farm operators by municipality in 2001.

Table 1.7: Average Age of Farm Operators in Simcoe County, 2001

	Average age of operators, 2001
Ontario	50.7
Simcoe County	51.7
Adjala-Tosorontio	53.5
Clearview	52.6
New Tecumseth	51.8
Springwater	50.5
Bradford West Gwillimbury	51.4
Severn	51.0
Innisfil	52.1
Ramara	51.9
Essa	49.6
Oro-Medonte	52.4
Tiny	52.4
Tay	49.0

Source: Statistics Canada, Census of Agriculture, 2001

Off-Farm Work, 2001

The data reported for average hours farm operators work per week at non-farm work documents that approximately half (49%) of Simcoe farm operators supplemented their farm income by working at a non-farm job in 2000. This is slightly higher than the provincial average. At the provincial level, 45% of farm operators reported that they worked at a non-farm job in 2000.

42% of Simcoe County farm operators worked over 20 hours per week of non-farm work in 2000. This is a little higher than the provincial average of 38% of farm operators working more than 20 hours off the farm.

Severn had the highest percentage of farm operators (53%) working more than 20 hours of off-farm work and the lowest number of farm operators (40%) reporting that they do not work off the farm.

Tay (49%) and Oro-Medonte (47%) had the next highest percentage of farm operators working more than 20 hours off the farm.

In 2001, Bradford West Gwillimbury reported the lowest percentage (26%) of farm operators working more than 20 hours off the farm. 66% of farm operators in Bradford West Gwillimbury reported not working off the farm.

New Tecumseth (27%), Tay (27%) and Ramara (30%) had the largest percentage of farm operators working more than 40 hours off the farm.

The emerging trend is that where farming is less profitable, farmers tend to work additional hours at non-farm work to supplement their on-farm income.

Table 1.8 reports the percentage of farm operators working over 20 hours of non-farm work by municipality.

Table 1.8: Farm Operators Working over 20 hours of Non-Farm Work by Municipality in Simcoe County, 2001

	Total Number of Farm Operators, 2001	Number and % of farmers with 20-40 hours/week of non-farm work (2000)		Number and % of farmers with more than 40 hours/week of non-farm work (2000)	
Ontario	85,020	15,255	18%	16,655	20%
Simcoe County	3,440	675	20%	745	22%
Adjala-Tosorontio	270	50	19%	50	19%
Clearview	500	100	20%	95	19%
New Tecumseth	220	30	14%	60	27%
Springwater	405	75	19%	70	17%
Bradford West Gwillimbury	265	30	11%	40	15%
Severn	265	75	28%	65	25%
Innisfil	245	50	20%	45	18%
Ramara	235	40	17%	70	30%
Essa	240	40	17%	60	25%
Oro-Medonte	500	120	24%	125	25%
Tiny	185	40	22%	35	19%
Tay	110	25	23%	30	27%

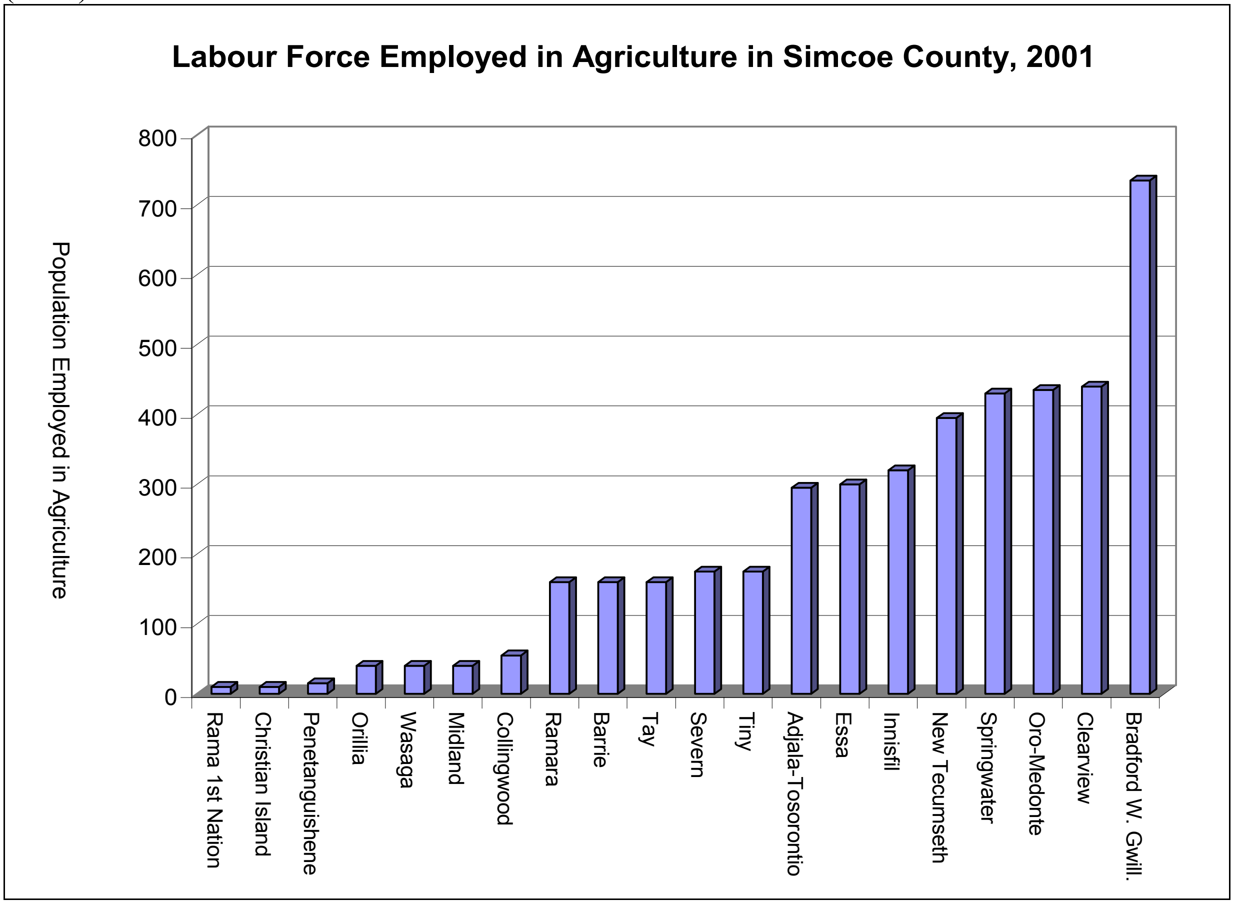
Source: Statistics Canada, Census of Agriculture, 2001

Employment in Agriculture in Simcoe County

In 2001, 4375 people were directly employed in agriculture in Simcoe County. This represents 2.2% of the County's total labour force.

Figure 1.10 illustrates the labour force employed in agriculture by municipality in Simcoe County in 2001.

Figure 1.10: Labour Force Employed In Agriculture by Municipality In Simcoe County (2001)



Source: Statistics Canada, Census of Agriculture, 2001

The fewest number of people employed in agriculture were in First Nation Reserves, including Rama 1st Nation and Christian Island, and urban areas within the County, including Penetanguishene, Orillia, Wasaga Beach, Midland and Collingwood.

The most people employed in agriculture lived in Bradford West Gwillimbury (735). Bradford West Gwillimbury represented 16.8% of the agricultural labour force. The concentration of labour employed in agriculture in Bradford West Gwillimbury is largely explained by the concentration of vegetable production in the Holland Marsh area. Vegetable production is typically more labour intensive than other forms of agriculture.

In 2001, 55% of the labour force employed in agriculture in Simcoe County were employed in New Tecumseth (9.0%), Springwater (9.8%), Oro-Medonte (9.9%), Clearview (10.1%), Bradford West Gwillimbury (16.8%).

Table 1.9 reports the number of people employed in agriculture by municipality in Simcoe County in 2001 and the percentage of the County labour force employed in agriculture.

Table 1.9: Percentage of the Simcoe County Labour Force Employed in Agriculture by Municipality, 2001

	# of Labour Force Employed in Agriculture	% of County Labour Force Employed in Agriculture
Simcoe County	4375	100.0%
Rama 1st Nation	10	0.2%
Christian Island	10	0.2%
Penetanguishene	15	0.3%
Orillia	40	0.9%
Wasaga	40	0.9%
Midland	40	0.9%
Collingwood	55	1.3%
Ramara	160	3.7%
Barrie	160	3.7%
Tay	160	3.7%
Severn	175	4.0%
Tiny	175	4.0%
Adjala-Tosorontio	295	6.7%
Essa	300	6.9%
Innisfil	320	7.3%
New Tecumseth	395	9.0%
Springwater	430	9.8%
Oro-Medonte	435	9.9%
Clearview	440	10.1%
Bradford West Gwillimbury	735	16.8%

Profile of Commodities Produced in Simcoe County

Simcoe County has a diverse and highly productive agricultural industry.

Commodities produced in Simcoe County include:

- Field Crops
- Livestock
- Fruits
- Vegetables
- Nursery Crops
- Greenhouse Crops
- Sod
- Christmas Trees

Crops

At a County level, the area planted in crops in Simcoe increased from 329,278 acres to 359,913 acres between 1991 and 2001. This represents a 9% increase in the area planted in crops during the decade.

The increase in the area planted in crops reflects provincial trends. Over the same time period Ontario experienced a 7% increase in the acreage planted in crops.

In 2001, 30.8% of the area planted in crops in Simcoe County was in Clearview (59,843 acres) and Springwater (51,269 acres). Both municipalities saw a steady increase in the area of cropland during the 1990s, with a 9% and 4% increase respectively.

The municipalities of Tay (6,110 acres), Tiny (14,168 acres) and Severn (17,502 acres) had the least area planted in crops in 2001.

While Severn had a relatively small acreage planted in crops in 2001, compared to the other municipalities in Simcoe County, it also experienced the greatest increase in the area planted in crops (38%) over the decade. The second most significant increase in the area planted in crops was in Oro-Medonte, with a 23% increase between 1991 and 2001.

Between 1991 and 2001, there was an increase in the acreage in crops in every municipality except New Tecumseth.

New Tecumseth was the only municipality that did not experience an increase in the acreage planted in crops. Over the decade, New Tecumseth saw a decline of 13% in the area of farmland planted in crops. New Tecumseth also saw a significant loss in area of farmland between 1996 and 2001. New Tecumseth is located in southern Simcoe County, near Highway 400, between York and Peel Region and the City of Barrie. Some of the loss in area planted in cropland may be connected to the loss of farmland as a result of residential, commercial and other development pressure.

Table 1.10 documents the change in area planted in crops in Simcoe County between 1991 and 2001.

Table 1.10: Area in Crops in Simcoe County, 2001

	Area in Crops 2001 (acres)	Area in Crops 1996 (acres)	Area in Crops 1991 (acres)	% Change 2001-1996	% Change 2001-1991
Ontario	9,035,915	8,759,707	8,430,414	3%	7%
Simcoe County	359,913	351,910	329,278	2%	9%
Adjala-Tosorontio	30,964	31,063	27,987	-0.3%	10%
Bradford - W. Gwill	27,273	27,763	25,132	-2%	8%
Clearview	59,843	60,818	54,634	-2%	9%
Essa	30,002	28,277	28,567	6%	5%
Innisfil	31,412	31,327	30,290	0%	4%
New Tecumseth	33,644	35,173	37,912	-5%	-13%
Oro-Medonte	39,335	34,815	30,296	11%	23%
Ramara	18,391	20,376	15,103	-11%	18%
Severn	17,502	14,452	10,862	17%	38%
Springwater	51,269	48,427	49,142	6%	4%
Tay	6,110	6,806	5,931	-11%	3%
Tiny	14,168	12,613	13,422	11%	5%

Source: Statistics Canada, Census of Agriculture, 2001, 1996, 1991

In 2001, 67% of the farmland in Simcoe County was planted in crops. This is the same overall percentage as the Province (67%) (Table 1.11).

The highest percentages of farmland planted in crops were found in Bradford-West Gwillimbury (84%), New Tecumseth (83%) and Innisfil (80%). This is a high concentration of cropland. Each of these municipalities is located south of Barrie in Simcoe County and north of York and Peel Region along Highway 400. There is a concentration of specialty crops in these municipalities: a potato growing area in New Tecumseth and Adjala-Tosorontio; vegetable production in the Holland Marsh - Bradford West Gwillimbury; and sod growing areas in New Tecumseth and Innisfil.

The municipalities that had the lowest percentage of farmland planted in crops were Tay (51%), Severn (54%) and Tiny (63%).

Table 1.11: Total Area in Crops as a Percentage of the Total Area of Farmland

	Total Area in Crops 2001 (acres)	Total Area of Farmland 2001 (Acres)	% of Farmland in Crops
Ontario	9,035,915	13,507,357	67%
Simcoe County	359,913	540,870	67%
Adjala-Tosorontio	30,964	47,411	65%
Bradford – West Gwillimbury	27,273	32,564	84%
Clearview	59,843	83,452	72%
Essa	30,002	40,719	74%
Innisfil	31,412	39,254	80%
New Tecumseth	33,644	40,559	83%
Oro-Medonte	39,335	63,059	62%
Ramara	18,391	58,215	32%
Severn	17,502	32,434	54%
Springwater	51,269	68,829	74%
Tay	6,110	12,017	51%
Tiny	14,168	22,357	63%

Source: Statistics Canada, Census of Agriculture, 2001

Between 1991 and 2001 there was a significant[4] increase in the acreage planted in grain corn (32%), potatoes (35%) and soybeans (66%) in Simcoe County.

Over the decade, there was a significant[5] decline in the acreage planted in wheat (-19%), barley (-58%), field beans (-82%), oats (-87%), mixed grain (-107%), and canola (-131%).

Despite a significant decline in six crops, Simcoe County still produced over 5% of Ontario's field beans, barley and canola crop in 2001.

[4] For the purposes of this discussion, a significant increase or decrease is + or – 10%.

Simcoe County is a major supplier of potatoes at the provincial level. The 15,540 acres planted in potatoes represented 30.8% of the potato crop in the Province in 2001. Due to its sandy soils, potato production is concentrated in New Tecumseth and Adjala-Tosorontio.

Table 1.12: Profile of Crops in Simcoe County

Type	Area in 2001 (acres)	Area in 1996 (acres)	Area in 1991 (acres)	% Change 2001 to 1991	% of total area for crop in Ontario (2001)
Oats	4,134	4,102	7,733	-87%	4.2%
Barley	19,377	24,713	30,643	-58%	7.4%
Mixed Grain	9,269	12,177	19,230	-107%	4.4%
Corn (Grain)	63,479	54,804	43,286	32%	2.9%
Corn (Silage)	9,550	9,522	10,234	-7%	3.2%
Wheat	24,213	34,850	28,879	-19%	4.5%
Field Beans	3,557	6,071	6,485	-82%	5.6%
Potatoes	15,540	12,304	10,099	35%	30.8%
Canola	3,777	7,242	8,710	-131%	13.6%
Soybeans	64,993	43,910	22,188	66%	2.3%
Hay	113,882	121,253	117,369	-3%	4.4%

Source: Statistics Canada, Census of Agriculture 1991, 1996 and 2001.

<u>Livestock</u>

There is a wide variety of livestock produced within Simcoe County.

Over the decade, 1991 to 2001, Simcoe County saw an increase in all but three livestock groups. The livestock groups that experienced a significant[5] decline were mink (-138%), dairy cattle (-46%) and chickens (-17%).

Simcoe County produces over 5% of Ontario's beef cattle, sheep, goats, horses, mink, deer & elk and bees. Simcoe County had a very small percentage of the Province's poultry industry.

Table 1.13 provides a description of the types and change in the amount of livestock in Simcoe County between 1991 and 2001.

Table 1.13: Profile of Livestock in Simcoe County 1986-2001

Type	Number in 2001	Number in 1996	Number in 1991	% Change 2001 to 1991	% of Total Numbers for Livestock in Ontario (2001)
Chicken	550,158	601,428	642,664	-17%	1.3%
Turkeys	94,380	56,244	59,930	37%	2.8%
Beef Cattle	20,218	25,736	20,727	-3%	5.4%
Dairy Cattle	8,348	10,785	12,156	-46%	2.3%
Pigs	77,979	63,794	66,297	15%	2.3%
Sheep	23,268	17,150	16,830	28%	6.9%
Horses	4322	4,074	3,369	22%	5.2%
Goats	3472	2,628	1,473	58%	5.6%
Rabbits	4367	2,287	3,413	22%	3.7%
Mink	19655	32,509	46,695	-138%	5.6%
Deer & Elk	4,201	1,429	N/A	N/A	20.6%
Bees	4, 430 colonies	3,092 colonies	3,679 colonies	17%	7.8%

Source: Statistics Canada, Census of Agriculture 1991, 1996 and 2001.

Fruits and Vegetables

Simcoe County is a significant supplier of fruits and vegetables in Ontario. A significant percentage of Ontario's supply of strawberries (5.5%), nursery crops (30.4%), sod (12.2%), Christmas trees (25.6%), onions (26.5%), carrots (30.4%) are grown in Simcoe County.

Over the decade, 1991 to 2001, Simcoe County experienced a significant[5] decrease in apples (-44.9%) and sod production (-87.5%).

Over the same period there was a significant increase in the amount of sweet corn (28%) and carrots (32%) grown in the County. There was also significant expansion in nursery (25%) and greenhouse crops (53%).

Many of the specialty crops produced in the County (carrots, onions and others) are grown in organic soils. There is a concentration of vegetable production in the Holland Marsh area in Bradford West Gwillimbury. Sod production is concentrated in New Tecumseth and Innisfil. Major apple growing areas are located in Clearview, near the shore of Georgian Bay, between Collingwood and Wasaga Beach.

Table 1.14 provides a description of the types and change in fruit and vegetable production in Simcoe County between 1991 and 2001.

[5] For the purposes of this discussion, a significant increase or decrease is + or – 10%.

Table 1.14: Profile of Fruits and Vegetables in Simcoe County					
Type	Area in 2001	Area in 1996	Area in 1991	% Change 2001 to 1991	% of Area in Crop in Ontario (2001)
Strawberries	276 acres	271 acres	250 acres	9.4%	5.5%
Apples	793 acres	951 acres	1,149 acres	-44.9%	3.3%
Sweet Corn	1,344 acres	1,260 acres	963 acres	28.3%	2.7%
Onions	1,756 acres	1,704 acres	1,776 acres	-1.1%	26.5%
Carrots	2700 acres	2,234 acres	1,847 acres	31.6%	30.4%
Nursery Crops	2779 acres	2,772 acres	2,072 acres	25.4%	10.9%
Greenhouse Crops	1435762 sq.ft.	1382830 sq.ft.	679090 sq.ft.	52.7%	1.5%
Maple Syrup	47759 taps	57,043 taps	45,734 taps	4.2%	3.7%
Sod	3,501 acres	3,467 acres	6,564 acres	-87.5%	12.2%
Christmas Trees	5,562 acres	5,807 acres	N/A	N/A	25.6%

Source: Statistics Canada, Census of Agriculture 1991, 1996 and 2001.

Total Farm Capital in Simcoe County

The statistic “total farm capital” looks at the value of the investment farmers have made to operate their farm. The category “total farm capital” takes into consideration the value of farm machinery and equipment, livestock and poultry, and the total value of land and buildings.

In 2001, the value of total farm capital in Simcoe County was $2,081,600,000. In order to compare the total farm capital invested in Simcoe County to the provincial average or surrounding counties, it requires calculating a value that takes into consideration the variation in the size of the agricultural land base between geographic regions. In order to do this a value is calculated called “farm capital/acre”. This value is taken by dividing the total farm capital for a geographic region and dividing it by the acreage of farmland in that same region. This allows for relative comparison between regions.

In 2001, the value of farm capital per acre in Simcoe County is $3,849. Comparing the value of farm capital/acre in Simcoe County to other counties/Regions in Western Ontario, Simcoe County had the 7th highest value. Simcoe County was behind Halton Region, Peel Region, Huron County, Perth County, Waterloo Region and Wellington County, and ahead of Bruce County, Dufferin, Grey County, and the overall provincial value. Table 1.15 summarizes the total farm capital for the Counties and Regions in Western Ontario.

Table 1.15: Total Farm Capital by County/Region in Western Ontario

counties	Total Farm Capital, 2001	Farm Capital/Acre ($/acre), 2001
Bruce	$ 1,591,200,000	$ 2,602
Dufferin	$ 695,700,000	$ 3,602
Grey	$ 1,470,500,000	$ 2,479
Halton	$ 1,010,000,000	$ 10,227
Huron	$ 3,190,400,000	$ 4,437
Peel	$ 1,433,700,000	$ 13,728
Perth	$ 2,842,700,000	$ 5,652
Simcoe	$ 2,081,600,000	$ 3,849
Waterloo	$ 1,386,800,000	$ 6,142
Wellington	$ 2,259,700,000	$ 4,794
Western Ontario	$17,962,300,000	$ 4,423
The Province	$50,529,800,000	$ 3,741

Source: Statistics Canada, Census of Agriculture, 2001.

When comparing the value of farm capital per acre in 2001, Simcoe County ($3,849/acre) had a higher value than the Province ($3,741). There is significant variation within the total value of farm capital in each municipality within Simcoe County.

Seven municipalities in Simcoe County have a higher value of farm capital per acre than the provincial average.

Bradford West Gwillimbury has the highest value of farm capital per acre, a value of $5,899 per acre, in Simcoe County. The high investment per acre is reflective of the high concentration of vegetable production in the area.

The five municipalities with the highest value of farm capital per acre are Bradford West Gwillimbury ($5,899), Essa ($4,903), New Tecumseth ($4,870), Innisfil ($4,333) and Adjala-Tosorontio ($4,142).

The municipalities of Clearview and Springwater had a value of farm capital per acre of $3,825 and $3,742 respectively. These municipalities most closely reflect the provincial average value of farm capital per acre of $3,741. Oro-Medonte had a value of $3,495, just below the provincial average.

The five municipalities with the lowest value of farm capital per acre are Ramara ($2,122), Severn ($2,786), Tiny, ($3,226), Tay ($3,315) and Oro-Medonte ($3,495).

Table 1.16 summarizes the above discussion.

Table 1.16: Total Farm Capital by Municipality in Simcoe County, 2001

Region	Total Farm Capital - Market Value $ (2001)	Region	Total Farm Capital (2001) per Acre
Ontario	$ 50,529,783,505	Bradford West Gwillim.	$ 5,899
Simcoe County	$ 2,081,575,843	Essa	$ 4,903
Adjala-Tosorontio	$ 196,381,941	New Tecumseth	$ 4,870
Clearview	$ 319,227,360	Innisfil	$ 4,333
New Tecumseth	$ 197,541,104	Adjala-Tosorontio	$ 4,142
Springwater	$ 260,345,604	Simcoe County	$ 3,849
Bradford West Gwillim.	$ 192,091,628	Clearview	$ 3,825
Severn	$ 90,350,016	Springwater	$ 3,782
Innisfil	$ 170,069,264	Ontario	$ 3,741
Ramara	$ 123,538,879	Oro-Medonte	$ 3,495
Essa	$ 199,646,321	Tay	$ 3,315
Oro-Medonte	$ 220,410,212	Tiny	$ 3,226
Tiny	$ 72,134,600	Severn	$ 2,786
Tay	$ 39,838,914	Ramara	$ 2,122

Source: Statistics Canada, Census of Agriculture, 2001.

Farm Receipts in Simcoe County, 2001

The category, "total gross farm receipts" reports the value of farm sales within a geographic area. This category is also commonly referred to as total farm gate sales.

The value of total farm sales in Simcoe County in 2001 was $293,933,003. In order to compare the total farm sales in Simcoe County to the provincial average or surrounding counties, the "value of farm receipts" per acre is calculated.

In 2001, the value of farm receipts per acre in Simcoe County was $543. Comparing the value of farm receipts/acre in Simcoe County to other counties/Regions in Western Ontario, Simcoe County had the 7th highest value. Simcoe County was behind Halton Region, Peel Region, Huron County, Perth County, Waterloo Region and Wellington County, and ahead of Bruce County, Dufferin, Grey County. Table 1.17 summarizes the total farm receipts for the counties and Regions in Western Ontario.

Table 1.17: Total Farm Receipts by County/Region in Western Ontario

Counties	Total Gross Farm Receipts	Value of Receipts/Acre ($/acre)
Bruce	$ 309,996,000	$ 507
Dufferin	$ 78,423,000	$ 406
Grey	$ 240,607,000	$ 406
Halton	$ 141,473,000	$ 1,433
Huron	$ 656,498,000	$ 913
Peel	$ 116,537,000	$ 1,116
Perth	$ 555,081,000	$ 1,104
Simcoe	$ 293,933,000	$ 543
Waterloo	$ 379,602,000	$ 1,681
Wellington	$ 433,776,000	$ 920
Western Ontario	$ 3,205,926,000	$ 789
The Province	$ 9,115,455,000	$ 675

Source: Statistics Canada, Census of Agriculture, 2001.

When comparing the value of farm receipts per acre in 2001, Simcoe County ($543/acre) had a significantly lower value than the Province ($675).

There is significant variation within the total value of farm capital in each municipality within Simcoe County.

Three municipalities in Simcoe County have a higher value of farm receipts per acre than the provincial average of $675 per acre.

It is interesting to observe that the five municipalities with the highest farm receipts per acre in 2001 are the same as the five municipalities with the highest value of farm capital per acre: Bradford West Gwillimbury ($1,041), Essa ($967), Innisfil ($716) and Adjala-Tosorontio ($657), and New Tecumseth ($596). The five municipalities with the highest value of farm receipts per acre are all located in southern Simcoe County. The high value of sales reflects the productivity and good access to local markets and transportation in this area of Simcoe County.

Looking at total farm receipts by municipality in 2001, Clearview ($48,271,420) and Springwater ($40,591,467) had the highest total sales. This reflects the fact that they have among the highest number of farms, farmland and farm operators in the County.

When considering the value of farm receipts per acres, the municipalities of Clearview and Springwater had a value of farm receipts per acre of $578 and $590, respectively. These municipalities most closely mirror the average value of farm receipts in Simcoe County ($543 per acre).

The same observation about the highest five municipalities in this category, can be made for the lowest five. The five municipalities with the lowest value of farm capital per acre are the same as the five municipalities with the lowest value of farm sales per acres: Ramara ($186), Severn ($269), Tay ($285), Oro-Medonte ($290) and Tiny, ($320). This reflects the lower productivity of the area and the lower value of the farm commodities being produced in these municipalities.

Table 1.18 documents the total farm receipts by municipality in Simcoe County in 2001.

Table 1.18: Total Farm Receipts by Municipality in Simcoe County, 2001

Region	Total Gross Farm Receipts (2001)	Region	Total Gross Farm Receipts (2001) per Acre
Ontario	$ 9,115,454,790	Bradford West Gwillim.	$ 1,041
Simcoe County	$ 293,933,003	Essa	$ 967
Adjala-Tosorontio	$ 31,143,049	Innisfil	$ 716
Clearview	$ 48,271,420	Ontario	$ 675
New Tecumseth	$ 24,166,348	Adjala-Tosorontio	$ 657
Springwater	$ 40,591,467	New Tecumseth	$ 596
Bradford West Gwillimbury	$ 33,897,530	Springwater	$ 590
Severn	$ 8,725,116	Clearview	$ 578
Innisfil	$ 28,112,915	Simcoe County	$ 543
Ramara	$ 10,812,908	Tiny	$ 320
Essa	$ 39,381,726	Oro-Medonte	$ 290
Oro-Medonte	$ 18,265,069	Tay	$ 285
Tiny	$ 7,143,297	Severn	$ 269
Tay	$ 3,422,158	Ramara	$ 186

Source: Statistics Canada, Census of Agriculture, 2001.

Farm Expenses in Simcoe County, 2001

Farm expenses include the value of inputs a farmer purchases to produce agricultural commodities throughout the year. Reported expenses include: fertilizer; herbicides; pesticides; seeds and plants; feed; livestock purchases; veterinary services; custom work; wages; fuel; repairs; land rental; and interest payments.

The same five municipalities have the highest total farm expenses as had the highest farm capital and farm receipts. The five municipalities with the highest value of farm expenses are Bradford West Gwillimbury ($882), Essa ($830), Innisfil ($612) and Adjala-Tosorontio ($594), and New Tecumseth ($542). The expenses in these municipalities are higher than the Simcoe County average because the types of agriculture require additional inputs, such as labour, specialized machinery and storage. There is also a connection between the increase in expenses and the high return in farm sales.

Looking at total farm receipts by municipality in 2001, Clearview ($48,271,420) and Springwater ($40,591,467) had the highest total sales. This reflects the fact that they have among the highest number of farms, farmland and farm operators in the County.

When considering the value of farm expenses per acre, the municipalities of Clearview and Springwater had a value of farm receipts per acre of $538 and $495, respectively. These municipalities most closely reflect the average value of farm receipts in Simcoe County, a value of $485 per acre.

The same five municipalities have the lowest total farm expenses as had the lowest farm capital and farm receipts. The five municipalities with the lowest value of farm expenses are Ramara ($177), Severn ($264), Oro-Medonte ($284), Tiny, ($287), and Tay ($285), As expected there is a correlation between expenses (inputs) and gross farm sales. Viewed another way, generally farmers will only purchase farm expenses relative to the return they anticipate from farm sales.

Table 1.19 describes the value of total farm expenses in Simcoe County.

Table 1.19: Total Farm Expenses by municipality in Simcoe County, 2001

Region	Total Farm Expenses (2001)	Region	Total Farm Expenses (2001) per Acre
Ontario	$ 7,829,246,574	Bradford West Gwillimbury	$ 882
Simcoe County	$ 262,292,929	Essa	$ 830
Adjala-Tosorontio	$ 28,178,967	Innisfil	$ 612
Clearview	$ 44,928,452	Adjala-Tosorontio	$ 594
New Tecumseth	$ 21,970,022	Ontario	$ 580
Springwater	$ 34,040,921	New Tecumseth	$ 542
Bradford West Gwillimbury	$ 28,716,515	Clearview	$ 538
Severn	$ 8,563,233	Springwater	$ 495
Innisfil	$ 24,014,670	Simcoe County	$ 485
Ramara	$ 10,318,903	Tiny	$ 287
Essa	$ 33,794,057	Tay	$ 285
Oro-Medonte	$ 17,920,288	Oro-Medonte	$ 284
Tiny	$ 6,427,428	Severn	$ 264
Tay	$ 3,419,473	Ramara	$ 177

Source: Statistics Canada, Census of Agriculture, 2001.

1.3 Linkages Between Agriculture and the County's Economy.

A recent study completed by Harry Cummings and Associates (May, 1999)[6] looked at the economic impact of agriculture in Simcoe County and its relationship to the local economy. Although this study drew heavily on the 1996 census, information from the 2001 Census and included within this report suggest that the basic parameters have not significantly changed.

Agriculture has an impact in the local economy that is much greater than the cumulative gross farm sales from individual farms. It includes a variety of services and products that range from veterinarians to trucking to processing. The Cummings study (1999) identified a total of 573 agriculturally-related businesses and these also contribute to the impact of agriculture on the local economy. The average gross sales of these businesses was approximately $2.3 million of which 44% was attributed to agriculture related sales. The Cummings study also documents that agriculturally related businesses have significant sales outside of Simcoe County. In fact, an estimated 56% of total agriculture related sales ($518,691,957) from these businesses is sold outside of the County (in other Ontario counties, other Provinces and other countries). Moreover, these 573

[6]Cummings, Harry and Associates. Economic Impact of Agriculture on the Economy of Simcoe County. May 1999.

agriculturally related businesses employ 6,055 individuals of which 2,237 full time employees (FTE) directly serve the agricultural sector.

Agriculture and Direct Sales

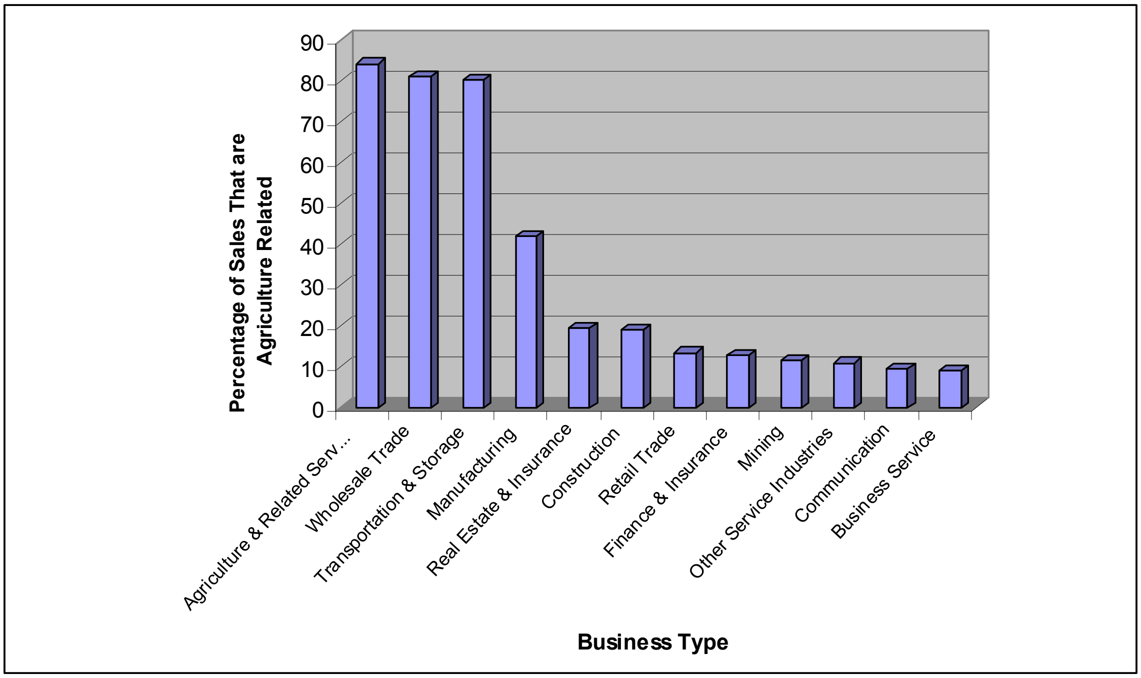
In Simcoe County, farm gate sales totaled $293,933,000 in 2001. This represents an increase of approximately 11% over 1996 data. Moreover, there were 4045 farm owners, operators and labourers employed in agriculture in 2001. Although this represents a decrease of 725 individuals compared to 1996 this reflects trends that occurred across the Province.

Table 1.20: Number of Agriculture-Related Businesses for Simcoe Townships and Towns (Cummings, 1999).

Townships/Town	Number of Agriculture - Related Businesses
Adjala-Tosorontio	7
Barrie	41
Bradford-West Gwillimbury	65
Clearview	63
Collingwood	43
Essa	27
Innisfil	29
Midland	26
New Tecumseth	62
Orillia	32
Oro-Medonte	44
Ramara	14
Severn	10
Springwater	51
Tay	28
Tiny	21
Wasaga	10
TOTAL FOR SIMCOE COUNTY	**573**

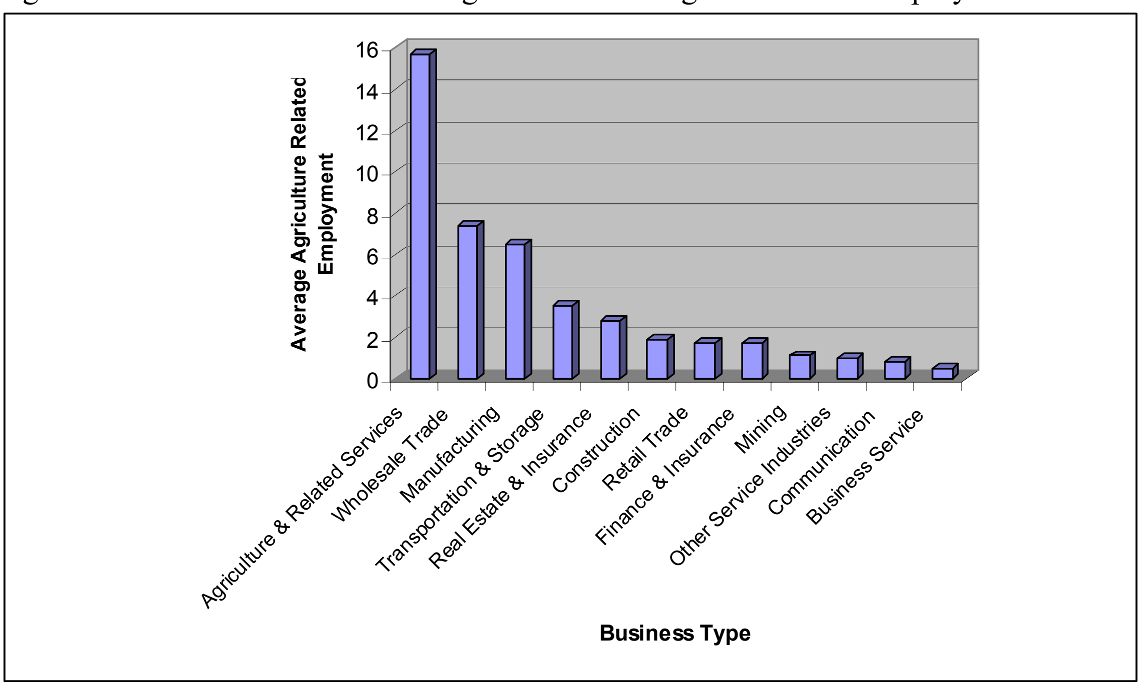
The Cummings study (1999) provides insight into the relationship between these agricultural businesses and the local economy (Table 1.20). The 573 agriculturally related businesses that exist in Simcoe County were identified based on at least 5% of their total sales being connected to agriculture (Figure 1.11). Many of these businesses have a much stronger tie to agriculture. These businesses have a significant number of employees (Figure 1.13). Agriculture and Related Services for example had an average of 15.7 agriculture related employees (Figure 1.12). This includes vegetable packers in the Holland Marsh and potato packers in New Tecumseth. The wholesale trade sector, given the total number of businesses and the modest 7.4 employees per sector is also of critical importance.

Figure 1.11: Businesses Connected to Agriculture: Percentage of Sales Related to Agriculture



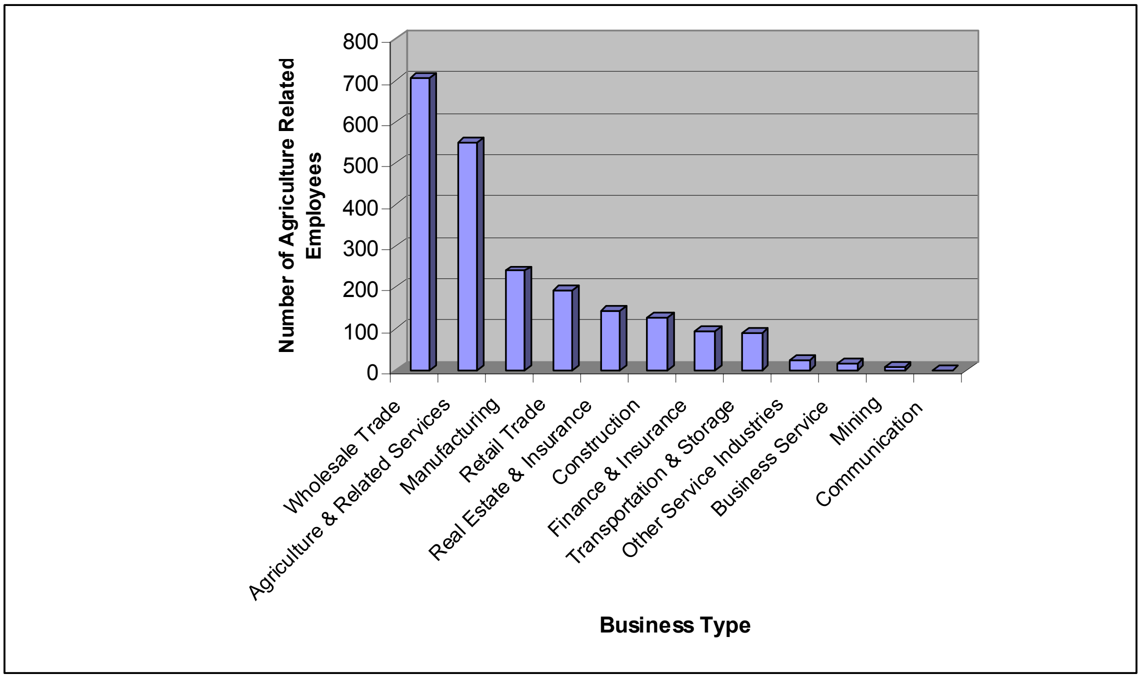
(adapted from Cummings, 1999)

Figure 1.12 Businesses Related to Agriculture: Average Number of Employees



(adapted from Cummings, 1999)

Figure 1.13 Businesses Connected to Agriculture : Total Number of Employees Related to Agriculture



(adapted from Cummings, 1999)

According to Cummings (1999) there were 4,770 direct jobs (farmers and labourers), 2,237 indirect jobs (jobs that exist to service or directly support agriculture) and 7,007 induced jobs (employment generated by the wages of workers in an area) created as a result of the agriculture sector in Simcoe County. Thus, farm operations, businesses that buy from and sell to, and services that support farmers and farm businesses are estimated to support approximately 14,014 jobs or 9.2 percent of the county's total employment. In addition, there are $265 million in direct and $519 million in indirect sales associated with agriculture in Simcoe County. Therefore, according to Cummings (1999) approximately $784 million in agriculture-related sales are generated in the Simcoe County economy.

Agriculture's Impact on the Rural Economy

Agriculture has an on-going and significant impact on the economy of Simcoe County. Approximately 9 percent of employment in Simcoe County and $784 million in agriculture and agriculturally related sales can be attributed to agriculture. In total 573 businesses buy or sell from farm enterprises (Cummings, 1999).

While the 2001 census indicated that 4,045 jobs exist at the farm level, there are additional jobs tied indirectly to the agriculture sector through expenditures by agriculture-related businesses, and further jobs supported by agriculture in education, health and government service (1999). Clearly this has a significant impact on the economy of Simcoe County. Based on Cummings' study (1999) multipliers associated with employment data suggest about 2 jobs off the farm for every 1 on the farm.

Similarly, for every dollar in farm gate sales another $1.95 is generated in agriculture-related business sales. Applying these multiplier effects to 2001 data it is probable that the 4045 on farm jobs yields 7,835 indirect and induced jobs for a total of 11,880 jobs compared to approximately 14,014 jobs in 1996. In contrast to this decline in agricultural employment there has been a significant increase in agricultural- related sales including a probable increase from $784 million in 1996 to $869.5 million in 2001.

Although these numbers are significant, the overview of the agriculture sector suggests change and evolution. In the midst of this change there will be opportunities. The trend in Simcoe and across the Province of fewer farms, higher levels of sales and specialization over the past generation is likely to continue into the future. The implications for agriculture and rural development are significant. Farms are likely to move in one of two directions. Some will get larger, with increased intensification and further specialization. These types of farms are likely to benefit from a rural landscape that is largely devoted to agriculture (i.e. minimal non-farm interference). Conversely, other farms will exist dependent on non-farm income. These "lifestyle" farms will still contribute to agricultural production, but with reduced reliance on agriculture for primary income.

In Simcoe the proximity to the Golden Horseshoe provides opportunities which do not exist in many other more remote counties. This proximity to urban centres combined with the amenities of the area (beaches and recreational communities) suggests further opportunities for agriculture, farm marketing and tourism. The degree to which this activity can bolster the Simcoe agricultural economy may be important to the next generation of farmers.

++++++++++++++++++++++++++++++++++++

1.4 Agriculture and the Future of Rural Development in Simcoe County

Forecasting the future of a given area or sector is inherently challenging. Circumstances change, government policy evolves and individual circumstances vary. This is even more of an issue for agriculture given uncertainties caused by agricultural markets, government policy, international trade, and climate, amongst others. Moreover, anomalies will exist. Whereas one area may have certain production advantages over another area, individual farmer expertise and initiative may easily lead to examples of productive and profitable farms in an area which may generally be in decline.

Despite these reservations, however, it is important to consider the potential for agricultural development as it continues to contribute to the overall economy of the rural community. The previous sections of this report provide considerable background (based largely on census data) which provide insight into the future of agriculture in Simcoe County.

Key results follow:

1) Agriculture in Simcoe County remains a productive and dynamic industry. Although profitability varies across the County, the county as a whole has not lost significant ground relative to other counties in the province. Overall, however, there have been declines in the number of farms, acres of farmland and number of farm operators during the 1990s. The decline in these areas has been consistent with provincial trends.

2) The municipalities of Simcoe County can be divided into three categories.

   a) Category 1 includes municipalities in the most southerly part of the County. These include the five municipalities of Bradford West Gwillimbury, Essa, New Tecumseth, Innisfil and Adjala-Tosorontio. These municipalities share the highest value of farm capital per acre, the highest gross farm receipts per acre and the highest expenses per acre. These municipalities give the impression of a progressive, productive and diverse agricultural economy. Farms tend to be more productive; more specialized and with better access to direct local markets and transportation. These townships accounts for about half of the farm sales and farm capital in the County. They are also the municipalities in greatest proximity to the Greater Toronto Area (GTA) and are generally located between the growth centre of Barrie and the GTA.

      Despite urban pressures, potential for growth of the agricultural industry remains strongest in this area. Assuming a secure land base, aspects of agriculture in this area will remain provincial leaders (Holland Marsh - Bradford West Gwillimbury, and potato production in New Tecumseth). Expertise in this area also raises the potential for further growth in the greenhouse and nursery industry. Proximity to the GTA and Barrie also offers opportunities in the area of agri-tourism.

   b) Category 2 includes the Townships of Clearview and Springwater. Indicators of long-term agricultural activity are positive. Soils and climate are generally supportive of agriculture, and there is a significant farm population. This area has the highest level of agricultural activity, including acres of farmland, number of farms and farm operators. Relative to the municipalities listed in category 1, however, the area is less intensively farmed, corn heat units are considerably less and the area has less flexibility in terms of cropping choice and proximity to markets. Urbanizing pressures still exist in proximity to Barrie, Collingwood and Wasaga Beach.

      There are opportunities for continued investment and growth in the agricultural sector in this area. There is a strength in the livestock sector (a significant number of beef farms) and while there are continued issues for the beef industry, there is the potential for the maintenance and expansion of the existing industry (largely dependent on international trade and the resiliency of existing farms coming out of the BSE crisis). There does not appear to be a particular strength in the Supply Management Sector (dairy or chickens).

c) Category 3 includes the more northerly townships of Ramara, Severn, Oro-Medonte, Tiny, and Tay. These 5 tend to share the lowest value of farm capital per acre, the lowest gross farm receipts per acre and the lowest expenses per acre. Although there are examples of commercially viable operations in this area agriculture does not have the same climate or soil capability that benefits municipalities elsewhere within the County. Growth pressure in this area is also less intense than elsewhere within the county, although the area is generally a very attractive destination for seasonal and recreational activity (focused on shoreline areas).

   Although this area is likely to retain an agricultural presence it may be more in the form of "lifestyle farms." While a commercial farming industry is likely to continue, this area, because of soil quality and a more limiting climate is likely to be more attractive for farmers who rely heavily on off-farm income.

3) Agricultural Employment

Forecasting agricultural employment is a challenging endeavour. There are, however, certain long-term trends. Across the Province and on a regular basis since the end of the Second World War direct on-farm agricultural employment has been declining. Initially driven by a move to mechanization and the cost-price squeeze, in more recent years the farm income crisis has been a key factor. Current and on-going trends across the Province indicate that this is likely to continue. In fact, in Ontario, nearly 8,000 farms were lost between 1996 and 2001. In Simcoe County approximately 310 farms and 725 direct farm jobs were lost over the same time period. It is probable that with the outcome of the BSE crisis and the current crisis related to low commodity prices that the eventual 2006 census will show a further decline in farm numbers.

Does this, however, represent an industry in decline or an industry in transition? In fact, the decline in farm numbers does not tell the entire story. Another one of the on-going trends in agriculture has been the replacement of people with capital. Simply put, farms have gotten larger, often more productive and continue to have important and positive economic impacts throughout the rural economy. Although there were fewer farms in Simcoe County in 2001 (Table 1.21), for example, gross farm revenue increased from $95,564 per farm in 1996 to $119,339 per farm in 2001. Even more telling is that on a per farm worker basis average farm receipts/worker increased from $55,555 in 1996 to $72,658 in 2001. This tends to suggest that despite challenges agriculture is finding ways to cope and expand.

In terms of employment and farm numbers, however, there have been declines. Between 1971 and 2001 there was a decrease of 1298 farms in Simcoe County, although the number of employees per farm has remained relatively constant at 1.64 workers per farm (based on 1986, 1996 and 2001 data the number of direct jobs per farm was 1.6, 1.7 and 1.6 respectively). ***Applying these trends to the future suggests a continued decline in agricultural employment, fewer farms, approximately the same number of workers per farm and a continued increase in the value of farm sales.*** A continued trend to larger farms (at least on the best quality farmland) is probable. Although at some point agricultural employment is likely to level off, a continued decline in farm numbers of 12.9 % per decade over the next 30 years (consistent with the last 30 years) would result in 1629 farms in 2031. Assuming agricultural employment remains constant at approximately 1.64 employees per farm the number of direct farm workers would drop to 2672 (Table 1.22).

Table 1.21: Simcoe County: Number of Census Farms (1971-2001)

year	# farms
1971	3763
1976	3631
1981	3452
1986	3007
1991	2709
1996	2773
2001	2465

Table 1.22 Simcoe County: Forecasted Farm Numbers Based on Trends of Previous 30 years (2001-2031)

year	# farms	Projected * direct on-farm employment
2001	2465	4045
2011	2147	3521
2021	1870	3067
2031	1629	2672

(* Assumes 1.64 farm workers per farm).

4) Farm Size

If farm numbers drop as predicted and assuming the existing amount of farmland remains in production this would yield an average farm size of 332 acres in the year 2031. While significantly larger than existing farms (2001) this is in keeping with average farm sizes found elsewhere in North America (and remains small compared to some jurisdictions). It is noted that recent work by Statistics Canada has demonstrated that large farms have a higher probability of profitability relative to small farms.

5) Off-farm work remains critical for many farmers. In 2001, approximately half the farm operators in Simcoe County were employed in non-farm work. In the future it is probable that there will be two categories of farms- those that are large enough to provide full-time employment and those which are much smaller and are probably supported by off-farm employment. There will be some small farms that find a niche that allows for profitability on a smaller acreage/ specialty market.

6) An unknown in all of the above forecasts are the responses that may occur as conventional energy supplies are diminished. This may lead to higher prices for energy, increased transportation and production costs, or over time it may lead to the need for evolving strategies and approaches to production.

7) Agriculture and Evaluating Options for Greenfield Development

   Although this report documents the importance of agriculture in southerly and central portions of the county it does not offer a detailed analysis of the relative agricultural importance of one area versus another. While, it is clear that local and provincial policy provides direction concerning the protection of prime lands, more detailed analysis beyond soil capability is sometimes required. This is especially important when considering options that might impact upon agriculture. A Land Evaluation and Area Review (LEAR) Study is sometimes used to evaluate long term agricultural potential using a diversity of variables. This analysis could occur in the context of comparing the agricultural merits of one area versus another or it could occur at a municipal or county level. The importance and productivity of a given area for agricultural production is a function of soil capability, but it is also a function of several other variables that affect long-term agricultural productivity including:

   - the presence of conflicting land use on neigbouring properties
     - use, size and distribution of parcels on surrounding land (for example number of residences within a km).
   - surrounding agricultural land use
     - use and distribution of neighbouring farm parcels
   - extent of land fragmentation (for example total number of properties (excluding residential) within a km)
   - Additional factors that could enhance agricultural potential (e.g. irrigation systems, capital investment in farm infrastructure, tile drainage, climate etc.)

1.5 Summary of Key Findings

1) Agriculture in Simcoe County remains a productive and dynamic industry. Declines in the number of farms, acres of farmland and number of farm operators during the 1990s are consistent with provincial trends.

2) The municipalities of Simcoe County can be divided into three categories.

Category 1 includes municipalities in the most southerly part of the County. These municipalities share the highest values of farm capital per acre, the gross farm receipts and expenses. These townships account for about half of the farm sales and farm capital in the County. Potential for growth of the agricultural industry remains strongest in this area. Assuming a secure land base, aspects of agriculture in this area will remain provincial leaders.

Category 2 includes the central part of the county. Indicators of long-term agricultural activity are positive. This area has the highest level of agricultural activity, including acres of farmland, number of farms and farm operators. Relative to category 1, the area is less intensively farmed, corn heat units are less and the area has less flexibility in terms of cropping choice and proximity to markets. There is strength in the livestock sector.

Category 3 includes the more northerly areas. These townships share the lowest values of farm capital, gross farm receipts and expenses per acre. This area does not have the same climate or soil capability that benefits municipalities elsewhere within the County. While a commercial farming industry is likely to continue, this area, because of soil quality and a more limiting climate is likely to be more attractive for farmers who are more dependent on off-farm income.

3) Agricultural Employment
Although farm numbers continue to decline (between 1971 and 2001 there was a decrease of 1298 farms in Simcoe County) gross farm revenue continues to go up. On a per farm worker basis average farm receipts/worker increased from $55,555 in 1996 to $72,658 in 2001.

It is expected that there will be a continued decline in agricultural employment, with fewer farms, approximately the same number of workers per farm and a continued increase in the value of farm sales.

4) Farm Size
It is expected that farm size will continue to increase reaching an average farm size of approximately 332 acres in the year 2031.

5) Off-farm work remains critical for many farmers. In the future two categories of farms are expected- those that are large enough to provide full-time employment and those which are much smaller and supported by off-farm employment. There will be some small farms that find a niche that allows for profitability on a smaller acreage/ specialty market.

6) An unknown in all of the above forecasts are the responses that may occur as conventional energy supplies are diminished.

7) Agriculture and Evaluating Options for Greenfield Development
   Further detailed local analysis is required to help determine the impact of any future urban expansions on the agricultural industry.

Part 2: Tourism and Rural Development in Simcoe County

2.1 Tourism in Simcoe County

Simcoe County includes recreational lands that provide an important resource for all of Ontario. The County contains about 400 kilometres of shoreline on three major water bodies- Georgian Bay, Lake Simcoe, and Lake Couchiching. There are also a number of smaller inland lakes. During the summer, seasonal occupancy swells the population of the County well above the permanent population. In addition to the lakeshore, attractions include golfing, fishing, boating, hiking and biking. Winter activities including skiing (downhill and cross-country), and snowmobiling are also important attractions. In addition there are significant excursions into the County. The Ontario Ministry of Tourism and Recreation (2004) for example reports more than 8 million visitors to the County in 2002 with nearly 3 million overnight stays. Of these 3 million overnight visitors 55% were on pleasure trips, 35% were traveling to visit family and friends and the remainder were visiting for business or other purposes. Nearly 1.7 million of the overnight visitors were housed in commercial lodgings (81% of these visitors were from Ontario).

Tourism is an important component of Simcoe's economy. In support of the seasonal and transient tourist population there are a variety of related economic activities including accommodations and restaurants. While most shoreline areas have been developed with cottages, permanent residences and limited commercial and industrial, there are some opportunities for infilling and further intensification. Although opportunities for new lake frontage development are limited there are other tourism opportunities within the county.

This section of the Rural Development Report provides further insight into tourism related activities in the County[7] and discusses some of the related issues and constraints that will affect the future growth of this sector of the rural economy. This section draws on secondary documents including the Regional Tourism Profile for Simcoe County prepared by the Ministry of Tourism and Recreation; a Discussion Paper on the Role of the County of Simcoe in Lakeshore Planning prepared by Meridian Planning Consultants, materials posted on the Huronia Tourism Association website and materials posted on the County Planning Department website (including factual information contained within proposed Amendment Number 1 which has not been adopted).

[7] Although the rural development report does not focus on related opportunities in the larger towns and villages it is acknowledged that significant opportunities exist within these areas (for example Collingwood and Wasaga Beach).

2.2 Tourism in Simcoe County: A Broad Base of Activity

Tourism in Simcoe County includes a number of key activities. In addition to development associated with approximately 400 kilometers of shoreline, there are additional activities and features that contribute to a more broadly based tourist industry. Numerous outdoor activities including boating, fishing, golfing, hiking and biking, skiing, snow boarding and tubing, snowmobiling and snowshoeing contribute to an important tourism industry. The Huronia Tourism Association website for example, lists 32 golf courses and 11 facilities that provide skiing, boarding and tubing (approximately half offering downhill opportunities). The county is also blessed with a network and variety of hiking trails across the county (including a section of Trans Canada Trail). In support of these activities there are a number of resorts, inns, hotels, bed and breakfasts, and camping. There are also numerous cultural and entertainment activities that also draw people to different parts of the county while enhancing opportunities for local residents. In addition there are evolving opportunities building on the relationship between agriculture and tourism. The Harvest Ontario Website for example lists 25 Barrie area farms that are engaged in pick-your own and road side markets.

Municipal Overview- A Focus on Shoreline Related Activities

In 2002, the County of Simcoe released a Discussion Paper prepared by Meridian Consultants on the role of the County in Shoreline Planning. This report included a municipality by municipality overview of shoreline planning issues facing shoreline municipalities in the County of Simcoe. Table 2.1 provides a summary of relevant information for the 6 rural lakeshore municipalities in Simcoe County.

The shoreline of Simcoe County includes substantial lands along Georgian Bay, Lake Simcoe and Lake Couchiching (Table 2.1). The Severn River and numerous in-land lakes also provide an important focus for development in Simcoe County. In each of the Townships it is noted that the vast majority of the existing shoreline has already been developed. It is estimated that nearly 85% of the existing lake frontage is developed and much of the remainder is either Crown lands (provincial parks) or for environmental reasons is unsuitable for development. Although much of the rural shoreline community was developed prior to the 1950's for cottage purposes, the majority of these properties are currently occupied on a permanent basis. The vast majority of the lakeshore was also developed on private services and although public water and sewer is available in limited locations, the prevalence of septic systems does raise issues concerning their potential impact on water quality. This is an on-going issue given pressure to convert seasonal dwellings to permanent dwellings.

Table 2.1 :Overview of Tourism Activity in Simcoe County: Summarized by Lakeshore Township[8]

Township of Tiny	**Township of Tay**
Shoreline: 72 kms. Along Georgian Bay *Extent of Development:* Almost all of the shoreline frontage has been developed *Population*: the township has a shoreline population of 21,804 people of which approximately 5800 are permanent residents *Date of Development:* Majority developed prior to application of planning controls. Additional development in late 60's and early 70's but has declined since then. *Issues*: - cottages on smaller lots accessed by roads with reduced rights of way - Pressure for cottage conversions *Opportunities for development*: Approximately 400 hectares of vacant land designated residential located inland from existing shoreline development area. Lack of services means any new development will be at a low density. There are approximately 4,000 vacant lots within the shoreline area. *Constraints:* servicing and environment. *Commercial:* any major commercial is directed to the Balm Beach area	*Shoreline:* 48 kms. Along Georgian Bay *Extent of Development:* Majority has been developed with seasonal residential use *Population*: Three settlements within the shoreline area – two with full municipal services (Port McNicholl and Victoria Harbour). Waubashene has municipal water. There are 834 lots in unserviced shoreline area (approx. 55% of these are estimated to be permanent dwellings). *Opportunities for development*: The township (2002) was pursuing installation of full services in some shoreline areas. Some opportunity in serviced areas (in 2002 condominium proposal in Port McNicholl) *Constraints:* The township official plan seeks to protect character of low density shoreline residential areas. The plan discourages the further inland expansion of backlot development in the shoreline area. *Commercial:* large commercial marine uses

Continued…

[8] Based on the Discussion Paper – Role of the County of Simcoe in Lakeshore Planning, prepared by Meridian Planning Consultants, 2002.

Township of Severn	**Township of Ramara**
Shoreline: Western Shores of Lake Couchiching (also numerous inland lakes) *Extent of Development:* Lands immediately abutting the shorelines of Lake Couchiching and Severn River have already been developed with cottages and permanent residences *Date of Development:* Smaller lots on private services in the 1920's, 30's and 40's *Issues*: Some pressure for cottage conversion and some development pressure along Trent Severn Waterway (although much of this area is owned by the crown) *Opportunities for development:* Majority of growth will likely occur in two settlement areas of Bayou Park or Cumberland Beach As of 2002 there were no major applications under consideration for shoreline areas. Development in Cumberland Beach will probably depend on installation of municipal services. *Constraints:* - only very limited opportunities for further shoreline development along the major shorelines of the Township - policy initiatives must be in accordance with Management Plan for Trent-Severn Waterway	*Shoreline:* Eastern Shores of Lake Couchiching (24 kms. and Lake Simcoe (43 kms.) and a number of inland lakes *Extent of Development:* Almost all of the land within the Township that abuts the shoreline has been developed *Population*: The shoreline area is the site of approximately 5820 households (approximately 3000 occupied full time, the remainder part time) (permanent residents 7637, seasonal residents 6912) *Date of Development:* Much of the existing development occurred in the 30', 40's and 50's as single detached dwellings. There are 2 large resort/condominiums along lake Simcoe (full services). *Issues*: Conversion of cottages or permanent residential occupancy *Opportunities for development*: Significant areas outside of municipal jurisdiction (Rama First Nations Reserve, Mara Provincial Park and MacCrae Point Provincial Park) Proposal (2002) to redevelop the site of the former Orr/Walton hockey camp to condominium style resort. Approximately 350 hectares of vacant land designated for shoreline development. *Constraints:* Other than 2 condominiums along Lake Simcoe the remainder of the townships on private services.

[1] Based on the Discussion Paper – Role of the County of Simcoe in Lakeshore Planning, prepared by Meridian Planning Consultants, 2002.

Continued…

Township of Oro-Medonte	**Town of Innisfil**
Shoreline: 30 kms. Along western shore of Lake Simcoe (Bass Lake has an additional 9 kms). *Extent of Development:* All of the land on the shoreline frontage has been developed *Population:* Shoreline area is the site of approximately 2241 dwellings (approx. 65% are permanent) and well as an additional 330 permanent dwellings in the 2 hamlets. The permanent population of the shoreline is approximately 5,000 people. *Date of Development:* Much of the first tier of shoreline development occurred prior to 1950. Large-scale development in the form of backlot subdivisions occurred in the 1950's, 60's and 70's. *Issues*: Cottage conversions *Opportunities for development*: No major applications under review (2002). Limited opportunity. *Constraints:* Almost all of the shoreline area is on private wells and septic systems (exceptions include Harbourwood Subdivision and portions of Shanty Bay and Hawkestone The official plan has an intent to preclude additional large scale development in the shoreline area as a result of the lack of services and the existing density of development.	*Shoreline:* Western Shore of Lake Simcoe *Extent of Development: Much of the Shoreline is developed* *Population*: In 2000 an approximate shoreline population of 6853 people (2451 dwellings of which 1593 were estimated to be occupied on a permanent basis) *Date of Development:* Much of the Shoreline was developed in the 1920's and 1930's with some additional development in the late 1980's *Issues*: Septic systems and cottage conversions *Opportunities for development*: The shoreline along the south shore of Kempenfelt Bay is the site of a number of larger estates that are in the process of being subdivided (2002). Development is directed to serviced shoreline areas (primary serviced area community of Alcona) *Constraints:* The municipal plan does not anticipate much development occurring in the unserviced shoreline areas *Commercial:* A marina and condominium resort complex is proposed adjacent to Big Bay point Marina (2002)

[1] Based on the Discussion Paper – Role of the County of Simcoe in Lakeshore Planning, prepared by Meridian Planning Consultants, 2002.

2.3 Summary of Key Findings

Building on the results of Table 2.1 a number of key findings related to current and future tourist activities in Simcoe County are presented.

1) **Most of the shoreline area in Simcoe County is already developed**. In each of the rural townships virtually all of the lakeshore property has been developed. It was originally designed for cottages. Much of it is currently used for permanent dwellings.

2) **Much of the existing shoreline development occurred prior to the 1950s with minimal (if any) planning review.** Related issues include substandard lots, private services and poorly designed and inefficient roads. Any new or on-going development will need to deal with this legacy.

3) **Further intensification of the existing rural lakeshore area is restricted by the absence of full services.** Although there is potential intensification in some of the small urban places where full services have been provided this is a relatively small area compared to the nearly 400 kilometres of shoreline. Municipalities are often reluctant to take on additional responsibilities for water and sewage systems. This absence of services means that any development that does occur is likely to be at low densities.

4) **Many of the local official plans (and residents) wish to maintain existing character and residential densities** (i.e. they are not supportive of further intensification). The public perspective on new development (and related beach access) is likely to be one of opposition. Moreover, backlot development is often discouraged in local planning documents.

5) **Recreational commercial development in proximity to the lakeshore includes existing marinas, condominiums and resorts**. The establishment of new facilities is likely to be restricted except were full services are available (for example Collingwood or Wasaga beach). Ski operations and golf courses are also important tourist attractions.

6) **Conversion of seasonal accommodations to permanent residences is a trend that is likely to continue**. This occurs as people decide to retire to this area or to raise their families in what has become a long linear residential community. There are however, related environmental issues, in that lot size and existing septic systems may be inadequate for proper treatment.

7) **Recreational demand is largely based on economic, continued good quality environment and perceptual factors**. Given the absence of vacant shoreline frontage it is difficult to predict new tourist related development in Simcoe County. Although the proximity of Simcoe to Toronto and other urban centres in Southern Ontario makes it an attractive destination for cottage owners and tourists, the relative availability of lakefront properties is likely to influence the extent of this type of development. The variability in demand is shown in Ministry of Tourism and Recreation statistics (2004) that report for

example that hotel occupancy dropped from 67% in 1998 to 56% in 2002. Potential servicing extensions may increase the ability of given areas to increase supply, thereby becoming more responsive to what is likely to be increased demand. It is acknowledged though that limited opportunity for lot creation along the shoreline is not necessarily a restriction on further growth and development of the broader tourist industry.

8) Employment opportunities in Tourism related industries are likely to increase. While much of the vacant shoreline frontage has been developed further growth and development in tourism related activities and employment can be expected. Further data collection, analysis and evaluation of tourism related employment would be of benefit.

9) **The extent of existing shoreline development means that opportunities for additional substantial development are limited**. Official plan policies for each of the rural townships recognize this and have policies discouraging further inland expansion of shoreline areas (Meridian, 2002). Although there is some vacant land designated for development, the absence of services and the relative location of the land is a constraint on development.

10) **The tourism industry in Simcoe County benefits from a diversity of attractions.** Shoreline areas are of key importance, and there are many outdoor activities (golf, skiing etc.) that contribute to the industry. There are, however, evolving trends related to lifestyle communities, and resorts that would benefit from further data collection, analysis and evaluation (looking at resource-based recreational communities and their impact on rural and shoreline areas).

In summary, tourism is an important economic activity based on a wonderful amenity or locational advantage. The extensive shoreline and landscape (including winter sports) are important features that provide employment and recreational opportunities. Further development, however, must contend with the fact that the vast majority of the lakeshore is already developed. Existing servicing issues and the aspirations of the existing community will also serve to limit further expansion. More probably this development will occur in urban centres (such as Collingwood and Wasaga Beach) that are more suited to accommodate this growth.

Part 3: Rural Development in Simcoe County: a Focus on Building Permits, Septic Tank Permits and Severance Activity

3.1 Rural Development in Simcoe

The rural landscape of Simcoe County is defined by farms, lakeshore communities, small villages and hamlets, trees, water and other land uses. This landscape is constantly evolving and further change is a certainty. As agriculture adapts, as urban pressures mount and as the lakeshore community evolves there will be important impacts on the economy of rural Simcoe County.

This section of the Rural Development Report presents information drawn largely from the municipalities themselves. It includes information based on building permit data (residential and agricultural), septic tank approvals, severance activity and draws upon planning policies at the provincial, county and municipal level to help develop a broader understanding of what the future may hold for rural lands in Simcoe County. It also speculates on other relevant issues in the rural community.

3.2 Rural Residential Building Permit and Septic Tank Permit Data

Municipalities in Simcoe County were requested to provide data on the issuance of building and septic tank permits for the 5 year period 2001-2005. This information was requested for both residential and agricultural uses. Building permits provide a useful means by which new construction can be tracked within the County. From the perspective of this report rural residential construction is an indicator of change within these communities. This construction can create issues for agriculture and can place increased demands on municipal services. Table 3.1 provides a summary of residential permits issued by rural municipalities in Simcoe County.

Table 3.1: Rural Residential Building and Septic Tank Permit Data

	Total # of Permits Each Year					Total 2001-2005
	2001	2002	2003	2004	2005	
# Permits for New Dwellings (reporting municipalities)	402	496	488	433	483	2301
Total Estimated New Dwellings – Rural Simcoe Municipalities*	804	991	975	866	966	4601
# Septic Tank Permits (reporting municipalities)	239	300	293	290	305	1427
Total # of New Dwellings on Septic Systems - Reporting Municipalities	239	300	293	290	305	1,427
Total Estimated # of New Dwellings on Septic Systems for Non Reporting Municipalities*	239	300	293	290	305	1,427
Total Estimated # of New Dwellings on Septic Systems for Simcoe County**	478	600	586	580	610	2,854

Reporting Municipalities - Clearview, Essa, Springwater, Innisfil, Tiny
Non-Reporting Municipalities - Ramara, Oro-Medonte, Adjala-Tosorontio, New Tecumseth, Bradford West-Gwill.
* Calculated by averaging the number of permits by reporting municipality, multiplied by 5 non-reporting municipalities
**Number of building permits from reporting municipalities plus estimated numbers for non-reporting municipalities
Assumption - Single Detached Dwellings serviced by a septic system is Rural Residential
Assumption - All septic permits issued were for new rural residential dwellings

As noted in Table 3.1 there are limitations in the methodology and assumptions used to produce this Table. First, the table is based on data from half of the rural townships. Data has been extrapolated for the remaining townships to create a county wide number. In addition, it was assumed that septic tank permits were issued for new dwellings only (whereas in fact there will be a number of replacements). It was assumed that a new dwelling in rural unserviced areas requires a septic tank permit and that all septic tank permits were issued to one of these new dwellings (the result is that the number of new rural dwellings on septic systems is probably over estimated).

Despite these methodological reservations and necessary assumptions one can conclude that new residential construction in the rural areas of the county has been approximately 920 units per year for each of the last 5 years. Moreover, approximately 571 of these were serviced by septic tanks on an annual basis. These of course are distributed across the rural area and include hamlets, lakeshore areas (including replacements of existing cottages and homes) and farm and rural non-farm residences.

3.3 Agricultural Construction (Building Permit Data)

As discussed in Section 1 of this report the agricultural industry is an important component of the economy of Simcoe County. An analysis of building permit data for agriculture demonstrates that this sector continues to evolve. In fact, over the 5 year period an estimated 640 building permits were issued for agricultural purposes in the county. This translates into an average of 128 per year. While the value of these permits was only available for Clearwater and Innisfil the 135 permits from these 2 municipalities had a combined value over the 5 years of $6,385,000 for an average value of $47,300 per permit. If this same average value were applied to the entire county there was an investment of $30,272,981 or $6,054,596 per year in agricultural buildings.

Table 3.2: Agricultural Building Permit Data

	Total # of Building Permits Each Year					Total 2001-2005
	2001	2002	2003	2004	2005	
Total # of Building Permits for Reporting Municipalities	68	70	72	52	58	320
Total Estimated # of Building Permits for Non Reporting Municipalities*	68	70	72	52	58	320
Total Estimated # Building Permits for Simcoe County**	136	140	144	104	116	640

- Reporting Municipalities - Clearview, Essa, Springwater, Innisfil, Tiny
- Non-Reporting Municipalities - Ramara, Oro-Medonte, Adjala-Tosorontio, New Tecumseth, Bradford West-Gwill.

* Calculated by averaging the number of building permits by reporting municipality, multiplied by 5 non-reporting municipalities

**Number of building permits from reporting municipalities plus estimated number of building permits for non-reporting municipalities

3.4 Residential Development in Rural Simcoe County: Development on Prime and Non-Prime Agricultural Lands.

Residential development in rural Simcoe County takes a number of forms. It includes small hamlets and villages, lakeshore development, farm residences and rural non-farm residences. Outside of the hamlets and lakeshore areas rural lands are divided into two primary categories based on soil capability. Prime lands *(Prime Agricultural Areas)* are to be protected for their long-term agricultural potential whereas Non-Prime lands *(Rural)* may have a different set of policies. The amount of Prime and Non-Prime land is presented in Table 3.3.

Table 3.3: Acreages of Soil Capability for Agriculture Land in Simcoe County

	Acreage			**Percentage**		
	Total Prime Agricultural Land (Class 1-3)	Total Non-Prime Agricultural Land (Class 4-7)	Organic Soil	Total Prime Agricultural Land (Class 1-3)	Total Non-Prime Agricultural Land (Class 4-7)	Organic Soil
Adjala-Tosorontio	54,298	33,553	5,089	58%	36%	5%
Essa	44,324	23,412	2,204	63%	33%	3%
Springwater	73,421	40,416	16,873	56%	31%	13%
Bradford West Gwillimbury	35,585	8,835	6,590	70%	17%	13%
Innisfil	47,575	17,210	5,890	67%	24%	8%
Ramara	41,511	39,483	18,950	42%	40%	19%
Severn	30,309	89,175	6,335	24%	71%	5%
Oro-Medonte	81,465	58,730	8,000	55%	40%	5%
Clearview	95,058	45,629	3,333	66%	32%	2%
Tay	21,924	24,236	590	47%	52%	1%
New Tecumseth	58,805	6,340	2,560	87%	9%	4%
Tiny	35,360	48,305	2,305	41%	56%	3%
Indian Reserve #32	970	1,140	330	40%	47%	14%
Simcoe County	620,605	436,464	79,049	55%	38%	7%

Source: Hoffman, D and H. Noble. 1975. Acreages of Soil Capability Classes for Agriculture in Ontario. University of Guelph and Ontario Ministry of Agriculture and Food. Ontario.

3.5 Potential Development in Prime Agricultural Areas: Lot Creation

Both the Provincial Policy Statement (2005) and the Simcoe County Official Plan consider Class 1-3 agricultural land and specialty crop land as prime agricultural land. Both documents direct municipalities to protect these areas for agriculture and compatible uses. The Simcoe Official Plan directs municipalities to determine and map areas considered prime agricultural areas in their Official Plans.

Based on the information reported in the 1975 report, Acreages of Soil Capability Classes for Agriculture in Ontario[9], 55% of Simcoe County's agricultural land is prime agricultural land. A

[9] Hoffman, D and H. Noble. 1975. Acreages of Soil Capability Classes for Agriculture in Ontario. University of Guelph and Ontario Ministry of Agriculture and Food. Ontario.

further 7% of the agricultural land in Simcoe County is considered organic. Many of the specialty crops produced in Simcoe County are grown in organic soil.

In Simcoe County, permitted uses in prime agricultural areas include agriculture, agriculture related uses, secondary uses, natural heritage conservation and forestry.

The Provincial Policy Statement continues to permit the creation of lots for agricultural uses, provided that the lots are of a size appropriate for the agricultural use common in the area and are sufficiently large to maintain flexibility for future changes in the type or size of agricultural operations. The Provincial Policy Statement also permits lots to be created for agriculture-related uses, provided that any new lot will be limited to a minimum size needed to accommodate and service the use.

The Simcoe County Official Plan permits lots to be created for agricultural uses. The Plan states that new lots for agricultural uses should generally not be less than 35 hectares or the original survey lot size, whichever is lesser, or 4 hectares on organic soils used for specialty crops.

The Simcoe County Official Plan[10] permits lots to be created for an agricultural use, a farm retirement lot, a residence surplus to a farming operation and infilling.

In 2002, a study was done by Caldwell and Weir[11], documenting the creation of rural non-farm lots in agricultural land across Southern Ontario during the 1990s. Simcoe County provided data that documented the severance activity in agricultural land for 1997-2000. Using the data that was collected in that study, the observed trends in the severance data have been extrapolated taking the total number of severance applications received by Simcoe County for the years 2001-2003. Table 3.4 reports the estimated severance activity that occurred in agricultural land between 1997 and 2003.

It is estimated that over the period 1997-2003, 12% of the severance applications received by Simcoe County involved lot creation in agricultural land. It is estimated that 58 of the applications were to create a new lot for an agricultural use (farm split) between 1997 and 2003.

During the period 1997-2003, it is estimated that over 80% of the lots created on agricultural land had the purpose of creating a residential use. A little over half the non-farm residential lots that were created are classified as rural residential lots. The remaining half of the non-farm residential lots are classified as either being residences surplus to a farming operation (surplus residential) or farm retirement lots. Very few lots were created as farm help lots or infilling lots.

[10] The Simcoe County Official Plan was adopted by County Council in October 1997. It was approved by the Ministry of Municipal Affairs and Housing in April 1998 and December 2005.
[11] Caldwell and Weir (2002). A Review of Severance Activity in Ontario's Agricultural Land During the 1990s. School of Rural Planning and Development, University of Guelph, www.waynecaldwell.on.ca.

Table 3.4: Estimate of Severance Activity in Agricultural Land between 1997-2003 in Simcoe County

	1997	1998	1999	2000	2001*	2002*	2003*	Total 1997-2003
Total Severance Applications	441	467	442	590	428	398	434	3200
Total Applications Involving Agricultural Land	48	57	59	66	51	48	52	381
Percentage of Total Severance Applications Involving Agricultural Land	11%	12%	13%	11%	12%	12%	12%	12%
Total Applications Classified as a Farm Split	6	9	13	7	8	7	8	58
Total Applications with the Purpose of Creating a Residential Use in an Agricultural Area:	38	47	45	57	42	39	42	309
Surplus Residential Lots	5	18	7	20	11	11	10	82
Retirement Lots	10	10	7	15	9	9	9	68
Rural Residential	23	19	29	20	21	19	19	150
Farm Help Lot	0	0	2	0	0	0	0	2
Infilling	0	0	0	2	0	0	0	2
Total Applications with the Purpose of Creating an Other Land Use in an Agricultural Area	4	1	1	2	2	2	2	14

* The number of severances involving agricultural land in 2001, 2002 and 2003 were estimated based on the trends observed in the data from 1997-2000. Total number of severances per year 2001-2003 obtained from Simcoe County website: www.simcoecounty.on.ca

Data collected from Simcoe County for 1997-2000 and published in Caldwell and Weir (2002). A Review of Severance Activity in Ontario's Agricultural Land During the 1990s. School of Rural Planning and Development, University of Guelph, www.waynecaldwell.on.ca.

In 2005, the Ontario government issued a new Provincial Policy Statement. The new Provincial Policy Statement had the effect of revising the types of non-farm lots that could be created in prime agricultural land. Under the new Provincial Policy Statement a residence surplus to a farming operation as a result of farm consolidation is the only type of non-farm lot creation that is permitted. The Provincial Policy Statement only allows this type of lot creation provided that the planning authority ensures that new residential dwellings are prohibited on any vacant remnant parcel of farmland created by the severance. This change in the Provincial Policy Statement is in part to protect prime agricultural areas for long-term agricultural use.

While this change to the Provincial Policy Statement will reduce the future supply of non-farm lots within prime agricultural areas of Simcoe County, non-farm residential development has been permitted in agricultural areas of Simcoe County for several decades. Much of the current rural residential development occurs on scattered consent lots which are a legacy of past rampant scattered lot creation. While it is much tougher now to create such lots, a large inventory remains. The presence of these lots has a direct impact on agriculture – the associated minimum distance separation formula place restrictions on the establishment and expansion of livestock housing. The continued development of existing vacant lots of record will introduce additional residences and create further restrictions that will reduce the long-term flexibility of agriculture in the county.

3.6 The Future of Residential Development on Prime Lands

Based on the policy direction established with the adoption of the revised Provincial Policy Statement in March 2005 there is limited opportunity for new non-farm residential lot creation on prime agricultural lands. Also, according to the County Planning Department there has been little pressure to create country residential subdivisions in prime agricultural areas. Clearly, farm residences are permitted, although given declining farm numbers the extent of new construction in this area is likely to be limited. Any residential development on prime agricultural lands therefore (excluding urban expansions consistent with the PPS) is likely to be connected to the severance of existing surplus residences or construction on existing vacant lots (recognizing that county and local policy may be more restrictive in this area than provincial policy). Although general it is possible to generate an estimate of this potential. In Simcoe County the original township survey was based on a farm size of 100 acres. Despite farm consolidations and divisions over the years this lot pattern still dominates the rural landscape. Given an average farm size of 220 acres farmers will on average own 2.2 of these original 100 acre parcels (it is recognized that in some instances these parcels will be contiguous and may be merged and in other instances farm parcels will be smaller than originally surveyed). In total, there is an estimated 2944 parcels with the potential to either receive a severance (of a surplus residence) or where these parcels are vacant to support the construction of a single dwelling.

Total Number of Farms	Total Farm Area	Average Farm Size	Predominant Farm Size Original Survey	Estimated number of farm parcels
2465	540870	220	100	5409

3.7 The Future of Residential Development on Non-Prime (Rural) Lands

Both the Provincial Policy Statement and the Simcoe County Official Plan define rural areas as lands in the rural area which are located outside settlement areas and which are outside prime agricultural areas.

Whereas Class 1-3 agricultural land is defined as prime agricultural land, Class 4-7 agricultural land and natural heritage/greenland areas fall into the rural designation in Simcoe County. Approximately 38% of Simcoe County's agricultural land has a soil capability of Class 4-7[12].

The 2005 Provincial Policy Statement identifies that within rural areas:

- permitted uses and activities shall relate to the management or use of resources, resource-based recreational activities, limited residential development and other rural land uses;
- development shall be appropriate to the infrastructure which is planned or available, and avoid the need for the unjustified and/or uneconomical expansion of this infrastructure;

[12] Hoffman, D and H. Noble. 1975. Acreages of Soil Capability Classes for Agriculture in Ontario. University of Guelph and Ontario Ministry of Agriculture and Food. Ontario.

- development that is compatible with the rural landscape and can be sustained by rural service levels should be promoted;
- locally-important agricultural and resource areas should be designated and protected by directing non-related development to areas where it will not constrain these uses;
- recreational, tourism and other economic opportunities should be promoted.

The Simcoe County Official Plan permits agricultural uses, highway commercial uses, institutional uses, residential lots created by consent, country recreational facilities, rural business parks and country residential subdivisions within areas that are designated rural. It should be noted that the County OP has not been updated to be consistent with the PPS, 2005.

While there are a range of land uses permitted within the rural designation, the opportunity for development is somewhat limited by the availability of servicing within rural lands. The most typical form of servicing in rural areas is private septic systems and water. Moreover, while the County Official plan does permit country residential developments on non prime lands, according to the County Planning Department over half of the local municipalities do not permit country residential developments at any location.

One of the most common types of development in rural areas is residential development. The next section discusses the potential for rural residential development on non-prime lands within Simcoe County.

3.8 Potential for Rural Residential Development

As discussed above, the Simcoe County Official Plan permits limited residential development on lands designated as rural. In the Simcoe County Official Plan, this type of development is called country residential development.

The Simcoe County Official Plan states that country residential subdivisions should generally be restricted to a maximum of 40 lots with an average lot size of one hectare (2.47 acres). This policy was approved under the Provincial Policy Statement (1997) and given the revised Policy Statement (2005) and the Proposed Growth Plan opportunities for this type of development are likely to be limited in the future.

The existing County Official Plan provides direction concerning the location of country residential subdivisions. For example country residential subdivisions should not be permitted in proximity to another country residential subdivision where the total number of lots would exceed 40. The Simcoe County Official Plan also requires that country residential subdivisions not be considered adjacent to or within one concession block of a settlement area.

The County Official Plan also establishes that country residential subdivisions must be justified within the context of the policies of the local official plan in relation to both need and the local municipality's long range growth objective (and several of these local plans preclude this form of development). It also requires that the site must be appropriate to be able to service the development and natural heritage impacts must be appropriately mitigated.

There are a significant number of variables that make it difficult to accurately forecast the potential for rural residential development in Simcoe County. Some of the variables that make it difficult include: the ability to service a development; the proximity and impact of a development on natural heritage features; the fact that over half of the local municipalities do not permit country residential developments at any location and the fact that the County Official Plan does not allow country residential subdivisions adjacent to settlement areas and does not allow them in proximity to each other.

Also, there are parts of the County that are designated rural and are subject to additional land use planning policies that municipal planning decisions must conform to and take precedence over municipal official plans. For example, much of the rural land in Clearview is subject to the policies in the Niagara Escarpment Plan, while a significant portion of the rural land in Adjala-Tosorontio and New Tecumseth is subject to the policies of the Oak Ridges Moraine Conservation Plan. As these areas are subject to further regulation, it is challenging to forecast the potential for rural residential development in these areas.

Despite the challenge in forecasting the potential for rural residential development, with over 436,000 acres of the land area in Simcoe County classified as non-prime (Class 4-7)[13] agricultural land there is potential for the creation of rural residential development on non-prime lands within the County.

It is anticipated that the majority of the demand for rural residential development exists in South Simcoe, due to its proximity to Barrie, and relatively easy access to the Greater Toronto Area for commuters. Conversely, the largest concentrations of low capability (non-prime) lands are in the north of the County.

3.9 Other Rural Development Considerations

Diversity of Rural Economic Activity

The rural economy is built on a diversity of activities and land uses. This report has focused on agriculture, tourism and residential. Related to these are a host of commercial, service and industrial activities. The Cummings report (1999), for example, identified 573 businesses with a strong connection to agriculture in Simcoe County. Other primary industries including aggregate extraction, forestry, and renewable energy (wind power) all contribute to the county economy. The impact of these primary and secondary industries is to support commercial and service activities throughout the rural economy.

Commercial and Industrial Activity

Partial data on Commercial and Industrial activity was received from 4 Townships with the most complete data received from Clearview and Innisfil. Over 5 years Clearview issued a total of 24 building permits for new commercial buildings and 54 for additions or improvements, while Innisfill issued 31 and 37 respectively. Clearview also issued 15 for new industrial and 8 for industrial additions

[13] Hoffman, D and H. Noble. 1975. Acreages of Soil Capability Classes for Agriculture in Ontario. University of Guelph and Ontario Ministry of Agriculture and Food. Ontario.

over the same time period. Innisfil issued 3 and 4 respectively. Although the data does not distinguish between rural countryside and rural hamlet/ village it is clear that this level of activity will positively influence the local economy and provide important assessment. It is probable that the majority of this development has access to full services.

First Nations Lands

This report has not evaluated development opportunities on First Nations lands. This has been considered in other foundation studies, but is acknowledged as an important contributor to rural development in the county.

3.10 Summary of Key Findings

Based on the preceding, a number of key observations can be reiterated.

1) **On an annual basis there is considerable residential construction in rural areas.** On average, approximately 920 new dwellings are constructed in the rural municipalities on an annual basis. Of these an estimated 571 are privately serviced. Many of these are located in shoreline areas and in small hamlets and villages.

2) **Despite agriculture's challenges there continues to be significant investment in agricultural buildings.** Over a 5 year period (2001-2006) there was an estimated 640 building permits issued with an estimated total value of $30,273,000.

3) **The new Provincial Policy Statement will significantly limit residential development in Prime Agricultural Areas**. Severances for residential uses will be limited to surplus residences (infilling and retirement lots are no longer permitted). Based on data from 1997-2003 there were approximately 12 surplus residential severances per year in Simcoe County.

4) **There is the potential for additional development on existing "lots of record" and for additional surplus residential severances.** Depending on the wording of surplus residential policies in local and county official plans it is estimated that there are nearly 3000 surplus and vacant "lot of record" opportunities.

5) **There is significant potential for limited residential development on non-prime lands**. This development may be consistent with provincial policy. There are significant acreages of non-prime (rural) lands in Simcoe County. There are many limiting factors (services, access, environment, other jurisdictions and desirability) that need to be considered in reviewing proposals for this form of development.

6) **Commercial and industrial development takes many forms in rural Simcoe County**. Much of it is focused in the hamlets and villages, although small home based businesses will be common in rural areas. Recreational commercial is also important. Significant investment and building permit activity was documented. A range of tourist and other economic activities exist providing important employment and related services within the county. Additional information concerning the level and type of development activity in the rural areas (rezonings) was

requested from municipalities, however, this information was unavailable. This information if available would provide a more comprehensive overview of current rural development trends.

References:

Cummings, Harry and Associates. May 1999. Economic Impact of Agriculture on the Economy of Simcoe County. http://www.ofa.on.ca/site/PDFs/EconomicImpactStudies/Simcoe/SimcoeReport.pdf

Hoffman, Wicklund & Richards. 1962. Soil Survey of Simcoe County. Report No. 29, Ontario Soil Survey, Research Branch, Canada Department of Agriculture and Ontario Agricultural College.

Meridian Planning Consultants (2002). Discussion Paper – Role of the County of Simcoe in Lakeshore Planning.

Ministry of Municipal Affairs and Housing. March 2005. Provincial Policy Statement. http://www.mah.gov.on.ca/userfiles/HTML/nts_1_23137_1.html.

Ministry of Tourism and Recreation (2004). Regional Tourism Profile: Simcoe County.

Ontario Ministry of Agriculture and Rural Affairs. Census of Agricultural Statistics. http://www.omafra.gov.on.ca/english/stats/welcome.html

Ontario Ministry of Agriculture and Rural Affairs. County Profiles (Simcoe County). http://www.omafra.gov.on.ca/english/stats/county/index.html

Simcoe County Official Plan. Consolidated February 2006. www.simcoecounty.on.ca http://www.county.simcoe.on.ca/municipal-and-corporate-services/planning-1/policy-planning/county-of-simcoe-official-plan/

Statistics Canada. 1996. Population Profile of Canada. Supply Services. Ottawa, Ontario.

Statistics Canada. 2001. Population Profile of Canada. Supply Services. Ottawa, Ontario.

Statistics Canada, 1986. Census of Agriculture. Supply Services. Ottawa, Ontario.

Statistics Canada. 1991. Census of Agriculture. Supply Services. Ottawa, Ontario.

Statistics Canada. 1996. Census of Agriculture. Supply Services. Ottawa, Ontario.

Statistics Canada. 2001. Census of Agriculture (CD-ROM). Supply Services. Ottawa, Ontario.