

HAMILTON

Agriculture Profile
and Economic Impact
Report





INTRO

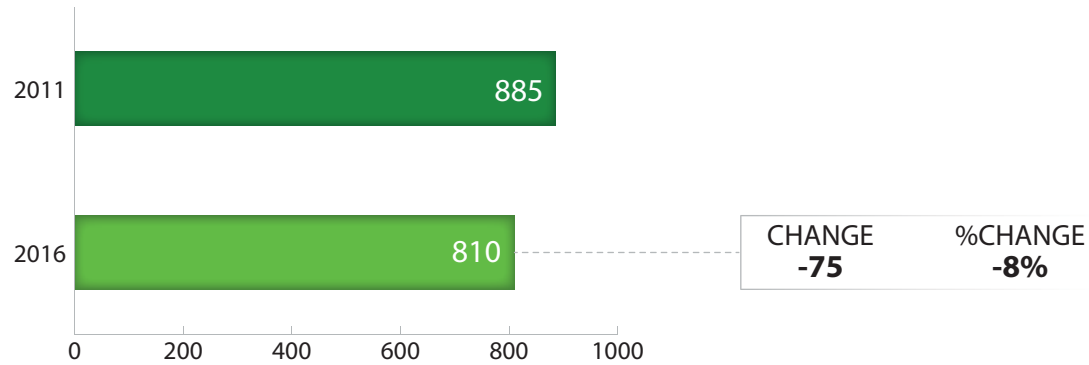
The City of Hamilton is a dynamic urban centre in the heart of the regional area known as the Golden Horseshoe. Hamilton also enjoys a historical and vibrant rural economy. In fact, 79% of Hamilton's land mass, some 219,504 acres is rural. The backbone to rural life in Hamilton is agriculture, an important primary sector to the City.

The following is a statistical overview of the agriculture sector in the City of Hamilton. The overview describes characteristics relating to the land base, the production profile, financial indicators, farm operating costs, characteristics of farm operators, and the economic impact of the agricultural production in the City.

The City has been tracking the statistics related to agriculture within its boundaries over time. Where possible in this report, comparisons are made to past profiles and in particular, data from the 2011 Census of Agriculture, in order to identify the trends and changes that are impacting agricultural production in the City. This information has helped inform the City in the past on economic development, strategic direction and policy planning related initiatives such as the Rural Hamilton Official Plan and Rural Hamilton Zoning Bylaw, and will continue to provide valuable insight on such strategies, plans and directions moving forward.

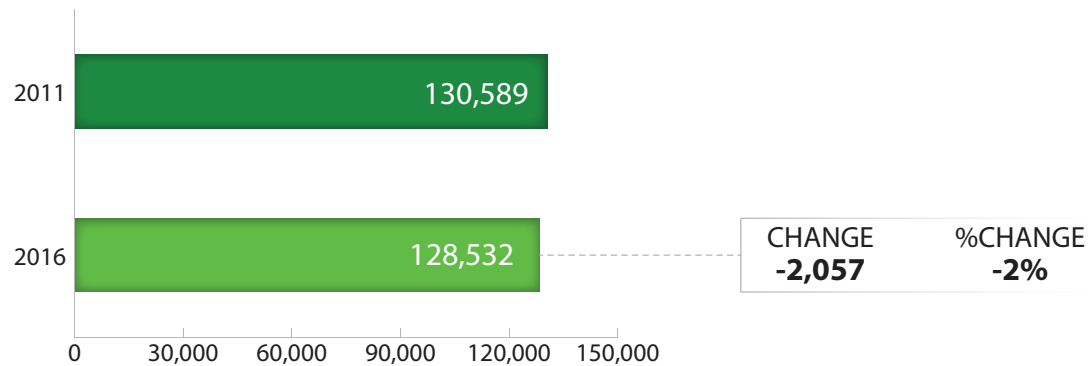
Key facts and commentary about the agriculture sector in Hamilton are below followed by a comparison of Hamilton to the Golden Horseshoe region and the economic impact of the sector.

NUMBER OF FARMS 2011 and 2016



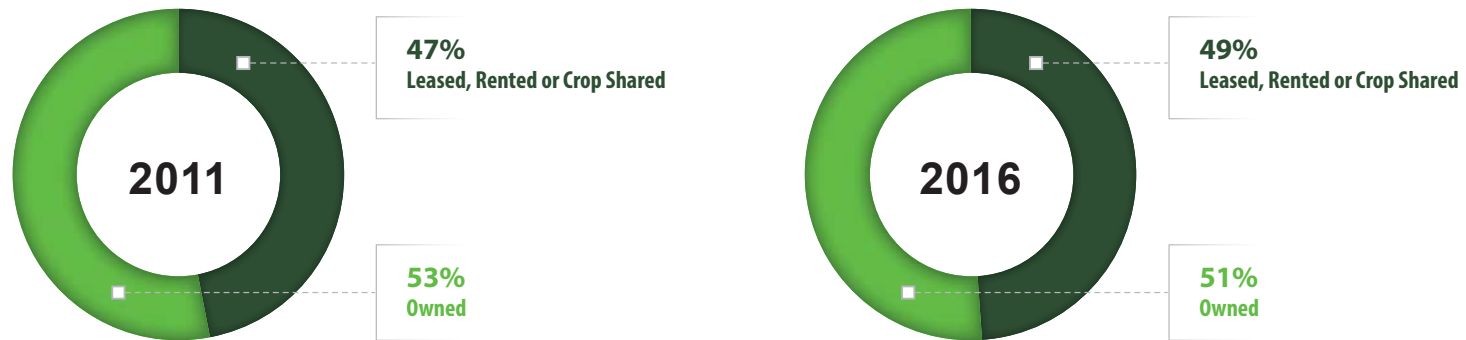
- The number of farms in Hamilton decreased by 75 or -8% to 810 farms between 2011 and 2016.
- This compares to a decrease of -9% between 2006 and 2011.

FARMLAND AREA (Acres) 2011 and 2016



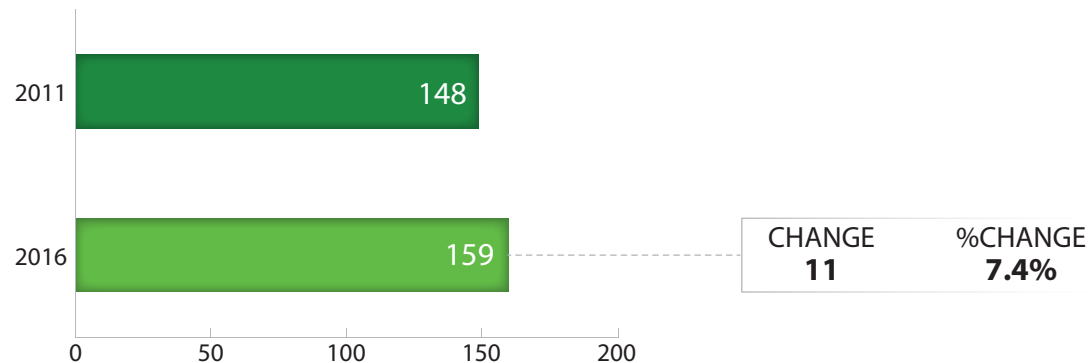
- Total farmland area in Hamilton decreased slightly (-2%) to 128,532 acres.

LAND OWNERSHIP 2011 and 2016



The amount of farmland leased, rented or crop shared as a percentage has increased so that it is almost equal with the amount of land farmed by the owners.

AVERAGE FARM Size (Acres) 2011 and 2016



- The average farm size has increased by 11 acres to 159 acres between 2011 and 2016.
- Aside from the aforementioned farm consolidation trend, the farm size is related to the types of operations which are prevalent in Hamilton's agricultural profile.

NUMBER OF FARMS BY FARM TYPE, RANKED BY TOTAL FARMS, HAMILTON 2011 and 2016

FARM TYPE	2011	2016	CHANGE	% CHANGE
Total # of farms	885	810	-75	-8%
Oilseed and Grain Farming	206	210	4	2%
Other Animal Production	178	144	-34	-19%
Greenhouse, Nursery and Floriculture Production	144	122	-22	-15%
Other Crop Farming (Tobacco, Hay, Combination, Maple)	97	90	-7	-7%
Cattle Ranching and Farming	76	69	-7	-9%
Vegetable and Melon Farming	58	59	1	2%
Fruit and Tree Nut Farming	57	56	-1	-2%
Poultry and Egg Production	42	41	-1	-2%
Sheep and Goat Farming	22	13	-9	-41%
Hog and Pig Farming	5	6	1	20%

- There is a fairly diverse agricultural base in Hamilton with the top three farm types by number of farms being: Oilseed and Grain Farming, Other Animal Production (including horse and other equine production) and Greenhouse, Nursery and Floriculture Production.

- While most farm types saw a decrease in the number of farms, oilseed and grain farming saw a slight increase.

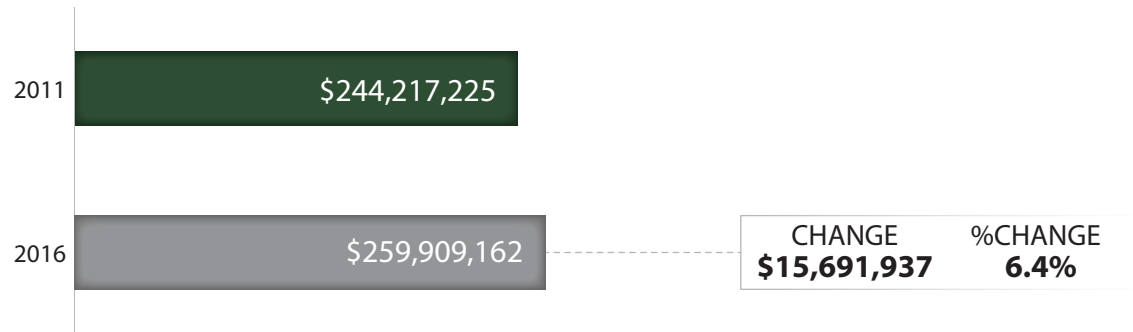
FARMLAND AREA (ACRES) BY LAND USE, RANKED BY AREA, HAMILTON 2011 and 2016

DESCRIPTION	2011	2016	CHANGE	% CHANGE
Total Farm Area	130,589	128,532	-2,057	-2%
Total Area of Hay and Field Crops	91,283	93,247	1,965	2%
Total Area in Christmas Trees, Woodlands and Wetlands	11,089	9,620	-1,469	-13%
All Other Land	6,529	8,055	1,526	23%
Natural Land for Pasture	3,244	3,089	-155	-5%
Tame or Seeded Pasture	3,883	2,884	-999	-26%
Summerfallow Land	1,222	748	-474	-39%
Total Area of Sod Under Cultivation For Sale	4,420	X	X	X
Total Area of Vegetables (excluding Greenhouse Vegetables)	3,443	X	X	X
Total Area of Fruits, Berries and Nuts	1,331	X	X	X
* Note = Total Area of Greenhouse in Square Metres	442,774	436,553	-6,221	-1%

- The total farm area in Hamilton has decreased slightly to 128,532 acres.
- There was a slight increase in total area of Hay and Field Crops between 2011 and 2016.

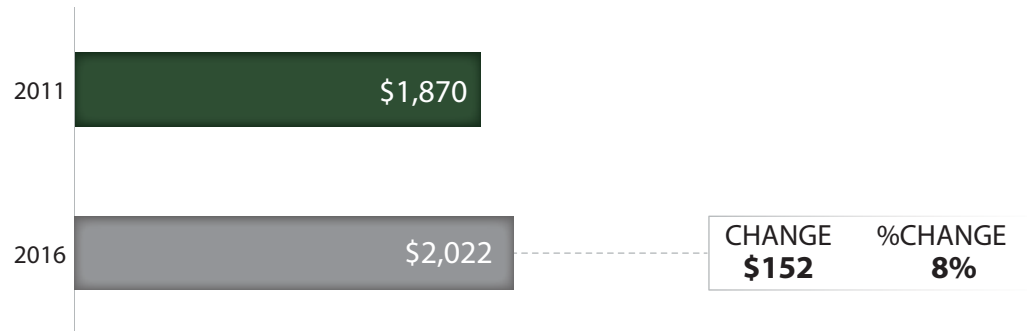
- Some data (represented by an X) has been suppressed for confidentiality purposes.
- The Greenhouse industry remains relatively sizable in Hamilton with 436,553 square metres of space.

TOTAL GROSS FARM RECEIPTS 2011 and 2016



- The value of agricultural sales in Hamilton has increased by \$15,691,937 or 6.4% between 2011 and 2016.
- The 6.4% increase in value is less than the 9% increase during the period between 2006 and 2011.

GROSS FARM RECEIPTS PER ACRE 2011 and 2016



- The value of gross farm receipts per acre in Hamilton increase 8% from 2011 to 2016 which continues the trend of farmland producing greater value per acre over time.

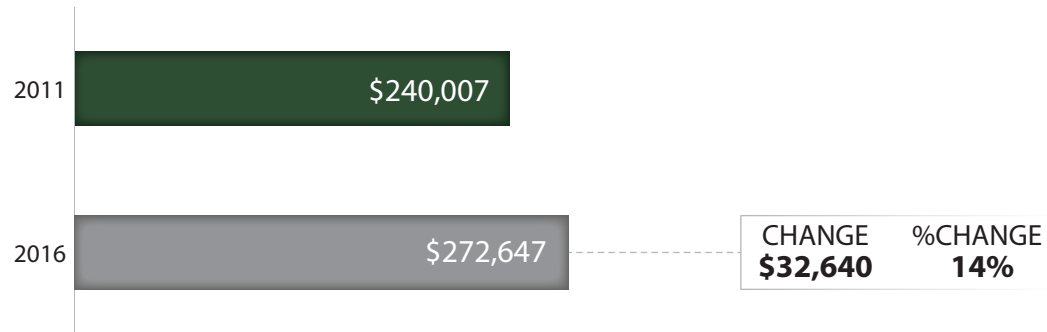
FARM TYPE, RANKED BY GROSS FARM RECEIPT, HAMILTON 2011 and 2016

FARM TYPE	2011	2016(\$)	CHANGE	% CHANGE
Greenhouse, Nursery and Floriculture Production	119,328,771	129,766,952	10,438,181	9%
Oilseed and Grain Farming	36,486,081	37,888,874	1,402,793	4%
Poultry and Egg Production	18,994,012	19,615,466	621,454	3%
Cattle Ranching and Farming	17,350,348	18,973,444	1,623,096	9%
Other Animal Production	13,530,550	17,547,856	4,017,306	30%
Vegetable and Melon Farming	22,031,646	16,490,300	-5,541,346	-25%
Other Crop Farming	5,681,039	12,055,424	6,374,385	112%
Fruit and Tree Nut Farming	7,720,225	5,910,442	-1,809,783	-23%
Hog and Pig Farming	1,306,094	1,383,825	77,731	6%
Sheep and Goat Farming	1,788,459	276,579	-1,511,880	-85%
Total	244,217,225	259,909,162	15,691,937	6%

- Greenhouse, nursery and floriculture production represents approximately 50% of the value of all agricultural gross farm receipts.

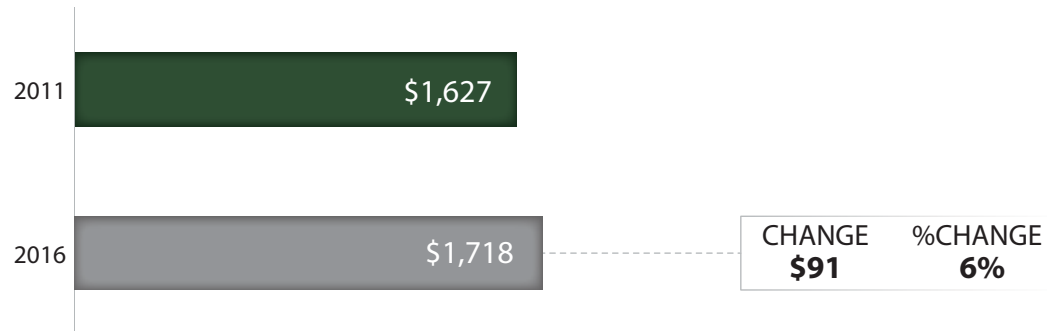
- In 2016, there is significant increases in Other Animal Production and Other Crop Farming and reductions in Vegetable and Melon Farming and Sheep and Goat Farming.

OPERATING COST PER FARM 2011 and 2016



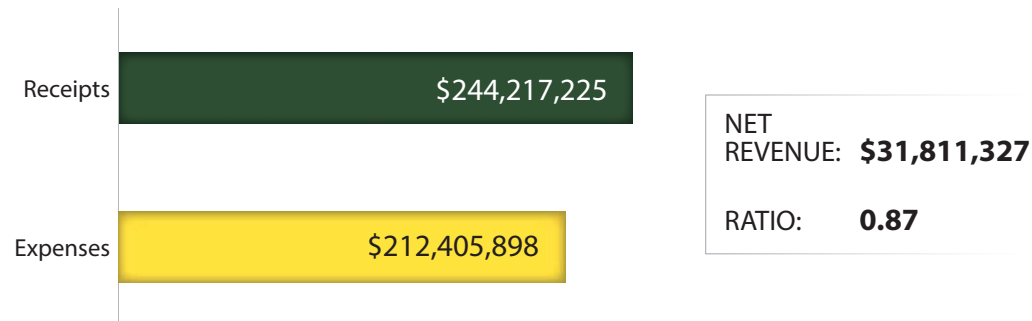
- There was an increase of 14% in the operating cost per farm in Hamilton over the period of 2011 to 2016.

FARM OPERATING COST PER ACRE 2011 and 2016



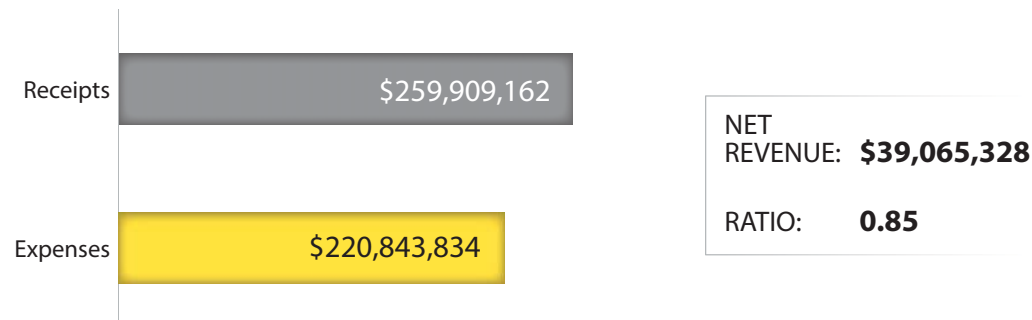
- On a per acre basis this operating cost increase works out to \$91 or 6%.

GROSS FARM RECEIPTS, EXPENSES, NET REVENUES, AND RATIO OF EXPENSES AND REVENUES, 2011



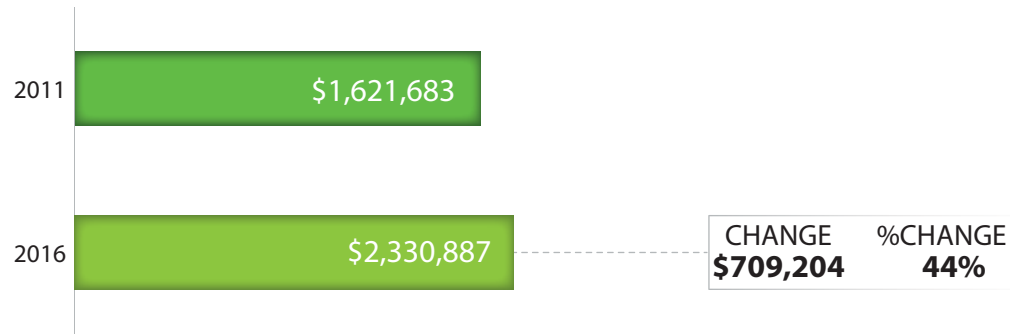
- In Hamilton in 2011, total expenses of farms were \$212,405,898 while net revenue was \$31,811,327. The ratio of expenses to revenues was 0.87.

GROSS FARM RECEIPTS, EXPENSES, NET REVENUES, AND RATIO OF EXPENSES AND REVENUES, 2016



- Gross farm receipts increased at a higher rate than farm expenses between 2011 and 2016 resulting in increased net revenue across all farms.
- The increase in net revenue also resulted in a decrease in the ratio of expenses to revenues to 0.85.

AVERAGE FARM CAPITAL 2011 and 2016



- Farms in Hamilton invested heavily between 2011 and 2016 as average farm capital (including land, buildings, animals, equipment, machinery, and technology) increased by 44% to \$2,330,887.

AVERAGE AGE OF FARM OPERATORS 2006, 2011 and 2016



- In Hamilton in 2016, the average age of farm operators was 57.5 years of age and continues the trend of the age of farm operators increasing.



COMPARISON TO THE GOLDEN HORSESHOE

The previous version of Hamilton's Agriculture Profile and Economic Impact was part of a larger report on "*Agriculture and Agri-Food Economic Profile For the Golden Horseshoe*" in 2014 and through an existing partnership the Golden Horseshoe Food and Farming Alliance (GHFFA). More information of the GHFFA and the report can be found at the following link: **www.foodandfarming.ca**

For comparative purposes, some key statistics and indicators are identified for Hamilton as well as the Golden Horseshoe region to show the trends from a regional perspective and to highlight Hamilton's position and importance relating to agriculture within the Golden Horseshoe.

TOTAL NUMBER OF FARMS: ONTARIO, GOLDEN HORSESHOE AND HAMILTON 2011 and 2016

GEOGRAPHY	2011	2016	% CHANGE
Ontario	51,950	49,600	-4.5%
Golden Horseshoe	6,090	5,531	-9.2%
Niagara Region	2,014	1,827	-9.3%
Durham Region	1,454	1,323	-9.0%
Hamilton	885	810	-8.5%
York Region	828	712	-14.0%
Halton Region	469	451	-3.8%
Peel Region	440	408	-7.3%

- The total number of farms across the Province, Region and Hamilton all decreased from 2011 to 2016.
- The decrease in the Golden Horseshoe as a whole and in Hamilton is greater than that of the province and only in Halton Region did the decrease of change happen at a lesser rate than the rest of the Province.

FARMLAND AREA: GOLDEN HORSESHOE AND HAMILTON 2011 and 2016

GEOGRAPHY	ACRES			AVERAGE SIZE (ACRES)			% OF GOLDEN HORSESHOE	
	2011	2016	% CHANGE	2011	2016	% CHANGE	2011	2016
Golden Horseshoe	977,481	934,198	-4.4%	161	176	9.3%	100%	100%
Hamilton	130,589	128,532	-2%	148	159	7.4%	13.4%	13.8%

- Farmland area is decreasing at a faster rate within the Golden Horseshoe than in Hamilton with the average size of farms increasing for both.
- Hamilton's share of the total farmland area in the Golden Horseshoe increased slightly between 2011 and 2016 by 0.4% to 13.8%.

GROSS FARM RECEIPTS: GOLDEN HORSESHOE AND HAMILTON 2011 and 2016

GEOGRAPHY	GROSS FARM RECEIPTS (\$)			PER ACRE (\$)			% OF GOLDEN HORSESHOE	
	2011	2016	% CHANGE	2011	2016	% CHANGE	2011	2016
Golden Horseshoe	1,716,206,729	1,959,172,301	14.2%	1,756	2,097	19.4%	100%	100%
Hamilton	244,217,225	259,909,162	6%	1,870	2,022	8%	14.2%	13.3%

- While the gross farm receipts in both the Golden Horseshoe and Hamilton have increased, the percentage of value of Hamilton's share in the Golden Horseshoe has decreased by -0.9% to 13.3% overall.

GROSS FARM RECEIPTS, RANKED BY VALUE 2006, 2011 and 2016

GEOGRAPHY	2006 (\$)	2011 (\$)	CHANGE (\$)	% CHANGE	2016 (\$)	CHANGE	% CHANGE
Ontario	10,342,031,229	11,890,835,395	1,548,804,166	15%	15,126,845,283	3,236,009,888	27.2%
Golden Horseshoe	1,573,787,767	1,716,206,729	142,418,962	9%	1,959,172,301	242,965,572	14.2%
Niagara Region	671,680,773	725,831,453	54,150,680	8.1%	838,113,788	112,282,335	15.5%
Durham Region	239,539,007	273,237,098	33,698,091	14.1%	321,749,341	48,512,243	17.8%
York Region	224,119,932	260,121,662	36,001,730	16.1%	301,462,398	41,340,736	15.9%
Hamilton	224,776,914	244,217,225	19,440,311	8.6%	259,909,162	15,691,937	6.4%
Halton Region	132,041,893	123,942,913	-8,098,980	-6.1%	143,802,693	19,859,780	16%
Peel Region	81,629,248	88,856,378	7,227,130	8.9%	94,134,919	5,278,541	5.9%

- From 2011 to 2016, the value of gross farm receipts in Ontario, the Golden Horseshoe, and Hamilton increased. Hamilton and Peel Region had relatively moderate increases, while other regions had substantial increases.



2011

REGIONAL DISTRIBUTION OF FARMS AND GROSS FARM RECEIPTS

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GEOGRAPHY	FARMS	% TOTAL	GROSS FARM RECEIPTS (\$)	% TOTAL 2
Ontario	51,950	100%	11,890,835,395	100%
Golden Horseshoe	6,090	11.7%	1,716,206,729	14.4%
Niagara Region	2,014	3.9%	725,831,453	6.1%
Durham Region	1,454	2.8%	273,237,098	2.3%
Hamilton	885	1.7%	244,217,255	2.1%
York Region	828	1.6%	260,121,662	2.2%
Halton Region	469	0.9%	123,942,913	1.0%
Peel Region	440	0.8%	88,856,378	0.7%

- In 2011, the Golden Horseshoe represented 11.7% of the farms in the Province, yet 14.4% of the value of gross farm receipts.



2016

REGIONAL DISTRIBUTION OF FARMS AND GROSS FARM RECEIPTS

GEOGRAPHY	FARMS	% TOTAL	GROSS FARM RECEIPTS (\$)	% TOTAL 2
Ontario	49,600	100%	15,126,845,283	100.0%
Golden Horseshoe	5,531	11.2%	1,959,172,301	13.0%
Niagara Region	1,827	3.7%	838,113,788	5.5%
Durham Region	1,323	2.7%	321,749,341	2.1%
Hamilton	810	1.6%	259,909,162	1.7%
York Region	712	1.4%	301,462,398	2.0%
Halton Region	451	0.9%	143,802,693	1.0%
Peel Region	408	0.8%	94,134,919	0.6%

- In 2016, the Golden Horseshoe represented 11.2 % of total farms in the Province and 13% of the value of gross farm receipts, down slightly from 2011.
- In Hamilton, the share of 1.7% of the value of the Provinces total gross farm receipts decreased from 2011. When compared to the total farms, Hamilton farms are still producing higher value goods compared to Ontario.



ECONOMIC IMPACT

Primary Agriculture remains a significant economic provider in Hamilton, the Golden Horseshoe and Ontario. Despite being in the middle of a region with the largest concentration of urban development in Canada, Hamilton and the Golden Horseshoe are home to many farms that generate a substantial annual economic impact. While the number of farms and farmland area has decreased, the economic value of agriculture has continued to increase between 2011 and 2016.

In 2016, Hamilton was home to 810 farms generating \$259,909,162 in gross farm receipts, \$950,574,095 in gross output impact, \$437,134,749 in gross domestic product impact, and 6,168 jobs. Except for the total number of farms, all of these are increases from 2011.

2011

AGRICULTURE ECONOMIC IMPACT

GEOGRAPHY	GROSS FARM RECEIPTS (\$)	GROSS OUTPUT IMPACT (\$)	DIRECT IMPACT (\$)	INDIRECT IMPACT (\$)	INDUCED IMPACT (\$)	EMPLOYMENT IMPACT	GDP IMPACT (\$)	GDP IMPACT % OF TOTAL
Ontario	11,890,835,395	43,488,732,797	7,786,300,869	21,213,220,674	14,425,914,142	282,221	19,998,900,010	100%
Golden Horseshoe	1,716,206,729	6,276,738,390	1,123,798,522	3,061,708,805	2,091,231,062	40,733	2,886,445,673	14.4%
Niagara Region	725,831,453	2,654,606,854	475,285,582	1,294,881,621	884,439,651	17,227	1,220,757,978	6.1%
Durham Region	273,237,098	999,318,878	178,919,848	487,454,346	332,944,684	6,485	459,550,721	2.3%
York Region	260,121,662	951,351,369	170,331,659	464,056,439	316,963,272	6,174	437,492,193	2.2%
Hamilton	244,217,255	893,183,558	159,917,189	435,682,960	297,583,408	5,796	410,742,914	2.1%
Halton Region	123,942,913	453,300,425	81,159,723	221,113,868	151,026,834	2,942	208,456,522	1.0%
Peel Region	88,856,378	324,977,306	58,184,521	158,519,571	108,273,214	2,109	149,445,346	0.7%

- From 2011 to 2016, the value of gross farm receipts in Ontario, the Golden Horseshoe, and Hamilton increased. Hamilton and Peel Region had relatively moderate increases, while other regions had substantial increases.

2016

AGRICULTURE ECONOMIC IMPACT

GEOGRAPHY	GROSS FARM RECEIPTS (\$)	GROSS OUTPUT IMPACT (\$)	DIRECT IMPACT (\$)	INDIRECT IMPACT (\$)	INDUCED IMPACT (\$)	EMPLOYMENT IMPACT	GDP IMPACT (\$)	GDP IMPACT % OF TOTAL
Ontario	15,126,845,283	55,323,895,313	9,905,289,634	26,986,254,240	18,351,828,450	359,025	25,441,464,475	100%
Golden Horseshoe	1,959,172,301	7,165,343,550	1,282,895,985	3,495,158,496	2,376,860,033	46,500	3,295,083,116	13.0%
Niagara Region	838,113,788	3,065,260,376	548,809,726	1,495,192,907	1,016,796,310	19,892	1,409,602,714	5.5%
Durham Region	321,749,341	1,176,744,161	210,686,389	574,000,022	390,345,019	7,636	541,142,206	2.1%
York Region	301,462,398	1,102,548,075	197,402,189	537,808,166	365,732,981	7,155	507,022,102	2.0%
Hamilton	259,909,162	950,574,095	170,192,494	463,677,296	315,320,760	6,168	437,134,749	1.7%
Halton Region	143,802,693	525,934,191	94,164,203	256,543,645	174,460,854	3,413	241,858,169	1.0%
Peel Region	94,134,919	344,282,652	61,640,985	167,936,461	114,204,109	2,234	158,323,177	0.6%

■ In 2016, the gross output impact of agriculture in Hamilton increased to \$950,574,095 .

■ While the GDP impact also increased to \$437,134,749, the percentage of the total provincial GDP impact dropped to 1.7%.

AGRICULTURAL GDP IMPACT, ONTARIO, GOLDEN HORSESHOE, AND HAMILTON 2011 and 2016

GEOGRAPHY	2011 (\$)	2016 (\$)	CHANGE	% CHANGE
Ontario	19,998,900,010	25,441,464,475	5,442,564,465	27.2%
Golden Horseshoe	2,886,445,673	3,295,083,116	408,637,443	14.2%
Niagara Region	1,220,757,978	1,409,602,714	188,844,736	15.5%
Durham Region	459,550,721	541,142,206	81,591,485	17.8%
York Region	437,492,193	507,022,102	69,529,909	15.9%
Hamilton	410,742,914	437,134,749	26,391,835	6.4%
Halton Region	208,456,522	241,858,169	33,401,647	16.0%
Peel Region	149,445,346	158,323,177	8,877,831	5.9%

SOURCES:

Statistics Canada Census of Agriculture, 2011 and 2016 including CANSIM tables 004-0201, 004-0204, 004-0005, 004-0200, 004-0202, 004-0233, 0040-235, 004-0234, 004-0239, 004-0238, as well as special data tabulations provided by Statistics Canada.

Links to Stats Canada definitions below (under Agriculture):

<https://www.statcan.gc.ca/eng/concepts/definitions/index>

<https://www.statcan.gc.ca/eng/ca2011/gloss>



Hamilton