

Agri-Business: Durham Region

Definition and Context

Agri-Business encompasses the entire agriculture supply chain, from the process of creating the good itself, to the sale of the end product to the consumer (OMAFRA, 2017). According to Statistics Canada (2017a), the agricultural industry, as classified by NAICS (North American Industrial Classification System), involves only the growing of crops, raising of animals and aquaculture and related support activities such as the harvesting of crops. However, agri-business is not limited by this definition and also includes the processing and distribution of agricultural goods, including the manufacturing of food products, retail stores and restaurants that serve local food (OMAFRA, 2017). Examples of agri-business establishments include farms, pick-your-own agritourism, abattoirs and specialty food stores (OMAFRA, 2017). Similarly, AgScape (2017) classifies agri-business as four main sectors of crop producers, fishers and animal producers, food manufacturers and food and beverage retailers.

The federal government offers many programs and services that help support innovation, sustainable farming and business development related to local farmers and agricultural businesses (Agriculture and Agri-Food Canada, 2019). One of the largest projects is headed by the Government of Canada, called the Canadian Agricultural Partnership (Government of Canada, 2018a). This Partnership involves collaboration at the federal and provincial/territorial levels, promising distribution of over three billion dollars across five years (Government of Canada, 2018a). The grant is divided into four main funding areas, with allocations of 297 million to growing trade and expanding markets, 690 million to innovative and sustainable growth of the sector through research, 166.5 million to supporting diversity within a dynamic evolving sector, and the remaining 467 million towards federal activities that directly benefit producers and processors, as identified in consultations (Government of Canada, 2018a).

Additional funding at the federal level targets specific farmers within the agri-food sector. Dairy farmers and processors have the opportunity to apply for funding that targets technology and infrastructure upgrades, and Indigenous entrepreneurs are able to secure funding for food systems project to help them engage in the agri-food sector (Agriculture and Agri-Food Canada, 2019). Additionally, funding opportunities are available for not-for-profits who want to build networks of sites that address agri-environmental issues, and develop risk management tools (Government of Canada, 2018a).

At the Regional level, the Durham of Region held consultations with industry stakeholders in 2010 to develop a Region of Durham Agricultural Strategy for 2013 to 2018 (Region of Durham, 2012). North Durham also highlighted the importance of agri-business for economic growth in Vibrant North Durham Plan (Township of Scugog, 2013). Durham Region is also a part of the Golden Horseshoe Food and Farming Action Plan 2021, with hopes of boosting the Golden Horseshoe as the go-to food and farming cluster in North America (Walton, 2012). In addition to these strategic plans, other local groups and organizations have led initiatives to promote the growth of agri-business. The Durham Agricultural Advisory Committee (2018) convenes ten times annually, with the ultimate goals of hosting an annual farm tour, encouraging the participation of youth in Durham agriculture and

coordinating with municipalities and agricultural interests. Similarly, the Durham Region Federation of Agriculture and Durham Farm Connections partner to provide education about the agricultural industry to residents, in ensuring the viability of the sector (Durham Farm Connections, 2018). In fact, a permanent education and event centre residing in Durham has been pitched, which will be a resource for local residents, as well as attracting tourism to the Region (Hall, 2018b). A feasibility study will be conducted through the first half of 2019, to ensure its utility in the community (Hall, 2018b).

Highlights of Agri-Business in Durham Region

Crop Producer: Nature's Bounty Farm is an apple orchard located near Port Perry, in the Township of Scugog (Nature's Bounty Farm, 2018). This farm offers apple picking to the public of over 20 varieties, and wholesale options as well (Nature's Bounty Farm, 2018). This farm also offers other products such as pick-your-own pumpkins, fresh-pressed cider and other produce offerings such as edible squash, and decorative ornamentals (Nature's Bounty Farm, 2018). Agri-tourism is also a strong element at this farm, with an obstacle course, corn maze, nature walk and sheep visit, drawing in many tourists annually; there are even options for educational tours for schools (Nature's Bounty Farm, 2018).

Animal Producer: Benrise Farms is a dairy farm in Bowmanville, within the Municipality of Clarington (Leading Livestock Genetics, 2018). This 450-acre farm is home to 260 holsteins, with 100 cows producing more than 8538 kilograms of milk annually (Leading Livestock Genetics, 2018). As part of the Leading Livestock Genetics alliance, these dairy cow and goat breeders strive towards using technology and innovation in providing the best quality livestock possible, and therefore, the highest quality products available (Leading Livestock Genetics, 2018). In addition to milking, Benrise Farms also offers cattle and embryos for export (Leading Livestock Genetics, 2018).

Food Manufacturer: Maple Leaf Foods has a food manufacturing facility in Port Perry, in the Township of Scugog (Hall, 2018a). This location is responsible for manufacturing branded and private label meat pies and pastries for Canadian grocery stores (Hall, 2018a). In June 2018, this facility announced its decision to expand their production line, upping their number of employees from 50 to 90 (Hall, 2018a). The financial investment was more than \$10 million dollars, and will be helpful in boosting the local rural community (Hall, 2018).

Food and Beverage Retailer: Buckingham Meat Market is a specialty butcher in Oshawa, that has been open since 1956 (Buckingham Meat Market, 2018). This retail store is known for selling hormone and antibiotic free meats from Ontario (Buckingham Meat Market, 2018). In addition, the store sells local-only deli meats and cheeses, baked goods and gourmet sauces and condiments (Buckingham Meat Market, 2018). Buckingham is a member of the Ontario Independent Meat Processors, supporting local products and thus, the local economy (Buckingham Meat Market, 2018).

Education: Durham College Centre for Food is located in Whitby, offering many academic programs that directly tie in with the agri-business sector. These programs include four-semester Ontario College Diplomas in culinary management, horticulture in food and farming, horticulture technician and hospitality- hotel and restaurants operations management, as well as two-semester Ontario

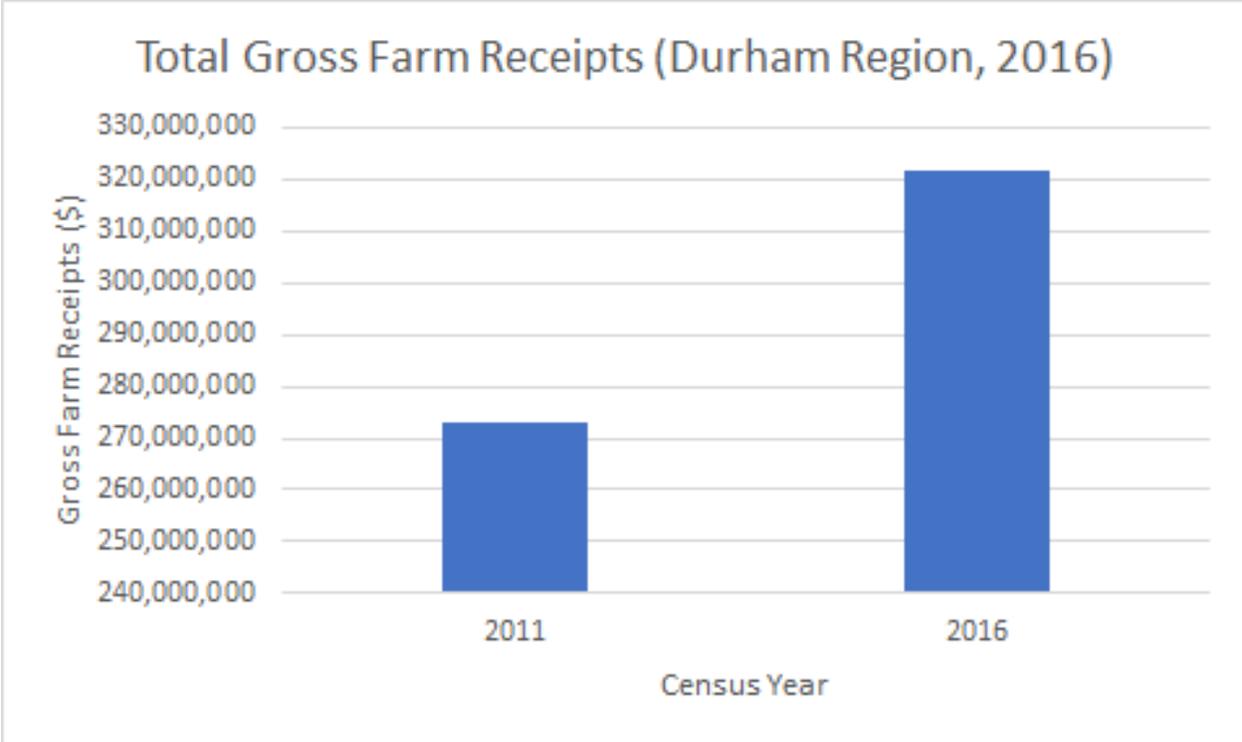
College certificates in hospitality skills and culinary skills (Durham College, 2019). The Centre for Food facility offers training throughout the whole field-to-fork chain from harvesting, storage, processing, packaging to consumption (Durham College, 2019). The location also offers a high-tech pollinator garden, and fine-dining restaurant Bistro '67, where students can practice their culinary skills (Durham College, 2019).

Census of Agriculture (2016)

The Census of Agriculture is held every five years, in conjunction with the Census of Population (Statistics Canada, 2016). This census offers detailed agriculture statistics, providing data that is useful in the development and implementation of agricultural policies and programs (Statistics Canada, 2016). The data is used in economic analysis of agriculture by academics, production and investment decisions, and an evidence-based discussion point between farm organizations and governments (Statistics Canada, 2016).

For this sector profile, two main variables will be examined: total gross farm receipts and the change between 2011 and 2016 and farms that report use of technologies.

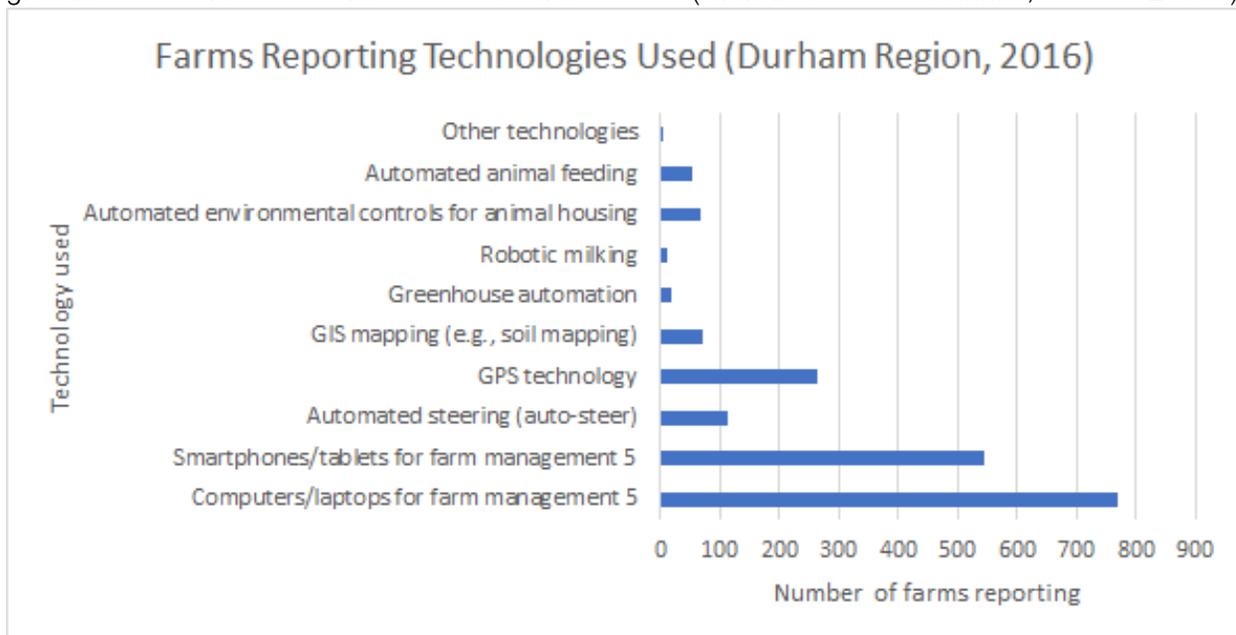
Gross farm receipts include receipts from all agricultural products sold, program payments and custom work receipts (Statistics Canada, 2018b). Since gross farm receipts are a good gauge for measuring financial flow through farms, it is a good indicator of growth in the industry if that number increases between census periods. Therefore, the census profile will document the total gross farm receipts reported in 2016, and whether there has been an increase since 2011.



Source: Statistics Canada. Table 32-10-0436-01. Farms classified by total gross farm receipts in the year prior to the census.

Overall, there has been a 17.8 percent growth in the Durham Region for total gross farm receipts between 2011 to 2016, indicating that there is an increase in the local agri-business sector due to more sales. This change is particularly positive, since there were 1454 farms which reported in 2011 and 1323 farms which reported in 2016, meaning that there has been an increase in farm receipts despite a lesser number of farms in the Region. In fact, the total number of farms which reported gross farm receipts of 2 million dollars and over increased from 19 to 26 between census periods, which is another healthy indicator.

It is important to track whether farmers use innovations in technology, since implementation of such technologies have the ability to improve productivity and optimize land use, which ultimately brings growth to the sector (Statistics Canada, 2017b).



Source: Statistics Canada. Table 32-10-0446-0. Farms reporting technologies used on the operation in the year prior to the census.

According to the Census of Agriculture (2016), many farms do report technology use. Nearly 700 farms reported computers and laptops for farm management and over 500 farms reported smartphone or tablet use for farm management. However, these farms account for less than 50 percent of the total number of farms that reported. Some other technologies such as GPS technology, GPS mapping and automated animal feeding were also used by dozens of farms, representing less than 10 percent of total farms that reported. Although it is a positive indicator that Regional farms have begun using technologies, it would be beneficial for these numbers to increase, in order to maximize productivity and efficiency in the local agri-business sector.

Agri-Business Employment by NOCS (2016)

The National Occupational Classification System (NOCS) is developed by the government of Canada, as the Canadian standardized taxonomy and framework for communicating about labour market information, and is sorted by skill levels and skill types (Government of Canada, 2018b). Occupations within this taxonomy are grouped by the type of work required for each job, including the employment requirements, job description and responsibilities, tasks and duties (Government of Canada, 2018b). Other factors that impact the classification of occupations include the complexity

of the work, the types of services that are provided or the goods that are being made, and the responsibility required in the work (Government of Canada, 2018b). There are several levels to these occupational categories, beginning with a single digit, described as a broad occupational category code (e.g. 0 Management occupations) (Government of Canada, 2018b). The occupational codes become more specific as the number of digits increase: two-digits are major group codes (e.g. 00 Senior management occupations), three-digits are minor group codes (e.g. 001 Legislators and senior management) and four-digits identify the above three groups including a unit group (e.g. 0011 Legislators) (Government of Canada, 2018b).

The following table outlines the occupations represented in the agri-business sector, along with the total employed persons in Durham Region in those occupations, and their respective median and average employment incomes. This table contains the most recent data from the Statistics Canada Census by Place of Work (POW), meaning that all these jobs are within the Durham Region.

Occupation (NOC)	Total Employed	Median Employment Income (\$)	Average Employment Income (\$)
0821 Managers in agriculture	1005	17558	32301
2123 Agricultural representatives, consultants and specialists	10		
6311 Food service supervisors	565	22315	25972
6321 Chefs	680	22348	25185
6322 Cooks	2485	14457	17030
6331 Butchers, meat cutters and fishmongers - retail and wholesale	115	36984	36411
6332 Bakers	600	18434	20789
6511 Maitres d'hôtel and hosts/hostesses	475	5580	7345
6513 Food and beverage servers	2525	11566	12920
6711 Food counter attendants, kitchen helpers and related support occupations	6575	10359	13679
8252 Agricultural service contractors, farm supervisors and specialized livestock workers	120	34903	27795
8431 General farm workers	590	12129	17554
8611 Harvesting labourers	55	29153	31299
9461 Process control and machine	150	36462	38955

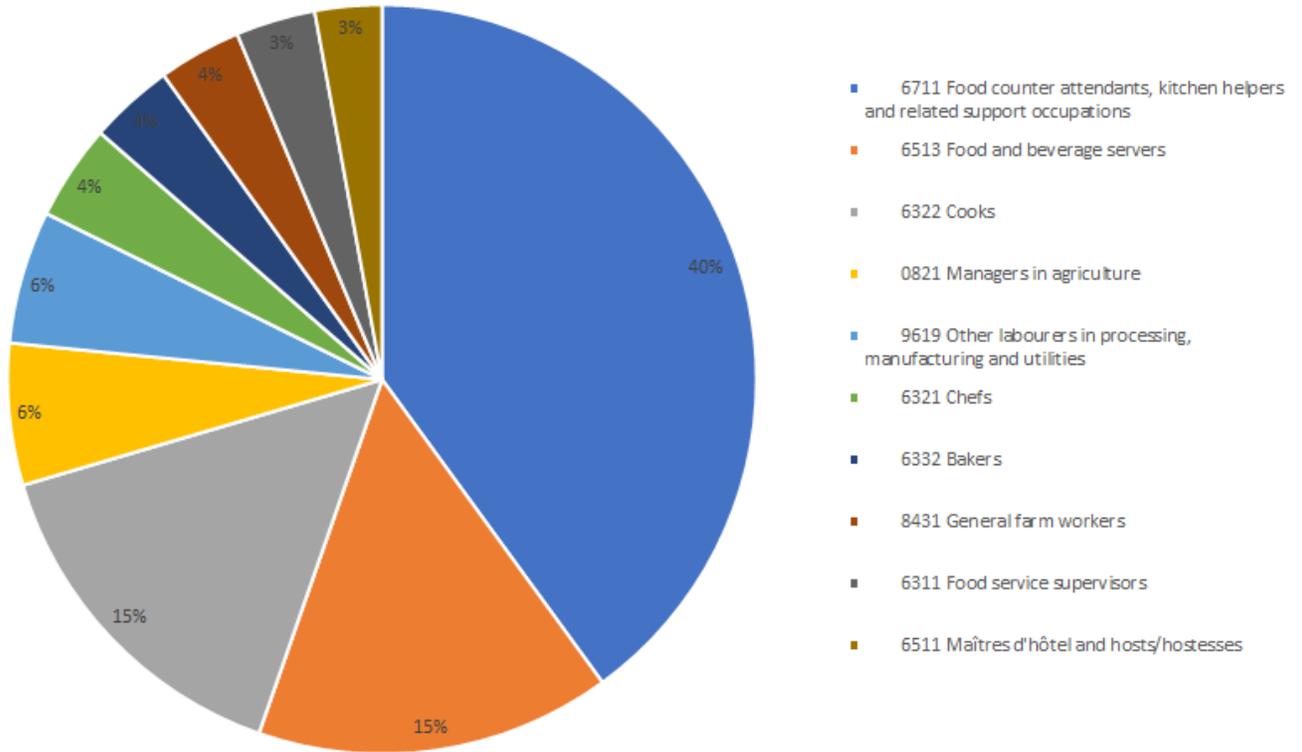
operators, food and beverage processing			
9462 Industrial butchers and meat cutters, poultry preparers and related workers	30		34279
9465 Testers and graders, food and beverage processing	10		
9617 Labourers in food and beverage processing	335	23521	26045
9619 Other labourers in processing, manufacturing and utilities	945	29326	32118

Source: Statistics Canada Census (2016), data custom purchased by Durham Workforce Authority

The majority of employees in agri-business occupations are employed as 6322 Cooks, with a median and average employment income of \$14,457 and \$17,030 that are below the regional median and averages of \$38, 893 and \$50,161 respectively. However, it is important to note that these positions are likely part-time and not full-time. The highest paid agri-business related occupation is 9461 Process control and machine operators in food and beverage processing with a median and average income of \$36,462 and \$38,955 respectively.

The following figure is a visual representation of the top 10 Agri-Business occupations in Durham Region, according to the 2016 Census. The subsectors are separated by four-digit NOCS, similarly to the chart above.

Top 10 Occupations in Agri-Business, Durham Region



Source: Statistics Canada Census (2016), data custom purchased by Durham Workforce Authority

Agri-Business Employment by NAICS (2016)

The North American Industry Classification System (NAICS) is a hierarchical classification system for industries, developed by the national statistical agencies of Canada, United States and Mexico. (Statistics Canada, 2017). This classification system divides the economy into 20 major sectors grouped by production criterion, which are further divided into 102 sub-sectors and 324 industry groups (Statistics Canada, 2017). The reason for the development of this system is to classify business establishments, and to segregate the establishments by the types of activities businesses specialize in (Statistics Canada, 2017). However, it is important to keep in mind that some large companies and enterprises may fall under several sectors in NAICS and cannot wholly be represented by one sector code (Statistics Canada, 2017). NAICS codes are available from broad categories of 2-digits (e.g. 31-33 Manufacturing) to more specific codes that are 6-digits (e.g. 335223 Major kitchen appliance manufacturing) (Statistics Canada, 2017). There are NAICS codes for 3-digits, 4-digits, and 5-digits (Statistics Canada, 2017).

The following table outlines the industries represented in the agri-business sector, along with the total employed persons in Durham Region in those industries, and their respective median and average employment incomes by 4-digit NAICS. This table contains the most recent data from the Statistics Canada Census by Place of Work (POW), meaning that all these persons are employed within the Durham Region.

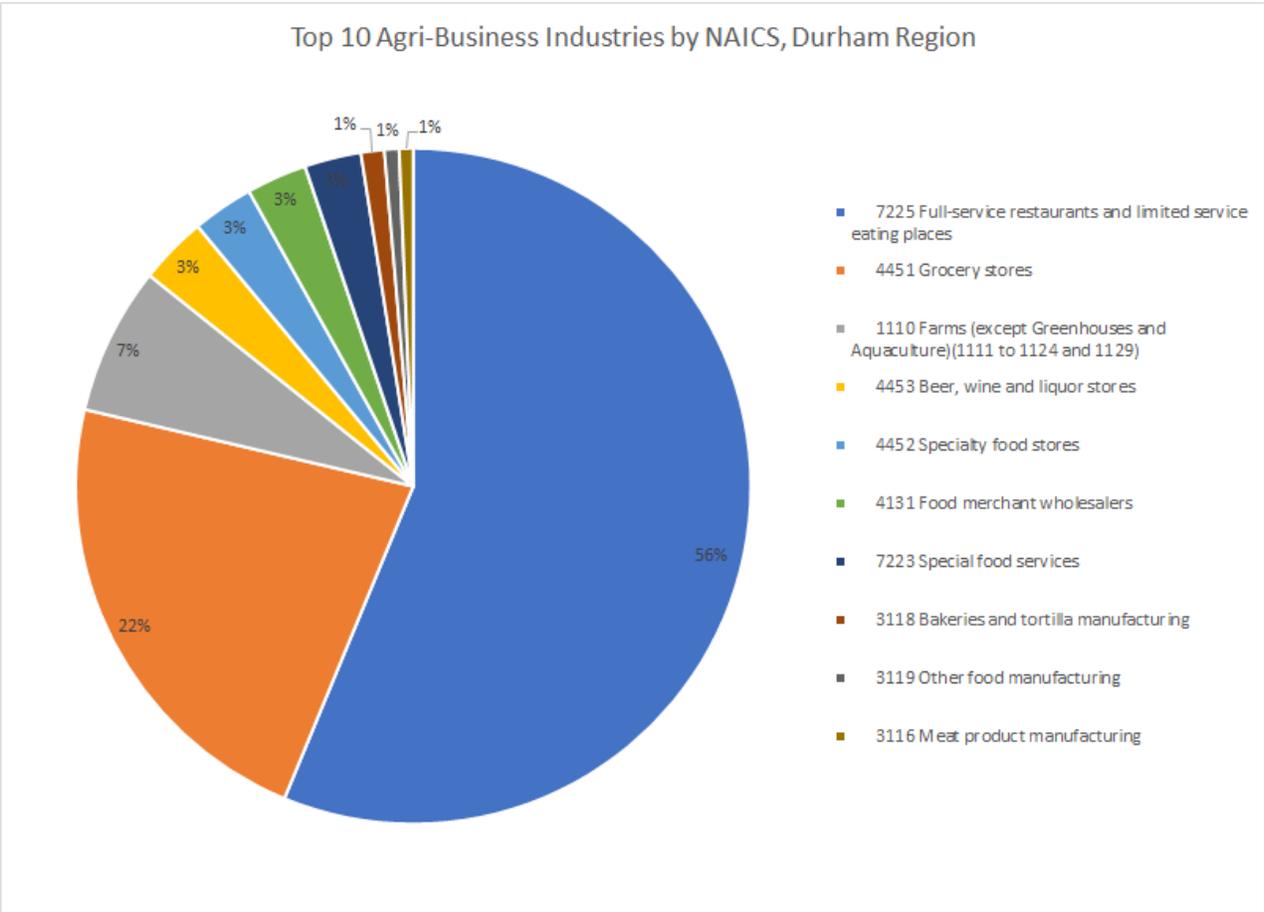
Industry (NAICS)	Total Employed	Median Employment Income (\$)	Average Employment Income (\$)
1110 Farms (except Greenhouses and Aquaculture)(1111 to 1124 and 1129)	1810	18022	26810
3111 Animal food manufacturing	35		
3112 Grain and oilseed milling	10		
3113 Sugar and confectionery product manufacturing	40	15620	21827
3114 Fruit and vegetable preserving and specialty food manufacturing	80	22348	34745
3115 Dairy product manufacturing	55		
3116 Meat product manufacturing	170	32755	37619
3118 Bakeries and tortilla manufacturing	285	18540	26724
3119 Other food manufacturing	180	36583	86806
3121 Beverage manufacturing	160	35156	40923
4111 Farm product merchant wholesaler	40	16428	20746
4131 Food merchant wholesalers	740	37166	41675
4132 Beverage merchant wholesalers	105	57984	56604
4171 Farm, lawn and garden machinery and equipment merchant wholesalers	90	41750	47285
4183 Agricultural supplies merchant wholesalers	55	58582	55993
4451 Grocery stores	5735	15346	22309
4452 Specialty food stores	750	10914	19130

4453 Beer, wine and liquor stores	830	44750	44118
7223 Special food services	695	18091	23197
7225 Full-service restaurants and limited service eating places	14385	12108	15850

Source: Statistics Canada Census (2016), data custom purchased by Durham Workforce Authority

The industry that employs the most persons in agri-business are 7225 Full-service restaurants and limited service eating places, which employ 14,385 persons. The highest paid industry for Durham Region in agri-business is 4132 Beverage merchant wholesalers, with a median and average income of \$57,984 and \$56,604 respectively, above the regional median and average incomes.

The following figure shows a visual representation of the top 10 Agri-Business industries in Durham Region, according to the 2016 Census. The subsectors are separated by four-digit NAICS, similarly to the chart above.



Source: Statistics Canada Census (2016), data custom purchased by Durham Workforce Authority

Canadian Business Counts (December 2018): Agri-Business

The Canadian Business Counts are published twice annually, and are available publicly available at the national and provincial levels (Statistics Canada, 2018). Canadian Business Counts by Census Subdivision (e.g. Durham Region) are purchased collectively by the Workforce Planning Boards of Ontario, including Durham Workforce Authority. These counts provide information about the number of businesses, as classified by three-digit industrial classification (NAICS) and employment-size categories (e.g. 1 to 4 employees), and are taken from the Statistics Canada Business Register (Statistics Canada, 2018). Each operating location is classified as a separate business, so if a company has more than one location (e.g. headquarters office, 2 branches), they will each be counted individually (Statistics Canada, 2018). Using the Canadian Business Counts is beneficial in understanding the composition of businesses in the Durham Region by industry, as well as the number of SMEs (small and medium enterprises) and their role in the local economy.

The following table outlines the number of businesses represented in the agri-business sector, categorized by 3-digit NAICS (North American Industrial Classification System) and number of employees. This table contains the most recent data from the Canadian Business Register in December 2018 by Place of Work (2018), meaning that all these businesses are located within the Durham Region.

Industry	Without employees	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
111 - Crop production	340	44	28	14	9	7	1	2	0
112 - Animal production and aquaculture	363	61	17	4	0	1	0	0	0
311 - Food manufacturing	46	22	8	9	7	3	0	0	0
312 - Beverage and tobacco product manufacturing	8	7	6	4	2	0	1	0	0

411 - Farm product merchant wholesalers	18	2	0	1	1	0	0	0	0
413 - Food, beverage and tobacco merchant wholesalers	76	35	5	7	7	0	0	0	1
445 - Food and beverage stores	201	139	106	78	21	30	18	5	0
722 - Food services and drinking places	492	253	256	238	221	69	11	0	0

Source: *Canadian Business Patterns, December 2018, data custom purchased by Durham Workforce Authority*

The majority of Durham Region-based businesses in the agri-business sector are food services and drinking places, encompassing restaurants, cafes and fast-food eating places. In addition, the majority of agri-business can be considered small-medium enterprises (SMEs), with less than 49 employees. In particular, crop production and animal production and aquaculture tend to be businesses without any employees.

Educational Attainment (Census, 2016)

Educational attainment in the agri-business sector varies due to the varied skill requirements and tasks associated with the breadth of occupations. The following table outlines employment in the Agri-Business sector in Durham Region by educational attainment and 3-Digit NAICS (North American Industrial Classification System). Please refer above for the full context and definition of NAICS.

Industry (3-Digit NAICS)	No certificate, diploma or degree	Secondary (high) school diploma or equivalency certificate	Apprenticeship or trades certificate or diploma	College, CEGEP or other non-university certificate or diploma	University certificate or degree (bachelor and above)
111 - 112 Farms	545	930	110	510	285
114 Fishing, hunting and trapping	0	0	0	10	0

311 Food manufacturing	170	335	55	165	110
312 Beverage and tobacco product manufacturing	10	50	10	50	50
411 Farm product merchant wholesalers	10	20	0	15	0
413 Food, beverage and tobacco merchant wholesalers	95	450	40	155	90
417 Machinery, equipment and supplies merchant wholesalers	115	555	120	600	395
445 Food and beverage stores	1580	3500	185	1415	550
722 Food services and drinking places	3800	6910	445	2670	1230

Source: Statistics Canada Census (2016), data custom purchased by Durham Workforce Authority

The majority of workers (78%) in Durham Region agri-business by industry have at minimum, a certificate, diploma or degree. A significant proportion of workers have a secondary school diploma or equivalent (44%), followed by a college or non-university certificate or diploma (19%).

The following table outlines employment in the Agri-Business sector in Durham Region by highest level of educational attainment and 4-Digit NOCS (National Occupational Classification System). Please refer above for the full context and definition of NOCS.

Occupation (NOC)	No certificate, diploma or degree	Secondary (high) school diploma or equivalency certificate	Apprenticeship or trades certificate or diploma	College, CEGEP or other non-university certificate or diploma	University certificate or degree (bachelor and above)
0821 Managers in agriculture	130	380	70	240	140
2123 Agricultural representatives					10

, consultants and specialists					
6311 Food service supervisors	90	260	10	150	60
6321 Chefs	90	210	90	230	40
6322 Cooks	650	1120	170	490	50
6331 Butchers, meat cutters and fishmongers - retail and wholesale	10	70	10	40	
6332 Bakers	140	180	40	200	40
6511 Maîtres d'hôtel and hosts/hostesses	170	240		30	30
6512 Bartenders	70	190	20	140	40
6513 Food and beverage servers	380	1130	80	600	280
6711 Food counter attendants, kitchen helpers and related support occupations	1960	2970	180	940	470
8252 Agricultural service contractors, farm supervisors and specialized livestock workers	40	50	10	10	10
8431 General farm workers	170	260	20	120	30
8611 Harvesting labourers	30	10			
9461 Process control	20	60	10	50	10

and machine operators, food and beverage processing					
9462 Industrial butchers and meat cutters, poultry preparers and related workers	10		10		10
9465 Testers and graders, food and beverage processing				10	
9617 Labourers in food and beverage processing	90	170	10	50	10

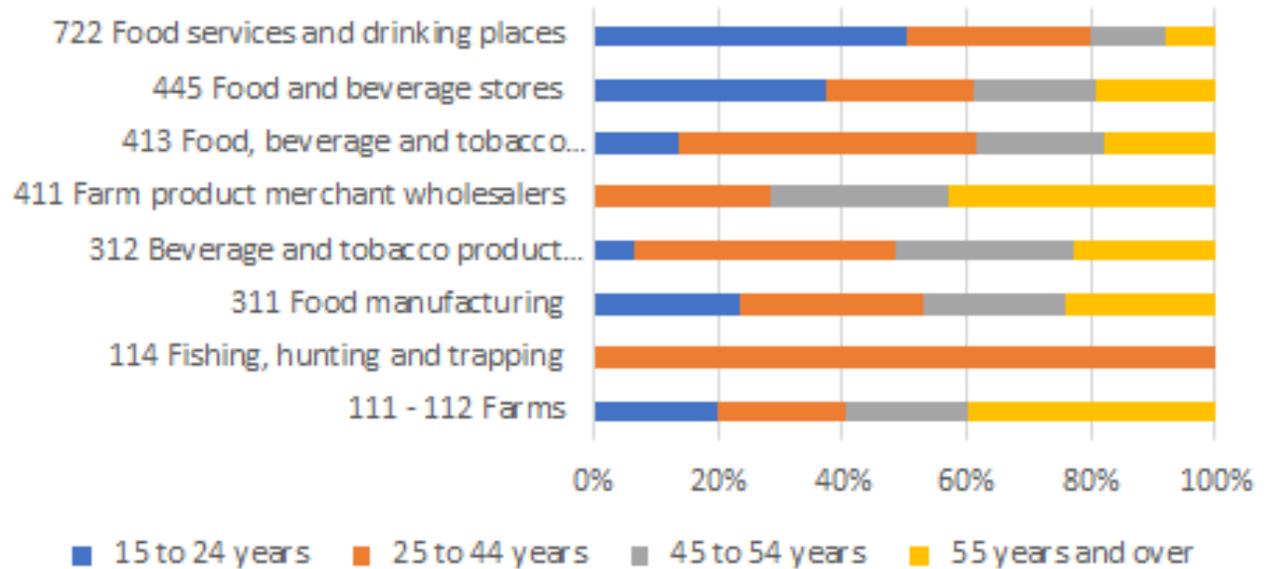
Source: Statistics Canada Census, 2016 (custom purchased by Durham Workforce Authority)

Educational attainment understandably varies by occupation, with certain occupations such as 2123 Agricultural representatives, consultants and specialists encompassing only persons with university bachelor's or higher. Occupations such as 6711 Food counter attendants, kitchen helpers and related support occupations encompasses primarily those with no certificate, diploma or degree (30%) or high school diploma or equivalent (45%), likely due to the lower educational credentials required to enter the job.

Workforce Age Breakdown by NAICS (Census, 2016)

The following table illustrates employment in the Agri-Business sector in Durham Region (POW) by age group and 3-Digit NAICS (North American Industrial Classification System). Specifically, for people who work in the agri-business industries within Durham Region, this chart shows approximately the age distribution by 3-Digit NAICS.

Workforce Age Breakdown by NAICS, Agri-Business, Durham Region



Source: Statistics Canada Census, 2016 (custom purchased by Durham Workforce Authority)

The workforce age breakdowns in agri-business differ significantly by industry. For industries such as 311 Food manufacturing, the age proportions are relatively similar, but for 111-112 Farms, the majority of workers are 55 years and over. Certain industries such as 722 Food services and drinking places have higher proportions of youth (15 to 24 years), likely due to the part-time or temporary nature of most positions and the lesser work experience required for employment in these industries.

Key Performance Indicators: Durham College

Each year, Durham College produces a Graduate Employment Report based on information compiled from the KPI survey. The information contained in the report profiles the employment status of Durham College graduates from post-secondary programs in 2016. Six months after graduation, graduates are contacted by an independent consulting firm (hired by the Ministry of Training, Colleges and Universities), regarding their employment status. The table below represents programs within the agri-business sector.

Program Name	Total Graduates	Percentage Working (Related to Program)	Percentage Working
Advanced Baking and Pastry Arts (ABAK)	12	50	50
Culinary Management (CMGT)	44	63	75
Culinary Skills (CSK)	24	60	80

Food and Farming (AAGR)	7	50	50
Hospitality Management- Hotel, Restaurant and Tourism (HMGT)	51	83	92

Source: Durham College, 2017, Graduate Employment Report

Key Performance Indicators: UOIT

UOIT is also responsible for publishing Key Performance Indicators for undergraduate programs, including employment rates 6 months and 2 years following graduation. Although there is less detail than the Durham College KPI data, the indicators still provide a basic understanding of what programs of study are related to higher employment. The table below represents programs within the agri-business sector, and is the most recent publicly available data, for graduates from 2014.

Program	Employment Rate (2 Years)	Employment Rate (6 Months)
Agriculture & Biological Science	90.91%	87.10%
Food Science & Nutrition		

Source: UOIT, 2016, Key Performance Indicators, Employment Rate of 2014 Graduates in Undergraduate Programs

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