

Location, Location, Location...

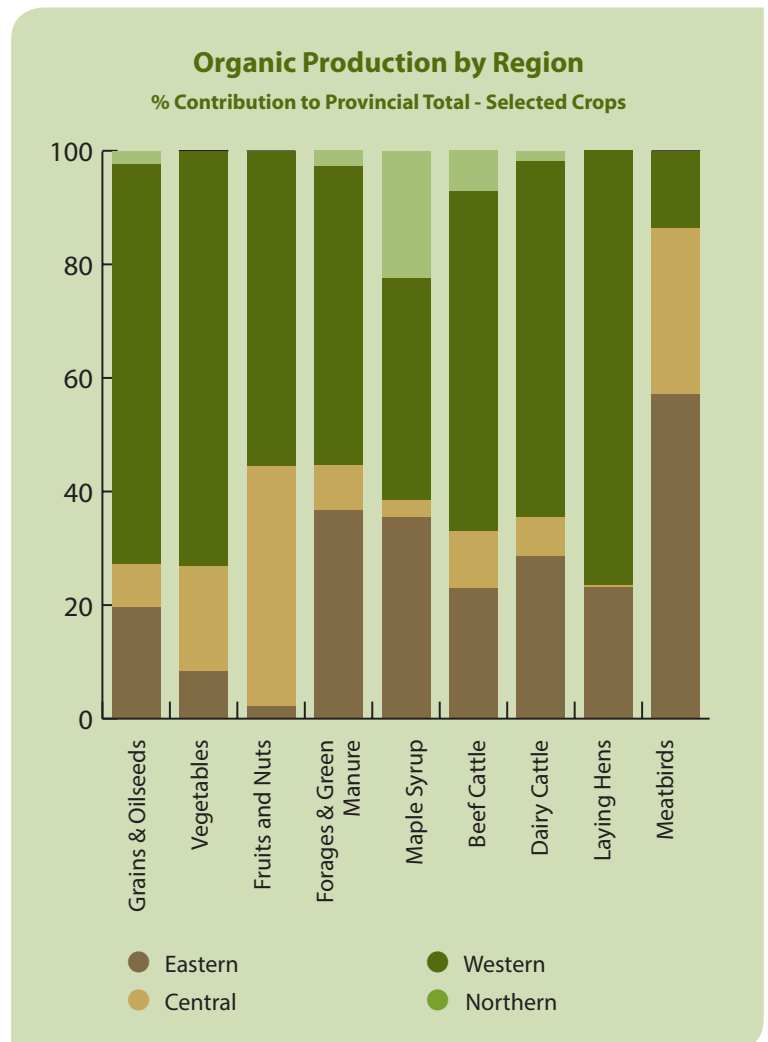
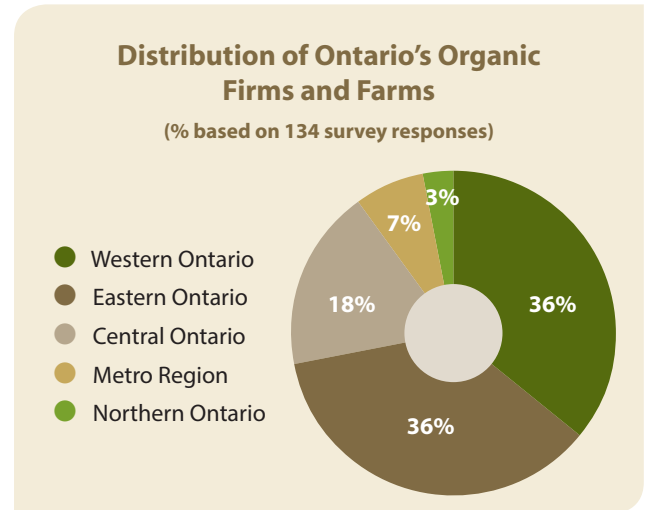
The organic movement began with farmers. Hence, the sector’s development in Ontario reflects the province’s agricultural production areas. Most of Ontario’s organic firms and farms are located in Western (37%) and Eastern (36%) regions of the province, with the remainder in Central (18%), Metro (7%) and Northern (3%) regions. Drawing on several 2012 surveys, this report highlights the unique organic profile of each of these regions.

Western Ontario - Ontario’s organic bread basket

- 62% of Ontario’s organically managed land and 65% of organic farms are located here.
- The region leads the province’s production in everything from field crops to goats.
- Most (43%) of the province’s organic handlers and most medium sized and large sized firms (49% and 39% respectively) are located here.
- Surprisingly only 25% of the province’s CSAs operate here – suggesting some opportunities.
- This region reports the highest rates of organic certification – 88% of our survey respondents from this region were certified.
- Organic stakeholders here are the most optimistic about the organic market – 80% believe that the demand for organic food has not yet peaked.

Eastern Ontario – organic AND local

- 26% of Ontario’s organically managed land and 19% of organic farms are located here.
- This area is the king of the small organic firm, with more small organic businesses (59%) located here than elsewhere in the province.
- Most (35%) of the province’s CSAs are located here.
- Most of the province’s organic wildcrafting, wild blueberries, meat birds and all the province’s organic buckwheat are produced here.



- It's not all small potatoes though – this region is also a significant organic trading hub – 33% of the province's organic handlers are here.
- In this region more than others, stakeholders feel that the cost of obtaining certification has a high impact on their business. Only 60% of Eastern Ontario respondents to our sector survey were certified.
- But – these same stakeholders are the most optimistic about Ontario organic – 88% believe that consumers are more willing to pay a fair price for organic food grown in the province.



Central Ontario – Thank-you!

- 9% of Ontario's organically managed land and 14% of organic farms are located here.
- The region produces 97% of the province's wine grapes, and for that we are all truly thankful.
- All of the province's organic bee hives and mushroom farms are here – more reasons to give thanks.
- This is an important direct-marketing region – 31% of the province's CSA farms here.

Northern Ontario – an organic sector just beginning

- 3% of Ontario's organically managed land and 2% of organic farms are located here.
- The region contributes over half of the organic hemp grown in the province, and a significant percentage of our organic maple syrup.
- CSAs are a strong option here – while the area only has 2% of the province's organic farms, it has 10% of the CSAs.
- We need to make extra efforts to include stakeholders from Northern Ontario as we develop the organic sector. Stakeholders we interviewed there were most likely to feel isolated and in need of better targeted supports and initiatives.

Metro Region – Ontario's magnet for organic products

- While less than 2% of organic farms and 8% of organic handlers are located here, this region is likely the easiest place in Ontario to find organic products. 62% of Ontario's organic handlers are marketing their products here.



About OCO

The Organic Council of Ontario (OCO) is a non profit association representing all members throughout the value chain including producers, processors, marketers, distributors, suppliers, certifiers, retailers, restaurants and others to provide leadership and support the continued growth of Ontario's organic sector.

Theresa Schumilas
Lead Researcher
Ontario's Diverse Organic Food System
c/o_tschumilas@organiccouncil.ca

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We defined different regions of the province by postal code: Western – “N” postal codes, Eastern – “K” postal codes, Northern – “P” postal codes, and Central Ontario - which includes L postal codes and Metro.

See other reports in this series posted at:
<http://www.organiccouncil.ca/category/research>

We use the term handler to refer to firms that add value to products as they move through the value chain such as: traders, brokers, marketers, processors, distributors and packers.

“Small” firms/farms are those with less than \$100,000 in annual gross sales, “large” as those with over \$1M in annual gross sales, and “mid-sized” firms/farms are those in between.