Ontario's Greenbelt

The Key to Food Security in the Greater Golden Horseshoe

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GREEN BELT

Possibility grows here.

CAPI
THE CANADIAN AGRI-FOOD POLICY INSTITUTE

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Land Acknowledgement

The Greenbelt Foundation acknowledges that the land we meet on and strive to protect is the traditional territory of the Anishinaabe, Haudenosaunee, Huron-Wendat, and is now home to many other diverse First Nations, Métis, and Inuit. The area we now call the Greenbelt consists of treaty lands. It is important that we learn about the history and continued presence of these treaties because we are all treaty people.

The lakes, rivers, and wetlands, as well as forests, ravines, and healthy farmlands in the Greenbelt have been stewarded and protected by the First Peoples since time immemorial and we are grateful to the First Peoples for their care of the land on Turtle Island. We respect and are inspired by the deep connection of kinship that Indigenous Peoples have with the land.

We acknowledge the truth of the events of the past and their continuing effects, and the enduring rights of Indigenous Peoples.

We recognize that the Greenbelt is based on a land management plan developed by settlers, and we as a Foundation have a responsibility to ensure the work we do reflects the continued efforts and rights of the First Peoples of this land.

We will continue to look for ways to align our mandate with the Calls to Action from the Truth and Reconciliation Commission, and further educate ourselves on Indigenous Knowledge Systems that can inform and support our mandate to sustain the air, lands and waterways in the Greenbelt.

Possibility grows here.

Visioning the Future of the Greenbelt Series

The Greenbelt is an essential framework for protecting Ontario's agricultural lands, natural areas, and water resources within the Greater Golden Horseshoe, one of Canada's fastest-growing regions. It underpins sustainable regional growth, strengthens climate resilience, and enhances the quality of life and economic vitality for communities across southern Ontario. The decisions and investments made in the Greenbelt today will determine the long-term environmental, social, and economic health of the region for future generations.

The **Visioning the Future of the Greenbelt Series** aims to ensure the Greenbelt continues to serve as a cornerstone for achieving food sovereignty, water security, ecological health, and economic prosperity in Ontario. Through a series of discussion papers, the series explores the Greenbelt's current and future role in addressing the challenges and opportunities of our time, positioning it as a vital solution for the province's sustainable future.

Collectively, the reports in this series will:

- **Articulate the Greenbelt's importance** by highlighting how it contributes to Ontario's success today and in the decades ahead.

- **Distill key issues and summarize existing evidence** to inform a cohesive and accessible narrative about the Greenbelt's interconnected systems across the GGH and southern Ontario.

- **Identify challenges, opportunities, and pathways** to strengthen the Greenbelt's role in climate adaptation, economic resilience, and regional well-being.

- **Provide clear, actionable policy recommendations** that translate research insights into evidence-based strategies for decision-makers, municipalities, Indigenous communities, stakeholders, and the public.

Ultimately, the discussion papers in the **Visioning the Future of the Greenbelt Series** seek to reinforce the Greenbelt's position as a dynamic, forward-looking system that supports Ontario's environmental sustainability, food and water security, and long-term prosperity, ensuring that the region continues to thrive for generations to come.

Foreword

In a country as big as Canada, it is easy to take farmland for granted. There is a lot of it. Except there isn't. Canada is the second largest country in the world, but not in the top ten when it comes to agricultural land. Canada has done well in getting the most out of its relatively small amount of agricultural land. That land helps feed the country and the world, is the starting point for a value chain that includes Canada's largest manufacturing sector and is key to Canada's economic growth and Canadians' well-being. But that small amount of land is also facing big pressures. Urban expansion and housing shortages, increasing land values and climate change emphasize the need to boost agricultural production, productivity, and sustainability, while recognizing farmland as a geopolitical asset that strengthens Canadian sovereignty and security. And this is especially true in Ontario's Greenbelt.

The Greenbelt in the Greater Golden Horseshoe (GGH) is where many of these pressure points intersect. It is the line between urban expansion and the agri-food economy. It is where conservation meets population. It is where the need to feed the country meets the need for a place for those people to live. It is where Ontario's farming past meets its food technology future. It is where domestic food security meets a trade corridor to the world.
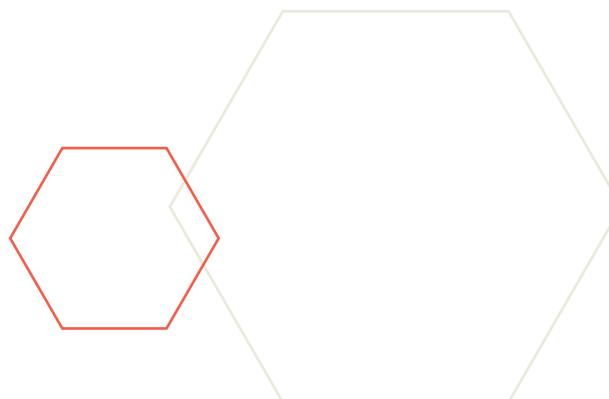
CAPI's recent work on Policies for Land Use, Agriculture, and Nature (PLAN) has focused on advancing policy solutions that address the pressures on Canada's agricultural land base while protecting farmland, preserving nature (and biodiversity) and promoting food security. This paper continues the work, exploring these issues and more in the context of a future vision for the Ontario Greenbelt to present a call to action to ensure its continued success in the future.

Key Takeaways

- **Ontario and its agri-food system have changed significantly in recent years with even bigger shifts expected over the next decade.** Population growth, the need for more housing, new land use policies, tariffs, and trade disruptions, increasing demand and food insecurity, and climate change are pressing challenges that must be addressed.

- **The Ontario Greenbelt is a strategic asset that drives growth and reduces risk in Ontario's significant agricultural economy.** It protects critical farmland, promotes local food, and addresses food security and can be leveraged to provide solutions to help Ontario grow in challenging times.

- **Farmland in the Greenbelt serves a high-value and thriving agri-food system** and food industry cluster that is an economic driver for Ontario. Recognizing the Greenbelt as an economic engine for the province could help drive investments that would mitigate risks and uncertainties.

- **Strengthening the Greenbelt can boost food manufacturing** and accelerate growth in an innovative sector that serves local and global markets and replaces imports.

- **The Greenbelt balances pressures from urban expansion that risk hindering the sector's productivity, growth, and food security.** But this balance is at risk. Strengthening capacity and collaboration in land use planning and decision-making can protect that balance.

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Introduction

The world is a very different place today than it was ten years ago. The pandemic changed society. The rules-based trading system that drove growth in Ontario has been thrown into disarray. The United States (US) Administration is working against the integrated North American economy, with tariffs on key industries.

Ontario's agriculture and agri-food system (AAFS) continues to be an engine of economic growth. It contributed $50 Billion to Ontario's economy in 2024 and nationally, where it represented roughly one third (36%) of Canada's total AAFS GDP.

But the sector is facing increasing local and global pressures from population growth, housing and labour shortages and higher land values. These pressures, along with higher costs for many businesses, and inflation and economic slowdown threaten the security and economic wellbeing of Ontarians.

Recent changes to provincial land use policies have also created uncertainty. The new Provincial Policy Statement (PPS) (2024) focuses on growth and housing supply while still protecting agricultural lands, yet increased flexibility for municipalities have altered the policy landscape and introduced less predictability (Caldwell, 2025).

This is the context in which the Ontario government will be reviewing its land use policies and the Greenbelt Plan. The paper provides the context in which the review is happening, describes the challenges and opportunities the Greenbelt provides Ontario and its agri-food system, and makes recommendations for how to move forward.

Given the positive role the Greenbelt plays in Ontario's success, the outcome of the review will have lasting consequences for Ontarians' ability to eat, work, and play in a strong, productive, and sustainable province.

Figure 1 The Greenbelt
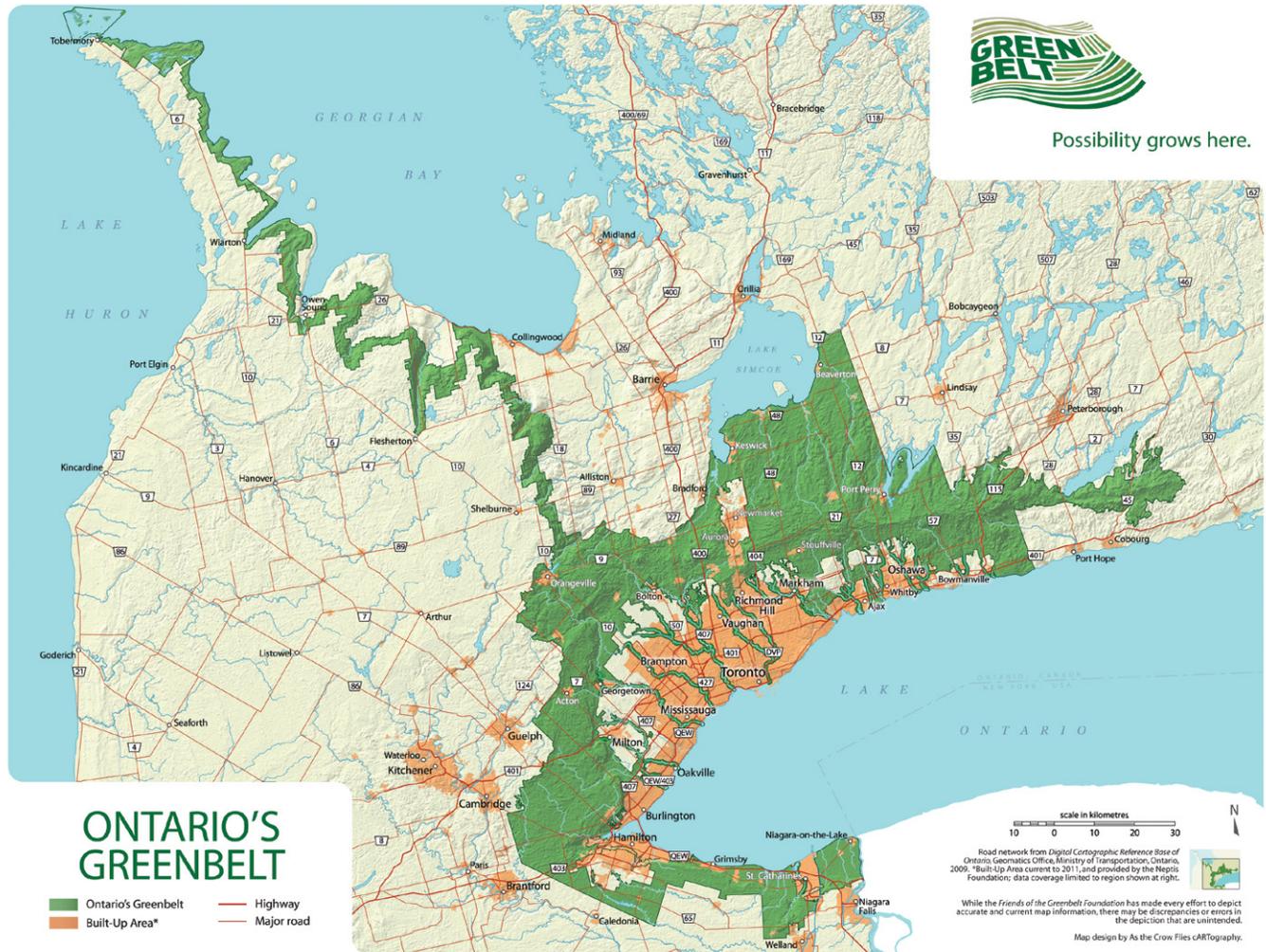
Source: Greenbelt Foundation

Changes and Challenges

Overview

The stable environment under which Ontario's agri-food sector operated was taken for granted in the past, but it cannot be taken for granted anymore. Supply chain disruptions, trade wars and more have reinforced how critical domestic food production is to economic and individual well-being.

Economic pressures have hit some Ontarians hard, with food insecurity and food bank usage increasing. There is growing awareness of the need to be able to produce more affordable food here at home, and the Greenbelt can provide a solution.

Trade Disruptions

While NAFTA, then CUSMA, and international trade helped Ontario boost its agri-food exports and enjoy levels of economic well-being not seen before, that growth is now more uncertain.

Many of Ontario's businesses are heavily integrated with supply chains in the US and agri-food is no exception. That integration has now changed from an asset to a liability, putting Ontario's economic growth at risk.

Population Growth

Population growth spiked in 2021, growing faster than in any other country in the G7, due to record-high immigration, including non-permanent residents.

At the same time, housing starts have not kept pace. This has been particularly true since 2021, when population growth exploded, especially in the GTA. Also, with the ability to work-from-home during COVID, many Ontarians moved to rural settings, driving up rural house prices, with impacts on housing availability for farm workers, who are already in short supply.

Skyrocketing house prices have impacted Ontarians ability to afford housing and other consumer goods (Angus Reid, 2024). This is contributing to a food insecurity crisis. According to FeedOntario, over one million Ontarians visited a foodbank between April 1 2023 and March 31, 2024, up 25% over a year earlier.

Protecting Farms and Farmland

Despite the pressures facing Ontario farmland, the Greenbelt and its policies have been successful at minimizing farmland loss.
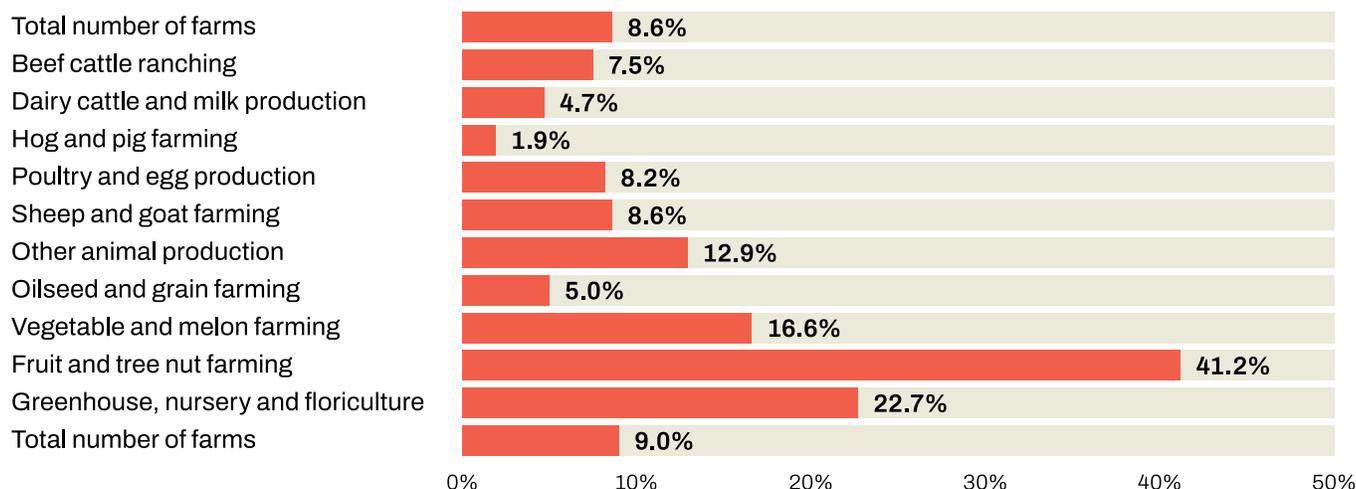
The loss of farmland is always a challenge, but it is particularly challenging in the Greenbelt, which accounts for around 6% of Ontario's farmland and is some of the world's best. Hence it will be important to ensure Greenbelt policies remain effective in the future.

Both population growth and demand for housing are impacting Ontario agriculture since both are putting upward pressure on land and farmland values. This is impacting the ability of young people to take over family farms or expand their farms for future growth.

In 2021, the number of farms in Ontario continued its downward trend, declining by 2.5% from 2016 and 15.5% since 2006. Land in the Greenbelt assessed as farming fell just 3% since 2006, as did area in crops, reflecting the success of Greenbelt policies in protecting farmland despite the pressures (MPAC).

There are several reasons for this farmland loss, including land being developed that was slated for growth before the Greenbelt Act of 2005 came into effect, marginal land being taken out of production that is no longer economically viable to farm, or lands used to build infrastructure, like highways, or set aside by a land trust or Conservation Authority for conservation purposes.

Figure 2 Share of Ontario's Farms in the Greenbelt

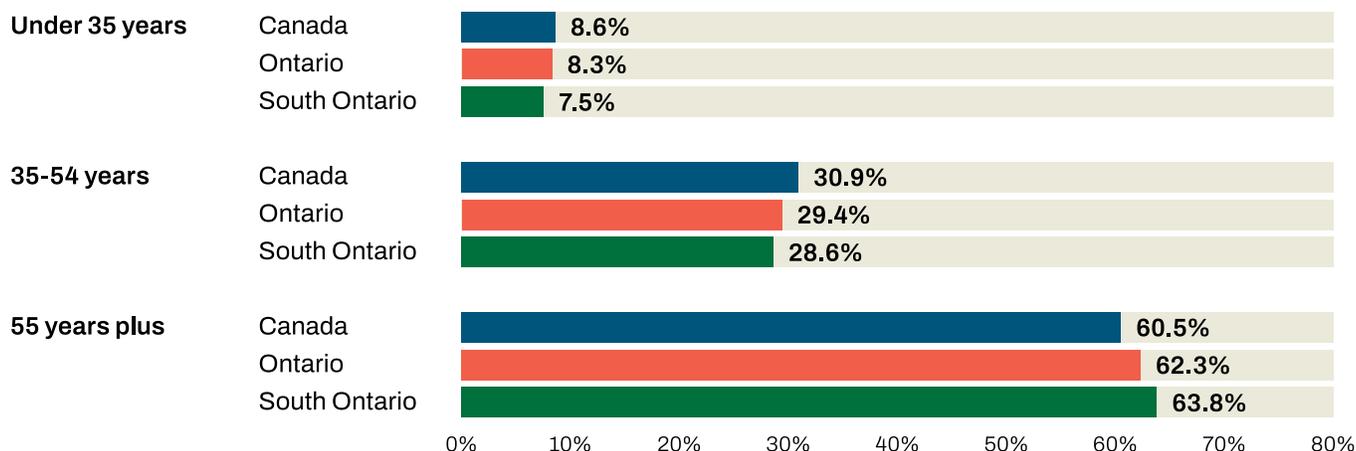| Category	Percentage
Total number of farms	8.6%
Beef cattle ranching	7.5%
Dairy cattle and milk production	4.7%
Hog and pig farming	1.9%
Poultry and egg production	8.2%
Sheep and goat farming	8.6%
Other animal production	12.9%
Oilseed and grain farming	5.0%
Vegetable and melon farming	16.6%
Fruit and tree nut farming	41.2%
Greenhouse, nursery and floriculture	22.7%
Total number of farms	9.0%

Source: OMAFA calculations based on Statistics Canada

The Greenbelt is home to diverse, high-value agriculture that cannot be replicated in other parts of the province. These farms produce everything from beef cattle, to hogs, sheep, grains and oilseeds, fruit and vegetables, grapes, and tender fruits in specialty crop areas such as the Niagara region, and greenhouse and nursery products (OMAFA).

Almost 9% of Ontario farms are in the Greenbelt (Figure 2). More specifically, it accounts for more than 52% of Ontario's fruit acreage, and over 10% of field vegetable acreage. Also 80% of acreage in grapes, peaches, plums, prunes and apricots, are found here, especially in the Niagara region with its locational (i.e., close to cities) and natural advantages and potential for future growth.

At the same time as the number of farms and the amount of farmland is declining, farmers are getting older, especially in Southern Ontario (Figure 3), a trend observed in the Greenbelt as well.

Figure 3 Farmers are aging in Southern Ontario

Age group	Region	Percentage
Under 35 years	Canada	8.6%
	Ontario	8.3%
	South Ontario	7.5%
35-54 years	Canada	30.9%
	Ontario	29.4%
	South Ontario	28.6%
55 years plus	Canada	60.5%
	Ontario	62.3%
	South Ontario	63.8%

Source: Statistics Canada, Census of Agriculture

Farm succession can often be challenging, but there are unique pressures in the GGH, including the Greenbelt. Record high land prices make selling to developers attractive but to other farmers, prohibitive (Farm Credit Canada 2025). This is the case even with Greenbelt policies that prohibit urban development in the Greenbelt, since this especially impacts the next generation of young farmers who want to enter farming or expand operations.

Ensuring succession and nurturing the next generation of farmers is essential. In fruit and vegetable growing regions of the Greenbelt, like Niagara, the share of farms with written succession plans, at 12.9%, is only slightly higher than the Ontario average (12.4%), implying more efforts are needed. Fortunately, Grower Associations in the region are proposing young grower programs and other initiatives to ensure future fruit and vegetable production (JRG Consulting, 2020).

Ever increasing farmland values will continue to discourage young farmers from entering farming, and while severing parcels to sell at high prices may be profitable, it leads to more fragmentation and conflicts.

Fewer farmers and more fragmented farmland mean fewer adjacent businesses and agri-food players that support farming, contributing to further declines, since all are key to keeping the sector viable and productive in the Greenbelt (Akimowicz et. al. 2016, l).

Prioritizing Housing Development

The political pressures created by population growth and housing shortages have led to more aggressive approaches by governments to encourage home building in rural settlements and urban areas of the province.

There are financial incentives for municipalities, including the federal Housing Accelerator Fund, which provided over $4 billion to transform land use planning. These changes include a push for urban densification so that Ontario will be able to meet its target of 1.5 million homes by 2031 (Protect Ontario by Building Faster and Smarter Act (2025)).

And while home building may be good for the economy and may help offset the impacts of tariffs on Ontario's economy, it is unclear what these changes mean for the future of Ontario farmland.

Benefits of the Greenbelt for Ontario's Agri-Food Sector

Preventing Development in the Greenbelt

One of the biggest challenges governments face is how to balance the pressures between agricultural, environmental and growth needs. Development and preservation can be two of the toughest to reconcile.

The *Greenbelt Act (2005)* achieves this by setting out where development should not occur. It permanently protects over 2 million acres of prime, productive farmland and natural features from development at the heart of the Greater Golden Horseshoe (GGH) in Southern Ontario (OAG, 20).

It is the world's largest greenbelt and preserves Ontario's valuable assets while also being home to farms, farmland and major food industry clusters (OAG, 18).

Despite pressures, the Greenbelt has not only protected farmland and natural landscapes, but it has also grown. Since 2017, the Greenbelt added 24,958 acres of land, while one-time mapping revisions made in 2015 removed 17 areas totalling 371 acres – a net increase of about 24,587 acres (OAG, 23). Caldwell et al. (2022) argues that the Greenbelt Plan had a positive impact on reducing rates of farmland loss in Central Ontario since 2005.

Evidence is available through recent mapping based on satellite data and municipal official plans that 79% of designated growth areas (62,598 hectares) are still available for development in the GTHA (As the Crow Flies Cartography, 2025). There is sufficient room for growth outside of the Greenbelt (Ontario Housing Affordability Task Force). A stable policy framework for protecting agricultural lands in the Greenbelt is necessary to ensure that farmers have certainty in the long-term use of lands for farming, which is critical for making investments.
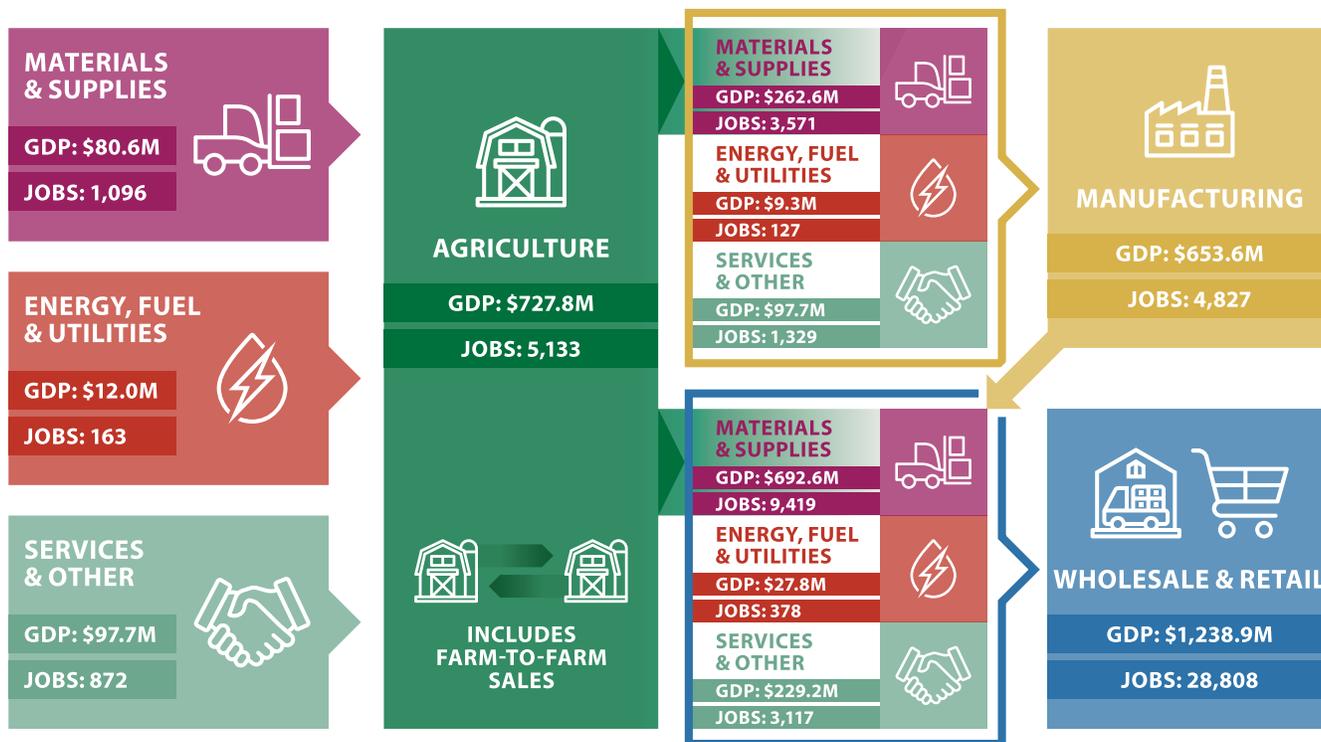
The Agriculture and Agri-Food System

The value of the agricultural land base and the "agricultural system" for economic growth and prosperity is reinforced in both the Greenbelt Plan (2017) and the Provincial Planning Statement (2024).

In 2024, the agriculture and agri-food system (AAFS) contributed $50 billion to Ontario's economy and AAFS employment grew by 4.4% since 2017, reaching 928,000 jobs by 2024. This growth occurred despite many businesses experiencing labour shortages. A recent study estimated that the AAFS in the Greenbelt generated $4.1 billion in GDP and 58,840 jobs in 2020 (Figure 4) (Greenbelt Foundation, 2021).

Figure 4 Agriculture's Contribution to the Greenbelt

TOTAL GDP: **$4,129.9M** TOTAL JOBS: **58,840**

MATERIALS & SUPPLIES
GDP: $80.6M
JOBS: 1,096

ENERGY, FUEL & UTILITIES
GDP: $12.0M
JOBS: 163

SERVICES & OTHER
GDP: $97.7M
JOBS: 872

AGRICULTURE
GDP: $727.8M
JOBS: 5,133

INCLUDES FARM-TO-FARM SALES

MATERIALS & SUPPLIES
GDP: $262.6M
JOBS: 3,571

ENERGY, FUEL & UTILITIES
GDP: $9.3M
JOBS: 127

SERVICES & OTHER
GDP: $97.7M
JOBS: 1,329

MATERIALS & SUPPLIES
GDP: $692.6M
JOBS: 9,419

ENERGY, FUEL & UTILITIES
GDP: $27.8M
JOBS: 378

SERVICES & OTHER
GDP: $229.2M
JOBS: 3,117

MANUFACTURING
GDP: $653.6M
JOBS: 4,827

**WHOLESALE & RETAIL**
GDP: $1,238.9M
JOBS: 28,808

Source: Greenbelt Foundation, 2021. *Understanding How Greenbelt Agriculture Feeds the Regional Economy*

Ontario's Food Industry Cluster and Investment

With over 5,000 food and beverage (FB) manufacturing establishments, Ontario accounts for 36% of the national total. Most are small (89%) family-owned businesses, producing niche products for the domestic market, but there are also large multinational businesses that serve domestic and global markets. 60% of Ontario's FB manufacturing capacity is found in the immediate vicinity of the Greenbelt. These businesses are part of a food industry cluster in the GGH that is the third largest in North America (Waterloo EDC, 2024) (Figure 5).

Figure 5 Food Industry Clusters
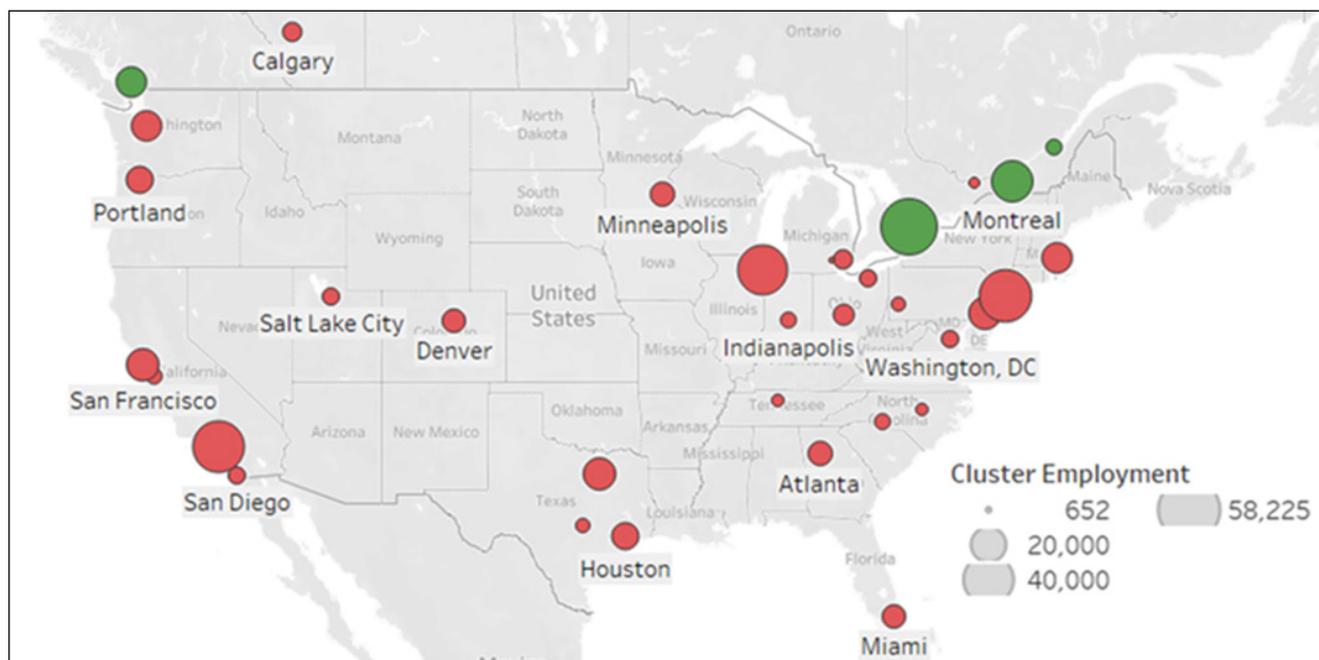
This region is ideally suited as a "true" food industry cluster (green) because it combines primary agriculture production, a large, specialized talent pool, institutions to innovate and develop skills, infrastructure to connect to global markets and a large consumer market within driving distance, as defined by Porter (1998).

Industry clusters drive innovation, productivity and new business growth and help businesses within the cluster to scale (Porter, 1998). The Greenbelt uses this food cluster approach to add extra value to Ontario agriculture and it continues to grow.

Ontario has seen significant growth in capital investments in FB manufacturing since 2017 (Figure 6). Ontario was a particularly attractive destination for European foreign direct investment given access to the US market.

Government programs including the accelerated capital cost depreciation, Accelerated Investment Incentives, and targeted programming helped secure investments which rose 71% between 2017 and 2024 to reach $1.3 billion. The investments in machinery and equipment (M&E) helped increase FB processing capacity and competitiveness in Ontario.

Figure 6 Capital Investment in Ontario Food and Beverage Manufacturing

Source: Statistics Canada

Plants M&E
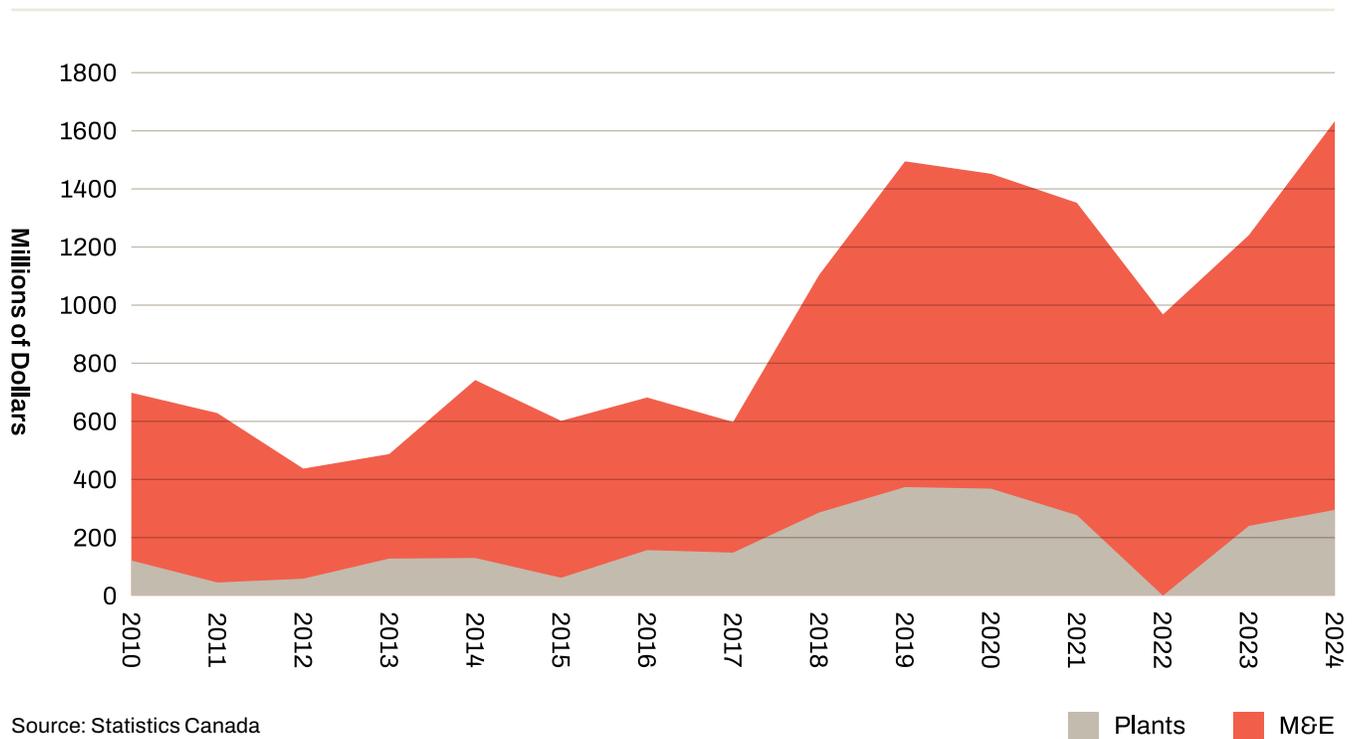
Export Growth

Investments have led to increases in exports as well. Ontario's agriculture and agri-food exports almost doubled between 2017 and 2024, growing from $15.5 billion to $28.3 billion (Figure 7). However, imports have also increased leading to an agri-food trade deficit of over $8 billion.

Looking at subsectors, Ontario had a trade surplus in products including hogs and bakery products, but was trade deficit in most other products, especially fruit and vegetables.

The highly integrated supply chains between Canada and the US mean that many of the imports are intermediate goods, which are further processed in Ontario and then sold as higher value products.

Ontario's agriculture and FB manufacturing sector has benefited from access to the nearby U.S. market, with 65% of agriculture exports, and 92% of FB exports headed there in 2024. The impact of tariffs on these exports has been minimal to date given exemptions under the current CUSMA trade agreement. However, uncertainty around a future agreement highlights the need for a new strategy for agri-food trade in Ontario and Canada.

Figure 7 Ontario's Exports of Agriculture and Agri-food Products

Source: ISED Trade Database Online
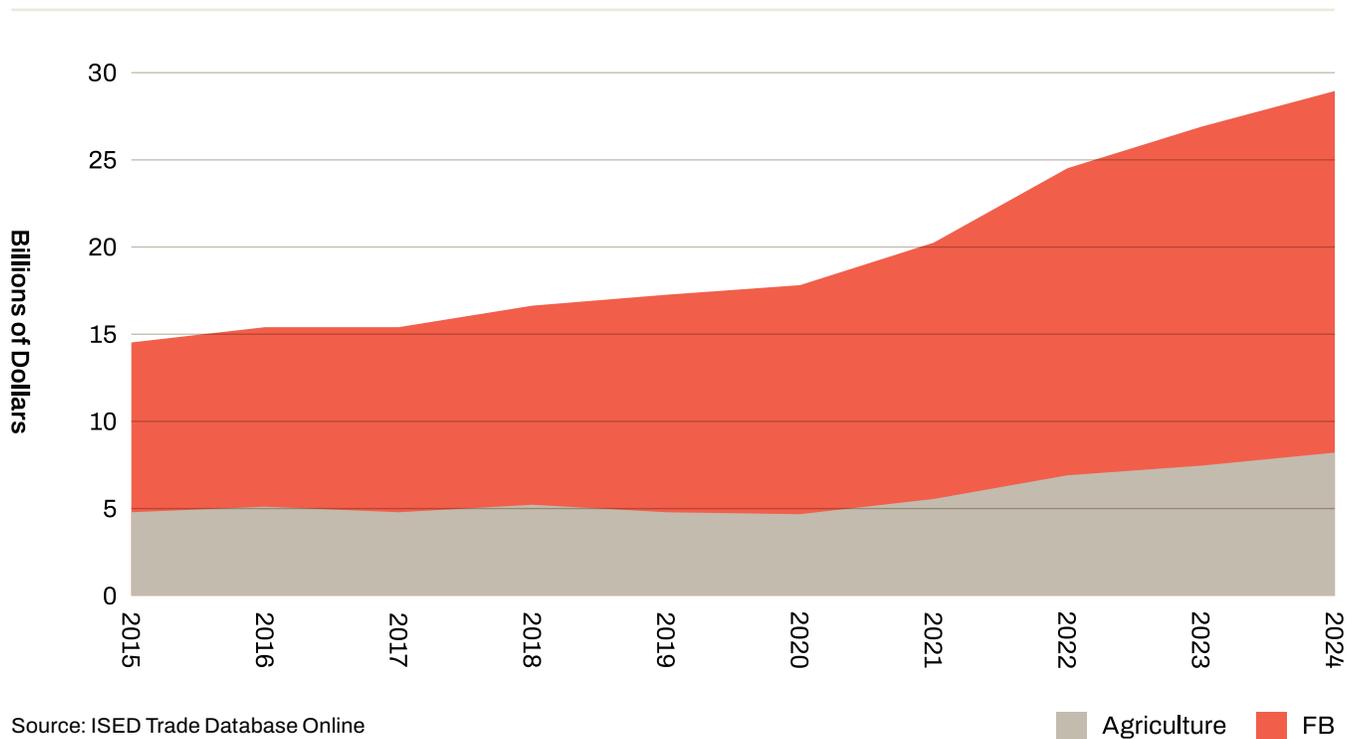
Increased Domestic Food Production

Ontario's growing population needs more than just homes. It also needs more affordable, accessible food. This need has been compounded by the income challenges facing Ontarians. In the past, imports were a safe reliable choice for meeting that need, but that choice comes with increasing risk. Being able to meet more of Ontario's needs domestically helps protect the people and the economy from these added risks. In this way, domestic food manufacturing capacity has implications for Ontario's food sovereignty and economic security.

Since 2012, the availability of Ontario's food products has increased, as measured by agri-food inflation-adjusted GDP per person, from $2.18 per person in 2012 to $2.45 in 2024.

At the same time, Ontarian's dependence on imports has fallen from 45% in 2016 to 40% in 2024. The presence of the Greenbelt which has helped protect farmland in Ontario, has played a role in maintaining a thriving agri-food sector, providing food for Ontarians, and driving down import dependence.

Preserving prime agricultural land in Ontario, and particularly in the Greenbelt near population centres, has helped Ontario meet food security needs, produce local food, and generate jobs and income.

A Future Full of Opportunity

Growing Demand for Local Food

The expanding urban population in the GGH on the doorstep of Ontario's Greenbelt will provide growing market opportunities for Ontario's agriculture and agri-food system.

While population growth adds to pressure on land use, it also creates opportunities. This growing urban population is increasingly embracing local food. Consumers are taking advantage of direct sales to consumers at local farmers' markets and roadside stands within the Greenbelt. Urban markets also provide access to fresh local food where it is not always available. These markets help address food deserts and food insecurity (e.g., Scarborough Fresh Food Pilot).

One of the positive consequences of the US Administration's trade war is that Canadians are increasingly looking for more Made in Canada options. There is a real opportunity to replace imports with locally produced food (Angus Reid, 2025).

A 2015 study estimated that Ontario could replace 50% of its imported food products with local food, amounting to an additional $20 billion in food sales given today's imports (Greenbelt Foundation, 2015). Fruit and vegetables grown in the Greenbelt region are a perfect candidate given ideal growing conditions, recent investments in greenhouses and cold storage facilities, and new varieties developed for this region. Policies that strengthen domestic production in the Greenbelt can play an important role in supporting this strategy, including support for local food production, distribution, and infrastructure.

Trade Diversification

Recent capital investments in Ontario's FB manufacturing sector have helped boost domestic production and exports. Future investments in AI and digital agriculture will only increase these opportunities.

However, a new reorientation is required, given tariffs and US trade disruptions. Ontario could benefit from more domestic east-west trade and by diversifying into international markets.

This will require new strategies, such as breaking down interprovincial trade barriers and investing in transportation infrastructure. These issues have often been on the back burner but are now at the top of the to-do list for governments across the country.

The Greenbelt can be the place where Canadian agriculture comes together to be exported to the world. Western grains, oilseeds and pulses, meat from central Canada and specialty crops all meet in the GGH where value is added and products are sent to markets around the world.

Quality of Life in the Greenbelt

The Greenbelt remains an important strategic asset in Ontario that protects farmland and natural assets and enhances the quality of life of the 10 million-plus citizens in the region.

The Greenbelt already provides high-quality local food, thousands of well-paying jobs, and a playground where Ontario can protect its natural heritage while embracing a future of growth and opportunity.
With a vibrant agriculture and agri-food sector and natural areas where people can explore, Ontario is well positioned to continue to improve the quality of life, food security, and economic well-being of its citizens.

Conclusion

The next decade will be full of change. No region of Canada may see more of it than the population-dense and productive agriculture-producing area of the Greater Golden Horseshoe and Greenbelt. Population growth and ecological productivity may increasingly seem at conflict, but the people and province will best manage the upcoming change if that conflict can be avoided.

The Greenbelt should be seen as an asset, rather than as a limiting factor to ensure the economy is strong, the agri-food system is resilient, and the province is able to take advantage of the opportunities in front of it.

This includes increasing food production for domestic and export markets. Growing the food processing sector has the potential to offset disruption in other manufacturing sectors. However, fully achieving Canada's and Ontario's agri-food potential will require a concerted push, but it ultimately starts with the ground that farmers farm on. Ontario's Greenbelt can be a cornerstone of an industrial strategy that builds on Ontario's strengths, including its rich fertile soil and agri-food cluster to generate a stronger, more resilient future.

This will require a delicate balance. There will always be the temptation to pave over the finite resource of prime farmland. The good news is that there are other options. With the right approach, engagement, and ambition, a better, more balanced approach can be found. Ontario will be stronger for it.

Recommendations

This report is a starting point for a dialogue on the future of the Greenbelt, providing a high-level overview of a set of complex issues and rewards. These recommendations can guide the future of the Greenbelt so it can continue to benefit Ontarians.

- Contribute to Canada's national food security by ensuring that Ontario's most productive and close to market farmland in, and around the Greenbelt, is preserved and stays in active production by prioritizing farmland protection at municipal and provincial levels.

- Protect Ontario in the face of economic instability and US trade disruptions and drive stable market rates for producers and affordability for consumers in Ontario.

- Incentivize connectivity and a critical mass of prime farmland, safe from fragmentation, to provide long-term business certainty and maintain economic viability of farms and support farm succession.

- Strengthen the future of Ontario agriculture by encouraging succession planning, especially in specialty and high value crops (e.g. fruit and vegetables) where there is potential to replace imports.

- Invest in local market development and infrastructure around the GGH to take advantage of interest in local food.

- Invest in the ag innovation ecosystem to support variety development and new products to meet evolving consumer demand.

- Raise awareness of the importance of agriculture and agri-food to the GGH and the province, including its role in economic growth, food sovereignty and addressing food insecurity.

- Facilitate a move toward value added exports and a more diversified export market.

- Facilitate greater collaboration between stakeholders and land use planners to boost clarity and coordination in decision-making under the new PPS, 2024 and Greenbelt plans and legislation.

- Develop an agriculture and agri-food strategy for Ontario that capitalizes on the Greenbelt as a strategic asset to meet the growing demand for local and affordable food and the Grow Ontario Strategy goal of 30% production and consumption of local food by 2032.

- Ensure Greenbelt policies remain effective in the face of emerging pressures over the next decade by addressing policy gaps and increasing awareness of the importance of the Greenbelt for Ontario's future productivity, growth, food security, sovereignty, and the overall well-being of its citizens.

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