



Possibility grows here.

Friends of the Greenbelt Foundation

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## **Request for Proposals Opportunities for Growth in the Fruit and Vegetable Sector in Southern Ontario**

### **Background**

Ontario's agri-food sector makes a significant contribution to the province's economy: in 2017, the sector supported 822,485 jobs—11.5% of total employment in the province—and contributed approximately \$39 billion to the GDP<sup>1</sup>.

Ontario also imports a lot of its food, with import values reaching \$27.3 billion in 2017, a 2.3% increase from 2016. As Ontario's exports were valued at \$14.9 billion in 2017, nearly half the value of its imports, the province was left with a trade deficit of \$12.4 billion. Fruit and nut and vegetable imports were especially high, valued at over \$4.2 billion and \$3.1 billion in 2017, respectively<sup>2</sup>. While at least some of those imports reflect seasonality of harvest and climatic factors, these imports happen throughout the year.

These data suggest there are significant opportunities for growth in the fruit and vegetable sector in the Greenbelt and across southern Ontario, which would result in economic benefits for the province. Research conducted by Econometric Research found that more than half of southern Ontario's imported food products could be produced within the province. If local production expanded to replace 10% of the top 10 fruit and vegetable imports, the Ontario economy would gain close to quarter of a billion dollars in GDP and 3,400 full-time jobs<sup>3</sup>.

The possibility of growth depends on a wide variety of factors on both the supply and demand side of the agri-food supply chain. Some obvious considerations include:

- Availability of a suitable land base (soil, climate, etc.) to expand production acreage;
- Financial risk/reward for farmers to invest generally in fruit and vegetable crops versus corn and soybeans, and specifically in perennial crops such as fruit trees;
- Costs of production in southern Ontario relative to costs of imported product;
- Availability of storage/aggregation facilities, distribution networks and processing capacity, and/or capacity to expand them; and

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<sup>1</sup> OMAFRA, "Economic Indicators" (2017), <http://www.omafra.gov.on.ca/english/stats/economy/index.html>

<sup>2</sup> OMAFRA, "International Trade Statistics" (2017), <http://www.omafra.gov.on.ca/english/stats/trade/index.html>

<sup>3</sup> Econometric Research Limited, *Dollars & Sense: Opportunities to Strengthen Southern Ontario's Food System* (2015).

- Potential changes in climate that could affect production (positively or negatively) in the region.

## **Purpose**

The Greenbelt is an important part of the agricultural economy in southern Ontario. Home to 750,000 acres of some of the most productive farmland in Canada, it contains nearly 53% of Ontario's fruit acreage and 11% of Ontario's vegetable acreage. Greenbelt farms are significantly more productive than farms in the rest of the province, producing an average of \$1,975 in revenue per acre compared to \$1,177 per acre for farms in the rest of the province. In addition to farming, the Greenbelt supports businesses throughout the entire agricultural and agri-food economy, as 60% of Ontario's food processing capacity is located within immediate vicinity of the Greenbelt<sup>4</sup>. Increasing fruit and vegetable production would continue to leverage and support the Greenbelt as a key part of Ontario's agri-food sector.

The Friends of the Greenbelt Foundation is interested in understanding the constraints as well as opportunities to expanding fruit and vegetable production in the Greenbelt/southern Ontario.

## **Scope of Work**

The project will involve looking at the opportunities as well as both the production and demand constraints for expanding production for up to five (5) fruit and vegetable crops. It is anticipated that it will require identifying where along their value chain there are challenges to increasing local food production, processing, and distribution, and ways to address those constraints, and where there are opportunities for growth. The geographic scope of the project will be southern Ontario with a focus on the Greenbelt.

The project will involve:

- Recommending specific crops to be considered given the consultant's understanding of the fruit and vegetable sector;
- Identifying the appropriate methodology(ies) to assess opportunities and constraints along the agri-food value chain, which is expected to include qualitative sources such as key informants (e.g., retailers, distributors, producers, organizations representing producers, and agriculture researchers), as well as data from the ConnectOn Agri-Food Asset Mapping Database, Statistics Canada Census of Agriculture, and OMAFRA;
- Proposing specific courses of action to turn the opportunities into reality and to address identified constraints;

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<sup>4</sup> JRG Consulting Group, *Agriculture Trends and Updates: Understanding the Greenbelt's Unique Advantages* (2018).

- Preparing a report documenting the methodologies used, findings from research including where there is capacity and interest along the value chain to expand fruit and vegetable production, and recommendations; and,
- Preparing and delivering up to 3 presentations.

In addition to working with Foundation staff, a small project committee will be established to provide input/advice at key milestones (e.g. selection of crops for the study, methodologies, and recommendations).

The successful team will provide:

- A work plan and timeline, which should clearly outline the methodology(ies) for conducting this analysis, and recommendations with respect to five (5) crops to be considered in the research;
- A survey/questionnaire for the key informant interviews;
- Report outline; and,
- Draft and final reports.

### **Proposal Requirements**

Proposals should include the following:

- A description of your understanding of the assignment, the proposed approach and methodology(ies) to implement the scope of work;
- A project timeline with touchstone meetings, research milestones, and estimated completion dates for deliverables;
- CV for the consultant(s) that clearly outlines their qualifications relevant to this assignment;
- Three examples of similar projects completed and references relevant to this assignment;
- A time/task breakdown by project team member (if more than one consultant); and,
- A proposed budget including reimbursable expenses as applicable.

The Friends of the Greenbelt Foundation reserves the right to choose any or none of the vendors responding to this request for proposals.

Any questions and completed proposals should be directed to:

Kathy Macpherson  
 Vice President, Research and Policy  
 Friends of the Greenbelt Foundation  
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**Proposals must be received by email no later than June 26.**