FOODBRIDGE TERRE À TABLE

Ontario Agri-Food System Sustainability: What We've Heard

May 2026

From late 2025 into mid 2026, FoodBridge engaged in many conversations about key issues and actors currently shaping Ontario's agri-food system sustainability. This work sought to listen to different perspectives, invite new relationships, and inform FoodBridge's approach to adding value to the existing ecosystem working on Ontario agri-food sustainability. This brief shares back key themes we heard in our (often quite diverse) conversations. **Thank you for speaking with us!**

Who we spoke to:

Ali English and Jackie Clark (EFAO); Alyssa Cousineau (ALUS); Angela Straathof and Heather White (Soils at Guelph); Bibek Dahal (P&H Milling Group); Bill Harvey (OMAFA); Bruce Taylor (EnviroStewards); Carly MacArthur, Jeff Pastorius, Vinicio Di Iorio, and Juri Gualandris (Centre for Building Sustainable Value at Ivey); Cheryl Appleton (Strategym); Christoph Wand (OMAFA); David Chambers (farmer in Chesterville); Diane Wolters (Everspring Farms/Ontario Cereal Industry Research Council); Eric Wood (City of Toronto); Evan Elford (OMAFA); Greg Vermeech (farmer in Tillsonburg); Jake Munroe (OMAFA); Jason Persall (Persall Fine Foods); Jenn MacTavish and Peter Katona (Agricultural Adaptation Council); Jennifer Doelman (farmer in Renfrew); Jo-Ann MacArthur (Nourish Marketing); Jo-Anne Rzadki (Conservation Ontario); Jonathan Zettler (Fieldwalker Agronomy Ltd); Laura Scott (OMAFA); Lauren Beerman (Gay Lea); Martin Strathoff (Ontario Farmland Trust); Nicole Mackellar (OSCIA); Norm Lamothe (farmer in Cavan); Peter Henderson (Ideovation); Shelly Petrie (Greenbelt Foundation); Taylor Stanley (Riverside Natural Foods); Thomas Bowers (Carbon Guild/Veresco); Tim Faveri (independent consultant); Tori Waugh (Ontario Soil Network); and Andersons Grain Traders. Our reflections were also informed by an Ontario Supply Chain Advisory Network discussion convened with the Ontario Soil Network.

What we heard:

A. Sustainability and Resilience Challenges

1. Environmental pressures are known but complex; progress is slow (or unclear).

Ontario's agri-environmental pressures are not new; lack of agricultural sector awareness is not the key issue. In addition to political, economic and demographic land pressures, thin province-wide outcome progress data limits coordination capacity. Across our conversations, we heard:

- **Water quality concerns**, especially nonpoint source pollution from nitrogen and phosphorus runoff into the Great Lakes, continues to be an ongoing landscape-level challenge. Capacity to measure and track outcome-level progress is thin.

- **Soil health concerns**: corn/soy production on marginal land, erosion, reliance on (over)application of inorganic fertilizer were all raised as concerns by soil specialists.
- **Biodiversity, wetland and farmland loss**, including urban expansion (ex. Greenbelt land use pressure) are frequently cited as complex sustainability challenges.
- **Ontario crop's climate risk exposure**: crop specialists worry that more weather variability will negatively impact productivity of important Ontario crop varieties (ex. grains).

2. Ontario field-based agriculture is 'locked-in' to current production patterns.

Commodity markets significantly shape Ontario agriculture land use practices. Commodity markets strongly incentivize short-term efficiency (volume-based production of a few crops) vs. longer-term diversity and soil resilience. We heard:

- **Payments based on yield mean yield remains the dominant metric for decision making** (vs. more nuanced focus on net profitability).
    - Our informants flagged that a focus on yield can override progress on beneficial management practices (BMPs). Ex. more corn residue from higher-yielding varieties resulting in increased use of tillage.
- **Heavy reliance on corn/soy rotations**, reinforced by livestock feed and biofuels markets.
    - ~30% of Ontario grain goes into provincially produced biofuels. Incentives for environmental service (carbon) payments in the biofuels market being passed on more directly to farmers are thin and complicated.
- **Mixed uptake of cost-share supported 'Beneficial Management Practices' (BMPs)**.
    - There are areas where practice adoption may have plateaued (ex. use of cover crops) and others where there is stronger cost-share uptake (ex. edge-of-field management and investments in precision application technologies).

3. 'Regenerative' transition ambition is impacted by current economic pressures.

Nascent 'regenerative agriculture' discussions in Ontario agriculture are intersecting with current geo-political uncertainty and federal market diversification priorities. Land costs and use pressures, tight farm margins, and trade uncertainty mean near-term progress depends on economically compelling practices and shared public-private financing models that can reduce or share risk, and deliver both farm-level and ecological value credibly. We heard:

- **Rising costs of production** driven by rising input costs (fertilizer, fuel) have tightened thin margins and depressed profitability. Window of opportunity for more precise applications.
- **High land prices and farm consolidation** continue to create barriers for new entrants and productivity pressure. Some informants are concerned this incentivizes more short-term corn-soy planting vs. making longer-term investments in diversifying crops (and markets).
- **Tariff and trade uncertainty** is heightening agri-food companies' sense of risk and reducing willingness to invest in sustainability-focused initiatives ('wait and see' strategy).
- **Push for market diversification** into European markets and European companies' investments in Ontario may create some pull for sustainability (vs. current US market).

4. Some barriers to on-farm practice change continue to be social (vs technical).

Informants frequently mentioned social factors that influence Ontario's agricultural practices. Understanding demographic changes across Ontario farming communities' nuances how 'farmer-to-farmer' theories of behaviour influencing work here in practice. We heard:

- **Cultural norms about collaborating vs. competing vary** across Ontario agricultural communities. Several informants remarked that Ontario is not widely considered to have a collectivist farming culture, though E Ontario is generally seen as having a slightly less competitive attitude towards farming (at least historically) than SW Ontario.
- **Aging farmer population potentially impacts willingness to experiment with new practices**. 'Next generation' of farm decision makers are coming into the sector, or attempting to, and what they will prioritize (land acquisition, markets, practices, technologies) is emerging, which will have implications for what supports are relevant.
- **Skepticism towards extension from institutions**: many discussions about disconnect between institutional research and on-farm realities ("farmers listen to other farmers").

2. Where the current system is under-delivering (unmet needs)

1. Misaligned/weak incentives for production transitions

- Dominant market systems reward yield and efficiency not improved environmental outcomes.
- Limited market signals that consistently support and reward more diverse (aka more complex) rotations and longer-term soil-building practices.
- Early-stage mechanisms to pay for environmental services are uncertain and fragmented.
- Business case for transitioning to more regenerative practices is not consistently clear.

2. Fragmented support ecosystem and weak coordination

- Ontario is described as a "busy implementer landscape" where existing agricultural organizations are challenged to stay relevant, useful, and secure funding.
- Many actors but challenging to coordinate efforts when funding is competitive.
- Ontario has distinct agricultural regions resulting in varying levels of funding allocation.
- No entity consistently plays a neutral, cross-value-chain coordination role, though some pockets of provincial public service and farmer-serving organizations are active in this area.

3. Intervention program design challenges

- Public-funded agri-food support programs are seen as complex and paperwork-heavy (ROI on applying for funding is not always strong for participants because time spent applying does not guarantee access to funding), but public funding programs are appreciated (/expected).

- Private-funded agriculture programs (ex. sustainability programs) are seen as straightforward to access, but producers wonder if new expectations are being created and future penalizations may be anticipated.
- Comments from food businesses about how sustainability may be messaged as 'pre-competitive' publicly, but internally often approached as a competitiveness issue.
- Data tracking cost, capacity, and farmer willingness to share data mentioned as on-going issues that affect ability to quantity environmental claims/track progress over time.

4. Skepticism & barriers to trust-building

- Sector fatigue with approaches to agri-food systems change: versions of "lots has been tried in Ontario already" or "we've been doing this for decades" are common to hear.
- Skepticism towards new programs and new entrant organizations.
- New concepts need credible farm/food business connections and to demonstrate results.

Where FoodBridge could add value in Ontario

1. Work to enable viable economic incentive models

- Build expertise in market-aligned mechanisms for rewarding regenerative practices.
- Design stacked and blended finance approaches that help advance 'who pays for what'.

2. Target high-leverage supply chain entry points

- Develop deeper understanding of regional supply sheds and value chains in Ontario.
- Understand and engage with drivers of mid-chain actors (grain buyers, processors, etc.).
- Identify and work to develop "win-win" market-based diversified crop opportunities.

3. Build and support collaborative action

- Facilitate sector working groups and place-based collaborations that can enable shared problem-solving on "no owner" challenges.
- Work to bridge/translate between 1) corporate demand ↔ farm realities and 2) policy frameworks ↔ field-level implementation.
- Help operationalize sustainability programs for companies that source from Ontario in practical, local terms.
- Be comfortable "learning in public" – creating room for others to weigh in on an emerging concept/approach *as its being developed* is more appreciated by other ON ag colleagues than under-communicating along the way (and becoming perceived as 'top-down').

Have more thoughts after reading this document?
We always welcome hearing from colleagues. Feel free to get in touch: info@foodbridge.ca