

1.10: THE IMPACTS OF COVID-19 ON CANADIAN AGRICULTURE AND THE AGRI-FOOD SECTOR

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RURAL INSIGHTS SERIES: COVID-19

THE INFORMATION INCLUDED HERE IS A SUMMARY OF CURRENT KNOWLEDGE ABOUT THE CORONAVIRUS DISEASE (COVID-19) AND ITS IMPLICATIONS IN RURAL CONTEXTS. THE STATE OF KNOWLEDGE WILL EVOLVE AS ADDITIONAL INVESTIGATION AND RESEARCH IS CONDUCTED, SO CONTINUOUS REVIEW OF REPUTABLE SOURCES AND WEBSITES IS ADVISED.

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DISCLAIMER:

The information included here is a summary of current knowledge about COVID-19 and its implications in rural contexts. The state of knowledge will evolve as additional investigation and research is conducted, so continuous review of reputable sources and websites is advised.

This report presents a high-level overview of areas of interest to key stakeholders and members of the Canadian Rural Revitalization Foundation and should be read as an exploration of challenges and opportunities that communities might consider as they consider their own unique circumstances.

Given the broad nature of the issues considered for this paper, individual communities and/or economic development professionals should take this paper as a preliminary starting point for their own investigations and planning processes. As such, this paper does not constitute specific recommendations for individual communities, and neither the authors nor the Canadian Rural Revitalization Foundation may not be held liable for any actions taken in response to this paper.

ABOUT THE CANADIAN RURAL REVITALIZATION FOUNDATION

The Canadian Rural Revitalization Foundation (www.crrf.ca) is a national charity that contributes to the revitalization and sustainability of rural Canada through collaborative research for rural leaders in the community, private sector, and in all levels of government. CRRF works to create credible insights and to improve our understanding of issues and opportunities that are of common interest to rural residents across Canada. Knowledge and better understanding are the fundamental pillars for the welfare of rural communities and environments.

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THE IMPACTS OF COVID-19 ON CANADIAN AGRICULTURE AND THE AGRI-FOOD SECTOR

KEY MESSAGES

- Impacts of COVID-19 to the agriculture and agri-food sector in Canada has impacted production, processing, distribution, and consumption patterns.
- Perturbations to agricultural sectors and supply chain entities do not occur in isolation of one another and subsequently impact the rest of the supply chain, thus impacting the access to a safe and secure food supply for Canadians, from the local, regional, national, and international scales.
- Responses for agricultural recovery to COVID-19 impacts require integrated and collaborative responses from government and non-governmental stakeholders at all different organizational levels to enhance the strengths of the Canadian food system.

RECOMMENDATIONS

1. Foster collaboration amongst all levels of government.
2. Support local government and local leadership.
3. Encourage open dialogue and learning amongst all players within the supply chain.
4. Recognize that agriculture and agri-food in Canada is a mosaic with a diversity of needs.
5. Recognize the importance of jobs and careers in agriculture and agri-food, and support education and training for new workers.

ISSUE

COVID-19 has had several economic and social impacts on rural communities and the sectors upon which they rely. These sectors include agriculture, food and beverage processing, fibre and fuel production, and their associated supply and value chains. Farm input suppliers, primary agricultural producers, food processors and manufacturers, food distributors, and food retailers were to proceed with business operations when other “non-essential businesses” across the country were ordered to close. These businesses are indeed essential - whether we recognize it, we are all impacted by the challenges posed to Canadian agriculture and agri-food.

While some initial research on the matter suggests that agricultural food production, processing, and distribution have successfully continued their operations with normalcy and resilience amidst the COVID-19 economic shutdown, this does not mean the sector is not facing its share of challenges. Some challenges impacting agriculture and agri-food include disruptions to supply chains and distribution networks, labour shortages, concerns for the safety of essential workers and workplaces, supports for local food production, and general consumption patterns. All of these impacts, as we will discuss, stem from the need to “stay home and stay safe.”

While we highlight these issues as separate from one another, it is easy to see how these impacts are interconnected and do not occur in isolation from other components of our local, regional, and even national food systems. Overcoming these challenges requires the cooperation and collaboration between all levels of government, industry, and community. The agricultural sector is diverse, requiring context-specific responses and innovative solutions to overcome the challenges of these unusual times. Rising to these challenges is a top priority to promote an affordable and secure food supply for all. The ways we have adapted to these challenges thus far will shine a light on the weaknesses and underappreciated strengths of the food system.

The following discussion will highlight the following impacts of COVID-19 on the Canadian agri-food sector: concerns over labour shortages in agricultural production, changes to distribution networks, impacts to the supply chain, and changing consumption patterns.

IMPACTS: PRODUCTION, DISTRIBUTION AND CONSUMPTION

CONCERNS OVER LABOUR SHORTAGES IN PRODUCTION

Agricultural production in Canada is mostly capital-intensive, allowing for the ability of farm operators to rely on machinery for production and harvest. A common exception is fruit and vegetable production in Canada, which is relatively labour-intensive. Labour recruitment for employers in primary agriculture throughout recent decades has proven increasingly difficult, and Canadian fruit and vegetable production is no exception. These shortages in labour demand have led to the need to rely on temporary foreign workers to overcome labour shortages and the establishment of the Seasonal Agricultural Worker Program.

In 2019, there were roughly 60,000 temporary foreign workers in Canada, most of whom were working in production or processing of fruits and vegetables. The recruitment of seasonal agricultural workers or labourers during COVID-19 presents challenges due to border closures, the inability or unwillingness to travel due to risk of contraction or spread of COVID-19, the need to physically distance while working, the significant costs and regulations associated with quarantine and accommodation needs, and protocols for worker health and wellbeing on the job. A shortage of farmworkers, both temporary due to illness, or lasting due to non-arrival, will have adverse effects on the production, harvest, supply, distribution, and import and export of both fresh and processed goods in Canada. The initial onset of travel restrictions to Canada due to COVID-19 had many producers of early-season crops, such as asparagus, worrying they would lose their harvest due to the delay in workers' arrivals.

CHANGES TO DISTRIBUTION

COVID-19 had led to several closures of "non-essential businesses" all across the country. Most industries involved in the production, processing, and distribution of foods were exempt from these closures. The temporary closures of other businesses, specifically those in the hospitality sector including hotels, restaurants, and conference centres, has impacted the rest of the supply chain as distribution networks had to adjust from supplying the hospitality sector to grocery markets and subsequently needed to re-allocate inventory. These changes to distribution were particularly challenging for perishable goods such as meats, dairy, poultry, and eggs, which needed to be sold relatively quickly compared to non-perishable goods. For example, eggs typically sold in cartons of 30 to hospitality were subsequently made available to consumers for purchase in many grocery markets. This outcome was also reflected in larger sized portions of chicken, which are often sold to restaurants but were made available in several grocery store deep freezers. Adjustments to distribution take time to accommodate and re-

allocate carryover of inventory. These adjustments, while manageable in the long run, have short term implications for the suppliers and consumers.

IMPACTS TO THE SUPPLY CHAIN

Much of agricultural production itself remains relatively unimpacted in the short term as many producers had already purchased the inputs needed to start the 2020 production season before the onset of widespread economic closure. There are a few unique instances, however, whereby the closures in the hospitality sector led to the need to dispose of excess supply or have raised questions about where to distribute goods. For example, closures in the hospitality sector led to a drop in demand for milk and other value-added dairy products, eventually leading supply-managed actors such as dairy farmers to dump raw milk across the country. While wasteful, farmers operating in supply-managed industries are partially protected against these losses, and the excess milk disposal is necessary for farmers and processors to adjust their productive capacity of this highly perishable good. This buffer allows for further adaptations in the supply chain, as processors and distributors simultaneously shift operations to account for this "new normal." On the contrary, some producers must use their means to adjust to changes in demand, such as grape growers of the Niagara Region, many of whom have lost local contracts with wineries due to limits on tourism and restaurant operations. Even the closures of meat processing plants due to COVID-19 outbreaks amongst employees, such as Cargill's plant in High River, Alberta have led to processing backlogs and losses to beef farmers in early April.

While the pandemic may have instilled public concern over food supply shortages, these stories show that this is not the case. The issue lies in distribution, and the need to adapt to these unique circumstances in a way where both consumers and producers can benefit.

CHANGING CONSUMPTION PATTERNS

Business closures, job precarity, and stay-at-home orders are shifting consumers' consumption habits as Public Health agencies across the country ask people to stay home to lessen the risk of exposure, contraction, and spread of COVID-19. Economic downturns have shifted consumers' budgets to the purchasing of mostly "essential" goods and services - any dollars previously spent in hospitality have likely been reallocated into at-home grocery budgets. Panic-buying and hoarding behaviour of products as either a response to public fear of a food shortage or a desire to lessen the frequency of grocery store trips has often led to reports of short-term shortages on supermarket shelves. The purchasing of frozen, processed foods and ingredients required for at-home-baking tended to be the food items which quickly cleared from grocery store shelves and freezers.

Curbside pickup, delivery, and online shopping are all expanding options to accommodate consumers and minimize the time and space needed for individuals to shop in-store safely. Adapting to new shopping “norms” are beneficial to not only help limit the spread of COVID-19 and continue safe and secure access to food, but they also help to keep essential workers who are stocking shelves and servicing stores, safe. Additionally, populations who may have a vulnerability to COVID-19, such as the elderly, may have turned to friends, family, and neighbours to run errands for them so that they may stay home safely, or take advantage of dedicated early shopping hours. Direct-to-consumer sales have also increased, including those from the beverage industry, such as craft breweries across the country now offering home delivery, or local farmers seeing a rising interest in farm-gate sales. These options help local producers connect with local consumers.

Although there are several challenges currently facing agriculture and agri-food as a result of COVID-19, a window exists to draw attention to the strength and importance of the agri-food sector, as well as opportunities to do better.

RESPONSES: RECOGNIZING THE ROLE OF FEDERAL, PROVINCIAL AND LOCAL STAKEHOLDERS

FEDERAL

The Government of Canada has made seasonal agricultural workers exempt from travel and border restrictions, as their contributions to our agri-food sector and supply chain are essential. To support labour in agricultural production which is impacted by COVID-19, the federal government is providing an additional \$50 million in support to farmers who are bringing in seasonal agricultural workers during the COVID-19 crisis. Specifically, employers are eligible for a \$1,500 subsidy per seasonal agricultural worker to help cover the expenses associated with wages, accommodations, and meals to have workers comply with the mandatory two-week self-isolation period upon their arrival in Canada. Safe and secure food supply is only as reliable as the health of the labour force supplying it, and the Federal investment for the welcoming of seasonal agricultural workers during COVID-19 is just one way of supporting this labour force. Despite the federal response putting support into place for self-isolation of workers, we are now seeing several outbreaks at farms that employ migrant workers across the country. These outbreaks illustrate the need to provide greater supports for migrant workers’ health, wellbeing, and integration into the community throughout the COVID-19 lockdown period, beyond what has been allocated to employers for the initial two-week period upon workers’ arrival.

Since 1966, seasonal agricultural workers have helped to fulfil needs for labour by participating in the production and processing of food in Canada's agricultural sector. While a topic of public debate, participation in the federal Seasonal Agricultural Worker Program provides an opportunity for migrant workers to support their livelihoods in their home countries. In recognizing a labour shortage in agriculture during a time when many Canadians have lost their jobs and are looking for work, the federal government is investing an additional \$9.2 million in the national Youth Employment Skills Program (YESP). This investment expects to fund up to 700 employment positions for Canadian youth interested in working in agriculture. Additionally, the federal government has opened the Step Up to the Plate - Help Feed Canadians employment resources website, which aims to connect interested workers to agriculture and agri-food employment opportunities. These responses, complementary to supports for the Seasonal Agricultural Worker Program, aim to help youth and others in Canada access employment during COVID-19, while simultaneously helping to fulfil labour needs in agriculture and agri-food across Canada.

PROVINCIAL

Several provincial governments have followed up with the federal YESP program to create online agriculture and agri-food job banks for Canadians. These examples include Alberta's Agriculture Job Connector, Agriculture and Food Jobs in Ontario, and British Columbia's Farm, Fish, and Food Job Connector. These portals give Canadians an opportunity, whether they are experiencing financial hardship or not, to gain career-related experience while contributing to their local economy and helping to feed their communities during these unprecedented times.

To accommodate those in agriculture and agri-food looking to capture the opportunity to take their businesses online in the wake of COVID-19, the Governments of Canada and Ontario, for example have launched the Agri-Food Open for E-Business initiative. The Initiative aims to assist agricultural producers, processors, and retailers in using e-business to create and expand markets to generate revenue, connect consumers to local food and create opportunities for future growth in light of responding to market challenges onset by COVID-19.

LOCAL

There have been several local initiatives and stories illustrating the advantage of government response efforts in supporting rural recovery and resilience when it comes to agriculture and agri-food. Farmers' markets, for example, were declared an essential service by provincial governments in Alberta, British Columbia, New Brunswick, and Ontario; however, farmers' markets, which rely on direct food sales, cannot operate under "business-as-usual" standards given the current circumstances. Many markets are exploring innovative solutions to connect farmers and consumers to local food, including

pre-packaged goods, delivery, drive-through, farm gate pickup, and virtual markets. [Farmers' Markets Ontario](#) is using the Agri-Food Open for E-Business initiative to support its vendors in transitioning to selling online. Some farmers' markets are even continuing their operations outdoors by adjusting setups to account for physical distancing requirements. The [Niagara-on-the-Lake market](#), for example, opened its season on May 23rd but restricted booths to food vendors only and followed strict physical distancing guidelines. In northern Ontario, an initiative to stabilize local food supply chains by residents resulted in the creation of a Facebook group, Farm to Table - Northern Ontario, that links producers with consumers. In partnership with researchers from the University of Guelph and other agri-food stakeholders, the producer information from this group has been translated into an [interactive map](#) that allows consumers to search within the database for farm products or producers within their district. These responses are essential for farmers who are not part of the corporate food system and utilize direct sales for provisioning their goods.

RECOMMENDATIONS

In order to overcome the challenges of COVID-19 within agriculture and the broader agri-food system, a number of recommendations are provided below:

FOSTER COLLABORATION AMONGST ALL LEVELS OF GOVERNMENT.

As this paper highlights, impacts to agriculture as a result of COVID-19 are integrated and interconnected, having ripple effects throughout the supply chain from farm to fork. As such, responses for rural agricultural recovery from the impacts of the pandemic require an integrated response from governments. There is a need to continue and enhance collaboration between federal, provincial, and municipal levels of government when it comes to addressing agricultural impacts of COVID-19. This collaboration includes consultation and partnership with local community actors, including producers, processors, suppliers, distributors, and consumers, and the agencies throughout various industries in the sector.

SUPPORT LOCAL GOVERNMENT AND LOCAL LEADERSHIP.

Local governments, public health units, and community groups are at the forefront of responding to the impacts that COVID-19 has had within their rural and agricultural communities. There are many cases where they have demonstrated local leadership in responding to the needs of communities during these difficult times. For instance, many farmers' organizations are collaborating with municipalities and public health agencies to collect, develop, and disseminate services, resources, and toolkits available to members of the agricultural community to support them in advancing their needs and operations

during the COVID-19 crisis. These governments and community groups should not be unsupported in these efforts by senior levels of government.

ENCOURAGE OPEN DIALOGUE AND LEARNING AMONGST ALL PLAYERS WITHIN THE SUPPLY CHAIN.

Trying times will highlight the strengths, weaknesses, and areas for improvements within our agriculture and agri-food sector. As emphasized, impacts on components of the supply chain will not occur in isolation. Identifying these strengths, weaknesses, and opportunities to do better will only come about with sound communicative and collaborative networks between players in the supply chain. While there are many obstacles facing agri-food as a result of COVID-19, there are also stories of triumph which we can learn from to adapt and innovate in these trying times. An open dialogue amongst players can help highlight lessons which we can apply to other areas of agri-food.

RECOGNIZE THAT AGRICULTURE AND AGRI-FOOD IN CANADA IS A MOSAIC WITH A DIVERSITY OF NEEDS.

Agriculture and agri-food in Canada are far-ranging. Regardless of form, scale, or size, there is a place for all types of agri-food businesses in the sector. Whether it is a processing plant that allows for distribution of meat at a national scale, or a local farm selling direct to consumers, the diversity in operations provides for the serving of a variety of needs amongst Canadian consumers - with or without COVID-19.

In recognizing that agriculture is diverse and has many needs, there is also a need to support alternative food networks. Alternative food networks, including farmers' markets, community-supported agriculture, or any markets outside of the conventional food system, provide another option for food access in communities that may have trouble otherwise accessing food in supermarkets. Supporting these alternative food networks means supporting these producers and processors who are provisioning accessible food to communities, even when pandemic-onset disruptions to distribution chains may leave some shelves empty in the supermarket.

RECOGNIZE THE IMPORTANCE OF JOBS AND CAREERS IN AGRICULTURE AND AGRI-FOOD, AND SUPPORT EDUCATION AND TRAINING FOR NEW WORKERS.

COVID-19 has highlighted an obstacle that has impacted Canadian agriculture and agri-food for decades - the need for labour. While many Canadians may be facing economic uncertainty, there is increasing attention paid to the opportunities that exist within agri-food. The possibilities are diverse, with jobs ranging from agricultural production, research, processing, agri-business, value-addition, food inspection, distribution, and plenty more. It is evident how vital the contributions our workers in agriculture and food are to feed our communities and growing our economies. Raising awareness and

encouraging more people to explore education and career opportunities in agriculture and food needs to continue, both during our fight against COVID-19 and after it.

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RURAL INSIGHTS SERIES: COVID-19

The information included above represents a summary of current knowledge about COVID-19 and its implications for economic resilience and recovery in rural contexts. The state of knowledge will evolve as additional investigation and research is conducted. Continuous review of reputable sources and websites is advised.

CRRF is producing a series of insight reports on key issues impacting rural communities as they face the challenges of managing the pandemic and look to future recovery. CRRF will be publishing reports through the *Rural Insights Series: COVID-19* on a rolling basis throughout 2020. Topics to be covered by these reports include (but are not limited to):

- Agriculture
- Rural Health
- Well-Being & Mental Health
- Employment & the Labour Force
- Local Economic Development
- Immigration
- Digital Divide
- Gender-Based Implications
- Localism & Supply Chains
- Islands
- Tourism
- Fisheries
- Mining
- Manufacturing
- Drinking Water
- Infrastructure Investment

Please visit www.crrf.ca regularly to access the *Rural Insights Series: COVID-19* as well as updates to emerging research and additional resources on the implications of COVID-19 for rural Canada.