Ecology Action Centre

Growing at Home

NOVA SCOTIA LOCAL FOOD AND AGRICULTURE REPORT

2025

AUTHORED BY

Vicki Madziak, Caitlin Skerratt and More Vail

CONTRIBUTIONS BY

Farmers' Markets of Nova Scotia, JustFOOD Action Plan

FARMERS' MARKETS of Nova Scotia

JustFOOD Action Plan for the Halifax Region

HALIFAX FOOD POLICY ALLIANCE

HALIFAX

REVIEWERS

Rebecca MacInnis - Farmer and National Farmers Union District Organizer

Dr. Phoebe Stephens - Dalhousie University

Introduction

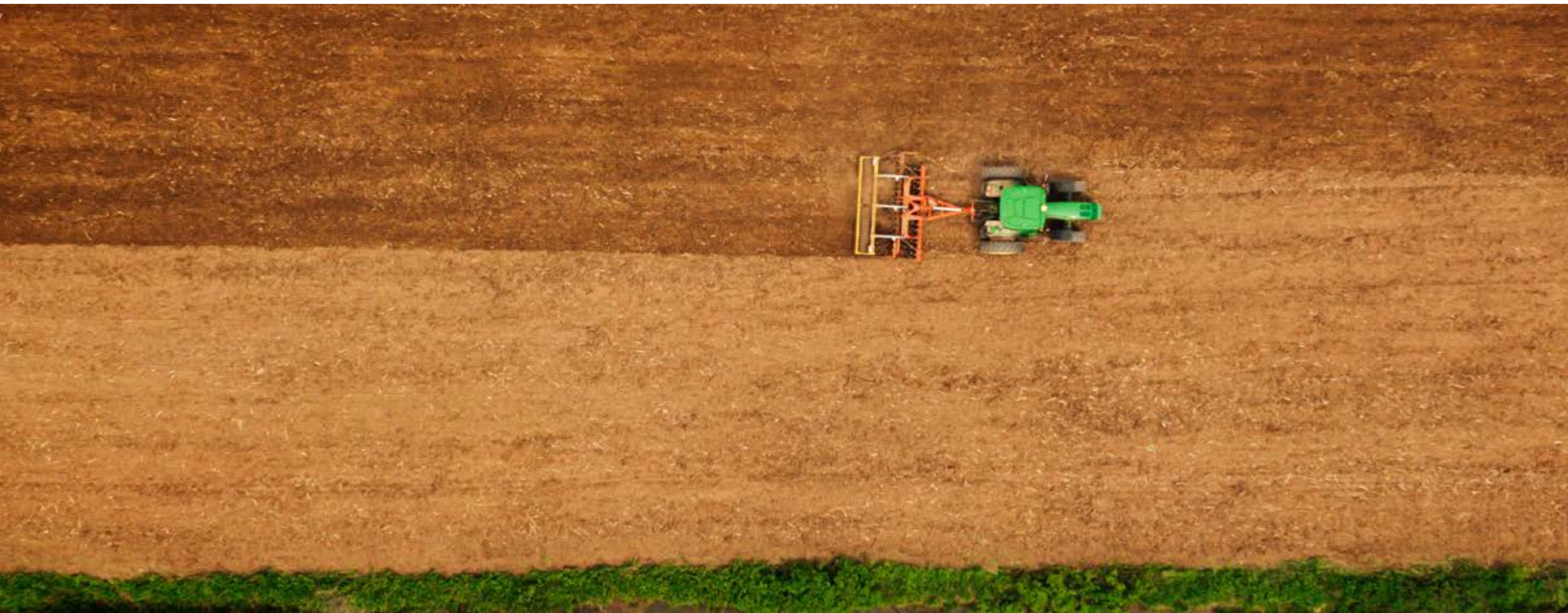
Nova Scotia has a rich history of farming and robust local food production and consumption. Prosperous local food and agriculture sectors are critical to ensuring that our region can meet the demands of an increasing population, while also supporting regional livelihoods.[1] However, worrisome long-term trends and current realities faced by farmers and local producers tell us that Nova Scotia's food and agriculture sectors are in a state of crisis.

For the purpose of this report we define 'local food' as food that is produced in Nova Scotia. We recognize that provincial food production is very much connected to the larger Maritime food shed, however due to limited regional data, our focus remains provincial.

Recently available data and research tell us that:

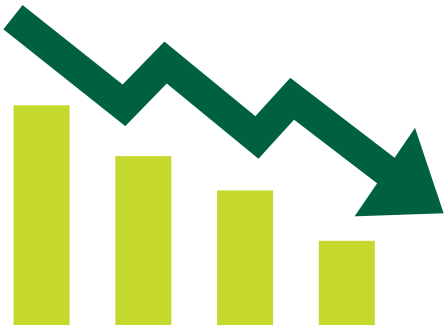
- Nova Scotia farms have, on average, been running a net total deficit since 2017, leaving farmers in a state of economic precarity;
- Nova Scotia is losing farms and farmland, while also having the highest average farm operator age in the country;
- Although Nova Scotia farm profit margins have grown in recent years, Nova Scotia farms had the highest provincial ratio of operating expenses to operating revenues in 2021, indicating that profit margins are comparatively low;
- Nova Scotia's production of food staples like vegetables, fruits, meat, and honey does not meet self-sufficiency needs, with rates as low as 4% for some products;
- Local food consumption rates are estimated at 14% as of 2023 data and have remained relatively stagnant in recent decades;
- Nova Scotia's rate of household food insecurity has increased 55.8% in the last five years to a record high of 29.3% in 2024.

Robust regional food systems and short food supply chains have significant economic and social benefits.[2] Supporting local food producers and fostering opportunities and demand for local consumption can positively contribute to regional economies and employment, keep dollars within our province, grow our local food infrastructure, increase food access and advance regional resiliency to stressors such as climate change and inflation.



State of the Industry

The Nova Scotia agricultural industry faces an array of serious threats, including labour shortages, recruitment challenges, rising operating costs, and shrinking profit margins.



21% ↓

Decline in **Nova Scotia** farms between 2016 and 2021

1.8% ↓

Decline in **national average** of total farms between 2016 and 2021

Data indicates that Nova Scotia is losing farms and farm operators at an unsustainable rate. Between 2016 and 2021, Nova Scotia saw the largest decline in farms across all Canadian provinces, losing 21% of its farms.[3] The national average for that same time span was 1.8%.

Although the reported losses are in part tied to a change in the Statistics Canada definition of a farm,[4] they can also be attributed to industry consolidation and declines in total farm acreage. Between 2011 and 2021, farm acreage in Nova Scotia declined by 29%[5]. During the same time span, the number of acres of land dedicated to crops declined by 12%. We are seeing less land under agricultural production and less land used for producing crops.

In 2021, the average wage of general farm workers and harvesting labourers was $15.00 per hour. In the same year, the average hourly wage of Nova Scotia employees was $26.09, and the average hourly living wage across Nova Scotia regions was $20.40.

Between 2017 to 2024, the total net incomes for Nova Scotian farms have, on average, been negative.[6] In 2021, Nova Scotia farms reported the highest provincial ratio of operating expenses to operating revenues, indicating that profit margins are comparatively low.[7] However, between 2015 and 2020, Nova Scotia's expense to revenue ratio fell by 4.9%, indicating that farm profit margins increased in this time.[8] Statistics Canada reported that farm families in Nova Scotia continue to depend on off-farm sources for two thirds of their family's income , as of 2021.[9] Together, this data

29% ↓

Decline in Nova Scotia farms **farm acreage** between 2011 and 2021

12% ↓

Decline in **acres of land in crops** during the same time span

tells us that farm incomes are precarious, farm profit margins are low, and many farmers must take on off-farm work in order to sustain their livelihoods.

As farm operators and workers are retiring or leaving the industry, there are fewer younger operators replacing them. Nova Scotia now has the highest average farm operator age in Canada (58.2 years), with the average age having increased by 14% between 2001 and 2021.[10]

Labour shortages continue to intensify, and it is predicted that Nova Scotia will face a shortage of 2,600 farm workers by 2029.[11] In 2021, the average wage of general farm workers and harvesting labourers was $15.00 per hour.[12] In the same year, the average hourly wage of Nova Scotia employees was $26.09,[13] and the average hourly living wage across Nova Scotia regions was $20.40.[14] Low farm labourer wages will continue to pose labour recruitment and retention barriers in the agricultural sector.

14%

Increase in the **average age** of Nova Scotia farm operators between 2001 and 2021

Temporary Foreign Workers (TFWs), or migrant workers, are increasingly filling labour needs in the agriculture sector. However, migrant workers frequently encounter unsafe and undignified work environments as governments fail to adequately enforce proper regulations. One report found that TFWs being paid by the hour did not always receive the same rates as Canadian workers doing the same jobs, even on the same farms.[15] Migrant workers in Nova Scotia can face dangerous working and housing conditions while also being shut out of public health care and additional social services.

Self-Sufficiency and Local Food Systems

In conjunction with farm and land loss over time, it raises the question where Nova Scotia will produce its food and who will produce it. Self-sufficiency is the capacity to meet food consumption needs with domestic or local production, and is a key benefit of having a strong local food system. A 2021 self-sufficiency analysis by the Nova Scotia Department of Agriculture indicated that provincial production of seafood, milk and dairy products, and eggs exceeded provincial consumption needs[16]. However, Nova Scotia's production of vegetables, fruits, grains and oilseeds, meat, and honey did not meet consumption needs. For example, Nova Scotia has a self-sufficiency rate of 8% for tomatoes and only 4% for pork.

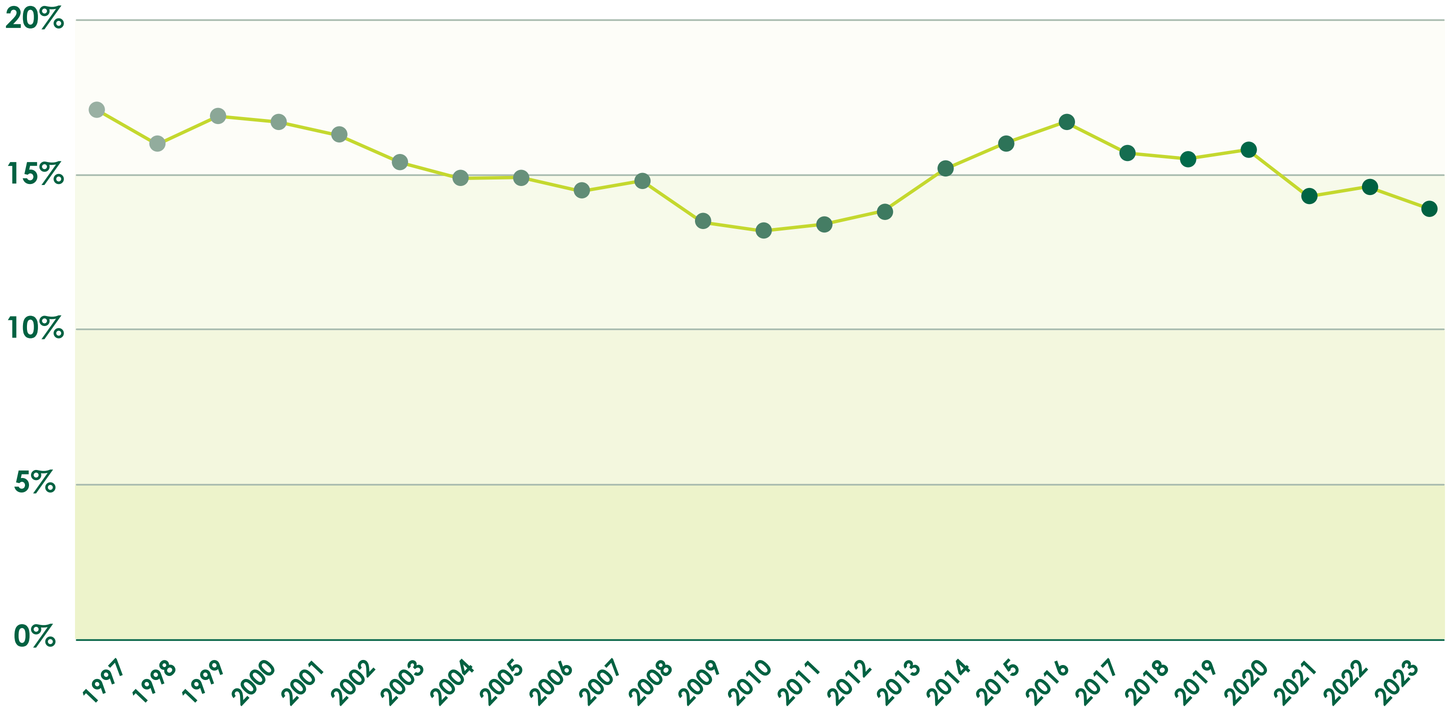
Low self-sufficiency ratios for many crops indicate that Nova Scotia continues to lack the capacity to feed itself, and that domestic production must increase for the province to become self-sufficient. Significant shortfalls in the reported local fruit and vegetable ratios are particularly concerning, indicating that the overall sufficiency for fresh, healthy food is likely low. We are in a time of increasingly unpredictable growing seasons and more frequent extreme weather events, further heightened by being a coastal region, making us more vulnerable to climate change impacts, such as flooding and erosion.[17] Increasing fluctuations in price and access due to economic and geopolitical disruptions also impact Nova Scotia's ability to feed itself and demonstrate the need to reduce dependence on vulnerable, long supply-chains.

A full Maritime self-sufficiency analysis is needed to assess the self-sufficiency of the larger region and to inform a wider understanding of Atlantic food flows.

Realities of Local Food Consumption

Using the same methodology developed in the 2010 *Is Nova Scotia Eating Local?*[18] report, it is estimated that 14% of the Nova Scotian food dollar went back to local farms in 2023, or that local food consumption rates are 14% (see Table 1 in Appendix). Farm cash receipts as a proportion of food spending provide a proxy for the proportion of our food dollar that goes back to Nova Scotia farms. While this provides an indicator of local food consumption, it is a high-end estimate, as total cash receipts for food include exported items and livestock sales, whose value cannot be determined or subtracted with available data. **Given this, it is likely that real consumption rates are even lower than those presented in Table 1.**

Figure 1: **Farm Cash Receipts as a % of Local Food Spending: A Proxy for Nova Scotia Local Food Consumption, 1997-2023**



If farm cash receipts grow relative to food spending, this would indicate more consumers are choosing NS-grown products, or a higher percentage of their food spending is going to local growers, or local growers are capturing a greater share of the price of food[18]. Unfortunately, this data shows stagnation, while total food spending itself is steadily increasing (see Appendix 1).

Rates of local food consumption do not appear to be changing significantly year over year. Between 2011 and 2023, Nova Scotia's total food expenditures increased by 60.5%, while rates of local food consumption in 2023 actually saw a 0.4% decrease when compared to the 2011 rate (*see Appendix 1*). While people are spending more on food, local food spending is not increasing proportionally.

Thus, the percentage of Nova Scotians' diets that is sourced locally has remained relatively unchanged despite the addition of a local food target under the *Environmental Goals & Sustainable Prosperity Act (EGSPA)* in 2012[19] and the legislation of a 20% by 2030 target in the 2021 *Environmental Goals and Climate Change Reduction Act (EGCCRA)*.[20]

Although the 2024 EGCCRA Progress Report states that between 27 and 34% of total food spending was on locally produced products in 2023-24,[21] these figures are adopted from a consumer perception-based study in which participants were asked to recall local food purchases in dollars or as a percentage of total expenditure over time.[22] Although the study provides important insight into consumers' perceived consumption of local food, the methodology cannot provide reliable estimations of local food spending.

Farm cash receipts as a proportion of food spending indicate that although estimated rates of local consumption peaked at 17% in 2014, they have since fallen back to 2011 levels. The absence of a clear upward trend suggests that stronger interventions are necessary to support local production, shift consumer patterns, and increase local consumption rates.

Local Retail Opportunities and Barriers

In 2022, as recorded in a Statistics Canada Survey on Local Food and Best Management Practices, an estimated 15.3% of Nova Scotia farms sold their products locally[23]. Of agriculture operations that sell locally, the most commonly cited rationales were (1) local food provides a higher margin compared to other market channels; (2) to improve food access to the community; and (3) to supplement or provide predictable income.

Respondents' most commonly cited challenges to selling locally were (1) regulations, red tape, or legal reasons, and (2) lack of resources. These barriers, in conjunction with the relatively low percentage of Nova Scotia farms that sell locally, indicate that we need to see an increase in the accessibility and viability of local market channels if we hope to encourage local food sales and consumption. A notable barrier identified in Nova Scotia is the lack of regional processing capacity in Nova Scotia, and that where there is processing capacity, it is often concentrated and/or access is restricted.[24]

Despite the opportunities and benefits of local food sales, Nova Scotia continues to prioritize the growth of its export markets. International exports of Nova Scotia-produced agri-food products increased by 6.9% in 2021, with half of these exports going to the United States.[25] While export economies present certain economic opportunities by providing producers with access to larger markets, they also heighten food system supply-chain vulnerability, where reliance on global markets increases susceptibility to external shocks.[26]

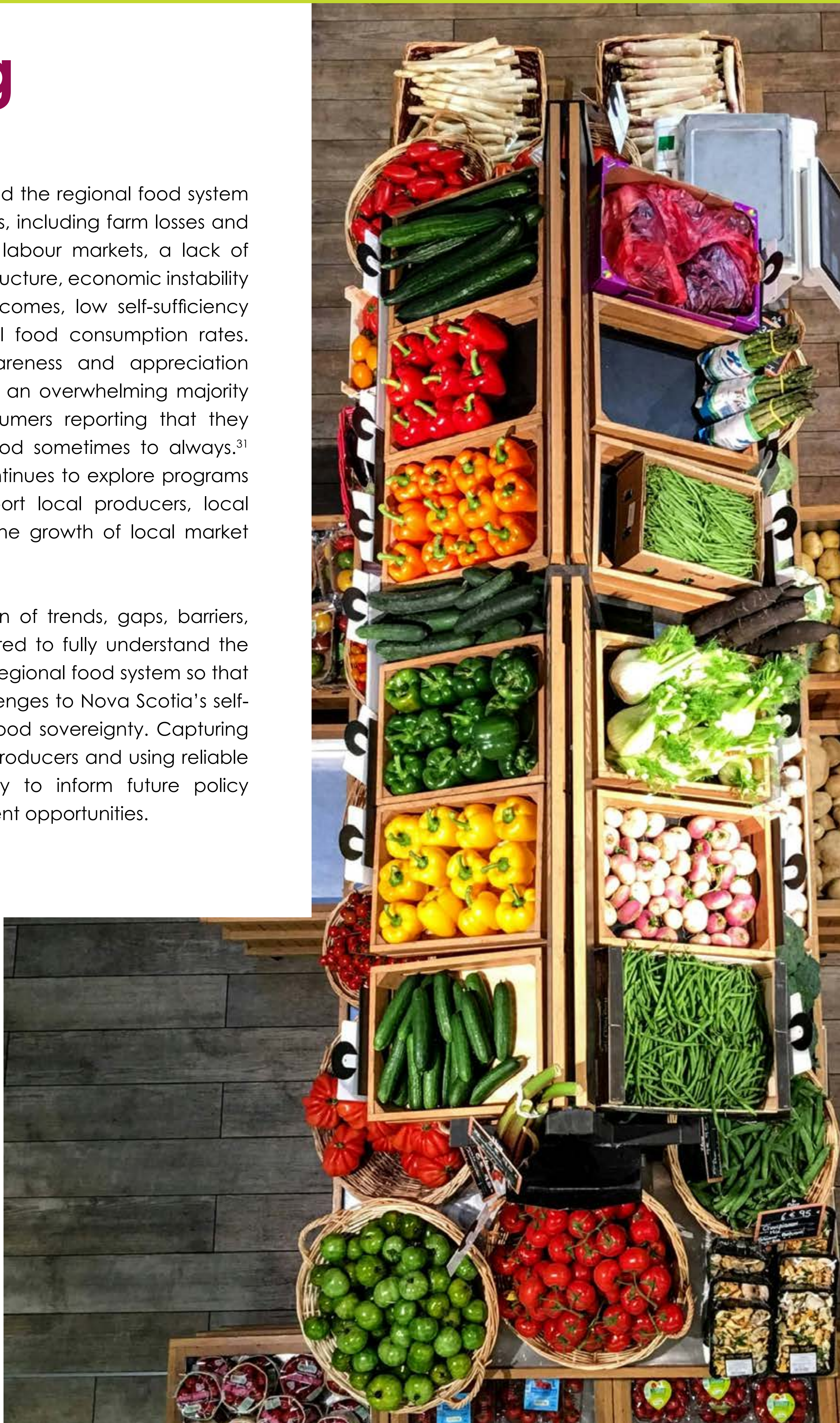
Supply chain vulnerabilities impact both producers and consumers. For example, consumers face increased market prices as a result of additional intermediary costs across the supply chain.[27] A recent Canadian pilot study found that select foods at mainstream grocery stores experienced greater price inflation than those at farmers' market between 2018 and 2023, suggesting that local food systems exhibit greater resilience than the industrialized, corporatized food system.[28] Direct market channels can allow producers to capture a larger proportion of profit that would otherwise be absorbed by intermediaries.[29] This highlights the role that local food markets can play in stabilizing food prices and strengthening food system resiliency.

While there are growing challenges facing our regional food system in Nova Scotia, local food actors are making successful strides. For example, Nova Scotia has seen a significant increase in the number of farmers' markets across the province. From 2004 to 2024, the Farmers' Markets of Nova Scotia cooperative's membership has grown from 11 farmers' markets to well over 40. Nova Scotia is now home to the most farmers' markets per capita in the country.[30] However, as demonstrated above, there are significant strides that need to be made on both the producer and consumer side to make full use of these direct retail channels.

Looking Ahead

Nova Scotia producers and the regional food system face significant challenges, including farm losses and consolidation, precarious labour markets, a lack of regional processing infrastructure, economic instability and non-viable farmer incomes, low self-sufficiency rates, and stagnant local food consumption rates. However, consumer awareness and appreciation of local food is high, with an overwhelming majority (86%) of Canadian consumers reporting that they seek locally produced food sometimes to always.[31] Likewise, the Province continues to explore programs and investments to support local producers, local food infrastructure, and the growth of local market channels.[32, 33]

A full-spectrum exploration of trends, gaps, barriers, and opportunities is required to fully understand the current landscape of our regional food system so that we can address the challenges to Nova Scotia's self-sufficiency and regional food sovereignty. Capturing the lived experiences of producers and using reliable data are both necessary to inform future policy interventions and investment opportunities.



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APPENDIX 1

Table 1: Farm Cash Receipts as a % of Local Food Spending: A Proxy for Nova Scotia Local Food Consumption, 1997-2023

YEAR	TOTAL NS FARM CASH RECEIPTS[2]	TOTAL ESTIMATED FOOD SPENDING IN NS[3]	FARM CASH RECEIPTS AS A % OF LOCAL FOOD SPENDING (A PROXY FOR LOCAL FOOD CONSUMPTION)
1997	$298,403,000.00	$1,746,579,000.00	17.1
1998	$293,612,000.00	$1,831,002,000.00	16.0
1999	$310,295,000.00	$1,837,253,000.00	16.9
2000	$325,384,000.00	$1,949,406,000.00	16.7
2001	$326,775,000.00	$2,006,850,000.00	16.3
2002	$318,693,000.00	$2,065,114,000.00	15.4
2003	$326,704,000.00	$2,190,928,000.00	14.9
2004	$335,824,000.00	$2,257,717,000.00	14.9
2005	$341,070,000.00	$2,353,486,000.00	14.5
2006	$348,684,000.00	$2,357,378,000.00	14.8
2007	$342,295,000.00	$2,542,456,000.00	13.5
2008	$350,228,000.00	$2,647,988,000.00	13.2
2009	$358,756,000.00	*[4]	-
2010	$359,957,000.00	$2,680,696,000.00[5]	13.4
2011	$398,586,000.00	$2,887,371,000.00	13.8
2012	$420,354,000.00	$2,757,288,000.00	15.2
2013	$434,243,000.00	$2,706,145,000.00	16.0
2014	$486,632,000.00	$2,920,126,000.00	16.7
2015	$461,961,000.00	$2,933,600,000.00	15.7
2016	$494,092,000.00	$3,182,491,000.00	15.5
2017	$490,022,000.00	$3,111,003,000.00	15.8
2018	$478,682,000.00	*[6]	-
2019	$521,332,000.00	$3,634,056,000.00	14.3
2020	$494,183,000.00	*	-
2021	$558,286,000.00	$3,828,462,000.00	14.6
2022	$623,314,000.00	*	-
2023	$642,474,000.00	$4,635,696,000.00	13.9
2024	$659,124,000.00	*	-

2 Derived by removing all non-food items such as furs, flowers, and Christmas trees from the table of Nova Scotia total farm cash receipts (Table 32-10-0045-01 Farm cash receipts, annual (x 1,000))

3 Derived by multiplying average household spending on food (fish/seafood spending removed) by the estimated number of households reporting. Using data from Statistics Canada Table 11-10-0222-01 and Table 11-10-0228-01.

4 * = Indicates no Survey on Household Spending data for that year.

5 Although the expenditure data collected since 2010 are similar to those of previous years, changes to data collection, processing and estimation methods have created a break in the data series. As a result, caution should be used in comparing SHS data since 2010 with previous years, unless otherwise noted.

6 Starting from 2017 reference year, the Survey of Household Spending (SHS) moved to a biennial survey.