

Safe and Local Food Supply Small Agricultural Holdings Viability Scan Final Report

Prepared For
Parkland County

Prepared By
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Ms. Shackel-Hardman:

RE: SMALL AGRICULTURAL HOLDINGS VIABILITY SCAN – FINAL REPORTING

We are pleased to present the Final Report for the small agricultural holdings viability scan. You will notice that we have addressed the four main areas that were discussed on the last call with you prior to the holiday season and look forward to your comments on those changes.

The growing interest by rural municipalities into fostering and developing this economic and community development sub-sector indicates the importance of this work. As was discussed in our first meeting, we focused our efforts on understanding the tax revenue and employment generating aspect of small holding businesses.

Yours truly,
Serecon INC.



Robert Burden, CVA, P.Ag., MBA
Edmonton Office

Enclosure

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Executive Summary

Purpose of Viability Scan

This study aims to provide Parkland County with clear recommendations on how to address the development of small agricultural holdings.

Parkland County is recognizing the growing economic and community benefits of encouraging the growth of a local food production system and associated agriculturally themed rural businesses. With the stated goal of providing employment opportunities and tax revenue generation, this study was commissioned to assess the current situation for small holdings businesses, review the existing available land base and regulations, and inform Parkland County's small holdings policy.

Summary of Findings

Based on interviews, assessments of existing small holding appropriate businesses, spatial analysis of the existing small holding land base, a regulatory review, and a market opportunities assessment, our findings are summarized in the following points:

1. There are over 15,000 acres on 3,015 agricultural small holdings parcels
2. Of the 54 existing small holding businesses identified, the average parcel size is 54.5 acres, and 20 of them operate on Country Residential parcels
3. It is important to consider small holdings businesses in separate categories, because of the significant differences in critical success factors
4. Significant seasonal and year-round employment is generated by all categories of small holding businesses
5. Of the small holding businesses assessed, only the agricultural input suppliers have a significant contribution to municipal tax revenue.

Conclusions

Our findings and analysis informed the following conclusions:

1. The agricultural land base in its current form has sufficient opportunities for small holding appropriate businesses
2. Small holdings support significant employment and increasing secondary economic benefits for the agriculture industry
3. Proximity to market and amenities is critical for agri-tourism businesses
4. Soil quality is more important than proximity to market for small holding businesses engaged in primary production
5. There are minimal regulatory barriers to small holding businesses

Recommendations

The findings and associated analysis provide the basis for the following recommendations:

1. Utilize existing small holdings and other agricultural land base to encourage growth in the emerging agri-food sector
2. Support emerging intensive food producers by encouraging alternative land access strategies and supporting market access support agri-tourism in targeted locations
3. Amend LUB to remove small regulatory barriers
4. Consider agricultural easements as country residential leakage mitigation for small holding subdivision applications

Project Context

Agri-food Industry Context for Parkland County

Agricultural businesses in Parkland County are mostly comprised of broad acre grain and oilseed production, cattle grazing, and forage production. Powerful drivers have influenced this configuration, including, but not limited to:

- technological incentives for increasing farm scale,
- globalized food trade driving production to shift to broad competitive advantages
- specialization as production methods become more technologically sophisticated.

There are powerful emerging drivers that are shifting this balance and enabling new opportunities in regional agriculture and food production systems. Increasing consumer interest in connecting to food, climate change, and COVID-19 are driving interest in localized, resilient food production as well as a desire to connect to the rural agricultural landscape. With the local food production system in the Edmonton area underdeveloped, there is strong interest in ensuring that unnecessary barriers to emergence are removed for businesses attempting to meet the demand for local food and experiences. There is also a growing interest in enabling agricultural business growth and diversification to overcome challenges to rural economic and social systems.

While the agricultural landscape is dominated by broad acre production, Parkland County also has a wide range of agricultural business activities that operate on a smaller scale and utilize unique market channels, diversify the broad acre businesses they are paired with, or provide a unique rural lifestyle for residents. This wide array of small agricultural businesses operates within agricultural and country residential land use districts and take place on a scale including full quarter sections all the way to parcels smaller than 20 acres.

Purpose of Report

The report aims to provide a coordinated strategic approach to enable the development of emerging and historically successful small plot agricultural opportunities. It has targeted opportunities to align with the goals of Parkland County to:

1. Generate employment opportunities for county residents
2. Generate tax revenue for the counties
3. Diversify the economies of each county with economically viable agri-food opportunities

Study Objective

The objective of the report is to answer the following question:

With the goal of adding tax revenue, diversifying the economy, and/or adding employment opportunities, how should Parkland County address agricultural small holdings?

Defining Small Agricultural Holdings and Appropriate Businesses

Context

Small agricultural holdings is a subjective term that depends on the relative agricultural scale. In a region focused on intensive vegetable production, the average field scale is very different from that in a region with broad acre crops and livestock. Parkland County's broad acre agricultural industry means in relative terms that small agricultural holdings are parcels smaller than broad acre cropping or grazing typically utilize.

Definition of Small Agricultural Holdings

Parkland County's current Municipal Development Plan (MDP, 2019) sets out subdivision guidelines for the *Prime Agricultural Area – Small Holdings* whereby subdivided parcels should be between 10 and 40 acres.

Based on a combination of this perspective and comparison to other jurisdictions, the interpretation in this report is that small agricultural holdings in Parkland County include:

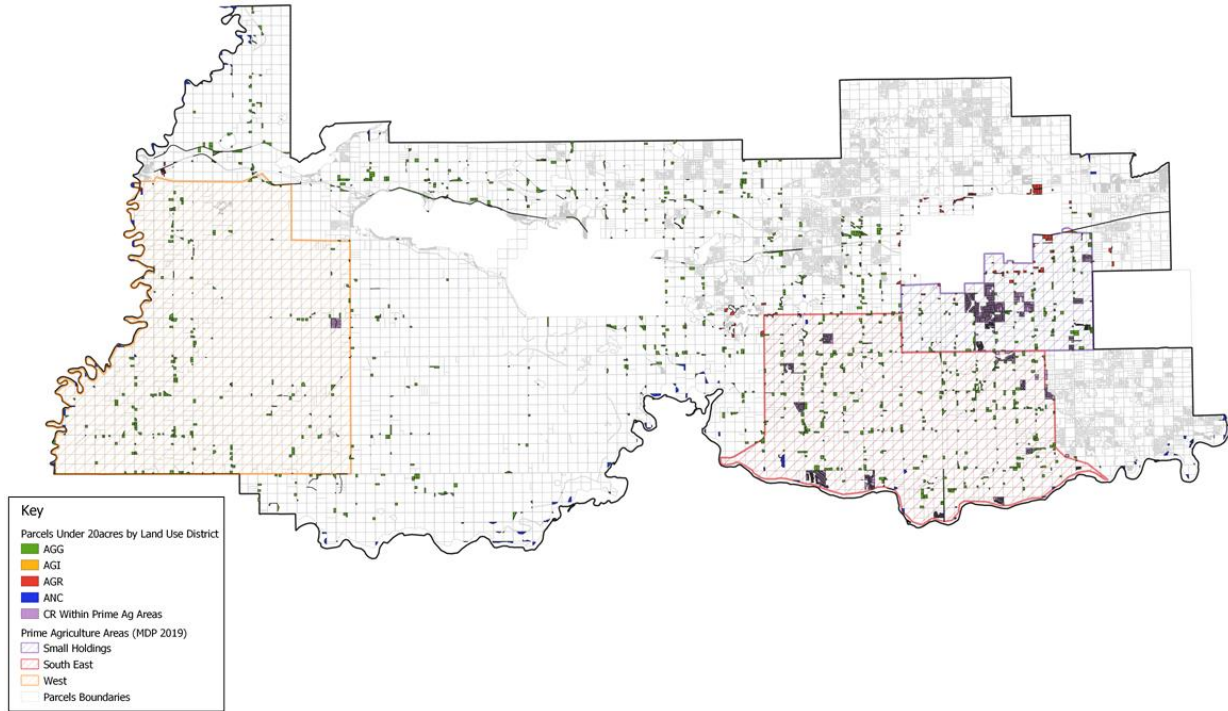
- All Parcels within the MDP (2019) designated Prime Agricultural Area – Small Holdings (4.2.4) that are 20 acres or smaller
- All Parcels within the MDP (2019) designated Prime Agricultural Areas – South East and West (4.2.2 & 4.2.3) that are 20 acres or smaller
- Parcels within Agricultural land use zones (AG, AGI, ANC, AGR) that are 20 acres or smaller

Table 1 outlines the number of parcels and total acres within each land use district that meet the above definition of small agricultural holding. Figure 1 below visualizes the distribution of these parcels across the County. Appendix 3 is a higher resolution visualization of the small holding dense eastern portion of Parkland County.

Table 1. Parkland County Small Holding Parcel Summary

Land Use District	Count	Total Acres
AGG	1,590	9,548.4
AGR	191	951.5
ANC	180	1,150.9
AGI	0	0.0
CR (Prime Ag)	1054	3643.8
Total	3,015	15,294.6

Figure 1. Parkland County Map of Small Holding Parcels by Land Use District



Hypotheses to Test

To inform the recommended actions for how Parkland County addresses agricultural small holdings, a few key components need to be assessed. We have framed these components as the following three hypotheses for the analysis to test:

1. Businesses appropriate for Small Agricultural Holdings require support in the form of bylaw considerations, property tax considerations, and/or infrastructure development.
2. Businesses operating on Small Agricultural Holdings provide tax revenue and/or employment benefits to Parkland County that justify supportive municipal action.
3. Critical success factors for Small Agricultural Holding-appropriate businesses include proximity to market and quality of soil (Proximity & Soil)

The current-state analysis and external case studies are used to test these assumptions, and provide clear direction as to where, or if, Parkland County may justify supportive action. These findings provide insights that are further integrated into a set of three recommendations.

Defining Small Holdings Appropriate Businesses

Defining a list of appropriate business types required an assessment of small holdings businesses that are currently operating in Parkland County, are operating in other parts of western Canada, and offer emerging opportunities potentially suitable for the Parkland County region. This task relied upon an extensive review of Parkland County's active businesses, a literature review of emerging businesses, and interviews with individuals knowledgeable about the emerging agricultural sector. To select businesses, criteria were first defined to provide a set of required conditions for a given business type to fit. To account for the broad range in businesses that fit these criteria, four categories were identified to help organize the many businesses.

Criteria

Start with defining criteria to judge appropriateness of a business:

- Agriculture-themed business
- Business that is viable¹ on a 20 acre or smaller parcel
- Business that requires proximity to agricultural land or landscapes
- Business that would not be suitable for a conventional commercial or industrial park lot

Appropriate Categories & Types

The following four categories of business, with specific types listed under each, fit the above criteria:

- *Production* means activities associated with the production of agricultural products for food, fibre, fuel, and other lawful uses
- *Value-Add* is "the addition of a process or service to an agricultural raw material being produced by the farmer (producer). This may include some form of processing (milling, drying, cleaning, sorting, slaughtering, distilling (winery), or direct marketing such as farm gate sales, farmer's markets or direct distribution)" (EMRB, 2017)
- *Agri-tourism* means tourism activities intended to attract visitors into agricultural areas to view and experience agriculture-based operations (Parkland County MDP, 2019)
- *Ag-Service* means commercial services of which core functions support or aid agricultural producers in their operations, or provide equestrian services

¹ 'Viable' is defined as a business that can provide enough income to finance the parcel cost with the residential value removed.

Table 2. Appropriate Agricultural Small Holding Business Type within each Category

Production	Value-Add	Ag-tourism	Ag-Service
U-picks*	Local Food Product* Aggregation	Equestrian Venues*	Equestrian Boarding*
Market Gardens*	Abattoir*	Agricultural-themed event venue*	Veterinarian
Specialty Livestock (not pets)*	On Farm food Packaging*	Agricultural-themed Activity Provider*	Ag-Input Supplier
Tree Nurseries/Garden Centre*	On Farm Processing/Packaging*	Agri-tourism Accommodation	
Cut Flowers*	Cannabis Processing (non-hemp)	Agricultural-themed Eating Establishment*	
Cannabis Cultivation (non-hemp)			
Medicinal Herb*			
Ministock - Insect Farming			
Fungiculture			
Aquaculture			

*Business types currently active in Parkland County as of December 2020

Most of these business types have existing examples in Parkland County, however a few of the types do not. These include insect farming, fungiculture, aquaculture, and agri-tourism accommodation. Insect farming and aquaculture opportunities are in a relative stage of infancy, with pioneering businesses determining the production, marketing, and product lines. Conventional mushroom operations have long been in operation in the Edmonton region, and are being joined now by specialty operations focusing on gourmet and medicinal mushroom production. While there are several bed and breakfasts scattered throughout Parkland County, there are currently none that market themselves as agriculturally themed.

Agricultural Input Suppliers are quite often situated within conventional industrial parks. It is advantageous for the business operator and their farmer clients for the supplier to be as close as possible to the agricultural landscapes, and it may also be preferable for a municipality. Time sensitive grain, fertilizer, and equipment movement has less potential for transportation conflict with other uses when situated within agricultural landscapes. This operating reality is being recognized by many rural municipalities including Parkland County, by including a form of industrial agricultural district into Land Use Bylaws.

Regulatory Review

Context

Agricultural small holdings and the businesses that are appropriate for them are a non-traditional land use that multiple jurisdictions are evolving their regulations to address. In addition to the provincial statutory North Saskatchewan Regional Plan, Parkland County also operates under the Edmonton Metropolitan Regional Growth Plan, and any applicable Intermunicipal Plans.

For this assessment, applicable regulations were limited to the Edmonton Metropolitan Region Growth Plan, Parkland County's Municipal Development Plan (MDP), and Parkland County's Land Use Bylaw (LUB). With some elements of the latest MDP not yet integrated into the LUB, particular emphasis was put on assessing the current status of the LUB with respect to small holdings and corresponding appropriate businesses.

Edmonton Metropolitan Region Board Growth Plan 2.0 (2016)

The Edmonton Metropolitan Region Board's Growth Plan 2.0 received Provincial approval in 2017 and is in the process of being implemented. Two of six regional policy areas strongly interact with agricultural businesses appropriate for small holdings and embed policies to support them. Policy area 1; Economic Competitiveness and Employment as well as Policy area 6; Agriculture both speak to support for diversification in the form of value-added food production, agri-tourism, and food manufacturing, packaging, and distribution. This is to be done by ensuring supportive infrastructure is available and by minimizing fragmentation and conversion of prime agricultural lands.

Policy Area	Policy	
Economic Competitiveness and Employment	1.1	<i>Promote global economic competitiveness and diversification of the regional economy</i>
	1.1.1	<i>Global economic competitiveness and diversification in the Region will be promoted by:</i> <i>j. promoting the growth and diversification of the agricultural sector related to food production, value-added activities, processing and distribution;</i> <i>k. identifying and promoting opportunities for tourism and recreation including planning and developing recreation corridors throughout and beyond the region</i>
	1.2	<i>Promote job growth and the competitiveness of the Region's employment base</i>
	1.2.2	<i>Employment growth will be accommodated in:</i> <i>e. on agricultural lands for agricultural purposes.</i>
Agriculture	6.2	<i>Minimize the fragmentation and conversion of prime agricultural lands for non-agricultural uses</i>

6.3	<i>Promote diversification and value-added agriculture production and plan infrastructure to support the agricultural sector and regional food system</i>	
6.3.1	<i>Value-added agriculture production and the diversification of the agricultural sector will be pursued by:</i>	<i>a. advancing food production, processing and distribution, value-added opportunities related to agricultural products and services;</i> <i>b. supporting manufacturing, packaging, shipping and distribution to wholesalers, agritourism, farmers' markets and urban agriculture;</i> <i>c. promoting diversification related to food production, processing, and distribution</i>
6.3.2	<i>Supportive infrastructure for the agricultural sector to sustain the regional food system, attract new opportunities and maximize investment to grow and diversify the sector will be pursued through the following measures, including, but not limited to:</i>	<i>a. maintaining and improving transportation access and facilities; and</i> <i>b. providing drainage and irrigation infrastructure</i>

Parkland County
Municipal
Development Plan
(2019)

Parkland County undertook a significant decadal review of their MDP in 2017 to account for changes in the current state of the County, changes in higher orders of legislation such as the EMR Growth Plan, and changes to the projected future growth. The review added a breakdown of three prime agricultural areas, one of which targeted the provision of small agricultural holdings to allow for flexibility targeting specialty and horticultural operations.

The 2017 review also added focus on value added initiatives with recognition of the flexibility needed for emerging agricultural opportunities. This flexibility is to be supported across the rural agricultural area.

A further update was approved in 2019 to address the goals of enabling tourism growth in Country Residential and Lakefront Residential areas. Though designated differently, the county-wide agricultural landscape results in the update's three identified prime tourism areas targeting agri-tourism as one type of tourism opportunity to be supported.

Section	Policy Area	Policy
Agriculture	4.1.3 Value-Added Initiatives	<p><i>a. Agricultural-based business, including agri-tourism, value-added initiatives and industrial agriculture, shall be supported throughout the Rural Agriculture Area</i></p> <p><i>b. The diversification and expansion of existing agricultural operation into emerging agricultural sectors shall be supported throughout the Rural Agricultural Area.</i></p> <p><i>c. The County will support flexibility in subdivision and development practises within the Rural Agricultural Area to meet land and development requirements for emerging agricultural sectors.</i></p>
	4.2 Prime Agriculture Areas	
	4.2.2 Prime Agriculture Area South East	<i>a. Prime Agriculture Area South East should retain large land parcels to support grazing and specialty operations such as grain and crop farming while promoting diversification and expansion into new agricultural sectors.</i>
	4.2.4 Prime Agricultural Area Small Holdings	<p><i>a. Prime Agriculture Area Small Holdings allows for flexibility of parcel sizes that allow for specialty agricultural operations and horticultural uses.</i></p> <p><i>b. Subdivisions in the Prime Agricultural Area Small Holdings should be between ten (10) and forty (40) acres in size.</i></p> <p><i>c. within the Prime Agricultural Area Small Holdings, a total of four (4) to six (6) parcels are allowed per quarter section.</i></p> <p><i>d. Rural Agriculture Subdivision - Residential is not supported within the Prime Agricultural Area Small Holdings.</i></p>
Tourism & Recreation Development	8.1.1 Supporting Recreation and Tourism Development	<i>b. Recreation and tourism development should benefit residents of all ages and abilities and be located in close proximity to transportation networks.</i>
	8.1.4 Agri and Eco-Tourism	<i>a. Agri-tourism and responsible eco-tourism is supported throughout the County as a way of supporting agricultural operations, promoting agricultural products, preserving natural areas, encouraging economic diversification and showcasing rural lifestyle.</i>
	8.2 Prime Recreation & Tourism Areas	
	8.2.2 Wabamun/Pembina	<i>a. Campgrounds, boating services, river tubing, pedestrian trails and parks, restaurants and hospitality use, as well as other recreation and tourism supportive uses, are encouraged to locate in Prime Recreation & Tourism Area - Wabamun/Pembina</i>
	8.2.3 Devon Dunes	<i>a. Campgrounds, pedestrian trails and parks, agri- and eco-tourism, value-added agriculture, hospitality uses, and other recreation and tourism supportive uses are encouraged to locate in Prime Recreation & Tourism Area - Devon Dunes</i>
	8.2.4 Great Waters	<i>a. Campgrounds, cabins, pedestrian trails and parks, equestrian facilities and other recreation and tourism supportive uses are encouraged to locate in Prime Recreation & Tourism Area - Great Waters</i>

Parkland County Land Use Bylaw (amendments consolidated last on June 19, 2020)

The Land Use Bylaw has varying development and use provisions for four separate agricultural land use districts. These are Agriculture General (AGG), Agricultural Industry Development (AGI), Agriculture/Nature Conservation (ANC), and Agricultural Restricted (AGR). Most agricultural parcels are designated Agricultural General, however there are a number of Agricultural/Nature Conservation parcels along the river valleys and a few Agricultural Industry Development and Agricultural Restricted parcels. Table 2 summarizes key subdivision parcel requirements for the four agricultural districts, as well as country residential (CR). CR was included because of the frequent existence of CR within prime agricultural areas, and the many small holding-appropriate businesses operating within the CR district.

Table 3. Parkland County LUB 2017-18 Agricultural Districts

District	Parcels Out	Min. Extensive Agriculture Parcel Size	Min. Horticultural Parcel Size	Max. Residential Parcel Size
AGG	3	16ha (40ac)	NA	4ha (10ac)
AGI	3	16ha (40ac)	NA	4ha (10ac)
ANC	1	64ha (160ac)	NA	4ha (10ac)
AGR	1	60ha (148.2ac)	16ha (40ac)	4ha (10ac)

Permitted and discretionary uses also vary depending on the agricultural district. Table 3 summarizes the status of all the land uses that correspond to the list of small holding-appropriate business types from Table 1. A summary of land use definitions is in Appendix 2.

Table 4. Parkland County LUB 2017-18 Permitted and Discretionary Land Uses

Land Use	Land Use District				
	AGG	AGI	ANC	AGR	CR
Abattoir	D				
Accommodation and Convention Services		D	D		
Apiary	P	P	P	P	D
Aquaculture	D				
Agricultural Support Services	D	P		D	
Bed and Breakfast Home	P		P	P	P
Cannabis Cultivation - Major	D	P			
Cannabis Cultivation - Minor	P	P	D		D
Cannabis Processing - Major		P			
Cannabis Processing - Minor		P			
Cottage Industry	D		D	D	D
Farm Vacation Home	P		P	P	
General Manufacturing and Processing - Indoor	D	P			
General Manufacturing and Processing - Outdoor	D	P			
Horticultural Use	D	P	D	D	D
Indoor Eating Establishment		D			

Outdoor Eating Establishment					
Outdoor Participant Recreation Services	D		D	D	D
Riding Arena	D		D	D	D
Tourist Campground - Destination	D		D	D	D
Tourist Campground - Enroute	D		D	D	D

Comparable Regulatory Review

The other three counties surrounding Edmonton provide useful policy comparisons for Parkland County. Each of them has a set of policies that encourage businesses appropriate for small agricultural holdings but do so with policies compatible to their specific economic and land use circumstances. Each of the approaches provides useful insight into alternatives Parkland County may consider in addressing agricultural small holdings.

British Columbia and Ontario have their own approaches for addressing small holdings in their agricultural land constrained provinces. Both have regions of agricultural land whereby development is strongly constrained, but where some agriculture activities struggle to thrive. These examples provide a useful comparison of approaches under differing land use pressures.

Leduc County

Leduc County's 2019 MDP update identified an eastern smallholdings agricultural area to provide for agricultural activities on smaller tracts of land. Subdivisions in this area are limited to no more than 3 per quarter section, only 1 of which may be a farmstead subdivision. Additionally, the "Subdivision of a smallholding shall be specific to the existing or proposed agricultural operation and shall be supported by a plan that describes the agricultural operation and its requirements" (MDP, 4.3.1.12)

In the most recent LUB, Leduc County has 2 agricultural districts: agricultural district (AG) and Agricultural/Country Residential Transitional District (AG/CR TR). Within both these areas and outside of the MDP's small holdings area, parcels of 40 acres may be considered when:

- "the land is low capability agricultural land,
- the subdivision would not compromise the orderly and economical conversion of the land for higher intensity development in the future in those areas where high intensity development is anticipated; and
- the County is satisfied that the subdivision is warranted to meet the special requirements of the agricultural industry in that location, and does not represent merely a large-lot country residential subdivision"

Strathcona County

Strathcona County's 2017 MDP (Consolidated in January 2020) identified small and large agricultural holdings areas to be handled with differing policies. The small holdings area has the stated goal of "providing opportunities for small holdings agriculture that supports livework, local food production, and local food distribution which respect the rural landscape and the environment." The policies that follow the statement include:

- *Prioritization of small holdings agriculture*
- *Limiting residential forms to single dwelling and associated accessory buildings*
- *Encouraging small, medium, and large scale agri-tourism where the land use district is consistent with the activity, it is compatible with adjacent land uses, and has infrastructure that meets municipal and provincial standards and regulations*

The small holding area in the MDP comprises a region districted in the November 2020 LUB with a distribution of primarily Agriculture General, Rural Residential, or Low Density Country Residential. Strathcona County does have a Small Holdings (RS) land use district in its LUB, however there are not many parcels currently designated RS, and so the County is constrained in its current ability to implement the small holding policy.

Sturgeon County

In contrast to the other three counties, Sturgeon County's 2014 MDP took a 'neighbourhood' approach that specifies policies for each of the identified 10 subregions. None of the neighbourhoods explicitly specify a small agricultural holdings area, however the agricultural dominant subregions "encourage Non-residential Type 4 Home Based Business (HBB)² that complement local agricultural activities (such as agri-tourism, value-added agricultural, and agricultural support services)".

BC Agricultural Land Reserve Small Holdings

British Columbia has the unique agricultural land challenge of having land that protected for agricultural uses that sometimes sits idle. With economic options for conventional farming not resulting in use, small holdings-appropriate agricultural uses are being held up as a viable alternative. A 2017³ analysis of Kelowna area agricultural land concluded that to enable emerging agricultural practises, barriers of entry for young and new farmers should be addressed. The author suggested that alternative land tenure, incubator farms, land linking, cooperative farming, farmland trusts, life estate leases and community farms all have individual merit, depending on the specific circumstances of the adjacent urban area.

² Type 4 Home Based Business (HBB) is not amended into the LUB. It is a new proposed category.

³ Agricultural Land Preservation and Urban Development in the New Fringe: A Case Study of Small Lot Farming in Kelowna, BC. Thesis submitted for Master of Arts, UBC. Edward Grifone. 2017

Ontario Prime Agricultural Land

The province of Ontario has protected agricultural lands within its designated greenbelt surrounding the Greater Toronto Area. Municipalities are required to designate and protect these prime agricultural lands, with minimum policy requirements provided in the *Guidelines on Permitted Uses in Ontario's Prime Agricultural Areas* document. Within prime agricultural lands, value added enterprises are encouraged that adhere to the following definition:

"On-farm diversified uses should be related to agriculture, supportive of agriculture or able to co-exist with agriculture without conflict. On-farm diversified uses are intended to enable farm operators to diversify and supplement their farm income, as well as to accommodate value-added and agri-tourism uses in prime agricultural areas."

As of 2018⁴, municipalities have been provided the option to enact a by-law applying a tax assessment subclass for small scale on-farm businesses where the land is used primarily to process, or manufacture something from a farm product or products that are produced on the land or on land used to carry on the same farming business. These subclasses are limited to parcels with assessed values below \$1M and must be within the farm property class prior to being entered into the new subclass.

Regulatory Review Summary

Encouraging emerging food and agricultural experience ecosystems around urban centres is attempted by many jurisdictions. Counties adjacent to the other three sides of Edmonton are attempting to include flexibility in subdivision and land use policy that enables agricultural diversification. Leduc and Strathcona Counties have done so by selecting a smallholdings area separate from the large holdings zone. Conversely, Sturgeon and Parkland are supporting small holdings in areas compatible with large holdings agriculture. All four of the counties are providing flexibility while attempting to limit the risk of small holdings leakage into country residential.

The British Columbia example shows that even when agricultural land is protected for production purposes, it can be difficult to encourage appropriate businesses. Innovative efforts to enable small holding agri-food businesses can overcome this difficulty if they are appropriate for the target community and economic circumstances.

Ontario has also worked hard to encourage on-farm diversification within an area of protected agricultural land. The province has done so by creating a new property tax sub class for on-farm farm product processing or manufacturing. Municipalities that choose to implement this by-law are then able to clearly define which value-add enterprises are appropriate for within agricultural land use districts.

⁴ Ontario Regulation 361/18, 2018.

Current State Analysis

Analysis Objectives

Consolidate insights from existing small holding appropriate businesses that enable testing of the 3 hypotheses, and provide direction regarding what strategy would best achieve the objective of generating employment, tax revenue, and/or diversifying the rural economy.

The three hypothesis tests are as follows:

1. Businesses appropriate for Small Agricultural Holdings require support in the form of bylaw considerations, property tax considerations, and/or infrastructure development. (Support Needed)
2. Businesses operating on Small Agricultural Holdings provide tax revenue and/or employment benefits that justify supportive municipal action. (Revenue & Employment)
3. Critical success factors for Small Agricultural Holding appropriate businesses include proximity to market and quality of soil (Proximity & Soil)

Methodology

The wide array of small holding appropriate businesses necessitates a separate assessment of each type. The analysis surveys each of the main business types operating in Parkland County by pairing the following two sources of information:

1. Interviews of existing Parkland County small holding appropriate businesses to acquire insights regarding their business needs that Parkland County may address.
2. Detailed business category assessment of each appropriate type which enables testing of the 3 hypotheses and summarizes direction on how to address the specific business type.

Interviews

Two business operators in Parkland County were selected to provide a specific look at critical success factors for their respective businesses. These interviews were included to provide insight into the current operating environment and into experiences with Parkland County regulations and officials, as well as to provide a check on the business category assessments in the second part of the current state analysis.

Interviews included the following questions:

1. Is a small agricultural parcel integral to your business model? Is there another reason you have chosen to operate on one?
2. What are critical success factors for your business? Proximity to market? Proximity to similar businesses? Soil Quality? Space for flexible growth?
3. Does your business generate employment opportunities for County residents?

	<p>4. Do you see any barriers to development of small footprint agriculture and agriculture-themed businesses that the County may address?</p>
Edmonton Corn Maze	<p>Dan Horneman and Jesse Kraay operate the Edmonton Corn Maze, which includes numerous activities tied to the maze, including a local farm product store. The following insights were provided:</p> <ul style="list-style-type: none"> • Aware of a couple of other businesses trying to get started – hops farm and wedding barn that have had some difficulties when operating under AGG, easier in CR • Location is critical for a business like the Corn Maze. Customer access and proximity to residential locations is important • It is appropriate to have some restrictions because too many businesses around country residential will raise concerns and conflict with neighbours. Clustering these types of agri-tourism businesses makes good sense • Reduce restrictions to business startup where appropriate, though the permitting process was found to be quite smooth for their operation
Rhodiola Rosea	<p>Travis and Carolyn Padgham operate a 10-acre medicinal herb operation as a part-time venture within Parkland County. The Rhodiola Rosea herb is a northern climate hardy plant that is processed in Thorsby, Alberta for tea and medicinal additives by the ARGO co-operative. A total of 200-300 acres are grown across Alberta with about 70 active full-time and part-time farmers. The following relevant insights were provided:</p> <ul style="list-style-type: none"> • The market is well established in Europe and Asia, and developing well in North America • Rhodiola is very hardy and drought resistant. A particularly good crop for many portions of Parkland County, though what has held back production is the inability to apply herbicide which results in an overwhelming amount of manual labour • Proximity to market, the highest quality soils, and irrigation infrastructure are not required for successful production
Interviews Summary	<p>The two interviews highlighted the differing critical success factors of agri-tourism and primary production small holding businesses. Agri-tourism relies upon access to population centres, while production in the case of Rhodiola Rosea requires access to appropriate land and determined emerging farmers.</p>

Business
Assessment
Summary

A survey of existing small holding appropriate businesses was completed by combining direction from Parkland County staff and website resources, Serecon team networks, and Parkland County social media local business networks. The parcel size, land use district, and tax assessment data were accessed using Parkland County's Discover Parkland online platform.

Businesses were grouped to reflect alignment of critical success factors and common business models into the following five categories:

1. U-Picks
2. Agricultural Themed Activity, Event, or Market Venue
3. Primary Production and On-farm Processing or Packaging
4. Tree-Nurseries/Garden Centre
5. Equestrian

For each grouping, relevant EMRB Growth Plan and 2019 MDP policies were summarized and paired with a table of land use classes that includes all the grouped businesses.

The information from the assessments, the Serecon team's industry knowledge, and interviews were condensed to summarize critical success factors, and test the three hypothesis tests from the *Defining Small Agricultural Holdings* section. There are included again for reference:

1. Businesses appropriate for Small Agricultural Holdings require support in the form of bylaw considerations, property tax considerations, and/or infrastructure development (Support Needed)
2. Businesses operating on Small Agricultural Holdings provide tax revenue and/or employment benefits to Parkland County that justify supportive municipal action (Revenue & Employment)
3. Critical success factors for Small Agricultural Holding appropriate businesses include proximity to market and quality of soil (Proximity & Soil)

The tests are followed by specific recommendations on how Parkland County may address small holdings in each of the business categories assessed.

Business Category Assessments:

U-Picks – Production/Ag-Tourism

A horticultural berry or vegetable producing operation that sells a portion or all its harvest to customers who pick their own product on the orchard or plot

EMRB Growth Plan:

Commitments are made to identify and promote the growth of food production and ag-tourism opportunities through the creation of recreation corridors.

Transportation, drainage, and irrigation infrastructure improvements for the regional food system will be pursued.

Land Use Bylaw Permitted and Discretionary Uses

Land Use	Land Use District				
	AGG	AGI	ANC	AGR	CR
Horticultural Use	D	P	D	D	D

MDP (2019):

Ag-tourism and emerging food production sectors will be supported through the rural agriculture area by way of flexible land use policy.

Tourism should be located close to transportation networks throughout the County as a way to support agricultural operations, promote agricultural products, and showcase rural lifestyle.

Number	% of parcels in CR	% of parcels in AGx	Median Parcel Size (acres)	Average Size of Plot (acres)	Commercial Land Improvement % of operations	Total Commercial Improvement
10	20%	80%	41.6	47.2	10%	70,000.00

Critical Success Factors

- Achieving market awareness
- Transportation and parking access
- Irrigation access

Hypothesis Tests

1. Support Needed – The large number of operations on parcels of varying sizes and varying proximity to market centres indicates that subdivision or tax support is not needed. The average parcel size and conversation with a regional haskap orchard owner indicates that parcels greater than 20 acres in size are needed for establishment and expansion.
2. Revenue & Employment – A small amount of commercial improvements provide minimal tax revenue as most investment is in irrigation, land, and equipment instead of facilities. U-picks provide some seasonal employment for products that are wholesaled and for site management.
3. Proximity and Soil – Proximity to market is a strong advantage for the u-pick portion of production but is hard to justify a higher land price for. Soil quality is important, but it is more important to have access to irrigation.

Recommendations:

1. Support U-picks by raising awareness through County communications and events.
2. Subdivision flexibility is not needed. Existing AGx and CR parcels of current sizes fit the needs of U-Picks.

Agricultural Themed Activity, Market, or Event Venue – Ag-Tourism

Venues or facilities that provide a service or sell agricultural goods in a manner that is agriculturally themed and tied to the agricultural landscape.

EMRB Growth Plan:

Commitments are made to identify and promote the growth of food production and ag-tourism opportunities through the creation of recreation corridors.

MDP (2019):

Ag-tourism will be supported through the rural agriculture area by way of flexible land use policy. Tourism should be located close to transportation networks throughout the County to support agricultural operations, promote agricultural products, and showcase rural lifestyle.

Land Use Bylaw Permitted and Discretionary Uses

Land Use	Land Use District				
	AGG	AGI	ANC	AGR	CR
Outdoor Participant Recreation Services	D		D	D	D
Cottage Industry	D		D	D	D
Tourist Campground	D		D	D	D

Number	% of parcels in CR	% of parcels in AGx	Median Parcel Size (acres)	Average Size of Plot (acres)	Comm. Land Improvement % of operations	Total Comm. Improv.
3	66	33	78.4	74.5	66	\$350,900

Critical Success Factors

- Proximity to population centres
- Adequate transportation access
- Avoidance of land use conflicts

Hypothesis Tests

1. Support Needed – There are gaps in the LUB for event venues such as weddings or conferences within AGx and CR districts.
2. Revenue & Employment - Commercial improvements are minimal with little municipal tax revenue generated. Significant seasonal employment is generated, and spinoff economic benefits arise from sales of local products and contracted services.
3. Proximity and Soil – Proximity to population centres and to an authentic agricultural landscape are critically important. Soil quality is not critically important as production related to the event or activity venue can be accommodated on mid-quality soil.

Recommendations:

1. Encourage the clustering of agri-tourism venues to minimize land use conflict, capitalize on high quality transportation infrastructure, and enable co-market development.
2. Amend AGx discretionary uses to include a land use compatible with agriculturally themed event venues.
3. Subdivision flexibility is not necessary as there are many available existing parcels of varying sizes within close proximity to the region's population centres.

Primary Production and On-farm Processing or Packaging – Production

Facilities that are closely tied to primary production and process and/or sell agricultural goods.

EMRB Growth Plan:

Commitments are made to identify and promote the growth of food production and ag-tourism opportunities through the creation of recreation corridors.

MDP (2019):

Ag-tourism will be supported through the rural agriculture area by way of flexible land use policy. Tourism should be located close to transportation networks throughout the County to support agricultural operations, promote agricultural products, and showcase rural lifestyle.

Land Use Bylaw Permitted and Discretionary Uses

Land Use	Land Use District				
	AGG	AGI	ANC	AGR	CR
Cottage Industry	D		D	D	D
Horticultural Use	D	P	D	D	D
General Manufacturing and Processing	D	P			

Number	% of parcels in CR	% of parcels in AGx	Median Parcel Size (acres)	Average Size of Plot (acres)	Comm. Land Improvement % of operations	Total Comm. Improv.
8	25	75	65.99	61.6	0	0

Critical Success Factors

- Market Access
- High quality soil
- Business skills necessary for growing an emerging business without well-defined development paths

Hypothesis Tests

1. Support Needed – The *Cottage Industry* land use category provides for small processing opportunities on small parcels and the *General Manufacturing and Processing (Indoor and Outdoor)* provide larger scale opportunities within AGG and AGI. Flexibility within AGx and CR land uses shows no needed subdivision or land use provision changes.
2. Revenue & Employment - Commercial improvements are minimal with little municipal tax revenue generated. Seasonal employment for commercial operations is significant.
3. Proximity and Soil – Proximity to market and access to high quality soil are both critically important. Proximity to market is valuable, however operating on lower priced land distant from population centres isn't necessarily a barrier to business development.

Recommendations:

1. Support land access efforts for emerging and new producers through conventional and alternative strategies.
2. Provide clarity for on-farm processors as to which on-farm buildings and developments will be considered non-farm and taxable at a higher rate.
3. Where possible, encourage clustering of businesses to make use of shared resources and complimentary products.

Tree Nurseries/Garden Centre – Production/Ag-Tourism

A tree, shrub, and ornamental nursery with on site sales of plants and associated gardening products. Complementary agri-tourism attractions sometimes included.

EMRB Growth Plan:

The promotion of job growth and the competitiveness of the Region's employment base is a priority.

Land Use Bylaw Permitted and Discretionary Uses

MDP (2019):

Ag-tourism and emerging food production sectors will be supported through the rural agriculture area by way of flexible land use policy.

Tourism should be located close to transportation networks throughout the County as a way to support agricultural operations, promote agricultural products, and showcase rural lifestyle.

Land Use	Land Use District				
	AGG	AGI	ANC	AGR	CR
Horticultural Use	D	P	D	D	D
Cottage Industry	D		D	D	D

Number	% of parcels in CR	% of parcels in AGx	Median Parcel Size (acres)	Average Size of Plot (acres)	Comm. Land Improvement % of operations	Total Comm. Improv.
9	67%	33%	12.3	39.6	44%	\$329,340

Critical Success Factors

- Proximity to Population Base
- Complementary Business Ventures – Commercial clients, residential clients, agri-tourism additions

Hypothesis Tests

- Support Needed – Operations exist near Edmonton, Spruce Grove, Stony Plain, and Devon. The long-time companies are on a wide range of parcel sizes with 6 of 9 operating on CR parcels. Continued growth in the operations indicate no support is needed.
- Revenue & Employment – Commercial improvements are minimal with little municipal tax revenue generated. Significant seasonal employment is generated.
- Proximity and Soil – Proximity to population centres is especially important. Soil quality is important for outdoor nurseries, but there are little limitations to suitable land throughout the County.

Recommendations:

- Tree Nurseries and Garden Centres do not require flexible subdivision or permitted use policies as there exists many options throughout AGx and CR districts.
- Support complementary agri-tourism ventures by raising awareness through County communications and events.

Equestrian – Ag-Tourism/Ag-Service

Equestrian services including riding lessons, boarding, riding arena, equestrian hospitals, and equestrian event centre.

EMRB Growth Plan:

Commitments are made to identify and promote the growth of food production and ag-tourism opportunities through the creation of recreation corridors.

Land Use Bylaw Permitted and Discretionary Uses

Land Use	Land Use District				
	AGG	AGI	ANC	AGR	CR
Riding Arena	D		D	D	D
Animal Health Care Services	D	D	D	D	D

MDP (2019):

Ag-tourism will be supported through the rural agriculture area by way of flexible land use policy. Tourism should be located close to transportation networks throughout the County as a way to support agricultural operations, promote agricultural products, and showcase rural lifestyle.

Number	% of parcels in CR	% of parcels in AGx	Median Parcel Size (acres)	Average Size of Plot (acres)	Comm. Land Improvement % of operations	Total Comm. Improv.
18	33%	67%	75.49	71.9	17%	\$549,980

Critical Success Factors

- Proximity to Population Base
- Access to Quality feed and Employees

Hypothesis Tests

1. Support Needed – Operations exist across the county on parcels ranging from 5 to 160 acres in size. Land use bylaws allow for riding arena's and barn throughout the rural area.
2. Revenue & Employment - Commercial improvements are minimal with little municipal tax revenue generated. Significant year-round employment is generated for equine handlers, trainers, and support staff. Local sourcing of feed provides significant secondary economic benefits.
3. Proximity and Soil – Proximity to market is important, though some equestrian service providers market their further flung rural experience effectively. Soil quality is not especially important, as pastures and forages grow well across most areas of the County.

Recommendations:

1. Support complementary agri-tourism ventures by raising awareness through County communications and events.

Agricultural Input Suppliers –Ag-Service

Fertilizer and crop production input suppliers, seed cleaning facilities, farm equipment dealerships.

EMRB Growth Plan:

Commitments are made to identify and promote the growth of food production systems including maintaining and improving transportation access and facilities.

Land Use	Land Use District				
	AGG	AGI	ANC	AGR	CR
Agricultural Support Services	D	P		D	

MDP (2019):

Agriculture-based businesses will be supported through the rural agriculture area by way of flexible land use policy.

Land Use Bylaw Permitted and Discretionary Uses

Number	% of parcels in CR	% of parcels in AGx	Median Parcel Size (acres)	Average Size of Plot (acres)	Comm. Land Improvement % of operations*	Total Comm. Improv.
3	0%	100%	16.26	14.2	100%	\$5,340,900.00

*and Machinery and Equipment (M & E)

Critical Success Factors

- Proximity to Agricultural Land Base
- Access to Skilled Labour

Hypothesis Tests

4. Support Needed – The three operations within Parkland County are all within the Meridian Industrial Park which is designated as AGR land use district. AGR and AGI provide adequate land use bylaw provisions for
5. Revenue & Employment - Commercial improvements are significant with considerable municipal tax revenue generated. Significant year-round employment is generated for mechanics, technicians, operational, and sales staff.
6. Proximity and Soil – Proximity to market is very important for both the businesses and the farmer clients. Soil quality is not important as a suitably prepared industrial parcel provides the best site.

Recommendations:

1. Support agricultural input suppliers by providing adequate AGR and AGI lots with high quality transportation access in suitable agricultural industrial sites.

External Case Studies and Insight

Purpose

With Parkland County being just one of many jurisdictions seeking to address small agricultural holdings, it is important to pair the current state analysis with a short survey of external case studies. Two farmers with strong experience operating their own horticultural operations in Alberta and contributing to local food sales channel development were selected to provide their valuable insights. Alberta's Young Agrarians input was also included because of their organization's focus on enabling young and new farmer development through innovative business models. This specialized knowledge and connection to farmers across the province provided useful insight for Parkland County.

Interviews for Small Holding Businesses

The two businesses were interviewed with the aim of understanding the critical success factors for continued growth of small agricultural holding businesses, and for insights into what role rural municipalities may play in removing barriers or providing substantive support.

The following questions were included:

1. Is a small agricultural parcel integral to your business model? Is there another reason you have chosen to operate on one?
2. What are critical factors for your success? Proximity to market? Proximity to similar businesses? Soil Quality? Space for flexible growth?
3. Do you see any barriers to development of small-footprint agriculture and agriculture-themed businesses that a County may address? Any general barriers the County should be aware of?
4. Are there certain infrastructure needs that should be considered?

Andrew Rosychuk - Rosy Farms

Andrew owns and operates a 27-acre haskap orchard on a 80 acre parcel in northern Sturgeon County. He founded the Haskap Alberta Association and is a board member on the North 49 Fruit Corporation, a producer owned marketing collaboration. Andrew had the following insights:

- Irrigation access is critical insurance for horticultural operations such as his
- The higher price of small parcels close to urban centres require associated higher value production, most likely in the form of value-add products. It is very difficult for a starting small farm to fit these criteria.
- Of critical importance for emerging food production is connecting entrepreneurs together, with 'coaches' providing a variety of specialized knowledge – Alberta Agriculture has a new venture specialist (Marissa Brewer) with some capacity to do so, however this should be supplemented by County efforts
- If land use policy was adjusted to enable emerging small-scale agriculture, it would be beneficial to group these parcels to facilitate sharing of equipment, knowledge, and human resources.
- Andrew prefers to operate where possible with infrastructure that can be upgraded or sold at any point. This provides the flexibility for rapid

Rod Bradshaw – Beck Farms/Innisfail Growers Co-operative

expansion or an exit plan if business issues occur. He included discussion of innovative ways of meeting health requirements for food product processing that do not require large investments of fixed infrastructure

Rod owns and operates a family-run grain and vegetable farm 10km outside of Innisfail, Alberta. The vegetable side of his operation is one of five farms collaborating in the innovative Innisfail Growers Co-operative. The co-operative amalgamates fresh and on-farm processed products and jointly sell through farmers markets throughout central Alberta. Rod had the following insights:

- Soil quality is critical for success of an intensive small acre horticulture operation
- Proximity to market is very important, but 20km or 60km away from a significant market does not make a critical difference. The Co-operative sells through markets up to 100km away from the clustered farms.
- Red Deer County has allowances for subdividing small holdings out if the application shows a well-formed business plan. Mountain View County tried enabling small holdings parcels but had issues with 20-acre parcels leaking into country residential.
- Unique parcel subdivision options are useful for intergenerational farm succession, but the risk of leakage may still exist.
- Agricultural easements that are managed by Land Trusts may be applicable for subdivisions near urban markets such as Edmonton.

Interview with the Young Agrarians

The Young Agrarians is a Canada wide farmer to farmer educational resource network for new and young emerging farmers. In partnership with Organic Alberta, they provide online, workshop-based, and peer to peer support to enable growth of small-scale farmers across Alberta. The following questions were asked to Dana Penrice, the Prairie Programs Coordinator:

1. What are generalized critical success factors for small holding agricultural businesses?
2. Do you think it is worth distinguishing small holdings from conventional agriculture parcels of 80 or 160 acres?
3. What are small holding opportunities that are experiencing a lot of growth, particularly in regions close to urban centres?
4. What are barriers that small holding farmers have come up against? How do you suggest municipalities play a role in overcoming them?

Dana provided an overview of the efforts made by the Young Agrarians to jump start a development channel of emerging agri-food businesses by reducing the barriers to entry. The aim is to generate enough momentum that the channel will begin to self perpetuate and continue to grow a community of small holdings farmers focused on providing local food. Dana had the following insights for how Parkland County may address small holdings:

- The biggest barrier is access to land. New farmers have difficulty purchasing or leasing appropriate land, so the Young Agrarians have provided resources to assist with a wide range of land access methods including community farms, co-operatives, land trusts, and conventional

purchase or lease. In BC and Quebec, there are provincially funded 'land-matchers' who facilitate land access for new farmers.

- The organization is working to develop a land matching solution for the Prairies. Resources are needed to fund a BC-equivalent land matching program, so a smaller scale pilot will most likely be employed first.
- These innovative land access methods may remove the need for small holdings-specific subdivision policy. Country Residential or portions of larger agricultural parcels may be used for a small holding business without subdividing them.
- In addition to land access, financial and production know-how are significant barriers. Young Agrarians partners with municipalities to provide workshops and resources that lower these barriers. There is an opportunity to do this either in one county or as a regional effort
- Young Agrarians build community by offering the following programs: Apprenticeships, 1st Generation Farmers group, and Business Boot Camps
- Country Residential has strong potential in some regions for small scale farmers to establish their business before scaling up to a larger parcel

Summary

These interviews provided valuable insight into experiences of horticultural farmers in other Albertan counties that have attempted to address small holdings. The following considerations inform the recommendations to Parkland County:

- Consider agricultural easements as a requirement for provisional small plot subdivisions on high quality agricultural land. Removing the threat of leakage into country residential is critical in any region that experiences residential pressure.
- While soil quality and proximity to market are both critical to horticultural production, distances of 50-100km are not insurmountable for getting products to market. An operation has to be economically consistent with the land value, which will often require it to be further from an urban centre.
- Consider supporting or partnering with the Young Agrarians to encourage land access arrangements between emerging farmers and Parkland County landowners.
- Review the Country Residential LUB to determine the land use provisions for landowners incubating agricultural small holdings businesses

Market Opportunities Assessment

Context

A review of the rapidly evolving small plot agricultural sector requires forward-oriented analysis that captures developing opportunities. This was done by supplementing the current state and external market review with a broader market assessment broken into the four identified agriculture themed business categories of Production, Value-Added, Agri-Tourism, and Ag-Service.

Identify Key Market Drivers

Assessing economic opportunities that will be successful over the long term requires assessing the stability of the underlying forces driving change. A driver is an event, action, or underlying force that exerts a strong influence on outcomes. In the agri-food industry, a driver shifts demand and supply patterns for agricultural and food products.

Business opportunities that capitalize on these drivers are much more likely to succeed through predicted and unforeseen challenges. We have identified the following 5 drivers affecting small plot agricultural business opportunities within the Alberta context:

1. Technological Innovation
New technology drives the development of innovative products from existing and emerging crops, it drives new intensive production techniques, and it opens new distribution channels
2. Consumer Demand for Connection to Food and Quality Assurance
Consumer increasing interest in both the quality and the source of their food drives opportunities in local production and agri-tourism
3. Demographics
An aging population with an increasing share of first-generation immigrants drives new products, changes in production and business models, and shifting agri-tourism interests
4. Climate Change
Changing local growing conditions as well as external agri-food market dynamics drives new opportunities for local production
5. COVID-19
The onset of the 2020 pandemic highlighted weaknesses in the interconnected global food system. Covid-19 drives a re-evaluation of food production, processing, and distribution systems

Parkland County Strengths

Parkland County has multiple agricultural strengths that provide unique opportunities for each of the four categories of small holding appropriate businesses. Businesses that align with the five drivers and also leverage Parkland County's strengths are the most likely to succeed.

The table below summarizes the applicable strengths for each category.

Production	Value-Added	Agri-tourism	Ag-Service
Highly Productive Soil	Existing Distribution Network Access	Proximity to Population Centres	Proximity to large, diverse agriculture sector
Northern growing region provides competitive advantage for some crops	Strong Existing Production Ecosystem	Existing operation have opportunities for complimentary and supplementary ventures	Significant Equestrian Industry
Proximity to >1M market	Access to technology and equipment support	Diverse landscape with lakes, river valleys, and rolling hills adjacent to agricultural land	

Market Indicators

The strength of opportunities may also be assessed using key market indicators. Emerging markets by their very nature have sparse data available, however data from Alberta's 2018 Open Farm Days showed that in its 6th year, the event attracted about 20,000 person visits and \$189,000 in on-farm sales. This indicates strong opportunities for production paired with agri-tourism (complimentary ventures).

Farmer' markets had an anomaly of a season in 2020 with COVID-19 impacting market distribution options, consumer interest, and economic conditions. Despite all these sources of risk, it was reported that vendors at one farmer' market in Edmonton had an average increase of 30% in sales year over year. This indicator may be a temporary trend, or it may be a sign of persistent growth resulting from the increased consumer interest in supporting local food production.

Market Access Channels

A critical success factor for all small agricultural holding businesses is market access. Available market access channels provide a significant leg up for new entrants, where it would otherwise take time to develop their own market from the ground up. The existing market access channels within Edmonton Metropolitan Region are summarized in the table below. Ag-Service was not assessed, as these businesses market directly to other agricultural businesses or animal owners.

Business Category	Market Access Channels	EMR Current	Growth Assessment
Production/Value-add	Farmers Markets	10 Major Markets in Edmonton area	Reported ~30% growth in YoY sales in 2020*
	Community Supported Agriculture (CSA)	12+ CSA's operate in the Edmonton area	Strong growth and interest especially since the onset of COVID-19
	Retail – Large Chain	Safeway, Superstore, Save-on-Foods, No Frills, Loblaws City Market, Co-op, Freson Bros	Save-on-foods, Co-op, and Freson Bros have programs to focus on local foods

	Retail – Specialty	Earths General Store, Blush Lane, Sunterra Market, Amaranth Foods, Italian Centre	Locally sourced food products are in high demand.
	Food Service	Many Opportunities	Growth in demand for quality local food products
	Institutions	Northlands, NAIT, the University of Alberta, Alberta Health Services and the Edmonton Convention Centre	Coordinated approach is being developed by <i>Flavour Edmonton</i>
	Local Product Online Delivery	SPUD, Organic Box, Steve and Dan's Online Store, Uproot Collective Online Store, The Public Shop	Strong growth occurring with acceleration since the onset of COVID-19
	U-Pick	10+ in Parkland County	There is strong recent growth, but a previous increase was followed by a decline.
	Farmgate Sales	Independent online and farmstands	
Agri-tourism	Independent Website	Most operations have one	
	Regional Website/ Service	Alberta Open Farm Days, Parkland County Tourism Map, Alberta Farm Fresh Producers Association	
	Institution Partnerships	School Boards, Corporate Entities	

Additional Viable Business Types

Each of the market assessment components above provides a framework for assessing which existing and developing industries not currently in Parkland County have strong opportunities for establishment and growth. Business types were listed and considered through a rigorous sweep of the western Canadian emerging agriculture industry. Only businesses that fit the criteria of appropriate for small holdings were included.

Business Type	Production Description	Example Business
Fungiculture	Indoor growing of conventional or specialty mushrooms on a soil or organic material medium	Gruger Family Fungi (Nisku), Signature Mushrooms (Ardrossan)
Mini-stock	Indoor insect raising using agricultural by-product as feed	Camola Foods (Wildwood)
Aquaculture	Indoor seafood raising may include fish for sport, conservation, or food	Deepwater Farms (Calgary), Smoky Trout Farm (Red Deer)
Agri-tourism Accommodation	Agricultural-themed accommodation such as a bed and breakfast or set of cabins	Ranch Retreats across Alberta

Barriers and Risks to Market Entry

Emerging primary production, value-add, and agri-tourism ventures all have significant risk associated with creating a new product, building a new market, and establishing reliable production. Barriers include access to financing (often self-financed), permitting difficulty, affordability of land, and market access. Interviews with locally-focused producers around Edmonton almost all point to the critical aspect of relationship building with clients, and the time that this requires. While relationships are being developed, operations continue to be vulnerable to many risks that may compromise their operations.

Fluctuating fruit, nut, and berry production acres provide insight into the volatility of specialty food production. Acres and producers dropped from 2001 to 2016, however several new entrants have established operations since 2016. This shows that despite continued growth in demand, businesses are vulnerable to production disruptions, difficulties getting product to market, and the secondary income nature of these businesses means they are vulnerable to other employment shocks.

Summary

Growing demand for locally-produced food and experiences related to the agricultural landscape fosters growth of existing and establishment of emerging small holding-appropriate businesses. New methods of producing high-quality foods locally has resulted in strong market growth, but there are many risks to producers who operate in a small market and with developing production methods. Well-established market channels provide an enhanced opportunity for production and value-add businesses; however, meeting quantity and quality demands is often challenging on small acreage production.

Marketing co-operatives and food hubs/aggregators serve as a strong method for small farmers to access various markets. Joining of sales and logistics not only reduces expenses, but also reduces the production risk for a small-scale food product which in turn provides greater supply confidence to a food retailer.

Agricultural themed attractions show growing demand, with continued room for expansion as online marketing options improve exposure to the Edmonton market. Parkland County's mix of agricultural production, landscapes, natural features, and its proximity to the Edmonton Metropolitan Region drives many opportunities for expansion of agri-tourism businesses.

Findings

	<p>Central to the agricultural small holdings viability scan was an assessment of the existing small holdings. Our survey of parcels within the four agricultural districts (AGG, AGI, ANC, AGR) that are 20 acres or smaller found 1,961 parcels totalling 11,650 acres. This result was then complemented with an analysis of current businesses that are appropriate for small holdings, many of which are operating on large agricultural holdings or on Country Residential parcels.</p>
Categories of Businesses	<p>It is critically important that in this analysis the different types of appropriate businesses for small holdings be evaluated separately. Agri tourism operators have for instance quite different critical success factors from production or value-add operations. For this reason, the analysis throughout the report and in the findings is discussed separately for the four separate categories.</p>
Hypotheses Tests	<p>Evaluating the hypothesis tests laid out in the report's early section informs the recommended actions to address small agricultural holdings. The analysis of current businesses in Parkland County exhibited many examples of operating production and agri-tourism ventures that contributed to the findings. The regulatory review and interviews with other small holding experts provide additional insight into policy options.</p>
Primary Production / Value-add Processing	<p>This category includes intensive horticultural production, specialty livestock production, honey production, u-picks, on-farm product processing and packaging.</p>
<i>Hypothesis One: Support Needed</i>	<p>Parkland County has many available AGx and CR parcels of varying sizes and proximity to population centres where these uses are supported. Given the land price-sensitive nature of new and emerging farmers, this variety provides an adequate range of options without need for further land use policy provisions.</p> <p>Current tax policy has little impact on production and small-scale processing.</p> <p>The most critical infrastructure for intensive agricultural production is irrigation access. This is typically achieved by use of on-site dugouts; however a district system would be of use if the cost justified it as an appropriate alternative. Currently these production sites are not clustered well enough to justify any provision of irrigation infrastructure. Conversely, dugouts are relatively low-cost structures that require minimal maintenance costs. Using a dugout as the insurance for a 10-40 acre market garden or orchard will likely be more cost effective than the connection and variable costs of utilizing a district system. If a district system was being constructed for a region, the economics of utilizing it for a market garden or orchard may be practical for larger, established producers.</p>

*Hypothesis Two:
Employment & Tax
Revenue*

Significant seasonal employment is generated by intensive production and associated value add production. This employment typically does not extend year-round and owners often supplements their businesses with off-farm income.

Minimal tax revenue is generated as most infrastructure is farm exempt.

*Hypothesis Three:
Proximity & Soil Quality*

Small scale horticultural operations (vegetable production more than orchards) require high quality soil to be successful. It is advantageous to be near a population centre, but the requisite higher land price increases risk of business failure and reliance on increasing revenue through value-add processing and marketing.

Agri-Tourism / Ag-Services

This category includes agriculturally themed venues for events, activities, accommodation, eating establishments, country good sales, equestrian facilities, and agricultural input suppliers.

*Hypothesis One:
Support Needed*

The analysis found many operational equestrian facilities, but only a few other agri-tourism businesses. On its own this result suggests that support is needed for other agri-tourism businesses, however the regulatory review indicated that except for some agricultural-themed event venues, there are adequate provisions for agri-tourism businesses across AGx and CR. The land use class *Accommodation and Convention Services* allows for events such as weddings, however it is a discretionary use only for the geographically limited districts of AGI and ANC.

Agricultural Input Suppliers are well supported in AGG, AGR, and AGI districts with industrial lots provided in the Meridian Business Park that have full municipal services.

*Hypothesis Two:
Employment & Tax
Revenue*

Significant seasonal and year-round employment is generated with spin-off benefits to supporting businesses in the County such as local product makers, caterers, and horse feed farmers.

For most businesses in this category there is not significant municipal tax revenue generated, as most infrastructure is either farm exempt or deemed non-commercial improvements. Agricultural Input Suppliers are the exception, with considerable tax revenue generated due to commercial as well as equipment and machinery improvements.

*Hypothesis Three:
Proximity & Soil Quality*

Proximity to population centres is critically important for all agri-tourism businesses. Activity, country store, and eating establishments also greatly benefit from proximity to each other as customers are often interested in visiting multiple locations in each trip. A certain level of authentic agricultural landscape adjacency is important for all these businesses, with some specifically marketing the further-removed location as an asset.

Proximity to the agricultural land base is very important to agricultural input suppliers whose cost of transporting goods and services is greatly affected by the distance to their customers.

Soil quality is not critically important for these agri-tourism businesses, as equestrian and activity-based venues can typically achieve the required level of productivity from the majority of soils in Parkland County. Agricultural input supply businesses do not require high-quality soils but are better suited to industrially prepared sites.

New Business
Types

Four small holding appropriate businesses identified in the market opportunities assessment do not currently operate in the County. The following considerations were found for each:

1. Fungiculture – The growing of mushrooms is considered a horticultural crop and is therefore a discretionary or permitted use in AGx and CR districts. Any on-farm processing or packaging is allowed under the *Cottage Industry* land use class which is a discretionary use on all the assessed districts except AGI.
2. Mini-Stock (Insect Farming) – The LUB does not specifically address insect farming in any land use class, however it may fit into the *Cottage Industry* land use class. Clarification may be necessary.
3. Aquaculture – Indoor or outdoor hatching, raising, and breeding of fish is a discretionary use for the AGG district. This provides opportunity for any prospective business.
4. Agri-Tourism Accommodation – Parkland County has existing bed and breakfasts and single cabin accommodations, but no larger farm stay sites were found. The LUB has Bed and Breakfast, Farm Vacation Home, and Boarding House, and Tourist Campground land use classes that address the wide variety of building type, number of units, and land use districts where an agri-tourism accommodation site may be applicable.

Additional
Regulatory
Considerations

1. Parkland County has a high number of existing small holding parcels including 1,961 within AGx and 1,054 CR parcels within the prime agricultural areas. A combined sum of more than 15,000 acres provides many opportunities for small holding businesses in every area of the county. Under current Land Use Bylaws there is much additional opportunity within the agricultural land base for further subdivision.
2. Existing Country Residential may serve as incubator parcels for small holding farms and other business types. The many existing small holding appropriate businesses on CR parcels, combined with the discretionary application of *Horticultural Use* and *Cottage Industry* land use classes, indicates that this may already be occurring.

3. Clarity may be required for when infrastructure related to on-farm processing is considered a commercial improvement, and taxed at double the rate

Ontario Regulation 361/18: Small Scale On-Farm Business Land Use Subclass provides an option for clearly enabling on-farm diversification within small or large agricultural holdings. It specifies a maximum allowable infrastructure value and size of facility in relation to parcel size.

Conclusions

Agricultural Land Base has Sufficient Small Holding Opportunities

Small agricultural holding businesses currently operate throughout Parkland County's Agricultural and Country Residential parcels. This study identified more than 50 operating businesses, many of which were operating on portions of properties greater than 20 acres in size. This demonstrated flexibility of business owners, and the large amount of agricultural small holdings existing across the County indicates many existing land base opportunities in all agricultural areas of the County.

It is important to note that small holding businesses have strong incentives to collaborate to build sales and marketing channels, however operational critical success factors widely vary from agri-tourism to primary production enterprises. A factor that was quite consistent across businesses is that additional municipal tax revenue generated from these enterprises, is with a few exceptions, quite small, however significant seasonal, and in a few cases, year-round employment is generated.

The analysis in this Viability Scan indicates that there is growing demand for locally sourced agricultural products, services, and experiences that can be filled by businesses operating across the County. Current and emerging agricultural small holding business types are shown to be able to operate under the current land use bylaw regulations.

Support may be provided in other ways, however the existing small holdings and additional county-wide subdivision provisions provide ample opportunities for small holding businesses to establish. This is shown to be the case for the list of existing and the 4 additional potential business types. Additionally, Country Residential parcels throughout the agricultural landscape provide opportunity for both the operation and incubating of many small holding businesses. This is supported by the finding that 20 of the 54 operating small holding businesses identified are situated on CR parcels. It is also shown through the LUB's discretionary support for *Cottage Industry*, *Horticultural Use*, *Riding Arena*, and multiple accommodation land use classes within the CR district. The identification of 1,054 CR small holding parcels within the 2019 MDP's prime agricultural areas demonstrates the high availability of CR parcels within the agricultural land base.

Small Holding Businesses Bring Significant Economic Benefits

Small Holdings appropriate businesses provide a significant amount of seasonal and year-round employment for Parkland County residents within production, value-add, agri-tourism, and ag-service operations. Economic benefits are also accrued within the County by secondary means such as the sale of local products, catering services, and site maintenance services. With relatively few operating agri-tourism enterprises, these economic benefits are not deemed to be significant, however there is strong potential if agri-tourism expands.

Many small holdings businesses pair production or a service with sales of local products or a unique experience. For instance, the Edmonton Cornmaze sells locally produced food and decorative products in addition to the outdoor recreation

Proximity to Market and Amenities is Critical for Agri-Tourism

activity of the maze. Additionally, most greenhouses provide spaces for events or activities, sales of other local businesses products, or food sales. This strategy not only diversifies revenue, but also builds interdependent relationships between regional businesses. Recognition of this dynamic also directs Parkland County support towards encouraging or reducing barriers to the clustering of small holdings businesses. When supported in this manner, businesses are not only better able to work together, but customers are also able to increase their engagement through combining visits.

Agri-tourism relies upon attracting visitors throughout the operational season. The market demand for agri-tourism activities and experiences is growing, however the ease of access is a critical hurdle to expanding visits. Encouraging businesses to locate in areas with high quality transportation access and close proximity to population centres may greatly reduce these hurdles. Many of these experiences rely on the agricultural or landscape amenity being integrated into the visit, so locations with desirable agricultural and natural features are important.

Attracting visitors is initiated and maintained by individual and shared marketing efforts that include regional communications, word of mouth, online resources, and business to business referral. Through these shared efforts and other direct cooperation, it is indicated that clustering together is also of great benefit to agri-tourism businesses.

Soil Quality is More Important than Market Proximity for Production Businesses

It is critically important for primary production businesses to have access to high quality soil that supports high yields that are resilient to variable weather. Part of this resiliency requires access to irrigation water which is often accomplished by use of an onsite dugout. While market proximity is beneficial in terms of lowering product transport costs and increasing business for complementary agri-tourism enterprises, it is not as important as soil quality. Interviews and reviews of existing businesses indicated that primary production businesses can be just as successful 20 or 40 kilometers from a population centre if they have effective marketing and distribution.

Clustering of small holding primary production businesses is also beneficial in terms of sharing equipment, human resources, irrigation infrastructure, and marketing options.

There are Minimal Regulatory Barriers for Small Holding Businesses

Very few regulatory barriers were found for small holding appropriate businesses. The wide array of existing businesses operating within many different land use districts shows the existing regulation flexibility. Barriers that do exist for agriculturally themed wedding venues or emerging businesses such as insect farming are easily removed if the target land use is deemed desirable in specified land use districts.

Summary

Parkland County has a diverse agricultural land base with many food, experience, and amenity producing opportunities to accommodate a growing demand from the large Edmonton area market. Supporting Parkland County residents to make use of the high soil quality, developed agricultural industry, and landscape beauty is a considerable opportunity for growing economic opportunities and a more integrated community.

Recommendations

The analysis to this point has reviewed land use regulations in Parkland County and instructive comparable jurisdictions, reviewed existing small holding appropriate businesses, reviewed potential business opportunities, and consulted with small holding experts. The following section takes these details and the summarized findings to lay out our recommendations on how to address agricultural small holdings in Parkland County.

Recommendation 1. Utilize Existing Small Holdings to Grow Emerging Agri-food Sector

Existing agricultural small holdings paired with current small holding appropriate businesses operating on large holdings and Country Residential parcels indicate that there is a wide diversity of appropriate parcels for most types of small scale agriculturally themed businesses. A review of additional market opportunities and current LUB regulations also indicates that, with a couple small exceptions, there is little land use class bylaw restriction to small holding businesses operating.

Small scale intensive food production businesses have many pathways towards a resilient business, but it is important to note that many struggle because of a failed crop, difficulty with sales, or changes to off-farm employment. Success with conventional market gardens, new products, new services, or new production methods often relies upon determination from the business owner. For this reason, there is significant risk that a small holding parcel won't be continually used for a targeted agri-food business following a small holding policy enabled subdivision. This finding supports our recommendation for Parkland County to avoid additional subdivision flexibility and focus instead on supporting prospective businesses through avenues detailed in recommendations 2 and 3.

Recommendation 2. Support Emerging Intensive Food Producers by Encouraging Alternative Land Access Strategies and Supporting Market Access

A primary barrier to new and emerging farmers is land access. The Young Agrarians are a group at the forefront of assisting emerging small-scale farmers that should be partnered with to facilitate the development of land access relationships between Parkland County landowners and prospective farmers. Through workshops, peer to peer connections, apprenticeship programs, and other resources this group provides alternative methods of incubating or jump-starting small scale intensive agricultural operations that may reduce the need for subdivision flexibility.

Parkland County can leverage the Young Agrarians network by serving as a connection point between Parkland County landowners and prospective farmers. This should be done by assigning an appropriate Parkland County staff or interested public member to be the connection point between Young Agrarians and Parkland County landowners or interested farmers. Parkland County landowners should be

notified of the Young Agrarian's efforts through various public facing print and digital notifications.

Applying this strategy to land access may enable emerging agri-food and agriculturally-themed businesses to be incubated or developed on large agricultural holdings or at unique agricultural locations such as close to population centres or other landscape amenities where purchasing land may not be feasible

Small producers also face barriers to market access based on their high marginal cost of marketing and product transportation as well as inability to reliably supply required product quantities for retail. We recommend that Parkland County support small scale farmer marketing efforts by connecting Parkland County farmers to emerging food hubs and local food aggregators such as SPUD, The Organic Box, The Public, Uproot Food Collective, and Parkland County's own Steve and Dan's Online Market. Serving as a connection point between farmers and landowners also fosters connections that may result in marketing partnerships such as the Innisfail Grower's Co-op.

Recommendation 3. Agri-tourism supported in Targeted Locations

Stand-alone operations, supplementary, and complimentary agri-tourism ventures all rely upon proximity to populations as a critical success factor. Soil quality and adjacent agricultural production are important to complimentary and supplementary ventures, but the frequency of customers is more important.

To support agri-tourism, we recommend that Parkland County use the MDP's target agri-tourism regions to further identify specific priority cluster zones where agri-tourism receives greater support through communications, facilitated networking, and enhanced transportation upgrade priority.

Recommendation 4. Amend LUB to Remove Minor Regulatory Barriers

Minimal regulatory barriers at the level of permitted and discretionary land use classes were found. Barriers to wedding venues and insect farms should be reviewed to ensure there are applicable land use classes if these enterprises are to be encouraged.

It is important to note that the agri-tourism operator we interviewed indicated that restrictions to limit business density and proximity to residential areas, in some circumstances, are in the small holding businesses' interest, to the extent that they reduce land use conflicts.

Recommendation 5. Consider Agricultural Easements

In the MDP's small holding prime agricultural area, subdivision proposals that utilize the unique size and number allowances of small holdings run the risk of eventual leakage into country residential. Requiring detailed business plans for prospective businesses provides one level of commitment screening, but it does not guarantee success or continued agricultural use of the parcel.

An alternative that Parkland County should consider is the requirement of an agricultural easement on a high soil quality parcel where a small holdings subdivision is proposed. Agricultural easements are like conservation easements in that they are a mechanism for ensuring a perpetual type of use of a given privately owned parcel of land. The agricultural version can be flexibly crafted to fit a compatible set of land management criteria consistent with the long-term productive use of high-quality soil. A certified land trust such as Edmonton Area Land Trust or a municipality itself can take on the responsibility of 'grantee' to the easement, which requires annual monitoring, managing of infractions, and other ongoing communication with the landowner. An easement approach may greatly reduce the risk of small holdings leakage into country residential, however it should be noted that the Kelowna Agricultural Land Reserve example instructs that protecting agricultural land does not always mean it will be used productively.

Agricultural easements are a legislated mechanism under the Alberta Land Stewardship Act (2009), however there are several current barriers to their widespread use. Contrary to the ecologically purposed *conservation easements*, agricultural easements do not qualify for federal tax advantages, whereby the capital gain from the change in property value may be used as a tax credit for the individual or corporation. A secondary barrier is the inability of agricultural land trusts to access provincial funding from the Alberta Land Trust Grant Program. These barriers are currently the operative clause in a November 2020 active resolution⁵ passed by the Rural Municipalities of Alberta.

5 <https://rmalberta.com/resolutions/3-20f-support-for-alberta-farmland-trust/>

Appendix 1. Existing Agricultural Small Holding Appropriate Business List

Business	Category	Contact	Phone	Parcel Size (acres)	Proximity to Urban Centre
Edmonton Cornmaze	Ag-tourism	Dan Horneman	780-554-4540	78.38	5km - Edmonton
Spruce Park Country Store	Ag-tourism	Les Trautman	780-963-5235	135.48	9km - Spruce Grove
The Red Tin Barn	Ag-tourism	Elaine & Kevin	780-700-5215	9.84	10km - Edmonton
Jewlz Ranch	Ag-tourism	??	(780) 966-0765	4.99	8km - Stony Plain
Blarney Stone Farms	Ag-tourism	Brittney Toner	780-470-0581	40.01	7km - Edmonton
Rusty Horseshoe Ranch	Ag-tourism	Chris & Keitrina	780.967.4551	74.14	18km - Stony Plain
Timber Ridge Stables	Ag-tourism	Rachel Sollid	780 965 1306	159.68	26km - Stony Plain
Esprix Stables	Ag-tourism	Sheri	780-220-4756	125.73	20km - Stony Plain
Hawkstone Stables	Ag-tourism	??	780-243-6882	76.84	8km - Devon
Riverview Stables	Ag-tourism	Shawna	(780) 919-1458	20	32km - Stony Plain
Solaris Equestrian	Ag-tourism	Levasseur Family	(780) 544-5867	40.05	7km - Edmonton
Nolova Acres	Ag-tourism	Jenni Beloin	780.887.3089	80.06	9km - Spruce Grove
Aspen Fire Farms	Ag-tourism	Sandy & Dave Ea	780.963.8113	40.28	18km - Stony Plain
EverGreen Hills Farm	Ag-tourism		(780) 902-1806	9.62	
Killerney Farms	Ag-tourism	Erika Crone	(780) 470-0260	40.03	10km - Edmonton
Sun Down Ranch	Ag-tourism	??	(780) 962-9530	77.94	10km - Edmonton
Devon Ridge Farms	Ag-tourism	Bob and Jocelyn	(780) 902-1954	104.27	10km - Devon
Parkland Equestrian Centre	Ag-tourism	??	780.960.2714	142.1	10km - Stony Plain
Kings Corner Equestrian Centre	Ag-tourism	Cara	(780) 963-8788	153.55	20km - Stony Plain
Junar Farm	Ag-tourism	??	??	9.96	3km - Spruce Grove
Champions Gate Equestrian Centre	Ag-tourism	??	??	95.05	13km - Stony Plain
Good Morning Honey	Production	Richard Ozero	780-257-9060	77.51	15km - Stony Plain
TPLR Honey Farms	Production	Tim Townsend		14.64	
Good Land Farms	Production	Maria and Darren Smith		71.17	6km - Stony Plain
Studio in Bloom	Production	Ewa Nowicka	250-703-6579	42.89	10km - Stony Plain
Rhyant Rock Farms	Production	Carla Rhyant	780.218.8890	69.19	25km - Stony Plain
Nina's Homegrown Horseradish	Production	Nina Ulmer	(780) 916-0146	10.31	10km - Stony plain
Headin' West Ranch	Production	??	(780)892-2266	62.79	26km - Stony Plain
Neitak Equestrian Ltd.	Production		(780) 963-1230	144.01	18km - Stony Plain
Happy Acres U-Pick	Production/Ag-tourism	Deb Verboda	780-968-0099	11.4	5km - Spruce Grove
				9.68	5km - Spruce Grove
Aspen Grove Nurseries	Production/Ag-tourism	Steve and Cindy	780-962-3148	12.28	3km - Spruce Grove
Creekside Home and Garden	Production/Ag-tourism	Brock Friesen	780-470-0527	29.73	1.5km - Edmonton
Bloom-In Crazy Garden Centre	Production/Ag-tourism	??	780-963-2711	4.74	10km - Stony Plain
Baraka Gardens	Production/Ag-tourism	Tasha Bradsell	780-221-5023	5.33	25km - Stony Plain
Local Nursery & Garden Centre	Production/Ag-tourism		780-987-9133	35.25	14km - Spruce Grove
Golden Greenhouses	Production/Ag-tourism		780-987-3675	5	3km - Devon
Kiwi Nurseries	Production/Ag-tourism	Munro Family	780-962-9297	148.98	1km - Spruce Grove
MoJo Garden Centre	Production/Ag-tourism		780-887-2836	105.01	15km - Stony Plain
Alpine GreenHouse	Production/Ag-tourism	??	(780) 470-0007	10.13	8km - Edmonton
Somerset Farms	Production/Ag-tourism	Kate de Windt	780-983-5664	72.31	17km - Stony Plain
Big Rock Berry Farm	Production/Ag-tourism	Tim Darragh	780-886-3387	19.5	7km - Edmonton
Blas Berry Orchard	Production/Ag-tourism	Sam Kreuger	780-803-8808	40.77	15km - Spruce Grove
Garden Valley Orchards	Production/Ag-tourism	??	780-963-9370	79.15	8km - Spruce Grove
Saskatoon Valley Orchards	Production/Ag-tourism	??	780-963-8311	146.08	20km - Stony Plain
Hilltop Berries & Cherries	Production/Ag-tourism	Cindy Iverson	780-621-2068	9.78	35km - Drayton Valley
Kindred Orchards	Production/Ag-tourism		780-884-9508	53.89	18km - Stony Plain
Grove Berry Patch	Production/Ag-tourism	Carol Jones	780-962-5824	42.49	5km - Spruce Grove
B.A.s Market Garden	Production/Ag-tourism		780-719-2230	2.78	10km - Stony Plain
Steve and Dans	Value-Add	Steven Souto		37.94	7km - Edmonton
Schleckers Meats	Value-Add	Dean Schlecker	780) 963-5918	7.3	12km - Stony Plain
Stony Plain Seed Cleaning Association	Ag-Service	Andrew	780-963-7259	5.08	1km - Stony Plain
Agriterra Equipment	Ag-Service	Scott Drake	780-963-2251	16.26	2km - Stony Plain
Nutrien Ag Solutions	Ag-Service	Robin Diether	780-963-1546	21.25	1km - Stony Plain

Appendix 2. Parkland County Land Use Bylaw Small Holding Use Type Definitions

Land Use	Definition
Abattoir	means the use of land or building in which animals are slaughtered and may include the packing, treating, storing and sale of the product.
Accommodation and Convention Services	means development to serve the traveling public primarily used for the provision of rooms or suites for temporary sleeping accommodation such as hotels (rooms have access from a common interior corridor and are not equipped with individual kitchen facilities), motels (temporary lodging or kitchenette where each room or suite has its own exterior access), country inns (more rooms than bed and breakfast); or, development which provides permanent facilities for meetings, seminars, conventions, product and trade fairs and other exhibitions with or without eating and drinking facilities. This use class does not include Boarding Houses.
Apiary	means a commercial development consisting of beehives in which bees are kept or raised for the production of honey.
Aquaculture	means a Development where land is devoted to the hatching, raising and breeding of fish or other aquatic plants or animals.
Agricultural Support Services	means development providing products or services directly related to the agricultural industry. Without restricting the generality of the foregoing, this shall include such facilities as: grain elevators, feed mills, farm implement dealerships (not including Automotive, Equipment and Vehicle Services) or crop spraying.
Bed and Breakfast Home	means a development within and secondary to a single detached dwelling or modular home where temporary lodging or sleeping accommodation with no more than three (3) guest rooms is provided with a breakfast meal to the travelling public. This use does not include a boarding facility, hotel, motel, or guest house.
Cannabis Cultivation - Major	means a development that has a plant canopy area greater than 200.0 m ² and is used principally for the production, cultivation, and growth of Cannabis as licensed by Health Canada. This use class does not preclude the packaging, storage and transporting of products and materials related to cultivation of Cannabis. This does not include Industrial Hemp.
Cannabis Cultivation - Minor	means a development that has a plant canopy area 200.0 m ² or less and is used principally for the production, cultivation, and growth of Cannabis as licensed by Health Canada. This use class does not preclude the packaging, storage and transporting of products and materials related to cultivation of Cannabis. This does not include Industrial Hemp.
Cannabis Processing - Major	means a development that is used principally for one or more of the following: making, testing, manufacturing, assembling or in any way altering the chemical or physical properties of semi-finished or finished goods and products of cannabis as licensed by Health Canada. This use class does not preclude the storage and transporting of products and materials related to Cannabis processing. This does not include Industrial Hemp.

Cannabis Processing - Minor	means a development that is used principally to process a maximum of 600.0 kg of dried cannabis (or equivalent) in one (1) calendar year. This includes one or more of the B C Bylaw No. 2018-03 Bylaw No. 2019-01 Bylaw No. 2019-01 Bylaw No. 2019-01 Bylaw No. 2019-01 Bylaw No. 2019-22 PARKLAND COUNTY LAND USE BYLAW BYLAW NO. 2017-18 CONSOLIDATED JUNE 19, 2020 Glossary 225 following: making, testing, manufacturing, assembling or in any way altering the chemical or physical properties of semi-finished or finished goods and products as licensed by Health Canada. This use class does not preclude the storage and transporting of products and materials related to Cannabis production. This does not include Industrial Hemp.
Cottage Industry	means one or more low intensity activities of a gainful nature demanding a skilled trade or craft or related to an agricultural and/or horticultural operation on a parcel. Cottage Industry shall maintain, and be compatible with, the rural residential and/or agricultural character of the surrounding landscape. Cottage Industry may be the principal use of the parcel, or secondary to existing principal uses such as residential dwelling. A Cottage Industry use shall not be located within a Multi-Parcel Residential Subdivision. Typical Cottage Industry requiring skilled trade may include workshops or storefronts selling custom made products or offering related services. Typical agriculture and horticulture related Cottage Industry may include growing, packing and sale of food products, small-scale wineries and breweries, and minor food establishments including cafes and diners.
Farm Vacation Home	means a single detached dwelling located on land whose primary use is agricultural where temporary lodging or sleeping accommodation, with no more than three guest rooms, is provided, with any or all meals prepared in the residential kitchen, on a daily basis to registered guests for not longer than fourteen days by the occupant and his immediate family for a remuneration.
General Manufacturing and Processing - Indoor	means development principally associated with manufacturing, assembling, fabrication, processing, packaging, and related research/testing activities, where no nuisance factors exceed the building envelope.
General Manufacturing and Processing - Outdoor	means development principally associated with manufacturing, assembling, fabrication, processing, packaging and related research/testing activities, where no nuisance factors exceed the site boundaries
Horticultural Use	means a Commercial horticultural operation other than a Confined Feeding Operation that, due to the nature of the operation, requires smaller tracts of land. Without restricting the generality of the foregoing, this shall include horticultural uses like nurseries, greenhouses, market gardens, tree farms, and specialty crops (not including Cannabis)
Indoor Eating Establishment	means a commercial development where foods and beverages are prepared and served for consumption by the public on the premises and may include a drive-through component for consumption off-site.
Outdoor Eating Establishment	means a commercial development where foods and beverages are prepared and served for consumption on-site by the public either outside or inside the confines of the establishment. This use class does not include Cannabis Consumption Facility.
Outdoor Participant Recreation Services	means development providing facilities that are available to the public at large for sports and active recreation conducted outdoors. This use class does not include Outdoor Shooting Ranges. Typical facilities include golf courses, driving ranges, ski hills, ski jumps, sports fields, outdoor tennis courts, unenclosed ice surfaces or rinks, athletic fields, boating facilities, miniature golf establishments, Scout/Guide camps, religious outdoor retreat camps and parks, paint-ball parks, gymkhana/rodeos.
Riding Arena	means a building or an area of land used for the purposes of training, exercising, handling, and care of horses.

Tourist Campground - Destination	means development of land which has been planned and improved for the seasonal use of holiday trailers, motor homes, tents, cottages, campers and similar Recreational Vehicles, and is not used as accommodation for residential use.
Tourist Campground - Enroute	means development of land which has been planned and improved for the seasonal short term occupancy of holiday trailers, motor homes, tents, campers and similar Recreational Vehicles for those travelers on their way to another destination and is not used as year round storage, or accommodation for residential use

Appendix 3. Eastern Parkland County Small Holdings

