FROM FIELD TO FEDERAL BUDGET

UNDERSTANDING FARMER PRIORITIES IN THE CONTEXT OF FEDERAL POLICIES AND BUDGET 2025

BY OHI AHMED AND GUILLAUME LHERMIE.

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EXECUTIVE SUMMARY

This briefing paper examines how Canadian farmers' policy priorities compare with the measures introduced in the 2025 federal budget. Based on a national survey of 979 producers, this briefing paper maps farmers' views on taxation, trade, transportation, business risk management, labour, sustainability, and institutional trust. It assesses the level of alignment between the federal budget and farmers' priorities and concerns. The survey results reveal that producers emphasize trade and market access, tax relief and financial support, transportation and infrastructure for agricultural goods, and enhanced risk-management tools. In this context, Budget 2025 includes several measures that match farmers' preferences, such as improved AgriStability coverage, significant trade and infrastructure investments, CFIA digital modernization, Accelerated Capital Cost Allowance (ACCA) tax incentives for capital investments, and new financing opportunities through FCC and a proposed Sustainable Bond Framework. However, gaps remain in fuel and energy taxation, interprovincial trade barriers, and strategies to handle U.S. trade tensions and non-tariff barriers. Overall, the analysis highlights both areas where farmer priorities and recent federal policies align and sectors where further policy changes and ongoing engagement with producers are essential to enhance competitiveness, resilience, and trust.

ISSUE

As we review the newly elected federal government's first federal budget, the voices of farmers, who work at the intersection of economic productivity, food security, and public policy, are more critical than ever. In 2024, the entire agriculture and agri-food system employed 2.3 million people, almost 1 in 9 Canadians. It contributed nearly 7% (149.2 billion CAD) to the 2024 GDP (Agriculture and Agri-Food Canada, 2025). Farmers are vital for maintaining Canadian food systems and ensuring food security. Despite having such a profound impact on the lives of Canadians, farmers, who constitute almost 1.6% of the total population in Canada (Statistics Canada, 2023), have historically felt that agricultural issues, needs, and demands are forgotten, as other issues seem to engulf Canadian public life (Cummings, 2025). That's why the Canadian federal budget for 2025, released on November the 4th, 2025, drew the collective interest of the farming community, looking to see whether their aspirations and priorities were reflected in the 2025 federal budget.

BACKGROUND

Using the survey data extracted as part of the Voices from the Field: The 2025 Federal Elections Project (that yielded several briefing papers and issue briefs showcasing the political inclinations and policy preferences of Canadian farmers), the Simpson Centre at the University of Calgary found that Farmers' top priorities centre on program and policy levers that directly impact their financial bottom line and resilience through improved trade and market access (including diversified export markets and reduced barriers in key partners like the U.S., China, and the EU), targeted tax measures (such as fuel and energy exemptions, favourable capital gains treatment, and accelerated capital cost allowances), and better transportation, digital, and inspection infrastructure to move products efficiently and competitively. They also place strong emphasis on robust risk-management and adaptation tools, disaster relief and climate-risk supports.

Budget 2025 is focused on infrastructure and economic security through major capital investments while balancing operational spending. Key measures include a $280 billion capital spending plan, alongside significant investments in trade diversification and defence. The government is also implementing measures to boost efficiency and cut operational spending.

Budget 2025 introduces agriculture-focused packages that strengthen trade and market access, combining major investments in transportation infrastructure and digital modernization alongside targeted programs to help exporters diversify into international markets and manage tariff-related shocks. It is projected to boost farm-level competitiveness and resilience through generous tax measures (including a Productivity Super-Deduction and accelerated depreciation), improved business risk management tools such as enhanced AgriStability coverage and eligibility for pasture-related feed costs, better weather-forecasting capacity, and substantial cash-flow and biofuels supports. The budget also aims to improve financing and capital access through a new Sustainable Bond Framework, modernization of Farm Credit Canada, and a $1 billion Trade Disruption Customer Support Program, while continuing to invest in workforce supports even as temporary foreign worker admissions become more restrictive. Finally, Agriculture and Agri-Food Canada (AAFC) is being refocused on core agricultural research, innovation, and the adoption of clean technology, with streamlined operations and partnerships with industry and academia to deliver more targeted, cost-effective support for sustainable and competitive food production. The evolution (provided below) of AAFC's spending over recent years helps illustrate how the new federal budget reorients its approach towards agriculture.

Year	Breakdown of the AAFC Budget							
	Domestic and International Markets	Percentage of the total Agricultural Budget	Science and Innovation	Percentage of the total Agricultural Budget	Sector Risk	Percentage of the total Agricultural Budget	Internal services	Percentage of the total Agricultural Budget
	Billion CAD	%	Billion CAD	%	Billion CAD	%	Billion CAD	
2019-2020	0.62	24%	0.59	23%	1.18	46%	0.177	7%
2020-2021	0.9	29%	0.72	23%	1.22	40%	0.192	6%
2021-2022	0.92	23%	0.7	18%	2.14	54%	0.186	5%
2022-2023	0.77	24%	0.71	22%	1.6	49%	0.159	5%
2023-2024	0.22	14%	0.462	29%	0.78	49%	0.132	8%
2024-2025	0.7	19%	0.88	24%	1.98	53%	0.18	5%
2025-2026	0.81	21%	0.91	23%	2.03	52%	0.18*	5%

* Author calculation=Total budget 3.93 Billion CAD-(Sum of Domestic and International, Science and Innovation and Sector Risk budgets)

KEY FINDINGS & DISCUSSIONS

A national survey was conducted from March 26 to April 13, 2025, to identify the policy preferences, political inclinations, and business concerns of Canadian farmers, and to assess how these producers' priorities align with the current political landscape. The survey aimed to determine: (1) the issues most concerning farmers in the current local and global business environments, (2) which policies and programs, such as trade and market access, taxation, financial supports, and transportation infrastructure, most strongly influence voting intentions, and (3) how well the federal policies and programs reflect these preferences.

The national survey was conducted across all ten provinces, targeting a representative sample of at least 50 Canadian farmers with a Gross Farm Income (GFI) in each segment ranging from "Less than $100,000" to "2 million and over." The Simpson Centre and Stratus Ag Research collaborated on developing the survey instrument, which was translated into French for Quebec respondents and administered online after extensive internal and pre-field testing to gather the necessary data. A portion of the summary and related survey questions can be found in the appendix. It is worth noting that Stratus Ag Research is Canada's leading market research company dedicated solely to the agriculture industry. The Stratus database includes several thousand commercial farmers who participate in surveys each year.

979 completed responses were gathered, representing 0.52% of 189,874 Canadian farms, according to the 2021 farm census (Statistics Canada, 2022). Provincial quotas were established based on Statistics Canada's reported distribution of farms above the GFI threshold to ensure geographic representation. Overall, the study provides a solid snapshot of farmer sentiment, broken down by region, farm size, and commodity type, allowing for a detailed understanding of political alignment and policy demands in Canadian agriculture. We received the following number of responses from each province:

Alberta (AB)	Atlantic Canada (comprising of Newfoundland and Labrador, Prince Edward Island, Nova Scotia, and New Brunswick	British Columbia (BC)	Manitob a (MB)	Ontario (ON)	Quebec (QC)	Saskatchewan (SK)
222	22	46	124	225	103	237

The survey's findings provide critical insights into the business concerns, aspirations and policy preferences of Canadian agricultural producers. The Simpson Centre reviewed the newly released federal budget and examined plans and budget allocations associated with policies and programs that impact the agriculture and agri-food sectors in Canada. Considering the previously mentioned cross-country survey findings, the Simpson Centre analyzed the alignments and misalignments between farmers' policy and program preferences and the federal policies and programs outlined in the budget released on November 4, 2025.

NOTABLE FINDINGS

Trade Volatility, Infrastructure Expansion, and Market Access

Budget 2025 introduces a broad strategy to support Canadian agricultural exporters facing rising global market pressures, including explicit federal recognition of increased Chinese tariffs on canola, pork, and seafood. To strengthen trade resilience and reduce bottlenecks, the federal government highlights streamlining procedures and improving transportation, with support from the Major Projects Office, as key steps to boost the efficiency of the agricultural supply chain. The budget allocates $6 billion for transportation infrastructure, which could raise national productivity and increase GDP by up to $21 billion. Export Development Canada (EDC) aims to grow total business by $25 billion by 2030, promoting expanded export opportunities, particularly through stronger ties in the Indo-Pacific and European markets, identified as crucial growth areas for Canadian agri-food exports. To expand Canada's international reach, the budget commits $75 million over five years to boost the AgriMarketing Program into new global markets.

To help industries manage tariff-related shocks, the budget introduces the Strategic Response Fund, allocating $5 billion over six years to assist firms in adapting, diversifying, offsetting new market-access costs, and pursuing new trade opportunities; within this, $1 billion is allocated to the Strategic Innovation Fund for industrial transitions. An additional $1 billion over three years is directed to Regional Development Agencies through the Regional Tariff Response Initiative, providing non-repayable aid to businesses affected by tariff disruptions. Finally, the Annex shows a forecast of $33 million in gains from securing market access for agri-food and seafood producers.

Farmers' priorities reflected in this segment of the budget: Throughout the budget, the federal government directly addresses farmers' top policy priorities of trade and market access (79.16%) and infrastructure (30.54%) (Figure 2). The $75 million AgriMarketing envelope for diversification and market promotion is clearly aligned with the 79.16 % who ranked "Trade and Market Access" as a top policy issue, supporting efforts to open and deepen markets for Canadian crops and livestock. Addressing Chinese tariffs responds to the 29.62% of farmers who identify China as their primary market priority, signalling federal acknowledgment of one of the most significant external risks producers face (Figure 1). The government's focus on reducing red tape, major investments such as $6 billion in transportation infrastructure, EDC's plan to facilitate an additional $25 billion in business by 2030, targeted Indo-Pacific and European market initiatives, and the Major Projects Office align with producers' calls for efficient logistics and fewer bottlenecks. Lastly, the Strategic Response Fund and the Regional Tariff Response Initiative closely align with producers' preferences for diversification (51%) and expanded domestic processing (43.41%), echoing farmers' support for adaptation over confrontation (Figure 3).

Alignments and misalignments between the budget and farmers' preferences: There is substantial alignment between these budget measures and what farmers say they want. China-focused acknowledgments validate farmers' concerns about tariff-related volatility. At the same time, infrastructure, transportation, and regulatory streamlining correspond well to demands for lower transaction and administrative burdens and more reliable supply-chain performance. The government's focus on export diversification, particularly through Indo-Pacific and European initiatives, closely aligns with the markets farmers identify as high priorities after the United States, as well as their preference for diversified export strategies and value-added growth. Adjustment-oriented programs, such as the Strategic Response Fund, reflect farmers' preferences for resilience-building tools rather than retaliatory tariffs.

However, gaps remain. The budget's treatment of Chinese tariffs is more reactive than proactive, offering recognition but fewer concrete tools to restore or expand access. Farmers' demands for dispute-resolution mechanisms and more detailed measures to address non-tariff barriers or specific processing constraints are acknowledged but not fully developed. Additionally, while diversification funds are substantial, it remains unclear how much of the envelope will be explicitly directed to agriculture rather than shared across sectors.

Next Steps

Farmers are seeking not just recognition of tariff risks but also concrete tools, such as dispute-resolution mechanisms, clear diplomatic strategies, and structured engagement, to secure more predictable, long-term access to major markets, particularly the U.S. and China. Although infrastructure and EDC measures are promising, producers still need clarity on how these investments will translate into farm-level benefits, such as reduced shipping delays, simplified export processes, and better support for navigating non-tariff barriers. Interprovincial trade barriers, supply-chain chokepoints, and risk-management mechanisms tied to trade shocks remain underdeveloped, even as farmers identify them as essential to competitiveness in a volatile trade environment. While diversification and value-added measures reflect farmer preferences, producers will want assurance that agriculture-specific allocations are sufficient and that these supports are designed with their operational realities in mind.

Figure 1. International markets - top priority (%) for farmers
(Table 1)

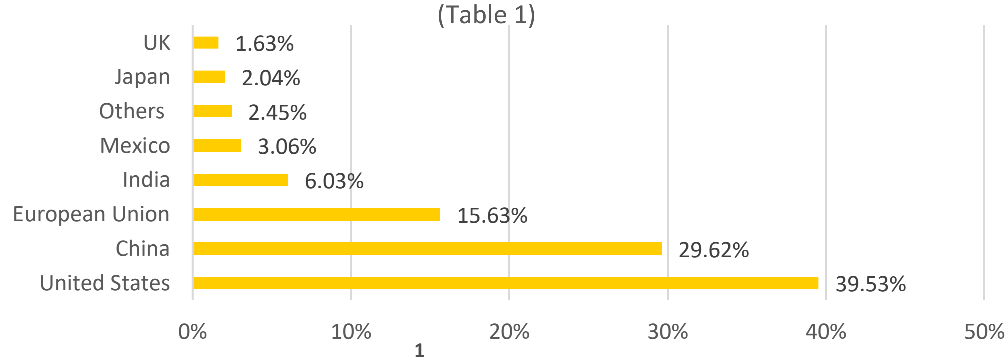


Figure 2. Top 3 policy priorities (national)*
*% of times a farmer mentioned a policy as one of their top three policy priorities
(Table 2)

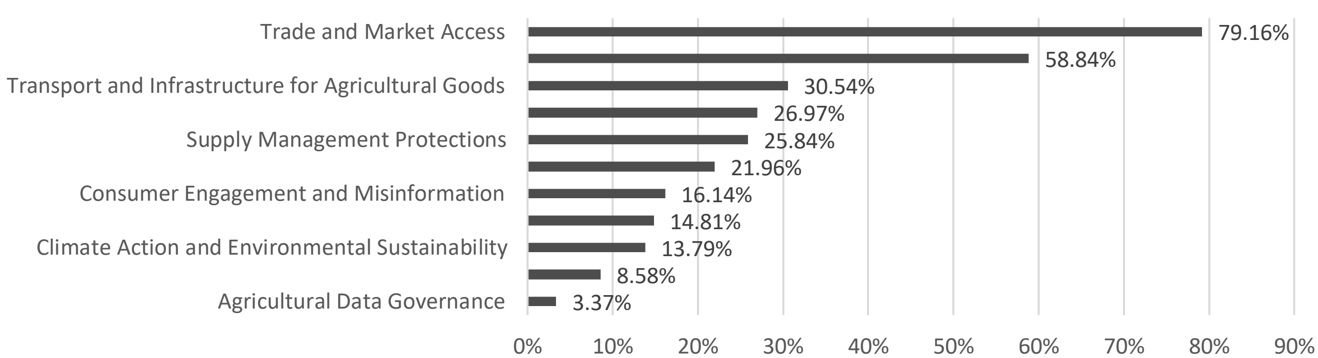
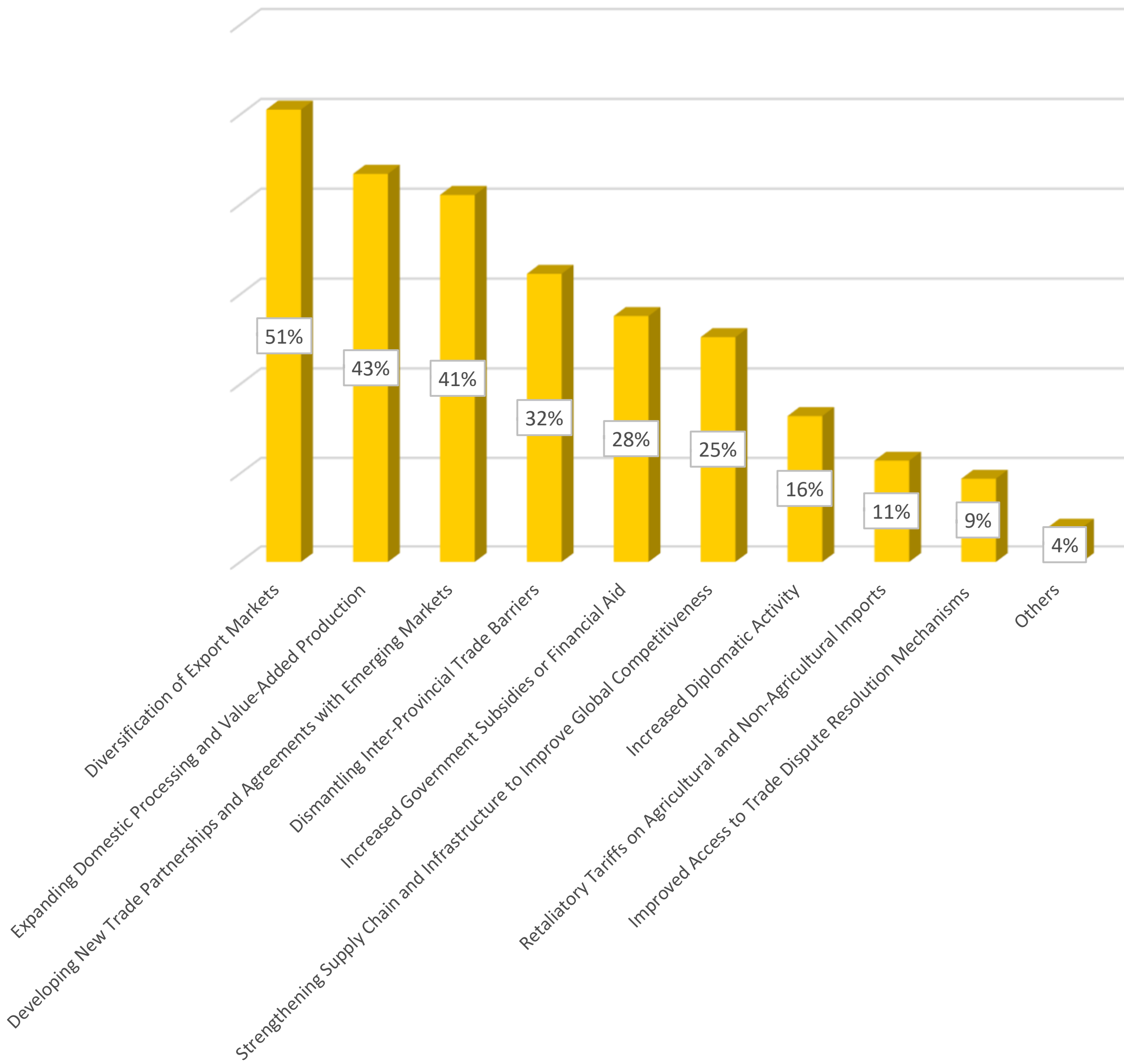


Figure 3. Measures % of farmers are in favour of
(each farmer could choose up to 3 options)
(Table 3)



Tax Incentives, Capital Investment, and Competitiveness

Budget 2025 introduces a comprehensive set of tax incentives to boost productivity and attract private investment across the economy, with significant implications for the agricultural sector. Central to this package is the Productivity Super-Deduction, which allows businesses to immediately write off a much larger portion of new capital investments. As a result, the Marginal Effective Tax Rate (METR) on agricultural investments decreases to 6.9%, making Canadian farm and agri-food capital investments more competitive than comparable U.S. tax treatments. The budget also expands the use of accelerated depreciation and immediate expensing, enabling producers to deduct the costs of new machinery, buildings, and technology more quickly. These measures collectively provide an estimated $2.7 billion in annual investment support, with the potential to generate up to $9 billion in additional economic output per year over the next decade by encouraging private capital. Meanwhile, the government confirms the cancellation of the previously announced increase to the Capital Gains Inclusion Rate, providing further stability for farmers planning business transitions or asset sales.

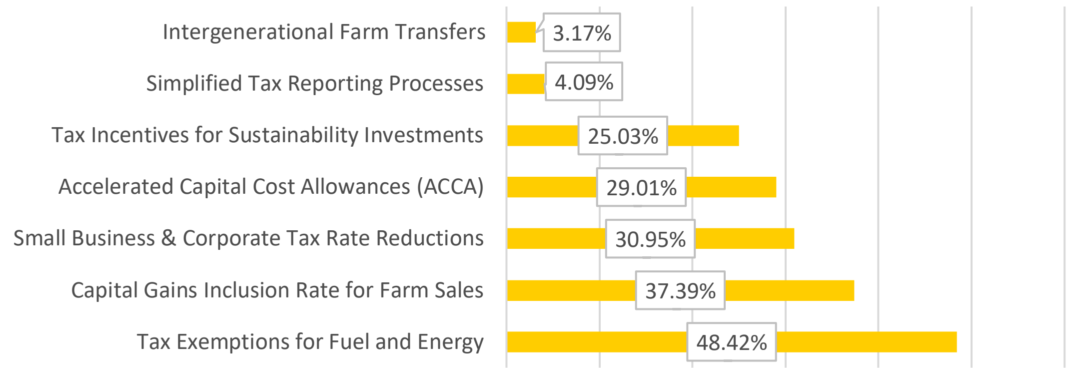
Farmers' priorities reflected in this segment of the budget: Farmers signalled that tax design around investment and farm transitions matters: 29.01% selected Accelerated Capital Cost Allowances (ACCA) as a critical tax tool. In comparison, 37.39% prioritized the Capital Gains Inclusion Rate for farm sales, and 30.95% highlighted reductions in small-business and corporate tax rates (Figure 4). The Productivity Super-Deduction and immediate expensing respond directly to the ACCA-type priority by lowering the projected marginal effective tax rate on agricultural investment to 6.9%, making Canadian farm investments more competitive than in the United States. This suite of measures aligns with producers' desire for a tax system that rewards capital investment in machinery, buildings, and technology and improves overall business competitiveness. The cancellation of the previously announced increase in the Capital Gains Inclusion Rate also reflects farmers' concerns about the tax treatment of farm sales and succession, helping preserve after-tax value when farms change hands.

Alignments and misalignments between the budget and farmers' preferences: There is strong alignment between the budget and farmers' tax preferences in two key areas: investment incentives and capital gains. The enhanced write-offs, accelerated depreciation, and immediate expensing provide producers with precisely the kind of ACCA-style support they identified as necessary, strengthening the business case for reinvesting in productivity-enhancing assets. Likewise, reversing the capital gains inclusion rate increase corresponds directly to the 37.39% who prioritized capital gains treatment for farm sales, reducing perceived risks around transition and exit. However, there's an opportunity to expand on the single most frequently selected tax priority: fuel and energy tax exemptions (48.42%) (Figure 4) While the general lowering of the cost of capital and a competitive METR will be welcomed, some farmers may feel that their day-to-day cost pressures (fuel and energy) and administrative burdens remain insufficiently addressed in this part of the budget.

Next Steps

While cancelling the capital gains inclusion rate increase is significant, there is limited detail on complementary supports for intergenerational farm transfers that some producers still value. Overall, farmers may view this tax package as a significant win on investment and capital gains, but only a partial response to the broader suite of tax tools they see as essential to long-run viability. Further research and communication regarding the broader suite of tax tools is necessary.

Figure 4. Prioritized by farmers
(each farmer had up to 3 choices)
(Table 4)



Sustainable Bond Framework and Farm Credit Canada Legislation

Budget 2025 outlines key steps to boost financial accessibility and support modernization in agriculture. The government plans to create a Sustainable Bond Framework to allow the issuance of both green and transition bonds aligned with the economic needs of Canadian agriculture. This framework aims to direct private and public investment towards cleaner, more competitive industrial and agricultural activities. At the same time, the budget suggests legislative changes to the Farm Credit Canada (FCC) Act to mandate regular reviews, ensuring FCC's operations stay aligned with the changing needs of the agriculture and agri-food sectors. These updates are intended to better match the FCC's priorities with producers' needs and to support groups that have historically faced challenges accessing finance, including women, youth, Indigenous peoples, etc. Collectively, these measures aim to strengthen the stability, inclusiveness, and sustainability of financing options for Canadian farm and agri-food businesses.

Farmers' priorities reflected in this segment of the budget: Farmers signalled that access to financing is generally adequate but not universal: while 60 % agree or strongly agree that they have no issues acquiring the funding they need, 15 % disagree, and another 24 % remain neutral, indicating a significant minority still faces barriers or uncertainty (Figure 6). At the same time, Farm Credit Canada already enjoys relatively high trust, with 57 % of producers expressing high confidence (ratings of 4 or 5) (Figure 5). The Sustainable Bond Framework, with its focus on channelling capital into cleaner, more competitive industrial and agricultural activities, directly addresses producers' desire for stable, long-term financing for modernization and transition investments. Legislative amendments requiring regular review of the FCC's mandate and operations further reflect farmers' priorities by committing the federal government to keep its central agricultural lender closely aligned with sector needs, including those of underrepresented groups.

Alignments and misalignments between the budget and farmers' preferences: There is clear alignment between the budget's intent and farmers' expressed priorities around financial accessibility and institutional reliability. A Sustainable Bond Framework, especially if linked to FCC, can "crowd in" private capital for on-farm and value-chain investments, potentially lowering borrowing costs and expanding the range of financing tools available for equipment upgrades, climate-resilient infrastructure, or technology adoption. Regular legislative reviews of the Farm Credit Canada Act reinforce and potentially deepen the already high levels of farmer confidence in FCC, while explicitly recognizing the need to better serve minority groups active in agriculture. However, the measures as described are still relatively high-level and capital-markets-oriented: they do not yet spell out how sustainable or transition bonds will translate into concrete, easily accessible loan products, flexible terms, or reduced collateral constraints for the 15 % who struggle with financing or the 24% who are uncertain (Figure 6). There is also a risk that, without careful design, sustainable bond–linked products might skew toward larger operations.

Next Steps

Farmers looking for immediate, ground-level improvements in loan access: simpler applications, more flexible security requirements, or tailored products for smaller and mid-sized farms, may find these commitments promising but still abstract. Likewise, while regular legislative review of the FCC is a vital governance step, farmers have not yet been given a clear picture of what concrete changes in FCC programming or risk appetite might follow. The farming community will much appreciate more detailed disclosures regarding these.

Figure 5. Farmer confidence level in FCC
(Table 5)

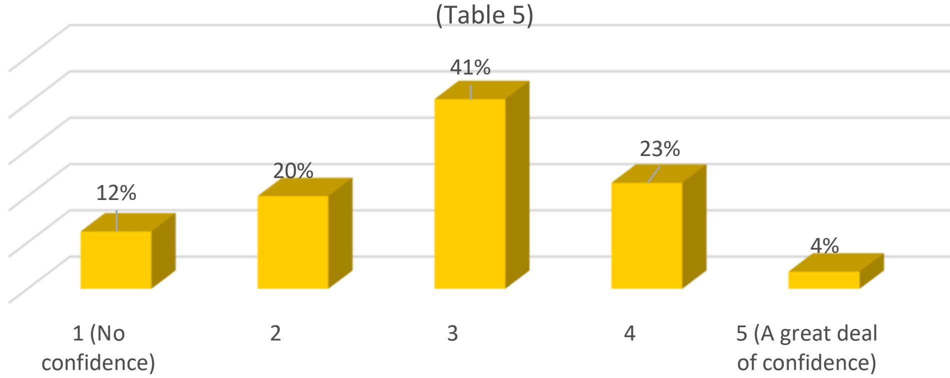
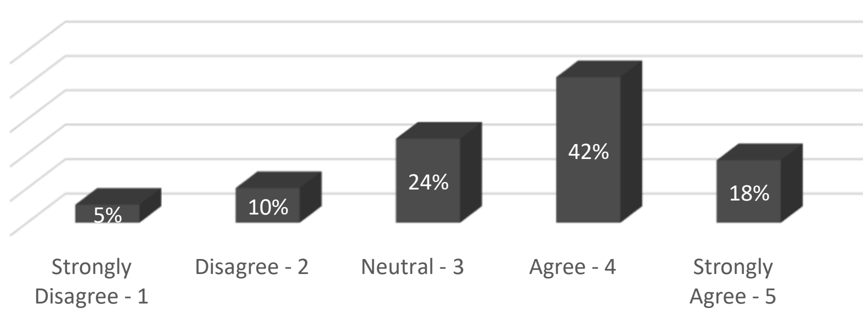


Figure 6. Farmers' agreement levels with the statement: "I have no issues acquiring the financing I need to sustain and grow my farming operations."
(Table 6)



Strengthening Competitiveness, Risk Management, and Market Diversification in Agriculture

Budget 2025 unveils a comprehensive investment package exceeding $639 million to enhance the competitiveness, resilience, and global standing of Canada's agriculture, fish, and seafood industries: key sectors for the country's rural employment and export success. Major initiatives include a significant boost to the AgriStability program, with $109.2 million allocated to increase compensation rates from 80% to 90% and double the payment cap to $6 million per farm, providing stronger protection against income drops caused by rising costs and volatile markets. The AgriStability program will also be updated to include pasture-related feed costs, benefiting livestock producers across major ranching provinces. Producers will also benefit from temporary increases to the Advance Payments Program (APP), raising the interest-free limit to $500,000 for canola producers and $250,000 for others, improving cash flow and reducing financing costs during vital operating periods. An additional $372 million over two years will support domestic production of biodiesel and renewable diesel through a new Biofuels Production Incentive, complemented by targeted regulatory amendments (such as the Clean Fuel Regulations) to bolster industry stability. Moreover, Farm Credit Canada has introduced a $1 billion Trade Disruption Customer Support Program to ease financial barriers faced by agribusinesses amid trade volatility. Overall, these measures aim to strengthen risk management, improve financial access, promote diversification, and keep Canadian agriculture competitive in an evolving global trade landscape.

Farmers' priorities reflected in this segment of the budget: This budget segment touches several of the core priorities farmers identified in the survey. Increasing AgriStability's compensation rate from 80 to 90 % and doubling the payment cap directly responds to the 26.97% of producers who prioritized "Programs for Sectoral Risk Management," by strengthening an existing, familiar tool for dealing with income shocks and volatile costs (Figure 7, same as Figure 2). The temporary expansion of interest-free limits under the Advance Payments Program (APP), together with FCC's $1 billion Trade Disruption Customer Support Program, responds to farmers' financing realities: while 60% say they have no issues accessing finance, 15% disagree, and 24% are neutral, so extra working-capital tools provide much-needed assistance (Figure 9). Finally, the Biofuels Production Incentive and Clean Fuel Regulation amendments align with the 58.84% who prioritized tax or financial incentives for sustainability and the broader climate and sustainability agenda, while also creating new demand and price support for feedstocks (Figure 7). Since 58% of the surveyed farmers feel that Federal renewable energy subsidies do not offset the costs of sustainable agricultural operations, this might address some of the farmers' pain points (Figure 10).

Alignments and misalignments between the budget and farmers' preferences: Risk-management concerns are addressed head-on through a more generous AgriStability, which speaks directly to producers' preference for tools that buffer them against income declines from higher costs and market shocks. FCC's new lending program plus higher APP interest-free limits show federal willingness to channel more capital into the sector, building on FCC, an institution in which 57% of farmers already express high confidence (Figure 8). The Biofuels Production Incentive and Clean Fuels adjustments are well-positioned to help close the perceived gap in sustainability support: 58% of respondents currently disagree that federal renewable energy subsidies offset the costs of sustainable operations (Figure 10). These measures can help strengthen demand-side support for low-carbon fuels and, indirectly, for crop-based feedstocks.

The clean-fuels support is targeted at industrial biofuel production, which may not be immediately visible to producers as "renewable energy subsidies" that reduce on-farm costs. While APP and FCC measures help with access to credit, they do not automatically solve longer-term structural worries some producers have about debt loads, collateral requirements, etc. As a result, farmers are likely to see this budget as a substantial step toward their trade, risk-management, and financing priorities, but still partial in addressing their concerns about everyday energy costs.

Next Steps

Clean-fuel and biofuel measures may boost commodity demand and create new revenue opportunities. Still, many farmers who currently oppose federal renewable energy subsidies will need to see more concrete, on-farm-facing supports before changing their minds. Finally, while FCC is well-positioned (given high farmer confidence in FCC) to deliver trade-disruption lending and potentially future sustainability-linked finance, the budget leaves open questions about how these tools will be tailored to smaller farms, diversified operations, and underrepresented groups that still face barriers to capital. These issues need to be addressed.

Figure 7. Top 3 policy priorities (national)*
*% of times a farmer mentioned a policy as one of their top three policy priorities
(Table 2)

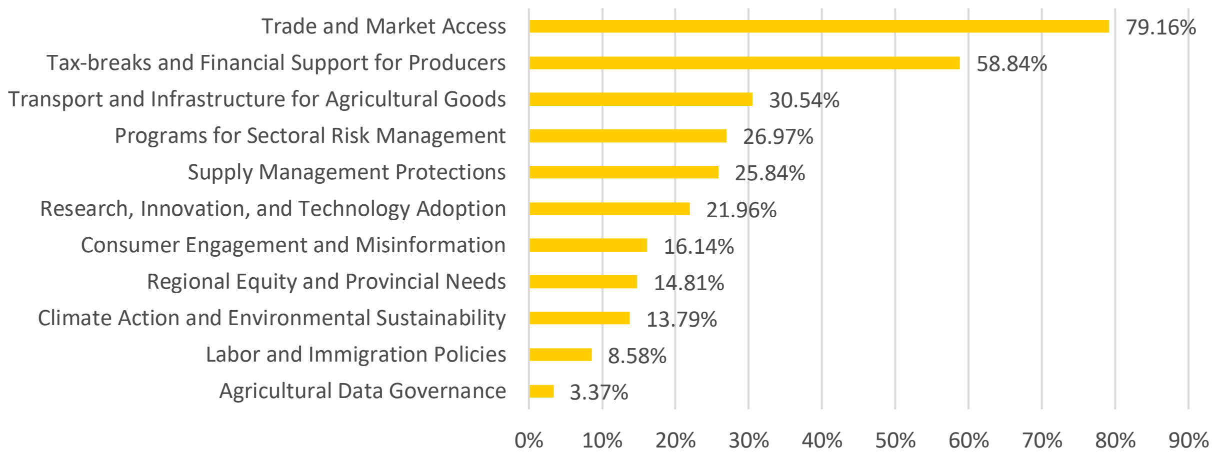


Figure 8. Farmer confidence level in FCC
(Table 5)

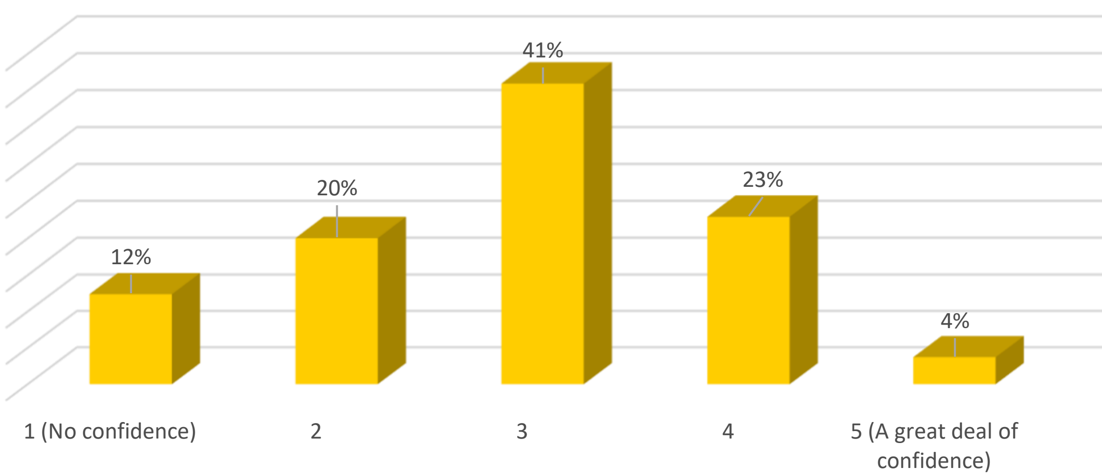


Figure 9. Farmers' agreement levels with the statement: "I have no issues acquiring the financing I need to sustain and grow my farming operations."
(Table 6)

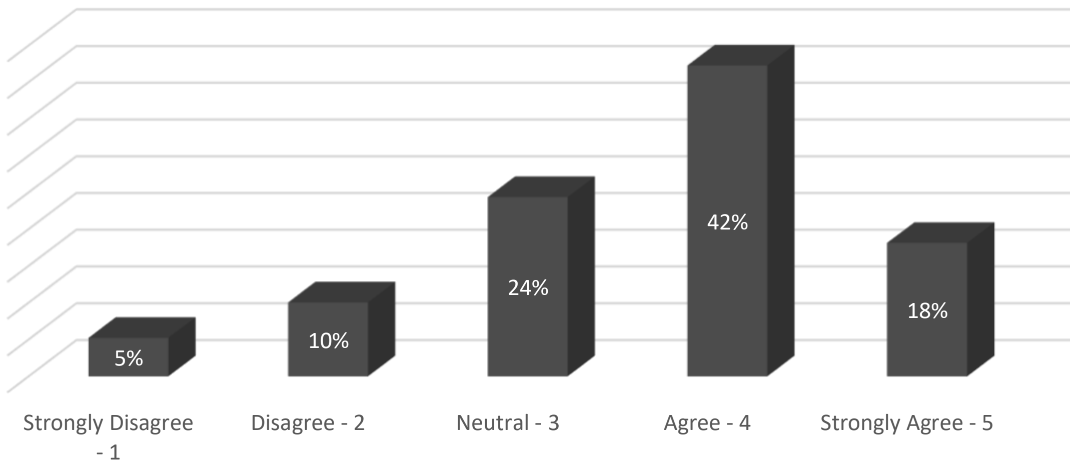
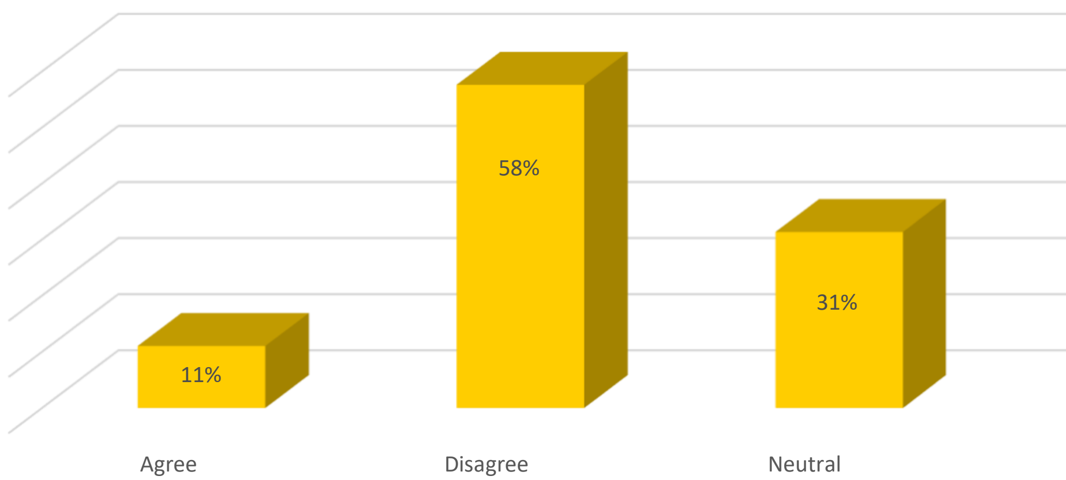


Figure 10. Farmer opinions on federal renewable energy subsidies (e.g., for solar, wind, bioenergy, etc.) offset the costs of sustainable agricultural operations.
(Table 7)



The Canadian Food Inspection Agency (CFIA), Digitization, Market Access, and Risk Management Supports for a More Resilient Agri-Food Sector

The Canadian Food Inspection Agency (CFIA) will receive $76 million over five years to modernize digital trade systems, including transitioning from paper-based processes to standardized digital import and export certificates and integrating artificial intelligence to improve traceability, reduce errors, and speed up service delivery for exporters. An additional $32.8 million over four years, along with ongoing funding, will support CFIA’s efforts to secure and expand market access through regulatory cooperation, barrier reduction, and active participation in new and existing trade agreements. Acknowledging persistent supply chain constraints, particularly in grain transportation, the government commits to continued work on forecasting, planning, and infrastructure capacity to ensure a more coordinated national logistics system.

To further strengthen export readiness, the budget funds a new digital trade-facilitation initiative designed to help producers and processors navigate global markets. The AgriStability program will be updated to include pasture-related feed costs ($8 million annually for AgriStability feed supports), benefiting livestock producers across major ranching provinces. It will begin voluntary collection of disaggregated data in 2025 to identify barriers to underrepresented groups' access to support. $639 million over five years will support workforce protection and sectoral transformation. A major $2.7 billion investment will modernize the Meteorological Service of Canada’s high-performance computing systems, improving weather forecasting for agriculture and other weather-sensitive sectors. Altogether, these initiatives aim to enhance operational efficiency, increase trade volume, improve market access, strengthen producer resilience, and modernize the information and risk-management systems that underpin Canada’s agricultural competitiveness.

Farmers’ priorities reflected in this segment of the budget: Several Budget 2025 measures directly address farmers’ stated priorities in trade, risk management, innovation, and competitiveness. Trade and market access (79.16%) and transportation and infrastructure (30.54%) are reflected in the CFIA's funding to digitize trade certificates, secure and expand agri-food market access, and address long-standing supply chain issues such as forecasting and infrastructure capacity (Figure 11, same as Figure 2). Programs for sectoral risk management (26.97%) and competitiveness concerns are addressed through amendments to AgriStability that make pasture-related feed costs eligible, directly lowering cost pressures for livestock producers and improving their resilience (Figure 11). Research, innovation, and technology adoption (21.96%) and emerging interest in data governance are echoed in the investments in CFIA digital tools, AI integration, digital trade facilitation, and the modernization of the Meteorological Service of Canada, which will enhance data-driven weather and operational planning for farms (Figure 11). Finally, the move to collect disaggregated data and acknowledge the barriers faced by underrepresented groups aligns with farmers' calls, implicit in their low confidence in federal policy support, for more responsive, evidence-based program adjustments.

Alignments and misalignments between the budget and farmers’ preferences: CFIA’s digital modernization and market-access work directly address trade-related administrative bottlenecks that slow exports, potentially improving the experience with an institution about which only 39% currently confident. In comparison, 26% report low confidence and 35% are neutral (Figure 12). The recognition of grain supply chain interdependence and explicit federal work on transportation planning and infrastructure capacity responds to the 52% of farmers who feel they have insufficient bargaining power with supply chain partners by signalling that Ottawa understands chokepoints and imbalances in the system (Figure 13). AgriStability’s inclusion of pasture-related feed charges, plus $8 million per year in feed support, translates directly into cost minimization for cow-calf and other livestock producers, which can improve competitiveness at a time when 57% of farmers disagree or strongly disagree that federal policies enhance their farm’s competitiveness. (Figure 14) The modernization of weather forecasting and digital tools also aligns with farmers’ desire for Research, innovation, and technology adoption (21.96%) (Figure 11).

Next Steps

Farmers who feel that federal policies do not currently enhance their competitiveness (57%) may welcome these steps but may still see them as incremental rather than transformative, particularly regarding major cost items outside feed, such as fuel and energy, and taxes (Figure 14). The CFIA investments and supply-chain work are promising. Still, producers have not yet been given a clear picture of how quickly these changes will reduce delays, paperwork, or compliance burdens in practice. Likewise, while disaggregated data collection under AgriStability is an important step, it is still diagnostic; concrete program redesigns for underrepresented groups have yet to be articulated. The government acknowledges supply chain challenges; next steps should include researching and communicating concrete, time-bound reforms that would tangibly shift bargaining power toward producers in the near term. In short, these measures align well with farmers' calls for better trade facilitation, digital tools, and risk management. However, producers are still waiting to see more substantial, more immediate shifts in supply-chain power dynamics and in the overall competitiveness environment.

Figure 11. Top 3 policy priorities (national)*
*% of times a farmer mentioned a policy as one of their top three policy priorities
(Table 2)

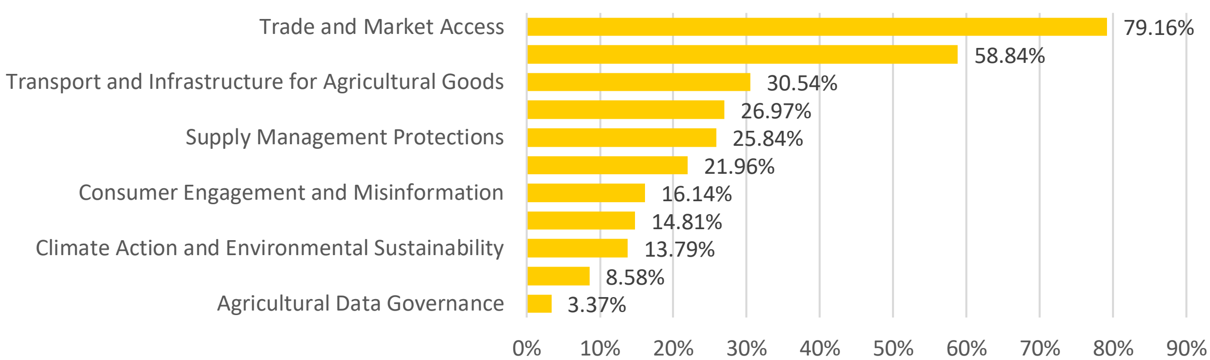


Figure 12. Farmer confidence level in CFIA
(Table 8)

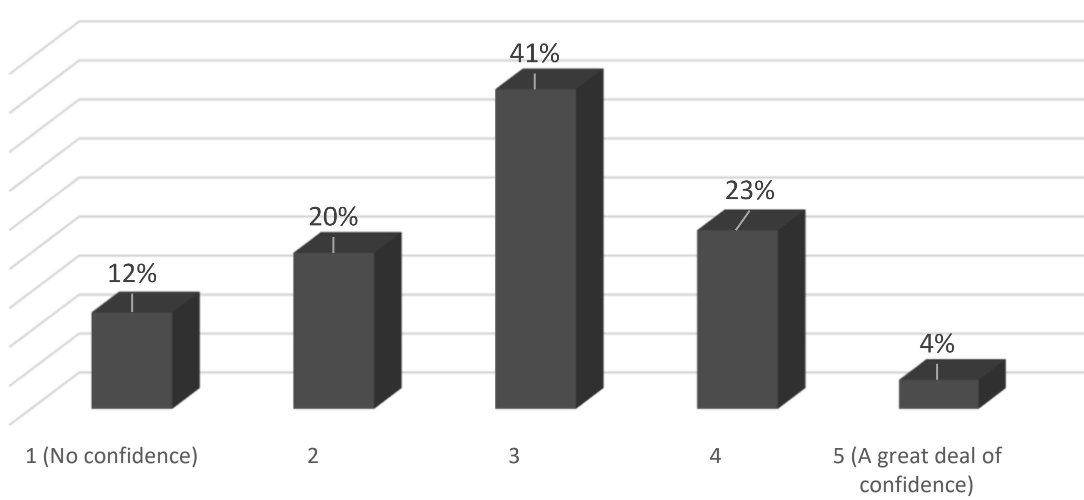


Figure 13. Farmer opinions on bargaining power with supply chain partners
(Table 9)

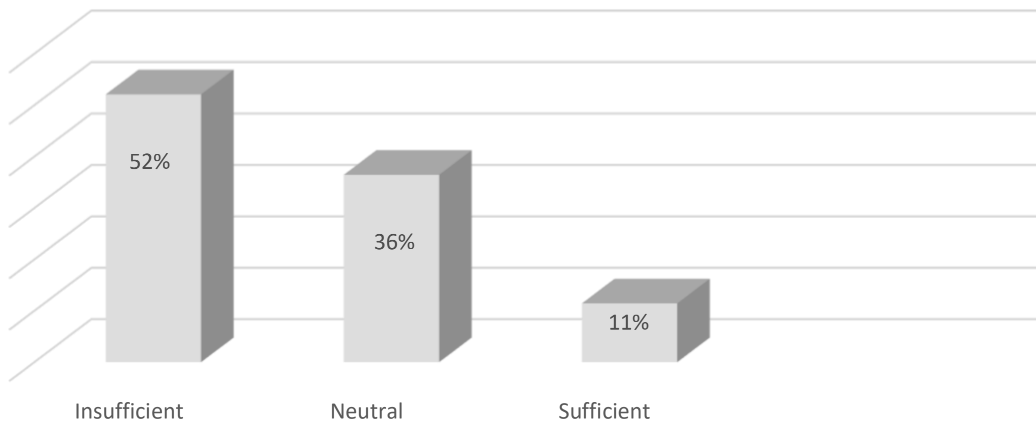
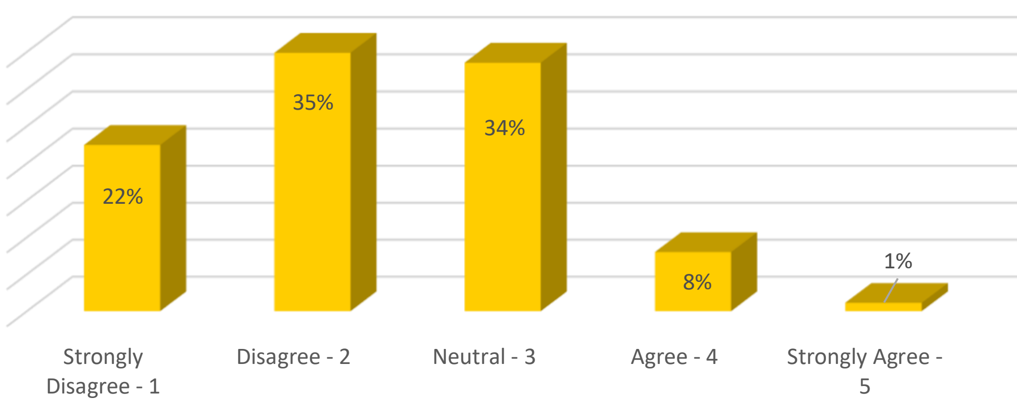


Figure 14. Farmer perception of "Canadian federal policies enhance or support the competitiveness of my farm operations"
(Table 10)



Refocusing AAFC on Core Issues, Competitiveness, and Operational Efficiency

Budget 2025 outlines a strategic shift for Agriculture and Agri-Food Canada (AAFC), focusing on core scientific and economic priorities with greater emphasis on competitiveness, innovation, and the adoption of clean technologies rather than broader climate initiatives. As part of this transition, AAFC will phase out certain activities outside its primary mandate, such as the Agricultural Climate Solutions Living Labs, and will concentrate support on helping producers and agribusinesses innovate, implement cleaner technologies, and stay competitive in an increasingly global market, while trying to establish Canada as a leader in sustainable food production. The department plans to streamline its scientific work by reducing efforts better suited to academia or industry and focusing its own research on key areas like crops and horticulture, animal production, food, biodiversity, and environmental sustainability, often through partnerships with sector stakeholders. At the same time, AAFC will continue supporting research and innovation through grants and contributions. Internally, the budget promotes greater operational efficiency by reducing management layers, streamlining administrative support, increasing the use of technology and automation to replace manual tasks, and reducing reliance on external contractors. Overall, these adjustments aim to enable AAFC to operate with fewer resources while maintaining service levels and better aligning activities with sector priorities and long-term cost efficiency.

Farmers' priorities reflected in this segment of the budget: This AAFC reorientation clearly aligns with several priorities that farmers value more than climate as a standalone issue. By highlighting business competitiveness and "supports for producers and agribusinesses to innovate, adopt clean technologies and stay competitive," the budget directly addresses research, innovation, and technology adoption (21.96%) (Figure 15, same as Figure 2), as well as broader competitiveness issues. The decision to streamline AAFC Scientific activities around core areas such as crops and horticulture, animal production, food, biodiversity, and environmental sustainability, while partnering with industry and academia for other activities, matches producers' preference for more focused, sector-driven research over scattered programming. Simultaneously, the ongoing emphasis on environmental sustainability and clean technology recognizes farmers' specific climate-related concerns, such as soil health, water management, disaster relief, and adaptation tools (Figure 17), even if they did not rank "climate action" as a top federal policy priority (13.79%) (Figure 15).

Alignments and misalignments between the budget and farmers' preferences: From a trust and alignment perspective, AAFC is starting from a weak position: only 27% of farmers express high confidence, while 32% report low confidence and 41% sit neutral (Figure 16). The budget's pivot toward competitiveness, innovation, and streamlined science operations can be read as a response to farmers' message that climate investments need to be tightly linked to on-farm productivity and adaptation. Furthermore, trade, tax, and risk management issues are more pressing. Cutting back on Agricultural Climate Solutions Living Labs while maintaining core environmental and sustainability science and supporting clean tech adoption may reassure farmers who see large, centralized climate programs as less directly applicable than targeted, farm-level tools. However, there is also a risk of misalignment: when asked about top environmental and climate policy-related concerns, survey results show strong interest in disaster relief (55%), climate-risk insurance (48%), soil health (47%), and climate adaptation research (18%) (Figure 17). If the winding down of ACS Living Labs is perceived as a retreat from practical, field-level climate solutions without clear replacement mechanisms, skeptical producers could interpret it as AAFC stepping back just as extreme weather risks intensify.

Next Steps

While the budget repositions AAFC around competitiveness, innovation, and streamlined science, it is less explicit about how environment-oriented programs will be strengthened or retooled. Producers may welcome less bureaucracy and fewer overlapping programs. Still, trust in AAFC will only grow if the new configuration delivers accessible programs and risk management tools, not just internal efficiencies. The shift of some science activities to academia and industry could improve relevance and leverage. Still, it may also create uncertainty about who is responsible for long-term public-good research on issues like regenerative practices and water conservation. This needs to be clearly articulated by the federal government going forward. To fully align with farmers' priorities, future implementation will need to demonstrate that climate-related supports are not simply cut, but refocused into more targeted, producer-facing instruments that tie environmental outcomes directly to competitiveness.

Figure 15. Top 3 policy priorities (national)*
*% of times a farmer mentioned a policy as one of their top three policy priorities
(Table 2)

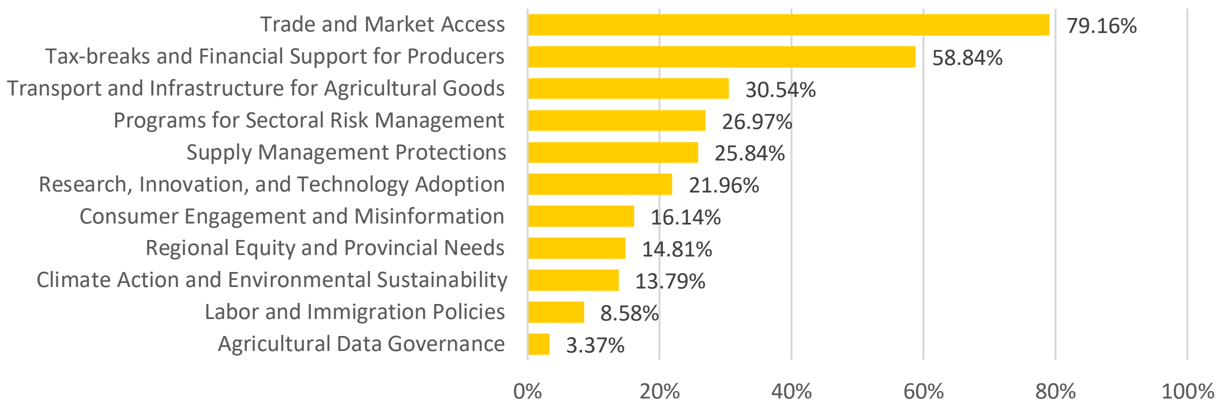


Figure 16. Farmer confidence level in CFIA
(Table 11)

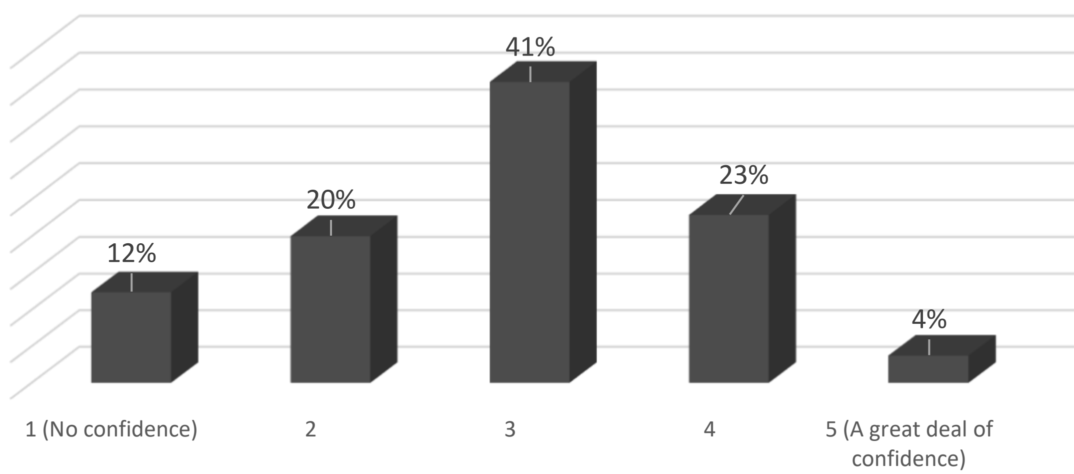
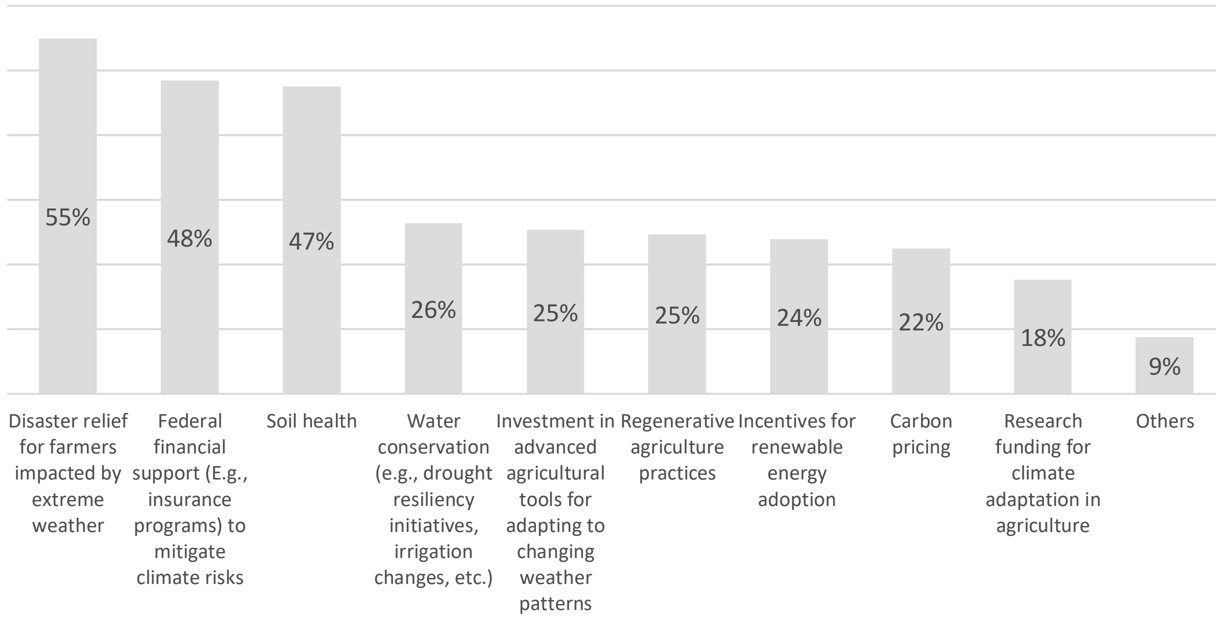


Figure 17. Environmental and climate priorities of farmers
(each farmer could pick upto 3 options)
(Table 12)



Workforce Supports, Labour Market Resilience, and Immigration System Recalibration

Budget 2025 allocates over $25 billion in support for workers and businesses, with an estimated accrual cost of $12 billion over five years (2025–26 onward), alongside $4.4 billion in anticipated tariff revenue. These investments aim to provide industries, including agriculture, with the tools needed to build a more resilient workforce and strengthen Canada's economic competitiveness. Concurrently, the federal government has announced a significant recalibration of immigration and temporary labour programs. The 2026–2028 Immigration Levels Plan stabilizes permanent resident admissions at 380,000 per year, down from 395,000 in 2025, while maintaining substantial allocations to the Economic Class (239,800–244,700 annually). In contrast, the Temporary Foreign Worker Program (TFWP) and International Mobility Program (IMP) will undergo sharp reductions, with the government targeting a decrease of the temporary resident population to below 5% of Canada's total population by 2027. TFWP admissions are planned to fall to 60,000 in 2026 and 50,000 in 2027–2028, while IMP admissions remain at 170,000 per year, reflecting its broader economic purpose and LMIA-exempt pathways. These changes demonstrate a federal effort to balance labour force needs, housing and service capacity, and long-term economic goals, while creating more stable pathways for in-Canada transitions to permanent residency. The TFWP and IMP have been significant sources of labour for some agribusinesses in the past.

Farmers' priorities reflected in this segment of the budget: Farmers' views on labour and immigration are mixed. A combined 39% of producers either want to maintain (29%) or increase (24%) permanent residency opportunities for TFWs (Figure 18). While only 10% of farmers favour reducing them, the remainder are unsure, indicating an overall preference for stability and lower immigration numbers (Figure 18), but no halt in immigration altogether. The fact that only 15% of the surveyed farmers disagreed with the statement that they can meet their labour demands from citizens and permanent residents aligns with reduced Temporary Foreign worker levels targeted for the next three years (Figure 20). The budget's commitment to over $25 billion in support for workers and industries, including industries heavily dependent on agricultural labour, should complement the current labour market scenario in agriculture as it responds to farmers' need for predictable labour availability and policies that strengthen workforce resilience. Additionally, most farmers (53%) believed at the beginning of the year that federal policies strike an equal balance between profitability and farming wages, aligning with the newly declared budget's framing of protections and supports that aim to stabilize both workers and industry competitiveness (Figure 19). By situating these investments within a broader strategy to "build a more resilient Canadian economy," the budget prioritizes farmers' interests in a labour environment that considers both farmers and employees, and includes temporary and permanent immigrant involvement.

Alignments and misalignments between the budget and farmers' preferences: There is clear alignment in that farmers broadly accept (and, in many cases, encourage) continued access to foreign labour, and the budget reinforces labour protection and sectoral supports rather than halting entry or mobility. The focus on tools that improve workers' and industries' resilience also mirrors farmers' acceptance of a balanced approach to profitability and fair wages. However, the budget does not explicitly address permanent residency pathways for agriculture TFWs (Apart from pilot programs), signalling a need for clearer policy direction. Similarly, while the budget invests in protections and tools for workers, it does not explicitly outline measures to improve labour supply predictability or streamline TFW processes.

Next Steps

Farmers seeking more explicit guidance on permanent residency pathways for TFWs working on their farms will find this segment incomplete, as farming employees do not have dedicated immigration streams beyond federal and provincial agri-food pilots. Additionally, the budget does not directly address operational issues related to immigration, such as processing times, administrative complexity, or seasonal labour shortages, all of which are longer-term pain points for producers. The emphasis on worker protections may be viewed positively, but some farmers may worry about rising compliance costs if support for employers is not equally detailed. Overall, the budget acknowledges labour as a strategic priority but falls short of detailing the thorough, agriculture-specific labour and immigration measures that would fully align with farmers' expectations. Depending on the jurisdiction, the federal and provincial governments can consider disseminating more detailed plans.

Figure 18. Opinions on Permanent Residency opportunities for Temporary Foreign Workers (TFWs)
(Table 13)

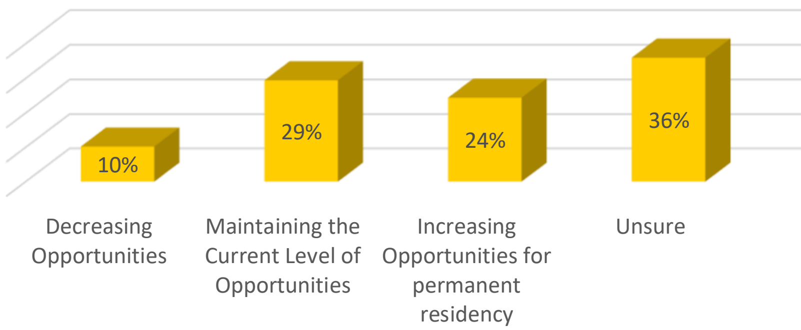


Figure 19. Farmers' opinions on current profit vs wages
(Table 14)

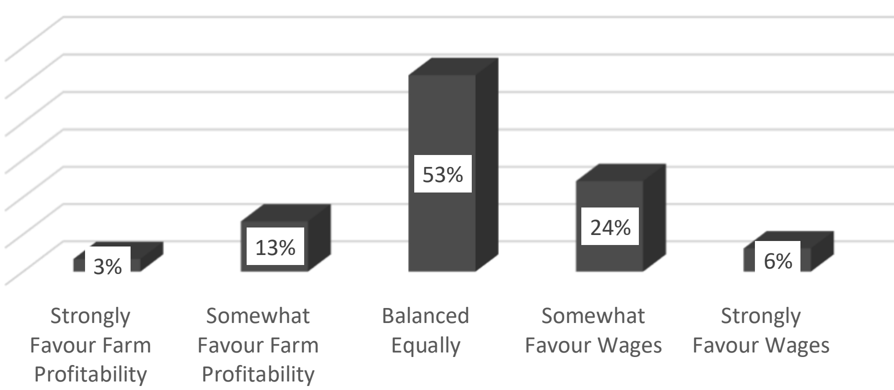
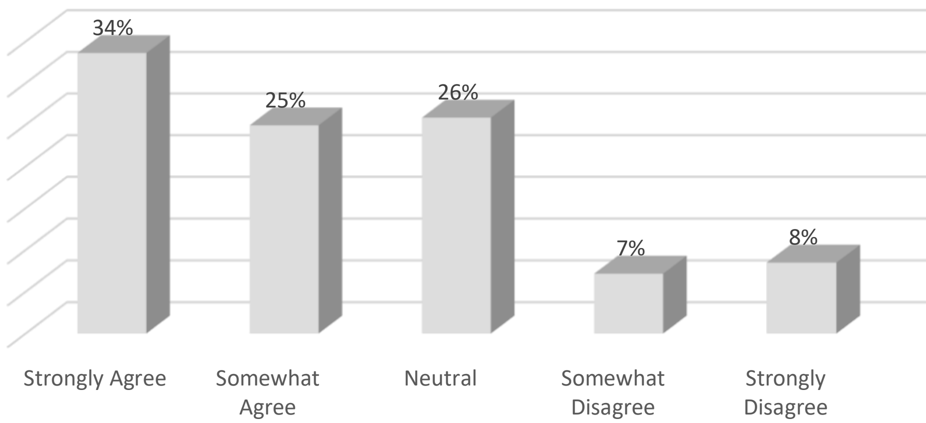


Figure 20. Farmers' position on: "I can meet my operation's labour needs by hiring Canadian citizens or permanent residents"
(Table 15)



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APPENDIX

Survey Question:

1. **Which international market should Canada prioritize for reducing agricultural trade barriers?** (Select 1)
    - United States
    - Mexico
    - European Union
    - UK
    - China
    - India
    - Japan
    - Others (Please specify): _______________

Results:

Table 1	
International market	**Top priority (%) for farmers**
United States	39.53%
China	29.62%
European Union	15.63%
India	6.03%
Mexico	3.06%
Others	2.45%
Japan	2.04%
UK	1.63%

2. **Which of the following policy issues do you believe political parties should prioritize the most in the lead-up to the next federal election?**
(Please **select up to three policy issues** that are most important to you, then **rank them as per priority**)
RANDOMIZE ORDER

POLICY ISSUES	
Climate Action and Environmental Sustainability	e.g., climate change, carbon pricing, soil health, water conservation initiatives for agriculture
Trade and Market Access	e.g., Dismantling Interprovincial Trade, expanding international markets, reducing non-tariff barriers, addressing Canada-USA trade conflicts
Supply Management Protections	e.g., safeguarding supply-managed industries like dairy, poultry, and eggs, ensuring fair compensation in trade deals
Tax-breaks and Financial Support for Producers	e.g., tax relief, carbon tax exemptions, financial aid for operational and equipment investments
Labor and Immigration Policies	e.g., enhancing Temporary Foreign Worker Programs, addressing labor shortages, pathways to permanent residency
Research, Innovation, and	e.g., increased funding for agricultural research,

PRIORITY
#1 PRIORITY
#2 PRIORITY
#3 PRIORITY

Technology Adoption	digital tools for productivity and sustainability
Programs for Sectoral Risk Management	e.g., improving AgriStability and AgriInvest for managing market volatility, weather, and disease risks
Transport and Infrastructure for Agricultural Goods	e.g., improving transportation networks to reduce costs and delays for agri-products
Consumer Engagement and Misinformation	e.g., combating misconceptions about farming practices, improving public trust in agriculture
Regional Equity and Provincial Needs	e.g., ensuring federal policies reflect the unique needs of specific provinces and rural communities
Agricultural Data Governance	e.g. Regulations and Legislations around Agricultural data use, data sharing, privacy, and ownership

Results:

Table 2	
POLICY ISSUES	Across Canada
Trade and Market Access	79.16%
Tax-breaks and Financial Support for Producers	58.84%
Transport and Infrastructure for Agricultural Goods	30.54%
Programs for Sectoral Risk Management	26.97%
Supply Management Protections	25.84%
Research, Innovation, and Technology Adoption	21.96%
Consumer Engagement and Misinformation	16.14%
Regional Equity and Provincial Needs	14.81%
Climate Action and Environmental Sustainability	13.79%
Labour and Immigration Policies	8.58%
Agricultural Data Governance	3.37%

Survey Question:

3. **Which of the following measures would be most effective in mitigating the impact of potential tariffs on Canadian agricultural products? (Select up to three.)**
    - Increased government subsidies or financial aid
    - Diversification of export markets
    - Retaliatory tariffs on agricultural and non-agricultural imports
    - Increased diplomatic activity
    - Improved access to trade dispute resolution mechanisms (e.g., WTO appeals, bilateral mediation)
    - Expanding domestic processing and value-added production
    - Strengthening supply chain and infrastructure to improve global competitiveness
    - Dismantling Inter-provincial Trade Barriers
    - Developing new trade partnerships and agreements with emerging markets
    - Other (please specify): ____________

Results:

Measures for mitigating the impact of potential tariffs	% of farmers in favour
Diversification of export markets	51%
Expanding domestic processing and value-added production	43%
Developing new trade partnerships and agreements with emerging markets	41%
Dismantling inter-provincial trade barriers	32%
Increased government subsidies or financial aid	28%
Strengthening supply chain and infrastructure to improve global competitiveness	25%
Increased diplomatic activity	16%
Retaliatory tariffs on agricultural and non-agricultural imports	11%
Improved access to trade dispute resolution mechanisms	9%
Others	4%

Survey Question:

4. **Which of the tax incentives and policies you're familiar with are the most critical to your farm or agribusiness?**
Select up to three that are most important to you.

TAX POLICIES & INCENTIVES		MOST IMPORTANT
Small Business & Corporate Tax Rate Reductions	e.g., lower tax rates for businesses to ease financial burdens	☐

Accelerated Capital Cost Allowances (ACCA)	e.g., faster depreciation on equipment and machinery to encourage investments	☐
Tax Exemptions for Fuel and Energy	e.g., exemptions for propane, natural gas, and diesel used on farms from carbon pricing or other taxes	☐
Capital Gains Inclusion Rate for Farm Sales	e.g., taxation policies when selling farm properties or businesses	☐
Intergenerational Farm Transfers	e.g., tax measures supporting family farm transfers like amendments under Bill C-208	☐
Tax Incentives for Sustainability Investments	e.g., deductions or credits for renewable energy, sustainable practices, or climate-resilient infrastructure	☐
Simplified Tax Reporting Processes	e.g., streamlined tax filing requirements and reduced compliance burdens	☐
I am not familiar with any of these		☐

Results:

Table 4

Tax policies considered critical for business	Prioritized by farmers (As one of their 3 picks-at max)
Tax Exemptions for Fuel and Energy	48.42%
Capital Gains Inclusion Rate for Farm Sales	37.39%
Small Business & Corporate Tax Rate Reductions	30.95%
Accelerated Capital Cost Allowances (ACCA)	29.01%
Tax Incentives for Sustainability Investments	25.03%
Simplified Tax Reporting Processes	4.09%
Intergenerational Farm Transfers	3.17%

Survey Question:

5. **How much confidence do you have in the following institutions?**
(Please select one option for each institution.)
RANDOMIZE

Institution	**No confidence at all 1**	**2**	**3**	**4**	**A great deal of confidence 5**
Farm Credit Canada	☐	☐	☐	☐	☐

Results:

Table 5

	Confidence Level				
Organization	1 (No confidence)	2	3	4	5 (A great deal of confidence)
Farm Credit Canada	5%	10%	28%	39%	18%

Survey Question:

6. **Please indicate the extent to which you agree or disagree with the following statements:**

	Strongly Disagree 1	Disagree 2	Neutral 3	Agree 4	Strongly Agree 5
I have no issues acquiring the financing I need to sustain and grow my farming operations.	☐	☐	☐	☐	☐

Results:

Table 6					
	Strongly Disagree - 1	**Disagree - 2**	**Neutral - 3**	**Agree - 4**	**Strongly Agree - 5**
Policy Perceptions: I have no issues acquiring the financing I need to sustain and grow my farming operations.	**5%**	**10%**	**24%**	**42%**	**18%**

Survey Question:

7. **To what extent do you agree or disagree with the following statements about federal sustainability incentives?**
(Please rate each item)

Statement	**Disagree**	**Neutral**	**Agree**
Federal **renewable energy subsidies** (e.g., for solar, wind, bioenergy, etc.) offset the costs of sustainable agricultural operations.	☐	☐	☐

Results:

Table 7			
	Agree	**Disagree**	**Neutral**
Opinion on Federal renewable energy subsidies (e.g., for solar, wind, bioenergy, etc.) offset the costs of sustainable agricultural operations.	**11%**	**58%**	**31%**

Survey Question:

8. **How much confidence do you have in the following institutions?**
(Please select one option for each institution.)

RANDOMIZE

Institution	**No confidence at all 1**	**2**	**3**	**4**	**A great deal of confidence 5**
Canadian Food Inspection Agency	☐	☐	☐	☐	☐

Results:

Table 8						
	Confidence Level					
Organization	1 (No confidence)	2	3	4	5 (A great deal of confidence)	Grand Total
Canadian Food Inspection Agency	8%	18%	35%	30%	9%	100%

Survey Question:

9. **To what extent do you feel your farm operation has sufficient bargaining power with the following entities?**

	Sufficient	Neutral	Insufficient
Supply Chains	☐	☐	☐

Results:

Table 9			
	Insufficient	**Neutral**	**Sufficient**
Perceived Bargaining Power with Supply Chain Partners	**52%**	**36%**	**11%**

Survey Question:

10. **Please indicate the extent to which you agree or disagree with the following statements:**

	Strongly Disagree 1	Disagree 2	Neutral 3	Agree 4	Strongly Agree 5
Canadian federal policies enhance or support the competitiveness of my farm operations	☐	☐	☐	☐	☐

Results:

Table 10					
	Strongly Disagree - 1	Disagree - 2	Neutral - 3	Agree - 4	Strongly Agree - 5
Policy Perceptions: Canadian federal policies enhance or support the competitiveness of my farm operations	22%	35%	34%	8%	1%

Survey Question:

11. **How much confidence do you have in the following institutions?**
(Please select one option for each institution.)
RANDOMIZE

Institution	**No confidence at all 1**	**2**	**3**	**4**	**A great deal of confidence 5**
Agriculture and Agri-Food Canada (Ministry of Agriculture)	☐	☐	☐	☐	☐

Results:

Table 11					
	Confidence Level				
Organization	1 (No confidence)	2	3	4	5 (A great deal of confidence)
Agriculture and Agri-Food Canada	12%	20%	41%	23%	4%

Survey Question:

12. **Which environmental and climate issues should political parties prioritize in the next federal election? Select your 3 top priorities.**

	PRIORITY
Incentives for renewable energy adoption	Top Priority
Carbon pricing	2nd
Soil health	3rd
Regenerative agriculture practices	
Water conservation (e.g., drought resiliency initiatives, irrigation changes, etc.)	
Disaster relief for farmers impacted by extreme weather	

Investment in advanced agricultural tools for adapting to changing weather patterns
Federal financial support (E.g., insurance programs) to mitigate climate risks
Research funding for climate adaptation in agriculture
Others: Please type other options

Results:

Table 12

Environmental and climate priorities of farmers

Environmental Issue	Number of Mentions
Disaster relief for farmers impacted by extreme weather	55%
Federal financial support (E.g., insurance programs) to mitigate climate risks	48%
Soil health	47%
Water conservation (e.g., drought resiliency initiatives, irrigation changes, etc.)	26%
Investment in advanced agricultural tools for adapting to changing weather patterns	25%
Regenerative agriculture practices	25%
Incentives for renewable energy adoption	24%
Carbon pricing	22%
Research funding for climate adaptation in agriculture	18%
Others	9%

Survey Question:

13. **Which of the following changes to permanent residency opportunities do you support for Temporary Foreign Workers (TFWs) working in agriculture and agri-food production?**
    - Increasing Opportunities for permanent residency
    - Maintaining the Current Level of Opportunities
    - Decreasing Opportunities
    - Unsure

Table 13

Row Labels	Decreasing Opportunities	Maintaining the Current Level of Opportunities	Increasing Opportunities for permanent residency	Unsure
Opinions on Permanent Residency Opportunities for Temporary Foreign Workers (TFWs)	10%	29%	24%	36%

Survey Question:

To what extent do current policies balance farm profitability with wages for farm workers?

- Strongly Favour Farm Profitability
- Somewhat Favour Farm Profitability
- Balanced Equally
- Somewhat Favour Wages
- Strongly Favour Wages

Results:

Table 14					
	Strongly Favour Farm Profitability	**Somewhat Favour Farm Profitability**	**Balanced Equally**	**Somewhat Favour Wages**	**Strongly Favour Wages**
Opinion on Current Policies Favouring Profit vs. Wages	**3%**	**13%**	**53%**	**24%**	**6%**

Survey Question:

14. **I can meet my operation's labour needs by hiring Canadian citizens or permanent residents.**
    - Strongly Agree
    - Somewhat Agree
    - Neutral
    - Somewhat Disagree
    - Strongly Disagree

Results:

Table 15					
	Strongly Agree	**Somewhat Agree**	**Neutral**	**Somewhat Disagree**	**Strongly Disagree**
Farmers' position on: "I can meet my operation's labour needs by hiring Canadian citizens or permanent residents"	**34%**	**25%**	**26%**	**7%**	**8%**