

Building Future Success

Growing Canada's agricultural sector

A ROUNDTABLE SUMMARY | FEBRUARY 2026

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This report was written by Stephany Laverty, Senior Policy Analyst at the Canada West Foundation.

Acknowledgements

Canada needs a clear, long-term vision for its agri-food industry, but charting that path forward requires collaboration among producers, investors and trading partners. Conversations like the one at this roundtable play a key role in determining shared priorities and measurable outcomes that can help grow the industry and increase competitiveness.

We would like to offer a special thanks to our partner, Canada Infrastructure Bank, our sponsors, Farm Credit Canada and Osler, Hoskin and Harcourt LLP (Osler), and to our moderator, Cherilyn Jolly-Nagel.

To all those who participated in the discussion: your thoughtful insights were deeply appreciated and helped shape this report.

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CONTENTS

**Building Future Success:
Growing Canada's agricultural sector**

02

Introduction

03

**Key takeaway:
National alignment
and systemic strategy**

04

On-farm investment

07

**Market and product
diversification**

09

Infrastructure

12

Technology and innovation

14

**Toward a national strategy:
More research required**

16

Conclusion

Introduction

On November 5, 2025, the Canada West Foundation, in partnership with the Canada Infrastructure Bank (CIB) convened a roundtable in Regina, Saskatchewan, with sponsorship from Farm Credit Canada and Osler, Hoskin and Harcourt LLP (Osler). Held under Chatham House rule, the roundtable brought together agriculture, business and government stakeholders to address the following question:

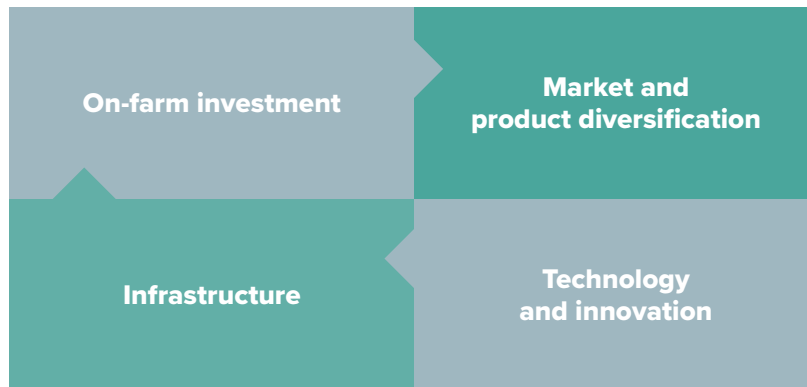
What are the biggest opportunities and challenges for increasing Canada's agri-food production, processing and net exports?

A central conclusion of the discussion was the need for **a comprehensive national agriculture strategy**. Participants agreed that such a strategy must articulate clear priorities, deliverables and performance measures. While the roundtable did not seek to prescribe specific targets or metrics, it identified several thematic elements that could serve as the foundation for a nationally aligned strategy, informed by further engagement with key sector stakeholders representing various agricultural regions of the country.

KEY TAKEAWAY:

National alignment and systemic strategy

The discussion underscored the interconnected nature of the Canadian agri-food system and the need to treat agriculture as a national economic priority. Participants emphasized that progress and evolution depend on co-ordinated action across four interrelated themes:



Strategic alignment among these themes would support modernization, expansion and diversification for the sector, reduce barriers and enable the sector to move toward shared goals and objectives supported by measurable indicators of progress.

This report examines each theme, identifies challenges and barriers, and provides recommended next steps to ensure the conversation to develop this national strategy continues.

On-farm investment

DISCUSSION SUMMARY:

- The definition of a farmer is changing as is the rural context.
- Smaller-scale investments that are easily understandable and accessible are needed.
- Investments to increase storage capacity on farms would have positive impacts.
- There is a generational shift that has resulted in more entrepreneurial and enterprise-focused farmers.

Urban areas in Canada have historically attracted a disproportionate share of investment, labour and business development contributing to stronger economic growth. Participants noted that targeted on-farm investments could play a similar catalytic role in rural communities. Farmers and producers could use on-farm investments to support both agricultural productivity and broader regional development. With ongoing advancements in ag-technology, the definition of a “farmer” also is evolving from a small-scale producer to larger-scale entrepreneur. This transition creates opportunities to revisit farm investment programs and look at ways they could be updated or improved to be more accessible to the modern “farmer.”

Most on-farm capital originates with farmers who are managing limited cash flow due to debt loads as financing terms have moved from five to between seven and 10 years, with costlier inputs. Farmers may only have a career spanning 45-50 years, so each year needs to be as productive as possible. When product cannot move through the value chain, farmers not only lose a year of investment but also the return on that investment through sales.¹

Farmers typically mitigate this risk by investing in what has worked in the past or through programs that are readily accessible and easy to access. Examples used at the roundtable included interest-free cash advances or dividends from energy investments.

Most federal investment in infrastructure focuses on large-scale projects valued at more than \$150 million, and on-farm infrastructure typically costs quite a bit less. The roundtable participants recognized that there needs to be more opportunities for smaller-scale investments at the federal level.

A specific example of this is the lack of storage capacity, such as bins for grains and oilseeds. While farmers harvest in the fall, market demand may not peak until the spring. To make the most profits possible, additional capacity to store products is essential.

¹ There are many reasons why product cannot move through the value chain. Export market or domestic regulations and infrastructure delays or failures can all impede movement.

Irrigation and drainage projects were also identified as areas where additional investments could be made to support the sector. In 2024, almost 97 per cent of total irrigated volumes in Canada were used in Western Canada, with Alberta comprising almost 85 per cent of total irrigation volumes.² Drainage to remove water from fields can occur at the surface level through “drainage ditches, sloping of the land, draining of wetlands”³ and is typically how drainage is approached in the Prairie provinces. In Eastern Canada, sub-surface or tile drainage is more common. The largest pumping system in Canada is the Rivard Pumping Works in Chatham-Kent, Ontario, which uses a complex system of pumps and drains to maintain 33,000 acres. However, the system is in need of modernization and upgrade.⁴

As farmers face increasingly volatile weather patterns with climate change, these infrastructure additions and upgrades can help to mitigate the risks from too much or insufficient water, water quality, and can increase crop yields. Recent investments in southern Alberta irrigation provide a funding model for these projects moving forward that leverages federal, provincial and local partnerships.

CASE STUDY

Federal, Provincial Partnership and the Alberta Irrigation Project

In December 2020, the Canada Infrastructure Bank, Government of Alberta and irrigation districts in southern Alberta announced “an agreement for the Alberta Irrigation Project [...] to build modern irrigation infrastructure and significantly expand irrigable land opportunities.” The announcement detailed that the Canada Infrastructure Bank would lend \$407.5 million, the Government of Alberta would contribute \$244.5 million and the farmers via their districts would contribute \$163 million to advance the single largest irrigation expansion in Alberta’s history and support the province’s economy. With the success of the initial funding, the partners then announced in November 2021 that an additional \$117.7 million would be invested for two phases of work. Phase one work is expected to result in approximately 56,100 new irrigated acres. Phase two is expected to result in approximately 143,800 new irrigated acres (200,000 new acres total).

The projects are estimated to contribute a combined total of \$59.5 million to Alberta’s gross domestic product (GDP) each year.⁵ This irrigable land expansion has resulted in new growth and downstream investment opportunities within the region, including a \$600-million potato processing facility expansion and a \$222-million new cold storage facility to support expanded operations in Southern Alberta.



Irrigation pipes at a construction site near Chin, Alta. (Photo courtesy of CIB)

² Statistics Canada Table 38-10-0239-01Irrigation volume by province and drainage region

³ Norris, Maggie. “Down the drain: Agricultural surface drainage across Canada,” *Knowledge Brief*, 2018, University of Saskatchewan Global Institute for Water Security, p. 1. https://rplcarchive.ca/wp-content/uploads/2018/09/PDG_Knowledge-Brief-Final.pdf

⁴ Wright, Pam. “33,000 acres of land: One drain system,” *The Chatham Voice*, August 28, 2025. <https://chathamvoice.com/2025/08/28/33000-acres-one-drain-system/>

⁵ Canada Infrastructure Bank. “Investing in irrigation, farmers and jobs,” *Trade and Transport*, November 12, 2021. <https://cib-bic.ca/en/medias/articles/investing-in-irrigation-farmers-and-jobs/>; Canada Infrastructure Bank. “Alberta irrigation,” *Trade and Transportation*, 2026. <https://cib-bic.ca/en/projects/trade-and-transport/alberta-irrigation/>

Agriculture could draw lessons from the early stages of energy project development, particularly in co-investment models that enable shared infrastructure and de-risk private capital.

Participants also noted that more support would be needed to encourage a mindset shift to see agriculture as a commercial enterprise. Crown and private programs are needed to support more farmers in reaching \$1 million or more in revenue and encourage those with more than \$1 million to reach \$2-5 million in revenues. These programs also would help to generate new goals for farmers and the sector as they look to expand or diversify production to reach profit milestones.

A generational shift is reinforcing this opportunity. Younger producers are more open to partnerships, cooperative models and public-private collaboration. Participants suggested that agriculture could draw lessons from the early stages of energy project development, particularly in co-investment models that enable shared infrastructure and de-risk private capital. There is now an opportunity to examine the best practices used in the energy sector, to determine if any could be replicated to build shared infrastructure such as storage facilities. Ideally, this could be a catalyst that would see greater investment in Canada's agriculture sector in the future.



Market and product diversification

DISCUSSION SUMMARY:

- Canada needs clearer intelligence on long-term market opportunities at the commodity and processed-product level.
- Infrastructure requirements must be aligned with identified and emerging market opportunities.
- Food safety regulations are constraining interprovincial trade and fragmenting the domestic market.

Canada's agricultural exports remain heavily weighted toward unprocessed commodities, rather than processed, manufactured foods. Discussion focused on what to produce, increasing domestic capacity and interprovincial trade, export opportunities and any associated barriers.

For commodity production, farmers are looking for “the next canola.” Canola is oftentimes the most profitable crop because of the demand, access to multiple markets, and the ability to sell in both raw and processed forms.⁶ Lentil crops were highlighted as having comparable potential to canola, given that Canada ranks among the top global producers of lentils.

For value-add processing and manufacturing, participants discussed ingredient processing as an area for potential development alongside end-product food and beverage manufacturing. Participants noted that companies are looking at other countries with the necessary infrastructure where processing and manufacturing capacity can be built quickly to capitalize on market opportunities. If Canada cannot create an environment that supports domestic processing, companies will continue to look abroad. Barriers to value-add production include investment attraction and regulatory delays.

When products are made in Canada, interprovincial export becomes a challenge as companies need to meet the *Safe Foods for Canadians Act* (SFCA) requirements, which is the same threshold for exporting internationally. Meeting SFCA standards is costly and time consuming as processors need to operate in federally approved and inspected facilities and meet federal packaging and traceability standards.

⁶ Lubieniecki, Simona, Darnell Holt & Peter WB Phillips. “Canadian lentil market, supply chain and lentil suppliers’ and processors’ qualitative interview results,” *EVOLVE Technical Report*, June 19, 2024. <https://www.schoolofpublicpolicy.sk.ca/csip/documents/research-paper-summaries/20234-06-20-suppliers-and-processors-interviews-final.pdf>

These regulations prevent companies from operating within one, unified Canadian market and make export more attractive than provincial trade as they have reached the threshold for both. Export markets are typically larger than provincial markets and non-tariff barriers to interprovincial trade at the provincial level can make it more difficult to sell within Canada.

However, exporting is not without its challenges. Participants noted that commodity reports that identify longer-term potential in alternative markets would be helpful rather than annual opportunity or market overviews. While export markets offer scale, they also carry risk. Canada's heavy reliance on the United States and China has increased exposure to tariffs, regulatory shifts and geopolitical tensions.

Participants emphasized the need for longer-term market intelligence that identifies emerging opportunities for both raw and processed products, alongside the infrastructure and trade pathways required to reach them.

For example, the U.S. Department of Agriculture (USDA) provides annual 10-year projections for commodities. The USDA's baseline projections are "based on assumptions about macroeconomic conditions, policy, weather, and international events, but with no domestic or foreign influence on global agricultural markets."⁷ While research finds that "longer projection horizons" can be less accurate, they are still useful as they "enable market participants to estimate the price flexibility of demand for agricultural commodities, informing their strategic planning and risk management strategies."⁸ These reports do not typically include suggestions related to infrastructure or policy adjustments, they can "help in strategic planning for infrastructure"⁹ for the long term. When used with short-term reports, policymakers and producers have a more holistic view from which to plan.¹⁰ As Canada looks to mitigate the risk of geopolitical and policy risks as governments in export markets make changes, such projections could help identify where diversification efforts may be more successful and in what commodities.



⁷ Fang, Xiaoyi & Ani L. Katchova. (November 2023). "Evaluating the OECD-FAO and USDA agricultural baseline projections." *Q Open* 3(2), p. 3. <https://doi.org/10.1093/qopen/qoad029>

⁸ *Ibid.*, p. 20.

⁹ Chandio, Rabil & Chad E. Hart. "Integrating USDA baseline projections with WASDE reports for a comprehensive agricultural market outlook," *Ag Decision Maker*, Iowa State University, October 2024, para. 10. <https://www.extension.iastate.edu/agdm/articles/chandio/ChaOct24.html>

¹⁰ *Ibid.*

Infrastructure

DISCUSSION SUMMARY:

- Bottlenecks in Canada's infrastructure system have adversely affected exports.
- Capacity constraints threaten market diversification. Canada's reputation as a reliable supplier of agricultural commodities and products is at risk, if not already damaged in some markets, because of interruptions across the supply chain.
- Capacity is not just about total volumes, but how effectively the infrastructure is being used and how well the system is timed¹¹ to maximize productivity.
- Labour is tied to capacity as workers are needed to ensure the efficient movement of goods through the system. Labour action can halt the supply chain and have a detrimental effect on Canada's reputation along with a financial impact on producers.
- As port authorities and others look to build supply chain infrastructure to address current and future needs, it is essential for the agriculture sector to be part of these discussions.

The roundtable discussion focused on capacity, reliability, bottlenecks and representation in infrastructure along the export supply chain and the challenges and opportunities from an agricultural perspective.

Capacity

The discussion on infrastructure capacity focused on time, labour and whether infrastructure is being fully utilized and properly sequenced to maximize timing of shipments for profit and to reduce bottlenecks along the supply chain. The bottlenecks discussed at the roundtable include regulatory delays, labour challenges, and aging infrastructure.

Those at the roundtable noted that it can take much longer to approve and build additional infrastructure to increase port or rail capacity in Canada than it does in the other countries, such as the United States. Those countries, which are quicker to adapt to emerging industry needs, may divert capital investment in infrastructure away from Canada.

¹¹ This timing can refer both to how long it takes commodities or products to reach export markets but can also mean how long it takes for infrastructure improvements or enhancements (which help address the product timing) to be approved and built.

While Canada has historically been seen as a reliable trade partner that produces high-quality goods, recent challenges have put that reputation at risk.

When thinking of infrastructure capacity, most people think of how much volume can be transported by rail or road or stored in silos or warehouses. However, capacity can also refer to labour as workers ensure product moves along the supply chain and workforce challenges can slow or even halt exports. Port automation could help improve port efficiency and address capacity challenges as workforce demographics shift in the future. However, increased automation is a real concern for workers and has led to labour action at ports in recent years, which has stalled exports.¹² These actions and infrastructure challenges have understandably raised concerns for export partners about Canada's ability to be a reliable supplier of goods.

Reliability

While Canada has historically been seen as a reliable trade partner that produces high-quality goods, recent challenges have put that reputation at risk. Those at the roundtable shared instances of export partners questioning whether Canada could be relied upon for timely delivery of agricultural inputs¹³ and products. Participants raised the issue of Second Narrows Bridge¹⁴ as a prime example of infrastructure that is both critical and presents a high risk for the sector.

The bridge is critical in that it serves as the final rail link for commodities shipped to the Port of Vancouver for export to the Asia Pacific. As a single-track line, the bridge is high risk as bottlenecks often arise which delays shipments as trains can only travel in one direction on the bridge. In addition, the infrastructure is aging and was not built to meet current demands and weight loads or mitigate earthquake risk. If the bridge were to fail, the impacts to the agriculture sector would be both financially and reputationally costly.¹⁵

It was noted that the main issue with Second Narrows bridge is not necessarily capacity but rather resiliency, which then brought up the challenge of building in redundancy in the event of infrastructure failure or to offset potential challenges. However, capital is limited which makes both increasing capacity and building redundancy difficult to achieve.

For Second Narrows bridge or other infrastructure projects to enhance current infrastructure or expand for future use, the CIB can play a role in financing projects through flexible and affordable loans. These loans are made with the guarantee that they will be repaid, and revenue sources of repayment are identified project by project. Where loans are feasible, the CIB can play a role in attracting private capital and unlocking trade infrastructure.

¹² Logan, Nick. "What is port automation – and why are striking workers concerned about it?" *CBC News*, July 8, 2023. <https://www.cbc.ca/news/canada/bc-port-strike-automation-1.6900521>; RealAgriculture. "Farmers voice frustration over port strike, expressing concern over Canada's global reputation," September 27, 2024. <https://www.realagriculture.com/2024/09/farmers-voice-frustration-over-port-strike-expressing-concern-over-canadas-global-reputation/>

¹³ Inputs refer to those things needed to grow crops such as seeds, water, and machinery.

¹⁴ Second Narrows Bridge is a rail bridge over Burrard Inlet which connects to the Port of Vancouver. As a single rail track, trains can only go in one direction at a time over the track.

¹⁵ Fransoo, Daryl. "The time is now: Why the Second Narrows Bridge's century of service deserves a century worth of foresight," *Real Agriculture*, August 13, 2025. <https://www.realagriculture.com/2025/08/the-time-is-now-why-the-second-narrows-bridges-century-of-service-deserves-a-century-worth-of-foresight/>

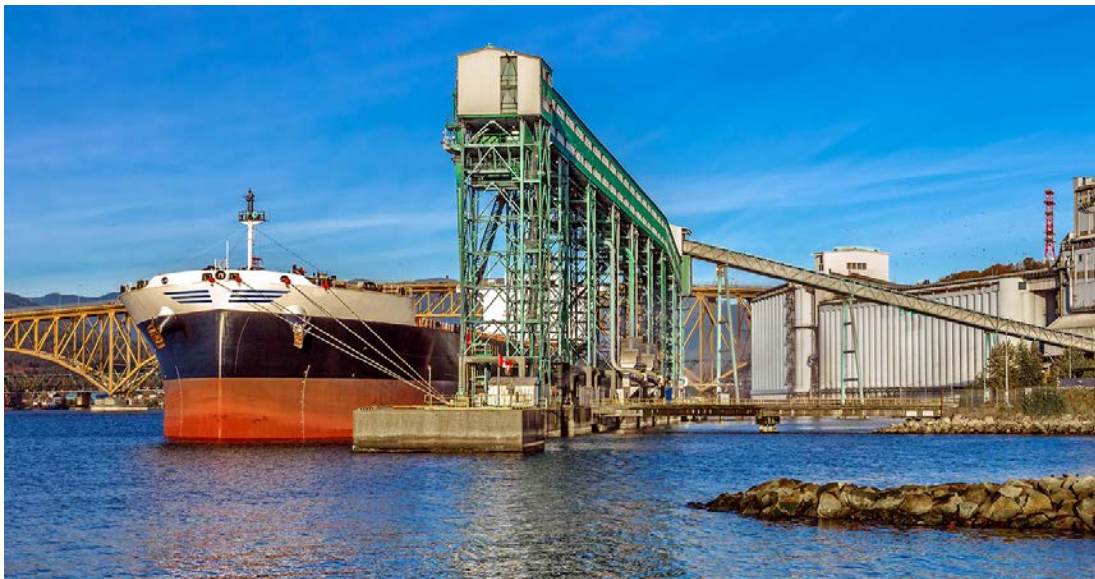
Moving forward, port governance and decision making should include engagement with representatives from the agriculture sector to ensure sectoral needs are considered ...

Two projects at the Port of Prince Rupert demonstrate how CIB financing can expand trade and import capacity. The CIB is lending \$150 million to the CANXPORT export logistic project, which will be able to handle six million tonnes of cargo and help Canadian businesses reach international markets. The CIB also is lending \$60.7 million to help the Metlakatla Development Corporation (MDC) and the Prince Rupert Port Authority develop the Indigenous-led South Kaien Import Logistics Park in British Columbia. The financing will be used for site infrastructure needed to develop 56 acres of flat, serviced land in proximity to Fairview Terminal, CN Rail and the future CANXPORT facility.

Representation

These conversations around capacity, reliability and redundancy are important for the future of the sector but previous conversations around coastal ports have had limited representation from the agriculture sector.

As Canada looks to diversify and increase exports, these ports will be crucial to the conversation around agriculture and there was concern about lack of representation from the agriculture sector. Moving forward, port governance and decision making should include engagement with representatives from the agriculture sector to ensure sectoral needs are considered as trade patterns and partners evolve.



Technology and innovation

DISCUSSION SUMMARY:

- Federal investment in agricultural research and development has decreased compared to other countries while private investment is slow to move.
- The lag in digital adoption and innovation in the Canadian agricultural sector is resulting in other countries attracting Canadian talent and projects.
- Canada needs to introduce supports, particularly at the post-incubator, pre-venture capital stage to encourage technological innovation in the agricultural sector.
- There is a significant opportunity in breeding and genetics but barriers to testing and commercialization exist.
- Investments need to focus on the sector as a whole, rather than at a commodity or infrastructure level.

Participants agreed that the discussion around technology and innovation in the agricultural sector and how best to support development warrant deeper, dedicated engagement. Concerns were raised about declining public investment in agricultural research and a growing disconnect between research priorities and on-farm needs.

This decline saw industry research partnerships move to Australia and Europe where they have investment to grow from start-up to commercialization. Artificial intelligence is well advanced in the United States, particularly for genetics and vaccine development, which could be of interest to Saskatchewan, as the Vaccine and Infectious Disease Organization is located at the University of Saskatchewan.

Investments in the Canadian agricultural sector have generally been quite targeted and have not been focused on benefiting the sector as a whole.

The investment gap is particularly prominent when start-ups move out of the incubator stage but are not quite ready for venture capital investment. Public funds could help fill the gap, but the right approach should be developed in partnership with industry. There is also a disconnect with what industry needs and the research that is currently underway. On-farm problems are not necessarily driving research and determining what could be commercialized. From the view of participants, researchers are oftentimes disconnected from on-farm challenges and solving for perceived or theoretical problems.

Investments in the Canadian agricultural sector have generally been quite targeted and have not been focused on benefiting the sector as a whole. On the other hand, some other countries employ a more holistic, industry-wide approach.

Germany's Fraunhofer-Gesellschaft was cited as an example of how an applied research institute can support agriculture research from initial development to scale. The organization supports the work of 13 institutes "to find solutions along the entire value chain including raw materials, processing, food, production protection and analytics, circular economy and sustainability, frameworks and regulations, value networks and markets and business models."¹⁶

Roundtable participants also saw the need to ensure research does not sit on the shelf and suggested that a similar Canadian entity like the one in Germany could help drive adoption and support integration of technology and innovation into the national agriculture conversation to strategically align efforts on a national level.

Technological Innovation

Canada needs to introduce supports to encourage technological innovation.

Research Opportunities

There is a significant opportunity in breeding and genetics.

Additional Investment

Investments need to focus on the sector as a whole rather than commodity.

¹⁶ Fraunhofer-Gesellschaft. "Fraunhofer Agriculture and Food Industry Alliance," *Fraunhofer Alliance*, 2025. <https://www.fraunhofer.de/en/institutes/institutes-and-research-establishments-in-germany/fraunhofer-alliances/agriculture-and-food-industry-alliance.html>

Toward a national strategy

MORE RESEARCH REQUIRED

One roundtable is insufficient to building a cohesive, unified strategy for such a strategically and economically important industry. However, the roundtable has provided a comprehensive summary of how Canadian agriculture is changing and the challenges that prevent producers and processors from seeing the full potential of or benefit from their labour.

National prioritization

Geopolitics are destabilizing Canada's trade relationships with our two largest trading partners, the United States and China, and the agricultural sector is caught on the front lines. Canola, which is one of Canada's most profitable crops, is a prime example of how commodities and the farmers who produce them can get caught up in tensions as China instituted a 100 per cent tariff on canola in response to Ottawa's banning of Chinese electric vehicles. Those within the agriculture sector felt their industry was used as a scapegoat to protect China's auto sector.

While the United States could have been a viable alternative for canola, particularly in biofuels, policy changes within the United States to support its own domestic biofuels industry alongside tariffs have curbed expectations.¹⁷

The federal government has responded with increased payouts through AgriStability, which provides much needed short-term supports for farmers in the event of "large declines in farming income [due to] production loss, increased costs and market conditions."¹⁸ Building long-term strategies to help protect the industry from trade shocks starts with domestic policy that recognizes the importance of the sector to the Canadian economy and does not expect one industry to bear the brunt of geopolitical retaliation for a policy direction affecting another sector.

Regulatory frameworks that reflect this prioritization and are built in consultation with sector stakeholders could also help address some of the challenges the government has faced when weighing the economic, environmental and social impacts along with the benefits of the sector.

¹⁷ White, Ed, and Karl Plume. "North American biofuels sector contracts amid trade and policy uncertainty." AgCanada, 2025, March 20. <https://www.agcanada.com/daily/north-american-biofuels-sector-contracts-amid-trade-and-policy-uncertainty>

¹⁸ Government of Canada. "AgriStability: 1. What this program offers," *Programs*, December 9, 2025, para. 11. <https://agriculture.canada.ca/en/programs/agristability>

Public and private investments are needed across the system to support necessary improvements to the current system while also building additional capacity and innovation for the future.

The “next canola”

Producers and processors need support in identifying where the long-term export opportunities are at the commodity level for both raw and processed exports. While reports typically focus on the current growth season, infrastructure and trade pathways take longer to build so there is a disconnect in timing.

While there are market challenges with our largest trading partners, the pathways to new markets and what will be able to sell at comparable volumes and prices to canola is unclear. Roundtable participants identified lentils as a potential opportunity, but further research could provide more guidance.

Outcomes and measures

System alignment from farm to export will require measurable milestones to gauge success. Statistics Canada and other organizations track a whole host of agricultural related data, and the roundtable participants want to use that data to inform key measures and targets and rethink the ways in which industry communicates technical information to non-technical audiences. This development of sector goals and measures would have a twofold purpose:

1. It will allow for a more cohesive and comprehensive understanding of how the different aspects of the system¹⁹ are functioning together and supporting the overall goals of the agricultural sector.
2. It will help Canadians develop a better understanding of agriculture and how things like infrastructure and technology are also intrinsically connected to the success of the sector.

Investment to drive strategic projects

Public and private investments are needed across the system to support necessary improvements to the current system while also building additional capacity and innovation for the future. Determining where best to invest capital in infrastructure, research and innovation, and production or value-add enhancements is not a simple task, but the roundtable did highlight some areas of immediate need:

- On-farm storage capacity
- Irrigation and drainage systems, and leveraging financing tools such as the CIB to advance projects
- Path forward for Second Narrows Bridge
- Post-incubator, pre-venture capital stage supports
- Creation of an institute to identify and align the system components

Longer-term needs would be identified and aligned with an industry-led strategy. For private investors, this strategy would help illustrate where investments are needed and identify longer-term returns on investment.

¹⁹ In this case, system is referring to inputs through to final export/domestic consumer.



Conclusion

Canada possesses significant agricultural potential, but legacy structures, regulatory fragmentation, aging infrastructure, and heightened geopolitical trade risks are constraining the sector's growth and competitiveness.

Rebuilding confidence among producers, investors and trading partners will require a clear, long-term vision for Canada's agri-food system. A new national strategy can align industry, governments and capital around shared priorities and measurable outcomes. A national agriculture strategy offers a pathway to that alignment and would allow Canada to emerge as a global agriculture leader.

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