

**SARNIA-LAMBTON**  
**ONTARIO • CANADA**



**SARNIA-LAMBTON**  
Economic Partnership  
*Powering a Sustainable World®*

**VALUE-ADDED AGRICULTURE**



## OVERVIEW

With over 2,000 farms operating more than 500,000 acres of crop, agriculture and agri-business represent Sarnia-Lambton’s second largest economic sector. The local industry consists of some of Ontario’s largest volumes of traditional cash crop and animal production but, has grown to include thriving value-added agriculture opportunities. Tying into the region’s booming bio-based economy, emerging food and beverage manufacturing industry, and established research and development capabilities, Sarnia-Lambton provides the resources necessary for value-added agriculture businesses to thrive and succeed.

Businesses invest here because of the region’s excellent location, access to raw materials and transportation routes to markets of the world, and supply of experienced labour, which together create an ecosystem that ensures the value-added agriculture industry a vibrant future – placing Sarnia-Lambton at the top of the competition.

## WHY CHOOSE SARNIA-LAMBTON?

- Market access to 400 million people via road, rail, and deep-sea port transportation infrastructure, including a strategic location on Canada/USA border.
- Immediate access to raw materials including Ontario’s largest volume of soybeans, 2nd largest volume of sugar beets, and 3rd largest volume of corn and wheat, in the heart of the province’s agricultural core.
- Partnership and value-chain opportunities as part of the bio-based economy within the Sarnia-Lambton Hybrid Chemistry Cluster.
- Affordable energy with opportunities to save 35-40% of electricity cost compared to Ontario averages due to “behind-the-fence” energy pricing.
- Established process infrastructure, ideally suited to large-scale value-added agriculture industries, can save new projects 20% on capital costs.
- Strong government support including a competitive corporate tax environment, incentives, and grants.



Sarnia-Lambton is a proud member of the **Ontario Food Cluster (OFC)**. The OFC welcomes international investments in its growing cluster of 3,000 companies. Approaching \$36.9 billion in manufacturing revenue, companies take advantage of Canada’s largest pool of agri-food talent. Collectively, the OFC represents one of the three largest food and beverage processing jurisdictions in North America – and is the largest in Canada.

## KEY MARKETS

CITY	KM	TIME (hrs driving)
Detroit, MI	105	1
Toronto, ON	240	2.5
Buffalo, NY	290	2.75
Cleveland, OH	375	3.75
Cincinnati, OH	525	5
Chicago, IL	550	5.25
Pittsburgh, PA	560	5.25
Indianapolis, IN	565	5.5
Ottawa, ON	675	6.25
Milwaukee, WI	710	6.75
Montreal, QC	765	7.5
New York, NY	920	9
Washington, DC	935	9
Nashville, TN	960	9
St. Louis, MO	980	8.75
Boston, MA	1015	9.5

## AIRPORTS

AIRPORT	KM	TIME (hrs driving)
Sarnia (YZR)	n/a	n/a
London (YXU)	70	0.75
Flint (FNT)	120	1
Detroit (DTW)	130	1.25
Toronto (YYZ)	225	2.25



*Sarnia-Lambton is located within a **ONE DAY** drive to 65% of the US market, and major Ontario & Quebec markets.*

## LOCATION

Located on the Canada/USA border in the heart of the Great Lakes Basin and in Ontario’s most abundant agricultural area, Sarnia-Lambton is a cost-effective choice for businesses looking for efficient access to important markets in Canada, the United States, and Mexico.

## MARKET ACCESS

Through the United States – Mexico – Canada Agreement (USMCA), companies in Sarnia-Lambton have direct highway access to a market of nearly 400 million people. Additionally, Sarnia-Lambton is well positioned for businesses to take advantage of international market access through the Canadian-European Union Comprehensive Economic and Trade Agreement (CETA), Canada-Korea Free Trade Agreement (CKFTA), and the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP).





## AGRICULTURE IN SARNIA-LAMBTON

With over 500,000 acres of cultivated land, Lambton County is home to Ontario's most fertile land for cash crop production, including corn, soybeans, wheat, and speciality crops of tomatoes, bell peppers, and many varieties of fruits and vegetables. Related agricultural by-products, wastes, and residues are also available. Additionally, there is a wide range of livestock, including beef and dairy cattle, pigs, and poultry.

There is plentiful supply of high-quality raw product inputs for value-added agriculture opportunities.

### KEY STATISTICS

- 2100 Farms
- 519,000 Acres of Cropland
- 1560 Oilseed & Grain Farms
- 390 Livestock Farms
- \$13 Billion in Farm Cash Receipts

Sarnia-Lambton produces Ontario's **LARGEST** volume of soybeans, **2ND LARGEST** volume of sugar beets, and **3RD LARGEST** volume of corn and wheat.



**CORN** – 21.5 MILLION BUSHELs are produced in Sarnia-Lambton each year, with Southwestern Ontario capable of supplying 265 million bushels.



**SOYBEANS** – Sarnia-Lambton produces over **15 MILLION BUSHELs** each year, while 121 million bushels are produced in Southwestern Ontario.



**WHEAT** – 6 MILLION BUSHELs are produced in Sarnia-Lambton each year, along with 72 million bushels produced in Southwestern Ontario.



**BIOMASS** – SARNIA-LAMBTON and surrounding Counties produce 835,000 TONNES of harvestable residues including corn stover and wheat straw, with 2,100,000 in Southern Ontario



**SUGAR & STARCHES** – 10,000 ACRES of sugar beets are produced in the area, with potential for more than 30,000 acres.



**CATTLE** – 33,300 TOTAL CATTLE including 4,100 beef cows and 4,600 dairy cows in Sarnia-Lambton, with 295,400 total cattle in Southern Ontario.



**PIGS** – Sarnia-Lambton has **276,500 TOTAL PIGS**, along with 1.6 million pigs in Southern Ontario.



**POULTRY** – 2.2 MILLION hens, chickens, and turkeys in Sarnia-Lambton for poultry and egg production.

### CO-OPERATIVES



Agriculture is the **SECOND LARGEST** industry in Sarnia-Lambton following chemical manufacturing.

### GRAIN TERMINALS



In Sarnia, Cargill operates the largest capacity grain terminal on the St. Lawrence Seaway at 580,000 metric tons. The facility utilizes onsite road, rail, and shipping logistics for easy access to export markets.



## WORKFORCE

With a population of approximately 130,000, the Sarnia-Lambton area draws from a dependable and abundant supply of labour, including a highly skilled workforce specializing in value-added agriculture industries. The region's skill pool is exceptionally strong in the areas of STEM, process operations, and high and general skilled occupations such as machine technicians, electricians and plumbers, key to the industry. Over 64,500 people are in the Lambton County workforce. The total labour force within a 100km radius of Sarnia-Lambton is almost 550,000.

Due to the quality of work and life, educational institutions and premier facilities in the area, companies can expect to experience low employee turnover and absenteeism rates.

*More than 64% of the total Sarnia-Lambton workforce has obtained a post-secondary certificate, diploma or degree.*

### EMPLOYMENT BY INDUSTRY

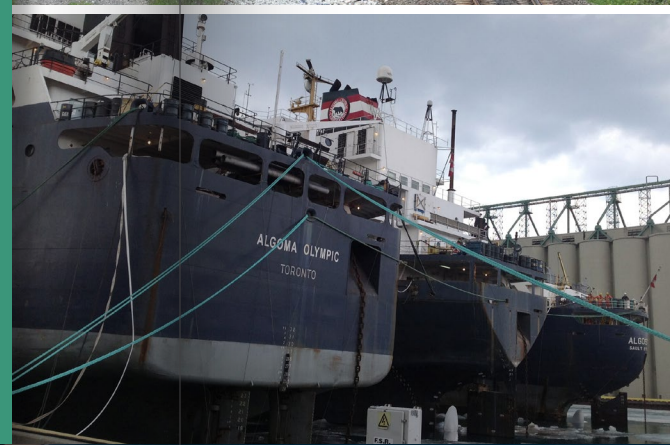
- 6,700 – Manufacturing
- 7,810 – Total Agri-Food
- 2,315 - Crop and Animal Production
- 105 – Food and Beverage Manufacturing

### LABOUR FORCE STATISTICS

- 64,500 - Labour Force
- 60,300 - Employment
- 58.1 – Participation Rate (%)
- 6.52 – Unemployment Rate (%)

*Sarnia-Lambton offers a high proportion of available, well-educated workers with a track record of company loyalty.*





## TRANSPORTATION

Sarnia-Lambton is uniquely located on major road, rail, water, and air corridors to ensure a smooth flow of inputs and end-products across the value-added agriculture value-chain.

### Road

Sarnia-Lambton is served by a superb network of highways that connects the region to the Great Lakes agricultural and industrial corridors, the United States, and Mexico.

Highway 402 travels throughout the Sarnia-Lambton area and connects directly with Highway 401 – Canada's busiest highway - while providing quick access to all other Ontario 400-series highways linking the Province of Ontario.

The twin-span Blue Water Bridge border crossing is a key link between Canada and the United States. Strategically placed on the major trade and transportation corridors linking Ontario Highway 402 to U.S. Interstates, I-69, I-94, and I-75. The bridge is Canada's second-busiest crossing for commercial traffic, with over 1.5 million trucks and \$42.2 billion in road trade annually.

Dedicated car and truck lanes are available for cross border transportation via the Free and Secure Trade (FAST) and NEXUS programs allowing for pre-approved low risk importers, carriers, and drivers, to be cleared into either country with greater speed and certainty, and at a reduced cost of compliance.

### Rail

The regional rail infrastructure is impressive with Canadian National (CN) and CSX Transportation operating mainline Class I railroad services, and the largest flat switching rail yard in the Great Lakes District.

The St. Clair Tunnel operated by CN connects Sarnia to Michigan allowing for the easy movement of goods throughout the US, and access to the Chicago-Toronto rail corridor. The tunnel allows for the carry of more freight than any other US-Canada border rail crossing.

### Water

Located on the banks of the St. Clair River, one of the busiest inland waterways in the world, the value-added agriculture industry has direct access to Sarnia Harbour, providing deep water facilities for both domestic and international shipping. Ships can navigate from Sarnia-Lambton through the Great Lakes to the Atlantic Ocean, March through December.

The Cargill Sarnia Grain Terminal is located at the Sarnia Harbour, with one of its key uses being the shipping of agricultural commodities such as corn, soybeans, and wheat, via the St. Lawrence Seaway System.

### Air

Sarnia is well serviced by several regional and international airports, capable of delivering goods and people to any location in the world

Three international airports are within 130 km (80 miles) of Sarnia-Lambton - Detroit, London, and Flint. Sarnia's Chris Hadfield Airport provides connections to Toronto Pearson International Airport, itself only 225 kilometres from Sarnia-Lambton.



INVESTMENT OPPORTUNITIES

Industrial Ingredients

Sarnia-Lambton’s agricultural base including the abundant supply of wheat, corn, and soybean feedstocks make the area an attractive location for industrial ingredient manufacturers and industrial scale agricultural processing. Such operations are a natural fit with both food process, and bioproducts and chemical processing that occurs locally and within the Southwestern Ontario region.

Cellulosic Sugar Producers Co-operative

The CSPC is a Sarnia-Lambton based farmer’s co-operative that strives to develop new value-added markets for crop residue materials that support new business opportunities such as extracting cellulosic sugars from crop residues. With this, farmers can explore new markets without having to compete for land. The CSPC is key to the Sarnia-Lambton value-added agriculture sector and Sarnia-Lambton Hybrid Chemistry Cluster, especially as they explore opportunities to invest in a commercial cellulosic dextrose facility.



SUCCESS PROFILES - Greenhouses

Greenhouses

As the market for vegetable, cannabis, and floriculture greenhouses continues to expand in Canada, Sarnia-Lambton’s unique location and climate provides a practical and cost-effective solution for those looking to expand their greenhouse business, lower operating expenses and increase profit margin. Opportunities exist to lower operating costs by collocating with local chemical facilities and utilizing excess carbon dioxide and steam production as an inexpensive heating source.

IDEAL CLIMATE

Sarnia-Lambton offers many environmental factors ideal for value-added agriculture. “Lake effects” due to the proximity of Lake Huron stabilize Ontario’s inclement weather patterns and provide the ideal growing climate- very moderate summer and winter temperatures.

These factors make the area a key location for crop and greenhouse production, given its temperate climate, limited snow, and amount of sunlight throughout the year.

INVESTMENT OPPORTUNITIES

Soy and Oilseed Crushing

A toll soy and oilseed crushing and refining facility producing specialized value-added oils for clients in food, bioproducts, and chemical manufacturing from soybean and corn oils. Such a facility could satisfy the industrial food markets, non-food industrial products markets, and market for protein for human consumption.

Sweeteners

Several companies in the Sarnia-Lambton Hybrid Chemistry Cluster require sweeteners in the form of liquid dextrose as a key feedstock to their operations. The proximity to corn, sugarbeet, and agricultural residues feedstocks, as well as the ability to collocate with local off-takers, represent an opportunity for new production of first- or second-generation sweeteners.



EnviroFresh Farms

EnviroFresh Farms operates a 23-acre greenhouse collocated with CF Industries’ fertilizer plant, to have excess steam and carbon dioxide pipelined from the facility to the greenhouse. This allowed for a 30% reduction in operating costs and 90% reduction in fuel, resulting in a carbon-negative greenhouse reducing emissions by at least 23,000 tonnes per year.

Twin Creeks Greenhouse

Twin Creeks Greenhouse operates a greenhouse co-located with a landfill, utilizing methane to reduce natural gas intake by 65% allowing for year-round production.

Roeland’s Plant Farms Inc.

Servicing vegetable growers across North America, the year-round greenhouse vegetable propagator supplies premium tomatoes, cucumbers, peppers, and sweet potatoes. The 17-acre facility has utilized automation and sophisticated irrigation systems to become one of the largest propagators in Eastern North America.



Food Processing

Located within North America’s 3rd largest food jurisdiction, Sarnia-Lambton provides food processors with immediate access to the US market, agricultural feedstocks, and highly skilled talent. The area’s growing food processing sector includes several new and well-established manufacturers.



Beverages

Over the last decade, beverage manufacturing has become a leading component of Sarnia-Lambton’s value-added agriculture industry. With seven breweries, a cider mill, winery, and meadery, the area has become a hot-bed for the alcoholic beverage entrepreneurs and start-ups. Additionally, the Province of Ontario is actively pursuing modernization of the alcohol sector in the province to provide more opportunities for private sector businesses.

SUCCESS PROFILES - Food Processing

SUCCESS PROFILES - Beverages



Munro Honey & Meadery

Since 1914 Munro Honey has grown to be one of the largest producers, packers, and exporters of Ontario Honey and hive products, and is the provinces only producer of mead and honeywine.



Purdy Fisheries Ltd.

Founded in 1900, the company processes fish – by hand and machine - netted from Lake Huron including pickerel, yellow perch, whitefish, lake trout, and catfish. Processed fish are then sold to grocers, food markets, and fine restaurants North America-wide.

Beer



Wine



Cider



Mead and Honeywine





## SARNIA-LAMBTON HYBRID CHEMISTRY CLUSTER

The emerging Sarnia-Lambton Hybrid Chemistry Cluster amalgamates Lambton County's two largest industries – petrochemicals and refining alongside value-added agriculture. Integrating green and sustainable chemistry to create opportunities for further industrial growth, the Hybrid Chemistry Cluster expands the traditional hydrocarbon value chain through inclusion of technologies and processes that utilize sustainable feedstocks, such as agricultural commodities, wastes and residues, and turning these renewable resources into value-added product. Sarnia-Lambton is becoming recognized around the world as North America's leading centre for bioindustrial manufacturing and R&D, with companies at every development stage, from bench scale to pilot plant to full-scale commercialization. Successful bio-based facilities include the Suncor St. Clair Ethanol facility, LCY Biosciences, and Origin Materials, to name a few.



### Bioindustrial Innovation Canada

Since its inception in 2008, Bioindustrial Innovation Canada (BIC) has developed a successful foundation by working nationally and internationally with multiple and diverse stakeholders in both industry and government. These collaborations help the development and commercialization of bio-based and sustainable chemistry-based products – including the development of Canada's first hybrid chemistry cluster in the heart of Canada's largest petrochemical cluster and the Southwestern Ontario agricultural community.

Through these efforts, BIC is accelerating the growth of the Sarnia-Lambton hybrid chemistry cluster, a natural community to link the existing value-added agriculture and petroleum industries with the future bioeconomy. BIC continues to build out sustainable value chains as well as creating highly qualified jobs and economic value in Canada.



### Western Sarnia-Lambton Research Park

The 80-acre Western Sarnia-Lambton Research Park, comprised of five interconnected buildings totaling 288,000 sq.ft., is a joint initiative of the County of Lambton, the City of Sarnia, and Western University. The Research Park's Commercialization Centre is Canada's largest clean-tech incubator, serving as a key contributor to the movement of an idea or a discovery from the lab bench to the marketplace.

The Research Park presents commercialization opportunities for companies in the value-added agriculture sector through its 50,000 sq.ft. of laboratory and pilot plant infrastructure. Additionally, the value-added agriculture sector can take advantage of tie-in opportunities to the biotech, energy, chemical and industrial processing activities taking place on site, as a supplier of feedstock or user of end products.



## EDUCATION, INNOVATION, RESEARCH & DEVELOPMENT



### Lambton College of Applied Arts & Technology

Since 1967 Lambton College has worked cooperatively with the companies in Sarnia-Lambton's value-added agriculture industry to create a region of innovators, working together to strengthen our local economy, and meet industry

demand for skilled employees. Built on a foundation of distinctive programs, applied research, evolving teaching methodologies, and experiential learning opportunities, Lambton College ensures the Sarnia-Lambton region will meet the skills and training required for the future of the growing value-added agriculture industry.



### Research & Innovation

Lambton College's Research & Innovation department is a global leader for collaborative applied research, development, innovation, education, entrepreneurship and commercialization.

Applied research at Lambton College has built a strong network of research partners and has grown to offer high quality labs, facilities and an exceptional research team that suit a multitude of research projects. Through collaboration, the applied research development works with partners to connect them with the appropriate resources, expertise and funding opportunities.

In 2018, Lambton College opened a new building dedicated to applied research and training, including 15 labs and 4 pilot plant spaces. Located here is the **Bio-Industrial Process Research Centre** which specializes in technical areas of research including:



- Fermentation and Distillation
- Pharmaceuticals & Natural Health Products
- Cultivation, Extraction & Chemical Analysis
- Bio Process Instrumentation & Process Control

### SUCCESS PROFILE



### Western Phytoceutica Inc.

Located at the Western Sarnia-Lambton Research Park, Western Phytoceutica Inc. has conducted research projects with Lambton College that have helped develop and commercialize innovative science-based technology for sourcing of Ontario-grown American ginseng materials and premium quality, evidence-based American ginseng natural health products.

#1 RANKED COLLEGE  
IN CANADA FOR  
APPLIED RESEARCH

– Research Infosource Inc's  
annual list of Canada's Top 50  
Research Colleges (2018)



# INDUSTRIAL INFRASTRUCTURE AND UTILITIES

## Energy

Electricity is the diver of industry and Sarnia-Lambton has an extensive power infrastructure consisting of 2,800 MW of natural gas, solar, and wind generated power through various privately owned and operated facilities. This energy is distributed by **Bluewater Power** and **Hydro One**.

## Water

The **Lambton Area Water Supply System (LAWSS)** includes a direct filtration water treatment plant (WTP) with a maximum rated capacity of 181,844 m3/d and 67,000 m3 of storage capacity. The system accommodates 90% of Lambton Counties water requirements. The remainder of the region is supplied water through connections to the **Petrolia – Bright’s Grove Water Treatment Plant** and the **Lake Huron Primary Water Supply System**.

## Natural Gas

**Enbridge Gas Ltd.** – one of Ontario’s largest utilities – provides reliable distribution of natural gas to 3.7 million homes, businesses and industries across Ontario including all the Sarnia-Lambton area. Value-added agriculture businesses can access some of the lowest cost natural gas inputs in North America due to the proximity and interconnections to Enbridge’s Dawn Hub infrastructure network.

## Telecommunications

The Sarnia-Lambton area is serviced by several telecommunications providers operating with the goal of providing fully redundant carrier-grade high speed fibre internet at competitive prices to both the residential and business community. Many rural communities have access to fibre internet services, while the Southwestern Integrated Fibre Technology (SWIFT) network is working to construct broadband services to make all rural locations more competitive.

# SITE OPPORTUNITIES

Sites are available for value-added agriculture opportunities that require heavy industrial zoning or for facilities that have large utility requirements. These sites may be attractive to commercial scale developments in the industrial ingredients sector or to companies scaling up their processes and technologies.

## Bluewater Energy Park

Fully serviced 268-acre site located on the St. Clair River in Sarnia. The park has 170-acres of brownfield land available for the development of new manufacturing and can provide electrical power from TransAlta’s 506 MW Sarnia Regional Cogeneration Plant exempt from fees to upload to the public grid known as “behind-the-fence” energy pricing. Additionally, the site is home to a 110,000 sq ft office and laboratory space at the Bluewater Energy Centre.

## Bio-Industrial Park Sarnia

Fully serviced 408-acre site with 42-acres of brownfield development opportunity. Operated by ARLANXEO Canada Inc. and located along the St. Clair River, the site offers new development opportunities with potential savings of up to twenty percent on capital costs through shared infrastructure opportunities. Support services, including medical services, security services, and locker facilities can be supplied by the Park. The park is ideal for pilot, demonstration, or full-scale manufacturing facilities.

### SERVICES AVAILABLE AT BOTH SITES:

- **Potential for “behind-the-fence” energy pricing with savings of up to 35-40% on energy costs.**
- **Potential to save up to 20% on capital costs through shared infrastructure.**
- Electrical distribution throughout sites.
- CSX and CN rail access with spur lines throughout site.
- Access to natural gas, hydrogen, nitrogen & compressed air via pipeline.
- Steam at multiple pressures.
- Service water, fire water and city water lines throughout the sites.
- 700+ foot marine terminals for ocean and lake freighter service.



*Savings of 35-40% of electricity cost can be realized on several Sarnia-Lambton brownfield site locations.*







# SITE OPPORTUNITIES

Sarnia-Lambton has several options throughout the community including municipally and privately-owned industrial parks. Fully serviced industrial land – with water, sanitary sewers, electrical and natural gas services – is available at competitive rates; with excellent access to major highways, rail lines, and marine shipping channels, as well as dependable industrial infrastructure.



	POWER	NATURAL GAS	WATER	SEWER	RAIL	ROAD
SARNIA						
Sarnia 402 Business Park	✓	✓	✓	✓		1KM TO HWY402
Sarnia Business & Research Park	✓	✓	✓	✓		2KM TO HWY402
Chippewas of Sarnia Industrial Park	✓	✓	✓	✓	✓	10KM TO HWY402
LAMBTON SHORES						
Forest Industrial Park	✓	✓	✓	✓		15KM TO HWY402
ST CLAIR TOWNSHIP						
St Clair Industrial Park	✓	✓	✓	✓	✓	19KM TO HWY402
WARWICK TOWNSHIP						
Warwick Industrial Park	✓	✓	✓	✓		3KM TO HWY402



Additional land and building opportunities exist throughout Sarnia-Lambton, with the capabilities of accommodating any size or use requirements. The Sarnia-Lambton Economic Partnership is available to assist with all site selection and property identification needs.



# ABOUT THE SARNIA-LAMBTON ECONOMIC PARTNERSHIP



## Who Are We?

The Sarnia-Lambton Economic Partnership is the County of Lambton’s economic development office. Our team of established and integrated experts work alongside investors and existing businesses to make the Sarnia-Lambton area a better place to work, live, and raise a family. Funded by the County, the Sarnia-Lambton Economic Partnership has been named one of Canada’s Top 10 Economic Development Offices six times.

## Customized Services

- Site selection and permitting assistance
- Support navigating municipal, provincial, and federal government agencies
- Demographic information, mapping, and statistics
- Facilitate connections to local businesses and support services pertinent to development
- Retention and expansion services for existing businesses
- Connect to local workforce and attract talent

## Key Contacts

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## CONTACT US

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