2020/2021 Ontario Farmer Survey Synopsis

In the fall of 2020, Cleanfarms commissioned market research that surveyed 273 Ontario farmers. The primary purpose of the survey was to benchmark agricultural plastic (ag plastic) disposal practices and gain insights into attitudes towards their disposal. These metrics will allow Cleanfarms to evaluate the effectiveness of its multi-phased *Building a Zero Plastic Waste Strategy for Agriculture* initiative.

This document highlights findings that are most relevant to the execution and evaluation of Cleanfarms-led pilots targeting plastic baler twine and silage plastics (includes bale wrap, and silage bags, tarps/covers), collectively called 'pilot materials.' These pilots were launched in the spring of 2021. Data related to pesticide and fertilizer containers (PF Containers) is provided for comparative purposes.

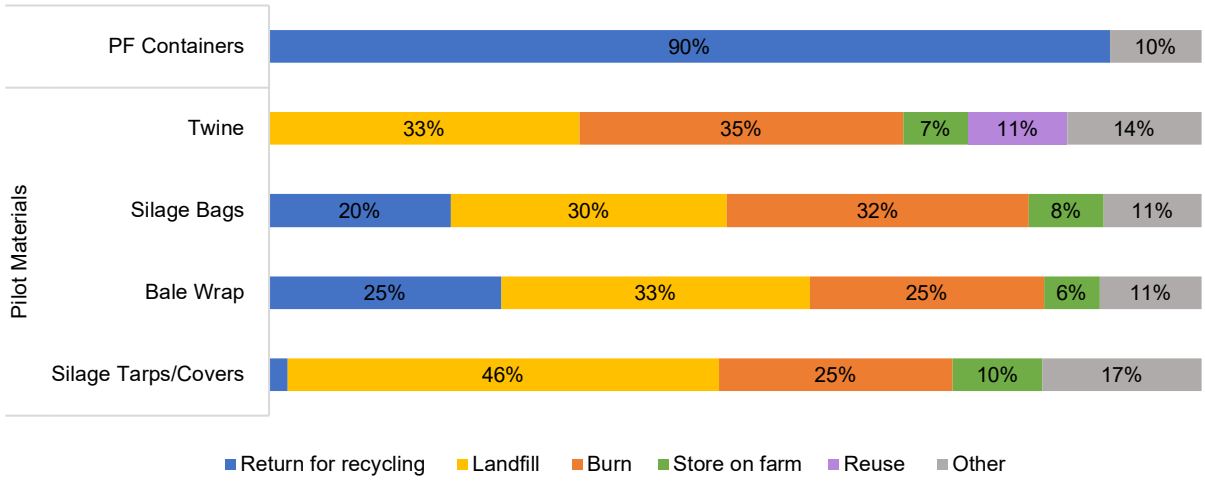
Methods of disposal

Farmers were asked to identify the ways they dispose of various types of ag plastics. Figure 1 displays select results which will help determine future farmer uptake in pilots.

Key findings & analysis:

- There is a lot of variation in disposal methods for pilot materials.
- Recycling is the top disposal method for PF Containers.
- Disposal habits likely reflect the availability of recycling programs or regional services.

Figure 1: Top disposal methods for select ag plastics



Satisfaction with methods of disposal

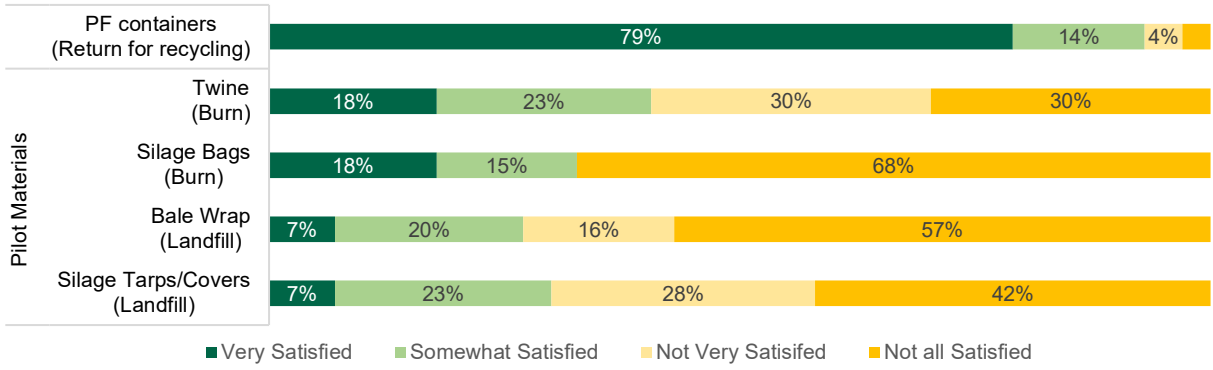
Farmers were then asked to rate how satisfied they were with the methods of disposal that they used. Figure 2 displays satisfaction levels with the most common method of disposal (shown in parentheses).

Key findings & analysis:

- Farmers report dissatisfaction with burning and landfilling pilot materials.
- Farmers report very high satisfaction with recycling PF Containers.
- Farmers are generally much more satisfied when they have an alternative to landfilling or burning bale wrap. This could indicate a willingness to change disposal methods.

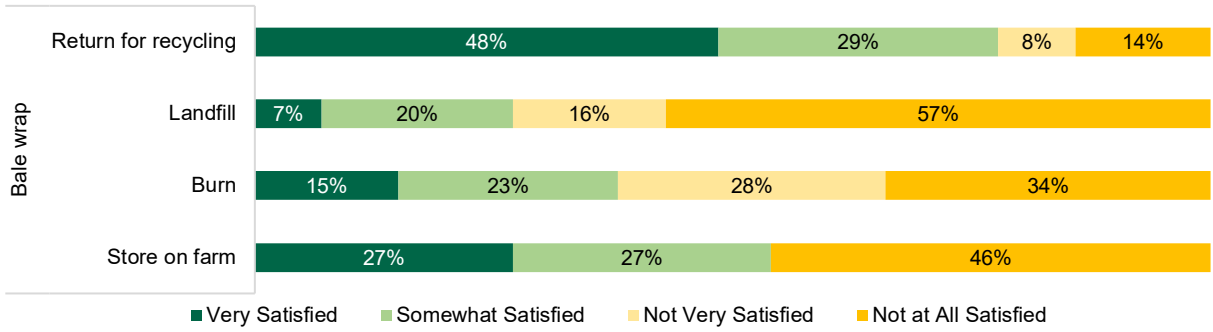
This project is funded in part by the Government of Canada through Agriculture and Agri-Food Canada's Canadian Agricultural Strategic Priorities Program (CASPP), a $50.3 million, five-year investment to help the agricultural sector adapt and remain competitive.

Figure 2: Satisfaction with the most common method of disposal



A further drill down on satisfaction with different methods of disposal for bale wrap is noted in Figure 3.

Figure 3: Satisfaction with methods of disposal - bale wrap



Likelihood to participate in pilots

Respondents were given a description of how pilots generally operate, i.e., farmers separate and prepare materials on farm to minimize contamination before bringing ag plastics to a collection site. They were then asked for feedback.

Key findings & analysis:

- Farmers expressed an appetite in taking part in recycling initiatives for pilot materials.
- Accessibility (distance to collection sites), ease of disposal/transportation and associated costs are factors that might limit participation.

- A very high percentage (91%) of twine users are very or somewhat likely to participate in the pilot if there was a collection site in their area. This figure is 78% for silage plastics.

Longer term outlooks
The empty pesticide and fertilizer container recycling program is a province-wide, permanent (available every season & easily accessible) recycling program. This type of province-wide, mature, stable recycling program is currently not available for twine and silage plastics. (Some regional collections services may be available for some types of silage plastics and are generally offered on a fee for service basis.) Farmers were probed on their positions related to the rollout and financing of potential permanent programs for pilot materials.

Key findings & analysis:

- Farmers expressed strong support for recycling programs. At the same time, there is strong opposition for farmers covering associated costs.

- There is strong farmer support for making recycling programs for pilot materials available on a permanent basis, with 89% of twine and 94% silage plastics users being either very or somewhat supportive.

Next steps
To access the full results of this survey, please contact us. Another farmer survey will likely be commissioned in 2022 to help evaluate the pilots and gauge if farmer attitudes towards ag plastics have changed.