

# Sector Snapshot 2017: B.C. Agrifood & Seafood

**Sector Defined:** British Columbia's agrifood and seafood industry includes primary production in agriculture, aquaculture and commercial fisheries, and processing of food and beverages.

- Over 200 primary agriculture products and about 100 fish, shellfish and marine plant species are produced in B.C.

## AGRIFOOD AND SEAFOOD KEY FACTS

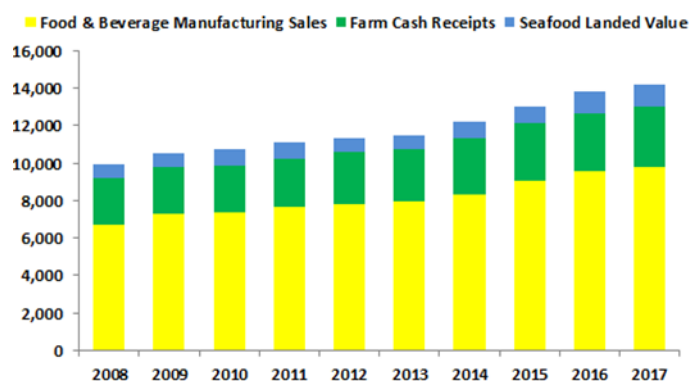
- ◆ **Sales: \$14.2 billion**
- ◆ **GDP: \$4.5 billion**
- ◆ **Share of Provincial Total GDP: 2.0%**
- ◆ **International Exports: \$3.9 billion**
- ◆ **Agrifood and Seafood Sector Jobs: 61,100**

- B.C. agrifood and seafood sales reached \$14.2 billion in 2017 - up 2.4 per cent over 2016.
- Total sales include \$3.2 billion in agriculture + \$1.2 billion in seafood + \$9.8 billion in food and beverage processing.
- Growth in sales occurred in the primary agriculture sector by 4.1 per cent, in the food and beverage processing sector by 2.1 per cent and in the seafood (aquaculture and commercial fishing) sector by 0.3 per cent.
- Total estimated agrifood and seafood GDP at \$4.5 billion rose 2.2 per cent over 2016 and nearly 13 per cent over the previous five year average.
- B.C.'s agrifood and seafood sector accounted for 2.0 per cent of B.C.'s total GDP of \$228.2 billion in 2017.

## AGRIFOOD AND SEAFOOD INTERNATIONAL EXPORTS

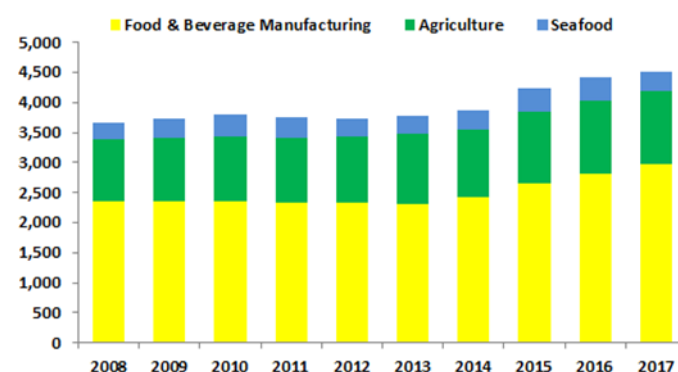
- B.C. exported a record \$3.9 billion in agrifood and seafood products to 157 markets in 2017.
- Total agrifood and seafood exports were up just over two per cent over 2016 due to a five per cent increase in the value of agrifood exports offsetting a three per cent decrease in the value of seafood exports.
- Agrifood contributed 67 per cent (\$2.6 billion) and seafood contributed 38 per cent (\$1.3 billion) to B.C.'s export value total for the sector.
- B.C.'s Top Five Export Markets in 2017: United States \$2.8 billion; China \$395 million; Japan \$204 million; South Korea \$71 million; and Hong Kong \$67 million.
- The fastest growing of the top 10 exports markets were Singapore (100 per cent); Philippines (35 per cent); Hong Kong (22 per cent); and South Korea (12 per cent).
- Top Five Exports: \$512 million in farmed Atlantic salmon; \$329 million in food preparations for processing and natural health products; \$321 million in baked goods and cereal products; \$222 million in blueberries; and \$153 million in mushrooms.

## Total B.C. Agrifood & Seafood Sales (\$ Millions)



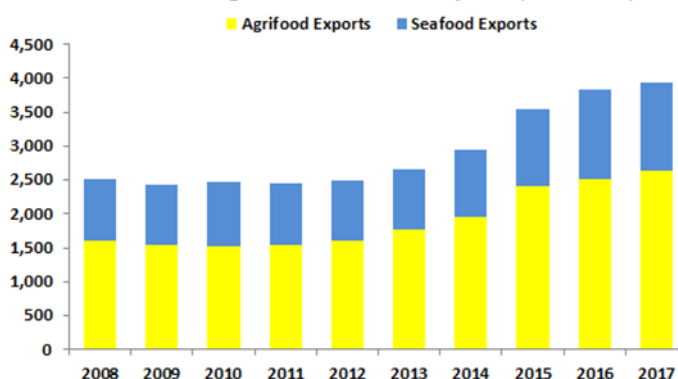
Source: Statistics Canada Tables 16-10-0048-01 (formerly CANSIM 304-0015) and 32-10-0045-01 (formerly CANSIM 002-0001); and B.C. Ministry of Agriculture

## Total B.C. Agrifood & Seafood GDP (\$ Millions)



Source: Statistics Canada Table 36-10-0402-01 (formerly CANSIM 002-0001)

## Total B.C. Agrifood & Seafood Exports (\$ Millions)



Source: Statistics Canada, CATSNET Analytics (March 2018)

# Sector Snapshot 2017:

## B.C. Food and Beverage Processing

**Sector Defined:** B.C.'s food and beverage processing sector comprises agrifood, seafood and beverage processing.

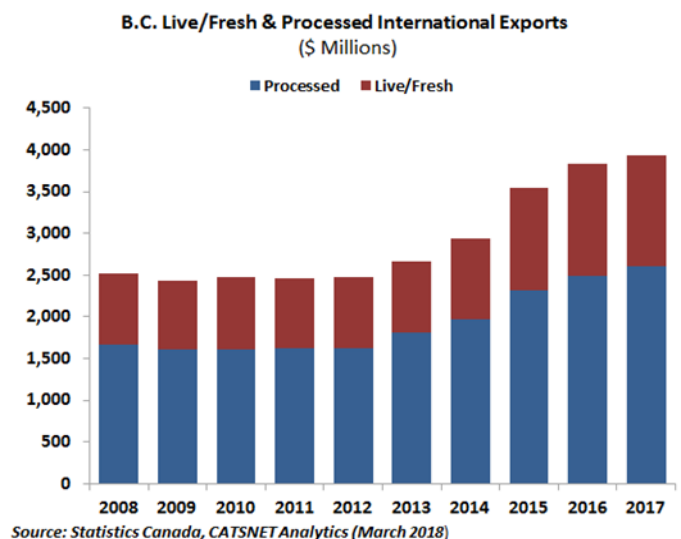
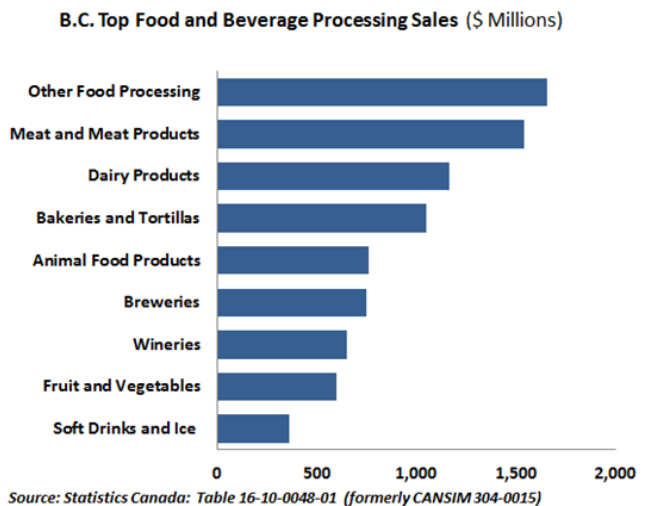
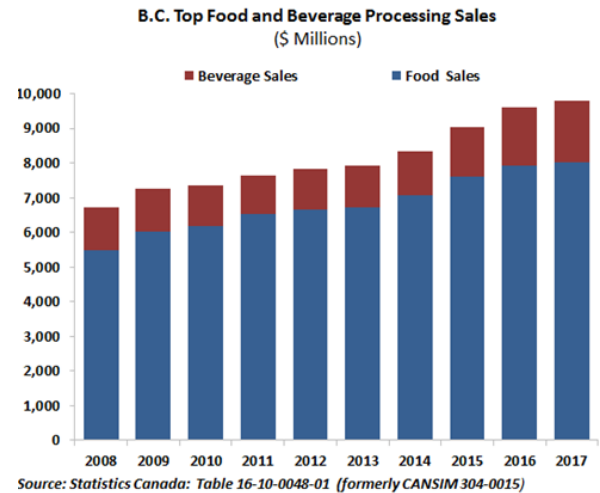
- The food and beverage processing industry is comprised of about 2,800 establishments and is the second largest processing sector in the province in sales and in GDP.

### FOOD AND BEVERAGE PROCESSING KEY FACTS

- ◆ **Sales: \$9.8 billion**
  - ◆ **GDP: \$3.0 billion**
  - ◆ **Share of Provincial Total GDP: 1.3%**
  - ◆ **International Exports: \$3.9 billion**
  - ◆ **Food and Beverage Processing Jobs: 32,600**
- Food and beverage processing in B.C. generated \$9.8 billion in 2017 - a two per cent increase over 2016.
  - Top Sales: \$1.7 billion "other food processing"; \$1.5 billion in meat and poultry products; \$1.2 billion in dairy products; \$1.0 billion in bakeries and tortillas; \$0.8 billion in animal food products; \$0.7 billion from breweries; \$0.7 billion from wineries; \$0.6 billion in fruit and vegetable products; and \$0.4 billion from soft drink and ice processing.
  - Combined sales from B.C. breweries, wineries, and distilleries amounted to \$1.4 billion in 2017.
  - Food and beverage processing made up 58 per cent of B.C.'s agrifood and seafood GDP in 2017, with contributions of \$3.0 billion.
  - In 2017 B.C. ranked fourth among provinces in Canada in food and beverage processing sales.

### FOOD AND BEVERAGE INTERNATIONAL EXPORTS

- In 2017, B.C. exported \$3.9 billion worth of agrifood and seafood products to 157 markets.
- Value-added and processed products comprised 66 per cent (\$2.6 billion) of the total export value with live and fresh products making up the remaining 34 per cent with a value of \$1.3 billion.
- Top Five Food and Beverage Exports: \$512 million in farmed Atlantic salmon; \$329 million in food preparations for processing and natural health products; \$321 million in baked goods and cereal products; \$222 million in blueberries; and \$153 million in mushrooms.



# Sector Snapshot 2017: B.C. Agriculture

**Sector Defined:** B.C.'s agriculture sector includes primary production from farmers, growers and ranchers. Agriculture does not include post-farm processing.

- B.C. lead the nation in sales of blueberries, cherries and raspberries.

## AGRICULTURE KEY FACTS

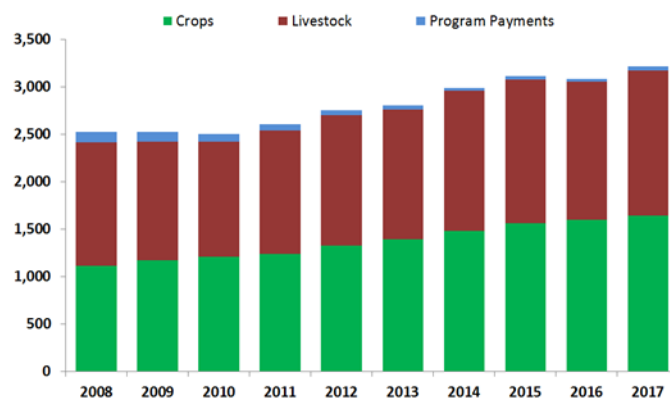
- ◆ **Farm Cash Receipts (FCR): \$3.2 billion**
- ◆ **GDP: \$1.9 billion**
- ◆ **Share of Provincial Total GDP: 0.8%**
- ◆ **International Exports: \$2.6 billion**
- ◆ **Agriculture Jobs: 24,000**

- Primary agriculture in B.C. generated \$3.2 billion in FCR up 4.1 per cent from 2016.
- Over 17,500 farms utilized 2.6 million hectares – less than three per cent of the provincial land base – to produce over 200 agriculture products.
- The top 10 commodities in terms of FCR in B.C. in 2017 were: dairy products; chickens; greenhouse vegetables; floriculture; beef; mushrooms; nursery products; eggs; blueberries; and sweet cherries.
- Total estimated GDP for crop and animal production (excluding aquaculture) plus support activities for crop and animal production amounted to \$1.9 billion and accounted for 0.8 per cent of B.C.'s total GDP.

## AGRIFOOD INTERNATIONAL EXPORTS

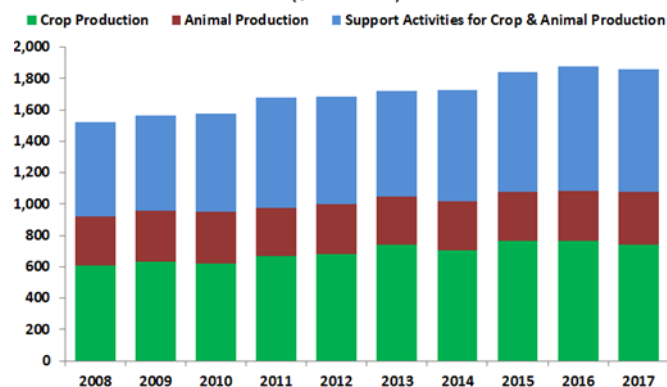
- Agrifood products include primary production products and post-farm processed products.
- B.C. exported \$2.6 billion worth of agrifood products to 147 markets in 2017. Total agrifood exports were up five per cent over 2016.
- Top Five Agrifood Export Markets: United States \$2.0 billion (77 per cent); China \$139 million (five per cent); Japan \$93 million (four per cent); South Korea \$65 million (three per cent); and Hong Kong \$34 million (one per cent).
- The fastest growing markets of the 10 top export markets were Singapore (137 per cent), South Korea (22 per cent), Taiwan (10 per cent), Australia (10 per cent) and Hong Kong (9 per cent).
- Top Five Agrifood Exports: \$329 million in food preparations for processing and natural health products; \$322 million in baked goods and cereal products; \$222 million in blueberries; \$153 million in mushrooms; and \$118 million in alfalfa, grass seed, fodder & animal feeds.

**B.C. Agriculture Sales (\$ Millions)**



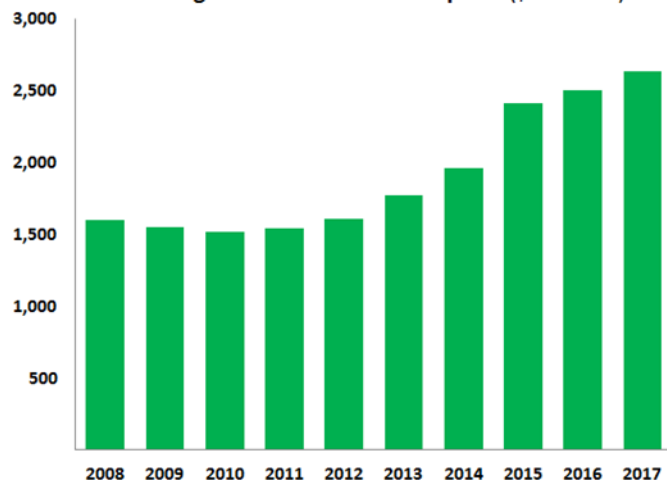
Source: Statistics Canada, 32-10-0045-01 (formerly CANSIM 002-0001)

**B.C. Agriculture GDP (\$ Millions)**



Source: Statistics Canada, Table 36-10-0402-01 (formerly CANSIM 379-0030)

**B.C. Agrifood International Exports (\$ Millions)**



Source: Statistics Canada, CATSNET Analytics (March 2018)

# Sector Snapshot 2017: B.C. Seafood

**Sector Defined:** B.C.'s seafood sector comprises primary production from commercial fishing and aquaculture. Seafood does not include post-vessel or post-farm processing.

- B.C. is consistently ranked as the 4<sup>th</sup> largest farmed Atlantic salmon producer in the world.
- B.C. lead the nation in sales of farmed and wild salmon, halibut, rockfish, hake, tuna and farmed oysters and clams.

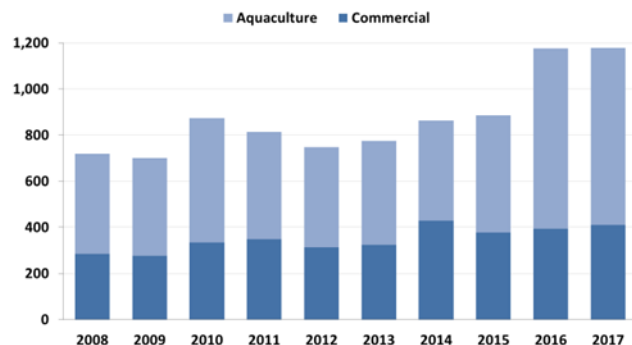
## SEAFOOD KEY FACTS

- ◆ **Sales: \$1.2 billion**
  - ◆ **Harvest: 279,400 tonnes**
  - ◆ **GDP: \$338 million**
  - ◆ **Share of Provincial Total GDP: 0.2%**
  - ◆ **International Exports: \$1.3 billion**
  - ◆ **Seafood Jobs: 4,500**
- Total sales of primary seafood production in B.C. were \$1.18 billion in landed and farm-gate value – an increase of 0.3 per cent above 2016.
  - Approximately 2,400 vessels harvested 1.9 per cent less wild fish, shellfish and marine plants in 2017 than in 2016.
  - The 182,900-tonne commercial fishery harvest generated a total landed value of \$410.2 million – up 4.1 per cent over 2016.
  - In 2017, there were 690 operations licenced to farm finfish, shellfish and marine plants in B.C. waters.
  - The total aquaculture harvest of 96,500 tonnes was down 8.5 per cent from the previous year, while the farm-gate value dropped 1.7 per cent to \$768.2 million.
  - Top 10 seafood commodities in terms of sales were farmed Atlantic salmon, halibut, crabs, wild geoducks, farmed Pacific salmon, prawns, wild sablefish, herring, rockfish, and chum salmon.
  - Total estimated GDP for seafood was \$338 million and accounted for 0.2 per cent of B.C.'s total GDP.

## SEAFOOD INTERNATIONAL EXPORTS

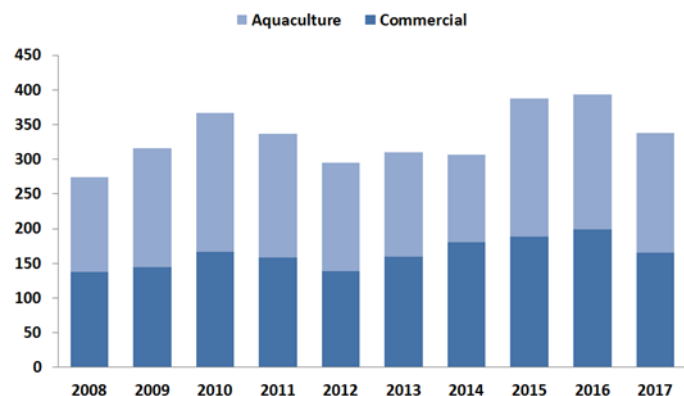
- Seafood products include primary production products and post-vessel and post-farm processed products.
- In 2017, B.C. exported \$1.3 billion in seafood products to 73 markets, a decrease of 3 per cent in value from 2016.
- Top Five Seafood Export Markets: United States \$777 million (60 per cent); China \$257 million (20 per cent); Japan \$111 million (nine per cent); Hong Kong \$33 million (three per cent); and Ukraine \$19 million (two per cent).
- The fastest growing export markets of the top 10 markets were Macao (130 per cent), Hong Kong (41 per cent) and Japan (4 per cent).
- Top Five Seafood Exports: \$512 million in farmed Atlantic salmon; \$131 million in crabs; \$72 million in hake; \$57 million in geoduck clams; and \$55 million in herring.

**B.C. Aquaculture & Commercial Fisheries Sales**  
(\$ Millions)



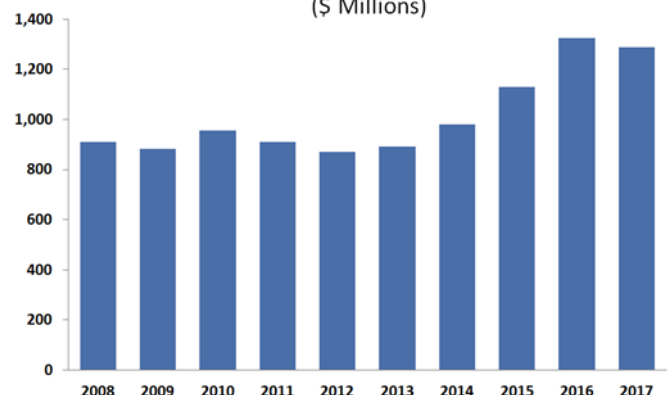
Source: BC Ministry of Agriculture, Seafood Year in Review

**B.C. Aquaculture & Commercial Fisheries GDP**  
(\$ Millions)



Source: Statistics Canada, Table 36-10-0402-01 (formerly CANSIM 379-0030)

**B.C. Seafood Exports**  
(\$ Millions)



Source: Statistics Canada CATSNET Analytics (March 2018)