

Sector Snapshot 2016: 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 species of fish, shellfish and marine plants are produced in B.C.

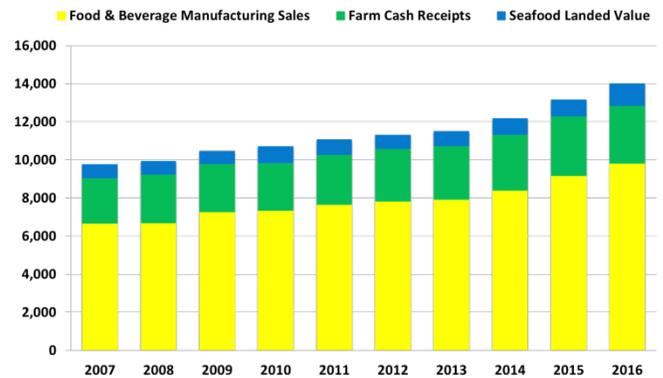
AGRIFOOD & SEAFOOD KEY FACTS

- ❖ **Sales: \$14.0 billion**
 - ❖ **GDP: \$4.5 billion**
 - ❖ **Share of Provincial Total GDP: 2.0%**
 - ❖ **Exports: \$3.8 billion**
- B.C. agrifood & seafood sales reached \$14 billion in 2016 - up 6.4 per cent over 2015.
 - Total sales include \$3 billion in agriculture + \$1.2 billion in seafood + \$9.8 billion in food and beverage manufacturing.
 - Growth in sales occurred in the seafood (aquaculture and commercial fishing) sector (up 31.2 per cent), and the food and beverage manufacturing sector (up seven per cent), while sales in the primary agriculture sector declined by 2.5 per cent.
 - Total estimated agrifood and seafood GDP, at \$4.5 billion, rose 4.6 per cent over 2015.
 - B.C.'s agrifood and seafood sector accounted for 2.0 per cent of B.C.'s total GDP which was \$218.8 billion in 2016.

AGRIFOOD & SEAFOOD PRODUCTS EXPORT PROFILE

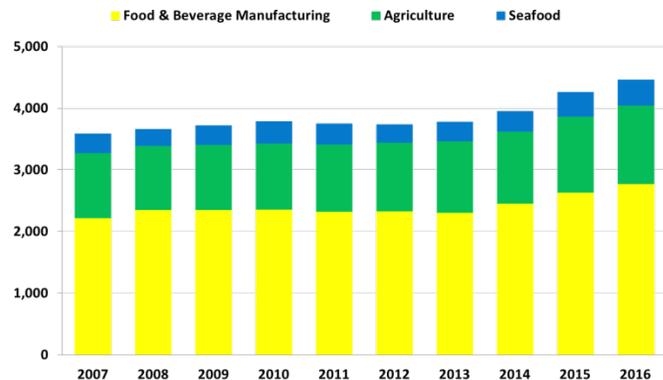
- B.C. exported a record \$3.8 billion in agrifood & seafood products to 160 markets in 2016.
- Total agrifood and seafood exports were up nine per cent over 2015 due to a 17 per cent increase in the value of seafood exports and a five per cent increase in the value of agrifood exports.
- Agrifoods contributed 65 per cent (\$2.5 billion) and seafood contributed 35 per cent (\$1.3 billion) to B.C.'s export value total for the sector.
- B.C.'s Top Five Export Markets: United States \$2.8 billion (71 per cent), China \$407 million (11 per cent), Japan \$207 million (five per cent), South Korea \$64 million (two per cent) and Hong Kong \$55 million (one per cent).
- The fastest growing of the top 10 exports markets were Ukraine (95 per cent), Philippines (40 per cent), Hong Kong (31 per cent), Australia (23 per cent) and South Korea (17 per cent).
- Top Five Exports: \$524 million in farmed Atlantic salmon; \$307 million in food preparations for manufacturing and natural health products; \$293 million in baked goods and cereal products; \$200 million in blueberries; and \$156 million in mushrooms.

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



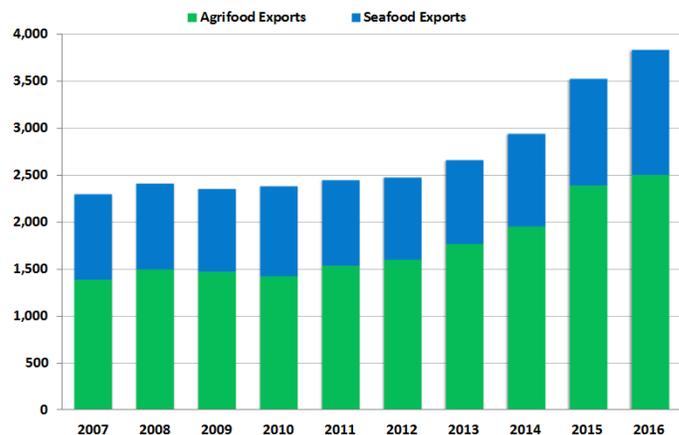
Source: Statistics Canada, Tables 002-0001 and 304-0015, CANSIM Database; and B.C. Ministry of Agriculture

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



Source: Statistics Canada, Table 379-0030, Cansim Database

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



Source: Statistics Canada, CATSNET Analytics

Sector Snapshot 2016:

B.C. Food and Beverage Manufacturing

Sector Defined: B.C.'s food and beverage manufacturing sector comprises agrifood, seafood, beverage & tobacco.

- The food and beverage processing industry is comprised of about 2,600 establishments and is the second largest manufacturing sector in the province in sales and in GDP.

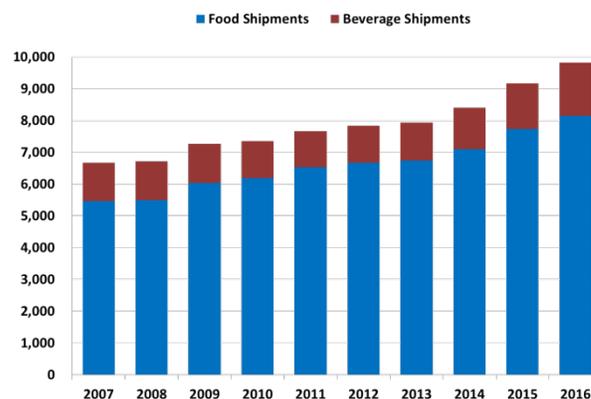
FOOD & BEVERAGE MANUFACTURING KEY FACTS

- **Sales: \$9.8 billion**
- **GDP: \$2.8 billion**
- **Share of Provincial Total GDP: 1.3%**
- **Exports: \$3.8 billion**
- Food and beverage manufacturing in B.C. generated \$9.8 billion in 2016 - a seven per cent increase over 2015.
- The sector employed 36,900 people in close to 2,600 establishments in 2016.
- Top Shipments: \$1.7 billion in meat and poultry products; \$1.4 billion in dairy products; \$1.0 billion in seafood products; \$0.8 billion in animal food products; \$0.8 billion in bakeries and tortillas; \$0.7 billion from breweries; \$0.6 billion from wineries; \$0.5 billion in fruit and vegetable products; and \$0.4 billion from soft drink and ice manufacturing.
- Combined sales from B.C. breweries, wineries, and distilleries amounted to \$1.3 billion in 2016.
- Food and beverage manufacturing made up 62 per cent of B.C.'s agrifood and seafood GDP in 2016, with contributions of \$2.8 billion.
- In 2016 B.C. ranked fourth among provinces in Canada in food and beverage manufacturing sales.

FOOD & BEVERAGE MANUFACTURING PRODUCTS EXPORT PROFILE

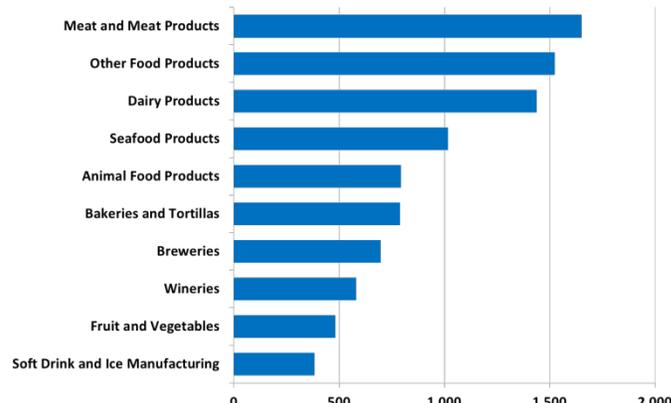
- B.C. exported \$3.8 billion worth of agrifood and seafood products in 2016. Processed products comprised 80 per cent of these exports, with the remaining 20 per cent comprised of live and fresh products.
- Top Five Food Exports: \$524 million in farmed Atlantic salmon; \$307 million in food preparations for manufacturing and natural health products; \$293 million in baked goods and cereal products; \$200 million in blueberries; and \$156 million in mushrooms.
- Top Five Beverage Exports: \$35 million in water; \$22 million in fruit & vegetable juice; \$10 million in wine; \$7 million in beer and cider; and \$3 million in other non-alcoholic beverages.

B.C. Food and Beverage Manufacturing Shipments (\$ Millions)



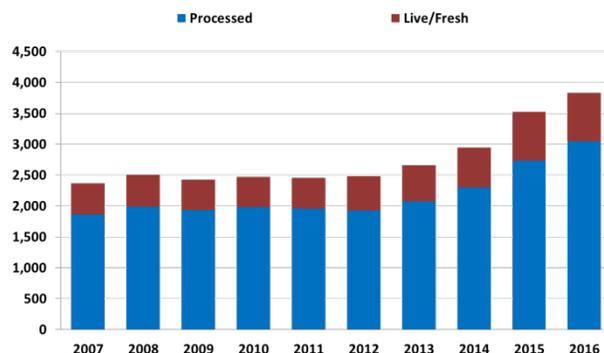
Source: Statistics Canada, Table 304-0015, CANSIM Database

B.C. Top Food and Beverage Manufacturing Shipments 2016 Ranked (\$ Millions)



Source: Statistics Canada, Table 304-0015, CANSIM Database

B.C. Processed and Live/Fresh Exports (\$ Millions)



Source: Statistics Canada, CATSNET Analytics

Sector Snapshot 2016: 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.

➤ In 2016, B.C. producers led the nation in farm sales of blueberries, cherries, raspberries, garlic and apricots.

AGRICULTURE KEY FACTS

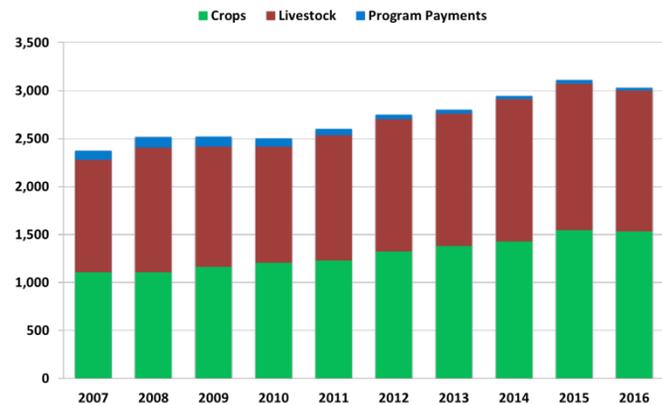
- ❖ **Farm Cash Receipts (FCR): \$3.0 billion**
- ❖ **GDP: \$1.3 billion**
- ❖ **Share of Provincial Total GDP: 0.6%**
- ❖ **Exports: \$2.5 billion**

- Primary agriculture in B.C. generated \$3 billion in FCR down 2.5 per cent from 2015.
- 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 2016 were: dairy products chickens, greenhouse vegetables, floriculture, beef, nursery products, blueberries, eggs, mushrooms and grapes.
- Nationally, B.C. ranked second in FCR for: greenhouse vegetables, floriculture products, nursery products, mushrooms, grapes, cranberries, peaches, field lettuce, pumpkins, pears, Brussels sprouts, ginseng, nectarines, plums and prunes, spinach, and Saskatoon berries.
- Total estimated GDP for crop and animal production (excluding aquaculture) plus support activities for crop and animal production amounted to \$1.3 billion and accounted for 0.6 per cent of B.C.'s total GDP.

AGRIFOOD PRODUCTS EXPORT PROFILE

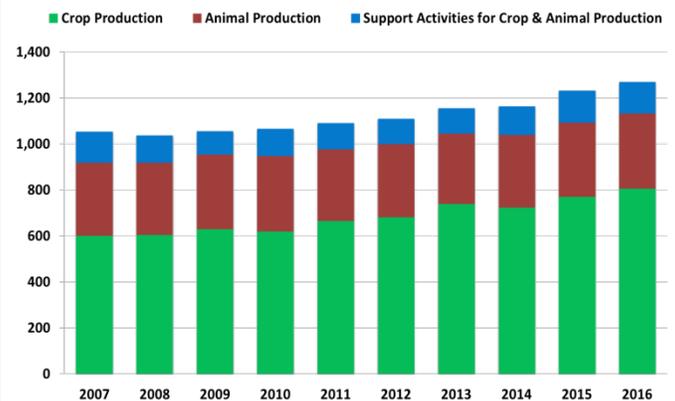
- Agrifood products include primary production products & post-farm processed products.
- B.C. exported \$2.5 billion worth of agrifood products to 147 markets in 2016. Total agrifood exports were up five per cent over 2015.
- Top Five Agrifood Export Markets: United States \$1.9 billion (77 per cent), China \$142 million (six per cent), Japan \$101 million (four per cent), South Korea \$54 million (two per cent) and Hong Kong \$31 million (one per cent).
- The fastest growing markets of the 10 top export markets were Australia (39 per cent), Philippines (38 per cent), Vietnam (33 per cent), United Kingdom (28 per cent) and Hong Kong (27 per cent).
- Top Five Agrifood Exports: \$307 million in food preparations for manufacturing and natural health products; \$293 million in baked goods and cereal products; \$200 million in blueberries; \$156 million in mushrooms; and \$119 million in chocolate & cocoa preparations.

B.C. Agriculture Sales (\$ Millions)



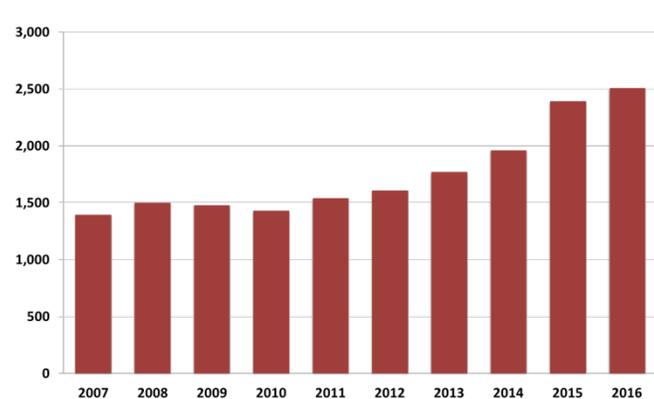
Source: Statistics Canada, Table 002-0001, Cansim Database

B.C. Agriculture GDP (\$ Millions)



Source: Statistics Canada, Table 379-0030, Cansim Database

B.C. Agrifood Exports (\$ Millions)



Source: Statistics Canada, CATSNET Analytics

Sector Snapshot 2016: 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 one of the largest producers of farmed Atlantic salmon in the world.
- B.C. leads the nation in sales of farmed and wild salmon, halibut, rockfish, farmed oysters, tuna, hake and sea urchins.

SEAFOOD KEY FACTS

- ❖ **Sales: \$1.2 billion**
 - ❖ **Harvest: 291,600 tonnes**
 - ❖ **GDP: \$415 million**
 - ❖ **Share of Provincial Total GDP: 0.2%**
 - ❖ **Exports: \$1.3 billion**
- Total sales of primary seafood production in B.C. were \$1.17 billion in landed and farm-gate value from about 100 species – an increase of 31.2 per cent above 2015.
 - Close to 2,400 vessels harvested 22.2 per cent more wild fish, shellfish and marine plants in 2016 than in 2015.
 - The 188,000-tonne commercial fishery harvest generated a total landed value of \$392.8 million – up 2.3 per cent over 2015.
 - In 2016, farmed fish, shellfish and marine plants were produced on 683 aquaculture operations.
 - The total aquaculture harvest of 103,600 tonnes was down 1.5 per cent from the previous year while the farm-gate value rose 52.9 per cent to \$776.8 million.
 - The top 10 seafood commodities in terms of sales were farmed Atlantic salmon, halibut, crabs, wild geoduck clams, wild chum salmon, farmed Pacific salmon, rockfish, wild sablefish, wild chinook salmon and herring.
 - Total estimated GDP for seafood amounted to \$415 million and accounted for 0.2 per cent of B.C.'s total GDP.

SEAFOOD PRODUCTS EXPORT PROFILE

- Seafood products include primary production products and post-vessel and post-farm processed products.
- In 2016, B.C. exported \$1.3 billion in seafood products to 80 markets, an increase of 17 per cent in value from 2015.
- Top Five Seafood Export Markets: United States \$799 million (60 per cent), China \$265 million (20 per cent), Japan \$106 million (8 per cent), Ukraine \$31 million (2 per cent), and Hong Kong \$24 million (2 per cent).
- The fastest growing export markets of the top 10 markets were Ukraine (95 per cent), South Korea (61 per cent), Germany (51 per cent) and China (31 per cent).
- Top Five Seafood Exports: \$524 million in farmed Atlantic salmon; \$142 million in crabs; \$71 million in hake; \$47 million in shrimp & prawns; and \$45 million in herring.

