

Sector Snapshot 2015: B.C. Agrifood & Seafood

Sector Defined: B.C.'s agrifood & seafood industry includes primary production in agriculture, aquaculture and commercial fisheries, and processing of food and beverages.

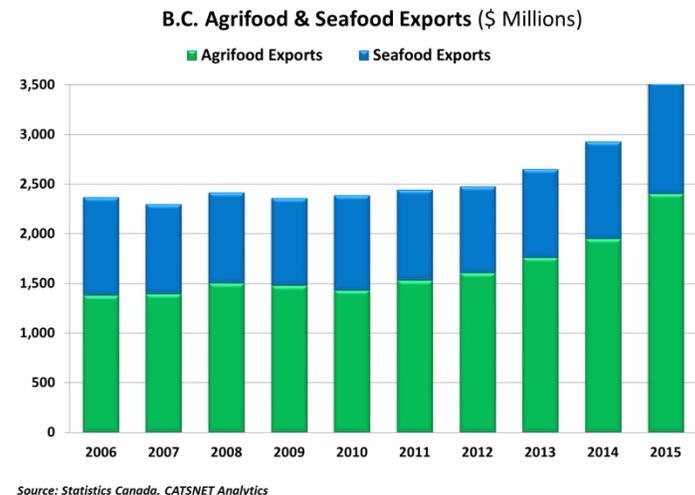
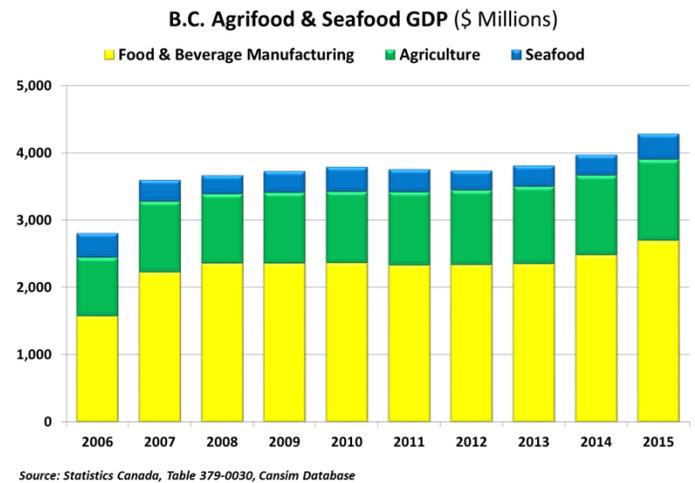
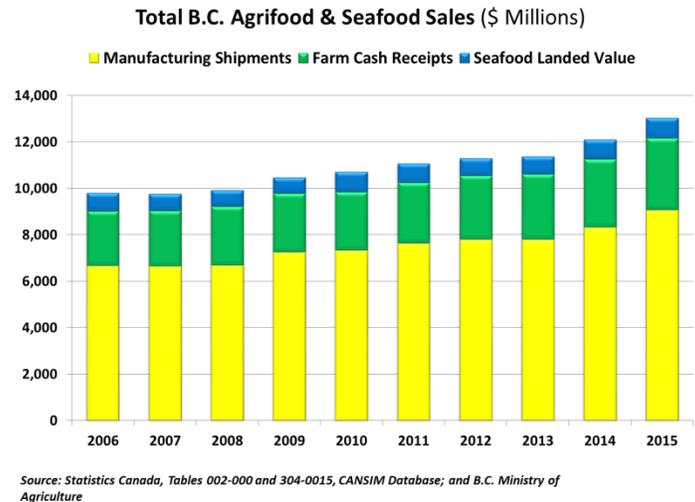
- Over 200 primary agriculture products and about 100 species of fish, shellfish and marine plants are produced in B.C.
- The food and beverage processing industry is comprised of about 2,500 firms and is one of the largest manufacturing sectors in the province.

AGRIFOOD & SEAFOOD KEY FACTS

- ❖ **Sales: \$13.0 billion**
 - ❖ **GDP: \$4.3 billion**
 - ❖ **Share of Provincial Total GDP: 2.1%**
 - ❖ **Exports: \$3.5 billion**
- Total sales of B.C. agrifood & seafood at \$13.029 billion are up 7.6 per cent over 2014.
 - Total sales include \$3.076 billion in agriculture + \$0.867 billion in seafood + \$9.086 billion in manufacturers' shipments.
 - Growth in sales occurred in the food and beverage manufacturing sector (up 9.1 per cent), the combined aquaculture and commercial fishing sector (up 4.7 per cent) and the primary agriculture sector (up 4.5 per cent).
 - Total estimated agrifood and seafood GDP, at \$4.3 billion, rose 7.8 per cent over 2014.
 - B.C.'s agrifood and seafood sector accounts for 2.1 per cent of B.C.'s total GDP which was \$209.1 billion in 2015.

AGRIFOOD & SEAFOOD PRODUCTS EXPORT PROFILE

- B.C. exported a record \$3.5 billion in agrifood & seafood products to over 150 markets in 2015. Total agrifood and seafood exports were up 20 per cent over 2014.
- This growth in exports was due to a 23 per cent increase in the value of B.C.'s agrifood product exports and a 15 per cent increase in the value of seafood exports.
- Top Five Export Markets: U.S. (72 per cent), China (10 per cent), Japan (5 per cent), Hong Kong (2 per cent) and South Korea (2 per cent).
- Agrifood shipments contributed 68 per cent and seafood shipments contributed 32 per cent to the total value of provincial agrifood & seafood exports in 2015.
- The fastest growing of the top 10 exports markets in 2015 were South Korea (63 per cent), Ukraine (56 per cent), China (33 per cent), the United Kingdom (25 per cent) and the United States (24 per cent).
- Top Five Exports: \$411 million in cultured Atlantic salmon; \$294 million in food preparations for manufacturing; \$218 million in blueberries; \$159 million in baked goods; and \$131 million in mushrooms.



Sector Snapshot 2015: B.C. Food and Beverage Manufacturing

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

- Food and beverage manufacturing was the second largest manufacturing sector in B.C. in shipments and GDP.

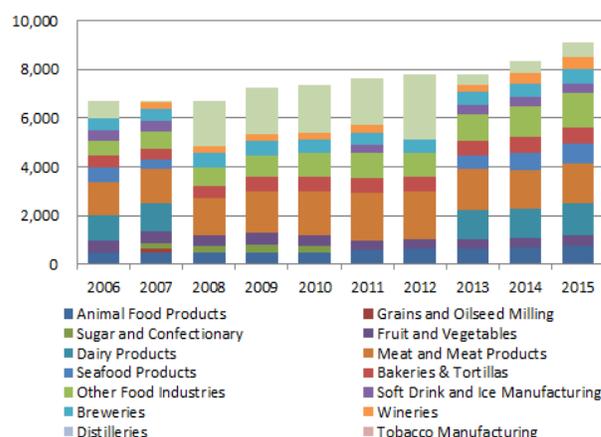
FOOD & BEVERAGE MANUFACTURING KEY FACTS

- ❖ Shipments: \$9.1 billion
 - ❖ GDP: \$2.7 billion
 - ❖ Share of Provincial Total GDP: 1.2%
 - ❖ Exports: \$3.5 billion
- Food and beverage manufacturing in B.C. generated \$9.086 billion in 2015, a 9.1 per cent increase over 2014.
 - The sector employed 33,000 persons across almost 2,500 establishments in 2015.
 - Top five shipments were: \$1.6 billion in Meat and Poultry Products, \$1.3 billion in Dairy Products, \$1.1 billion in Breweries, Wineries, and Distilleries, \$0.8 billion in Seafood Products, and \$0.8 billion in Animal Food Products.
 - From 2006 to 2015 B.C.'s food and beverage manufacturing shipments averaged \$7.5 billion a year.
 - In 2015 B.C. ranked fourth among provinces in Canada in terms of shipments.
 - Food and beverage manufacturing made up 63 per cent of B.C.'s agrifood and seafood GDP in 2015, with contributions of \$2.7 billion.

FOOD & BEVERAGE MANUFACTURING PRODUCTS EXPORT PROFILE

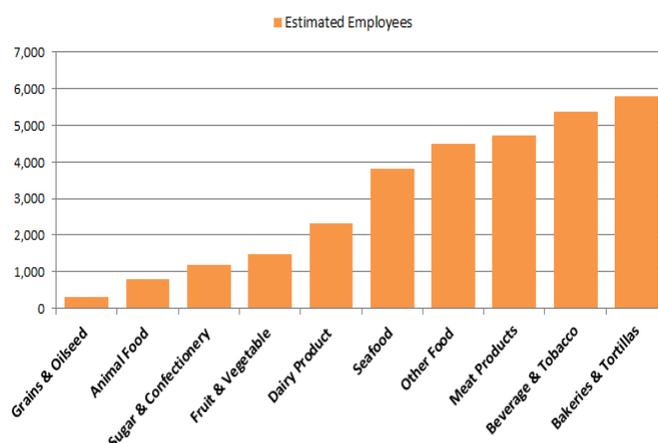
- B.C. exported \$3.5 billion worth of agrifood and seafood products in 2015. Processed products comprised 94 per cent of these exports, with the remaining six per cent comprised of live and fresh products.
- Top Five Beverage Exports: \$50 million in water; \$25 million in fruit & vegetable juice; \$12 million in beer and cider; \$9 million in wine; and \$2 million in other non-alcoholic beverages.
- Top Five Food Exports: \$411 million in cultured Atlantic salmon; \$294 million in food preparations for manufacturing; \$218 million in blueberries; \$159 million in baked goods; and \$131 million in mushrooms.

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



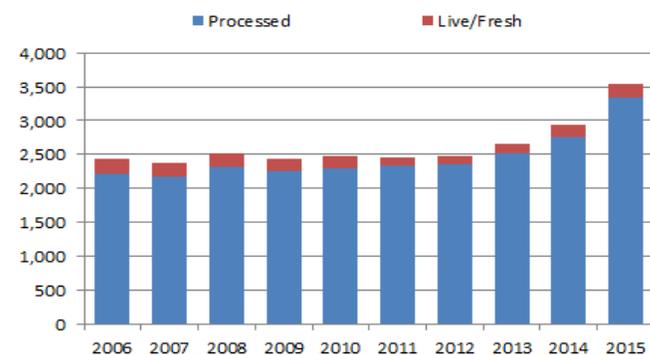
Source: Statistics Canada, Table 304-0015, CANSIM Database

2015 B.C. Food and Beverage Manufacturing Employees



Source: Statistics Canada, Table 553-0003, 281-0024, and 281-0027, CANSIM Database

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



Source: Statistics Canada, CATSNET Analytics

Sector Snapshot 2015: B.C. Agriculture

Sector Defined: B.C.'s agriculture sector comprises primary production from farmers, growers and ranchers.

Agriculture does not include post-farm processing, commercial fishing or aquaculture.

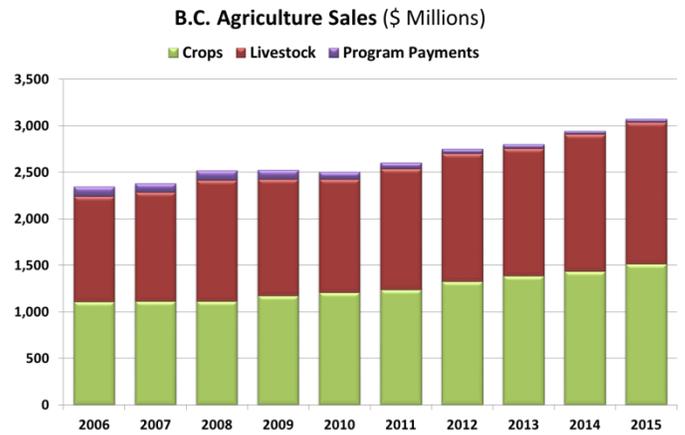
- In 2015, B.C. producers led the nation in sales of blueberries, cherries, raspberries, Brussels sprouts, apricots, and rhubarb.

AGRICULTURE KEY FACTS

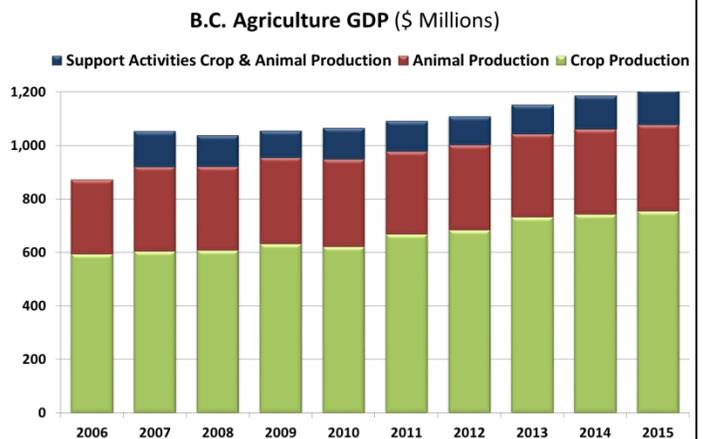
- ❖ **Farm Cash Receipts (FCR): \$3.1 billion**
 - ❖ **GDP: \$1.2 billion**
 - ❖ **Share of Provincial Total GDP: 0.6%**
 - ❖ **Exports: \$2.4 billion**
- Primary agriculture in B.C. generated \$3.076 billion in FCR up 4.5 per cent over 2014.
 - Approximately 20,000 farms utilized 2.6 million hectares – less than 3 per cent of the provincial land base – to produce more than 200 agriculture products.
 - Top 10 commodities in terms of FCR in B.C. in 2015: dairy products, chicken, beef, greenhouse vegetables, floriculture, nursery, blueberries, eggs, mushrooms and cherries.
 - B.C. FCR ranked second in the nation for floriculture products, nursery products, greenhouse peppers, greenhouse tomatoes, mushrooms, greenhouse cucumbers, grapes, cranberries, peaches, lettuce, pumpkins, pears, garlic, and nectarines.
 - Total estimated GDP for crop and animal production (excluding aquaculture) plus support activities for crop and animal production amounted to \$1.2 billion and accounted for 0.6 per cent of B.C.'s total GDP.

AGRIFOOD PRODUCTS EXPORT PROFILE

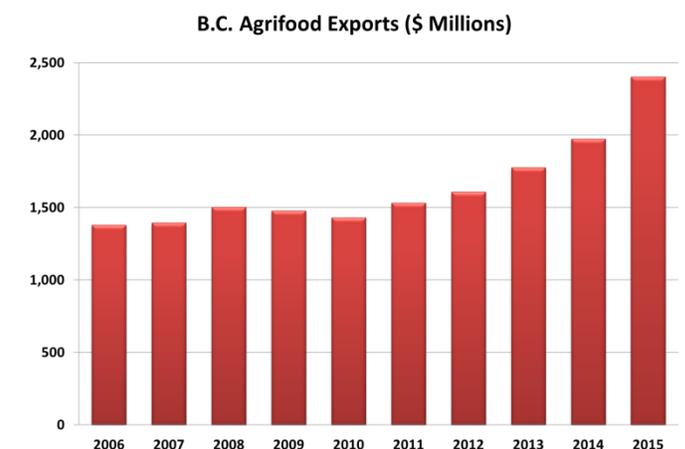
- Agrifood products include primary production products & post-farm processed products.
- B.C. exported \$2.4 billion worth of agrifood products to about 150 markets in 2015, an increase in value of 23 per cent over 2014.
- Top Five Agrifood Export Markets: the United States (77 per cent), China (6 per cent), Japan (4 per cent), South Korea (2 per cent) and Hong Kong (2 per cent).
- The fastest growing markets of the top 10 export markets in 2015 were China (75 per cent), Netherlands (68 per cent), South Korea (64 per cent), Hong Kong (42 per cent) and Vietnam (41 per cent).
- Top Five Exports: \$294 million in food preparations for manufacturing; \$218 million in blueberries; \$159 million in baked goods; \$131 million in mushrooms; and \$124 million in chocolate & cocoa preparations.



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



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



Source: Statistics Canada, CATSNET Analytics

Sector Snapshot 2015: B.C. Seafood

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

- Over the last decade, B.C. has been one of the very largest producers of cultured Atlantic salmon in the world.
- In 2015, B.C. led the nation in sales of farmed salmon, halibut, wild salmon, wild clams, rockfish, farmed oysters, tuna, hake, farmed clams, sea urchins, sea cucumbers, skate, dogfish, and squid.

SEAFOOD KEY FACTS

- ❖ **Sales: \$867.4 million (Wild \$370.2M/Farmed \$497.2M)**
- ❖ **Harvest: 255,000 tonnes (Wild 159,000t/Farmed 96,000t)**
- ❖ **GDP: \$383 million**
- ❖ **Share of Provincial Total GDP: 0.2%**
- ❖ **Exports: \$1.1 billion**

- Total sales of primary seafood production in B.C. were \$867.4 million in landed and farm-gate value from about 100 species, up by 4.7 per cent from 2014.
- Commercial fishers harvested 159,000 tonnes of wild fish, shellfish and marine plants in 2015, down 4.8 per cent from 2014. The landed value of commercial fisheries decreased by 10.9 per cent to \$370.2 million in 2015 compared to 2014.
- In 2015, aquaculture operations produced 96,000 tonnes of cultured fish, shellfish and marine plants.
- In 2015, cultured seafood production increased 31.0 per cent over 2014, while landed values increased 20.4 per cent to \$497.2 million.
- The top 10 commodities in terms of sales in B.C. in 2015 were cultured Atlantic salmon, crabs, halibut, prawns, geoduck, cultured Pacific salmon, sablefish, rockfish, wild chum salmon, and herring.
- Total estimated GDP for seafood amounted to \$383 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-farm and post-vessel processed products.
- In 2015, B.C. exported \$1.1 billion in seafood products to 79 markets, an increase of 15 per cent in value from 2014.
- Top Five Export Markets: the United States (61 per cent), China (18 per cent), Japan (8 per cent), Hong Kong (2 per cent), and Vietnam (1 per cent).
- The fastest growing markets of the top 10 export markets in 2015 were the Ukraine (56 per cent), South Korea (52 per cent) and Taiwan (39 per cent).
- Top Five Exports: \$411 million in cultured Atlantic salmon; \$116 million in crabs; \$50 million in shrimp & prawns; \$44 million in hake; and \$44 million in geoduck clams.

