

Sector Snapshot: B.C. Agrifoods - 2012

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

- Over 200 primary agriculture products and over 100 species of fish, shellfish and marine plants are produced in B.C.
- The food and beverage processing industry is comprised of nearly 1,400 small and medium-sized firms and is the largest manufacturing industry in the province.

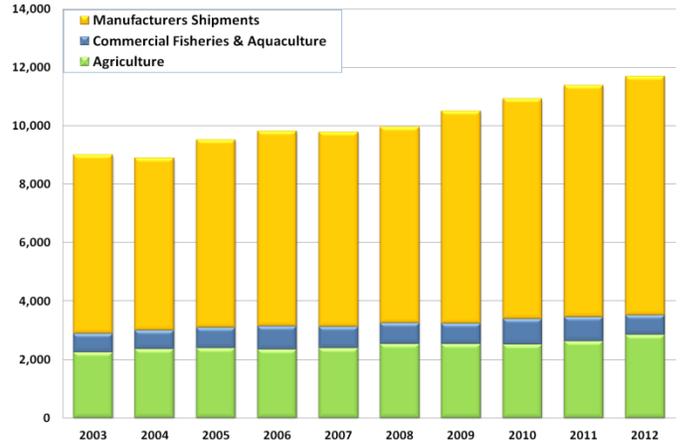
AGRIFOODS KEY FACTS

- ❖ **Sales: \$11.7 billion**
 - ❖ **GDP: \$3.7 billion**
 - ❖ **Share of Provincial Total GDP: 1.9%**
 - ❖ **Exports: \$2.5 billion**
- Total sales of B.C. agrifoods at \$11.7 billion are up nearly three per cent over 2011.
 - Total sales include \$2.8 billion agriculture + \$0.7 billion seafood + \$8.2 billion in manufacturers' shipments.
 - Growth in sales occurred in the primary agriculture sector (up eight per cent) and in the food and beverage manufacturing sector (up three per cent), while landed values in the combined aquaculture and commercial fishing sector declined 18 per cent in 2012 over 2011.
 - Total estimated agrifoods GDP, at \$3.7 billion, fell 1.4 per cent over 2011.
 - B.C.'s agrifoods sector accounts for 1.9 per cent of B.C.'s total GDP of \$191.7 billion.

AGRIFOODS PRODUCTS EXPORT PROFILE

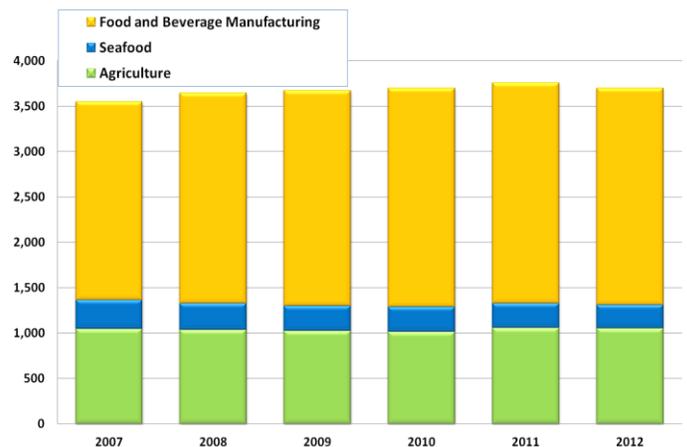
- B.C. exported \$2.5 billion in agrifoods products to more than 130 countries in 2012. Total agrifoods exports were up just over one per cent over 2011.
- This growth in exports was due to a five per cent increase in the value of B.C.'s agriculture product exports, while seafood product exports declined five per cent.
- Top Five Export Markets: U.S. (70 per cent), China (seven per cent), Japan (six per cent), Hong Kong (three per cent) and Taiwan (two per cent).
- Agriculture product shipments contributed 65 per cent and seafood product shipments contributed 35 per cent of the total value of provincial agrifoods exports in 2012.
- The fastest growing of the top 10 export markets in 2012 were Ukraine (42 per cent), Australia (24 per cent) and China (14 per cent).
- Top Five Exports: \$291 million in cultured Atlantic Salmon; \$168 million in blueberries; \$155 million in food preparations; \$105 million in baked goods; and \$74 million in pork products.

Total B.C. Agrifoods Sales (\$ Millions)



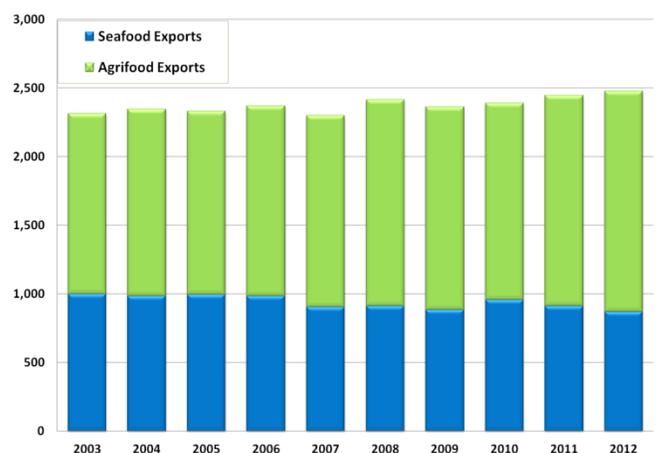
Sources: Statistics Canada, CANSIM Tables 002-0001 and 304-0014 and B.C. Seafood Industry Year in Review, 2004-2012.

Total B.C. Agrifoods GDP (\$ Millions)



Sources: Statistics Canada, Cansim Table 379-0030 and BC Stats, Special Tabulation of Aquaculture GDP. Agriculture GDP excludes Animal Aquaculture GDP. Provincial estimates using the 2007 base year are currently only available back to 2007.

B.C. Agrifoods Exports (\$ Millions)



Sources: Statistics Canada, Global Trade Atlas, and CATSNET Analytics (February 2013).

Sector Snapshot: B.C. Agriculture - 2012

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 2012, B.C. producers led the nation in sales of blueberries, sweet cherries, raspberries, pears, apricots, Brussels sprouts and rhubarb.

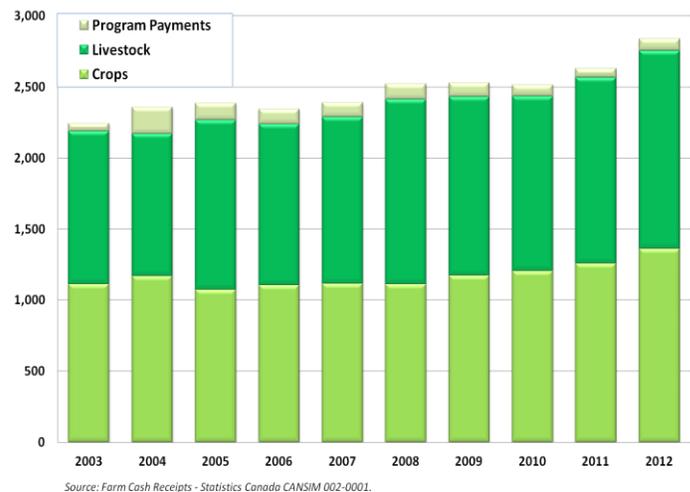
AGRICULTURE KEY FACTS

- ❖ **Farm Cash Receipts: \$2.8 billion**
 - ❖ **GDP: \$1.1 billion**
 - ❖ **Share of Provincial Total GDP: 0.6%**
 - ❖ **Exports: \$1.6 billion**
- Primary agriculture in B.C. generated \$2.8 billion in farm cash receipts (FCR), up eight per cent over 2011.
 - Approximately 20,000 farms utilized 2.6 million hectares - less than three 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 2012: dairy, poultry, floriculture products, beef, nursery products, blueberries, eggs, mushrooms, greenhouse tomatoes and greenhouse peppers.
 - B.C. ranked first in FCR across the country in: blueberries, sweet cherries, raspberries, pears, apricots, Brussels sprouts and rhubarb.
 - B.C. ranked second in FCR in: floriculture products, nursery products, greenhouse tomatoes, greenhouse peppers, greenhouse cucumbers, mushrooms, grapes, apples, cranberries, peaches, nectarines, lettuce, pumpkins, spinach, garlic, field cucumbers, and leeks.
 - Total estimated GDP for crop and animal production (excluding aquaculture) plus support activities for crop and animal production amounted to \$1.1 billion and accounted for 0.6 per cent of B.C.'s total GDP.

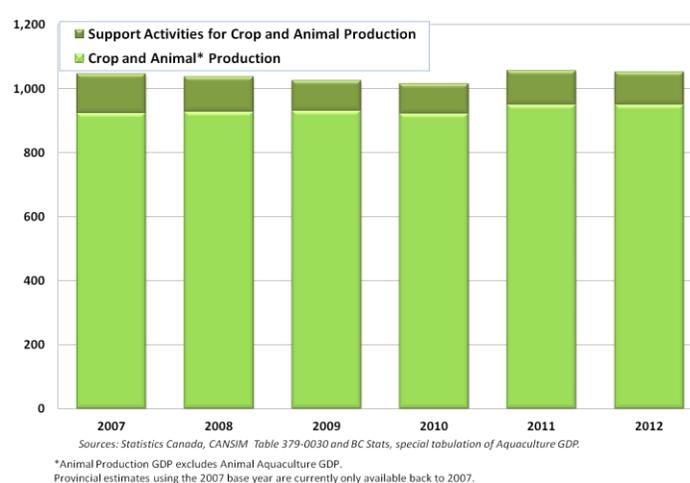
AGRICULTURE PRODUCTS EXPORT PROFILE

- Agriculture export products include primary production products & post-farm processed products.
- BC exported \$1.6 billion worth of agriculture products to 130 different markets in 2012, an increase of five per cent over 2011.
- Top Five Export Markets: U.S. (77 per cent), Japan (four per cent), China (three per cent), Taiwan (two per cent) and Hong Kong (two per cent).
- The fastest growing markets of the top 10 export markets in 2012 were Russia (249 per cent), Hong Kong (35 per cent) and China (25 per cent).
- Top Five Exports: \$168 million in blueberries; \$155 million in food preparations; \$105 million in baked goods; \$74 million in pork products; and \$69 million in mushrooms.

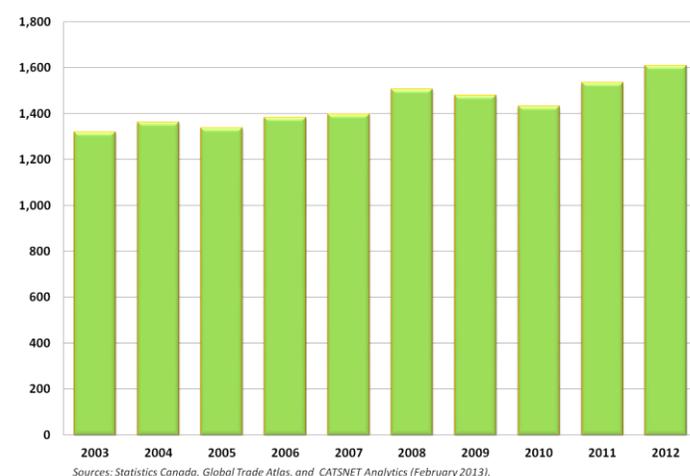
B.C. Agriculture Sales (\$ Millions)



B.C. Agriculture GDP (\$ Millions)



B.C. Agrifood Exports (\$ Millions)



Sector Snapshot: B.C. Seafood – 2012

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.

- B.C. was the fourth largest producer of cultured Atlantic salmon in the world after Norway, Chile, and the U.K.
- B.C. led the nation in sales of cultured salmon, wild salmon, halibut, rockfish, skate, dogfish, sea urchins, wild clams, flatfishes, and farmed clams, oysters & scallops.

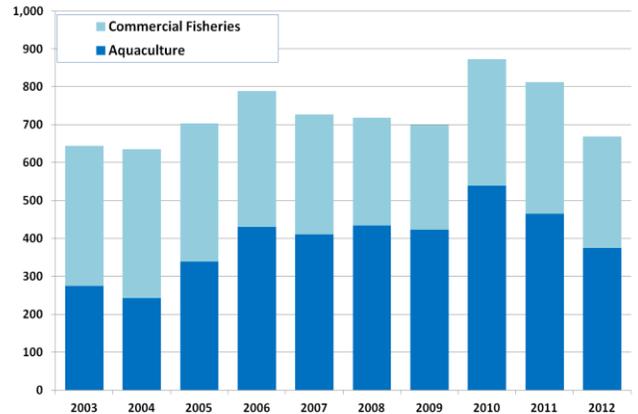
SEAFOOD KEY FACTS

- ❖ **Sales: \$668.5 million**
 - ❖ **GDP: \$261 Million**
 - ❖ **Share of Provincial Total GDP: 0.1%**
 - ❖ **Exports: \$869.4 million**
- Total sales of primary seafood production in B.C. were \$668.5 million in landed and farm-gate value from more than 100 species, down 18 per cent in value from 2011, due to changes in a number of species' harvest allocations and aquaculture production.
 - Approximately 3,053 vessels harvested 147,500 tonnes of wild fish, shellfish and marine plants in 2012, down 14 per cent from 2011. The landed value of commercial capture fisheries decreased by 16 per cent to \$293.4 million in 2012 compared to 2011.
 - In 2012, 639 aquaculture tenures utilized 8,466 hectares of Crown Land to produce 84,200 tonnes of cultured fish, shellfish and marine plants.
 - In 2012, cultured seafood production declined 10 per cent over 2011, while landed values fell 19 per cent to \$375 million.
 - The top 10 commodities in terms of sales in B.C. in 2012 were Atlantic salmon, geoduck clams, Pacific salmon, halibut, crabs, prawns, sablefish, rockfish, hake, and tuna.
 - Total estimated GDP for seafood amounted to \$261 million and accounted for 0.1 per cent of B.C.'s total GDP.

SEAFOOD PRODUCTS EXPORT PROFILE

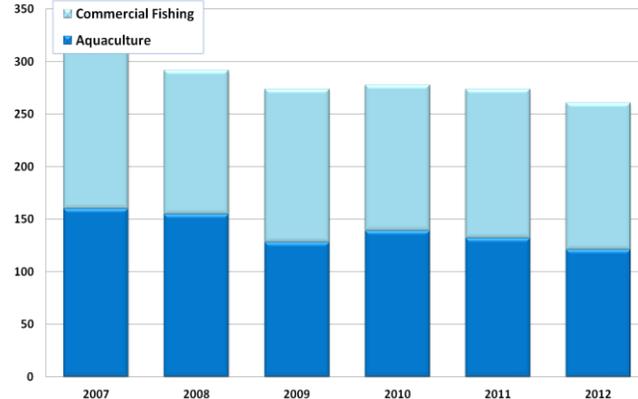
- Seafood products include primary production products and post-farm and post-vessel processed products.
- In 2012, B.C. exported \$870 million in seafood products to 62 countries, a decrease of five per cent in value from 2011.
- About 80 per cent of B.C.'s seafood is exported.
- Top Five Export Markets: United States (55 per cent), China (14 per cent), Japan (11 per cent), Hong Kong (five per cent), and the Ukraine (three per cent).
- The fastest growing markets of the top 10 export markets in 2012 were Ukraine (42 per cent), Australia (30 per cent) and China (11 per cent).
- Top Five Exports: \$291 million in Atlantic salmon; \$72 million in crabs; \$53 million in hake; \$43 million in geoduck clams; and \$38 million in shrimp & prawns.

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



Source: B.C. Seafood Industry Year in Review, 2004-2012.

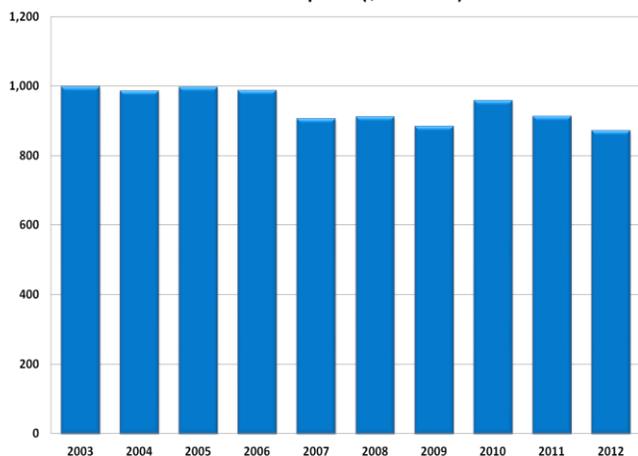
B.C. Aquaculture and Commercial Fisheries GDP (\$ Millions)



Source: BCSTATS September 2013.

Commercial Fisheries GDP estimated based on GDP for Fishing, Hunting and Trapping (NAICS 114000). Provincial estimates using the 2007 base year are currently only available back to 2007.

B.C. Seafood Exports (\$ Millions)



Sources: Statistics Canada, Global Trade Atlas, and CATSNET Analytics (February 2013).