

Sector Snapshot: B.C. Agrifoods - 2013

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 about 100 species of fish, shellfish and marine plants are produced in B.C.
- The food and beverage processing industry is comprised of more than 1,500 small and medium-sized firms and is the largest manufacturing industry in the province.

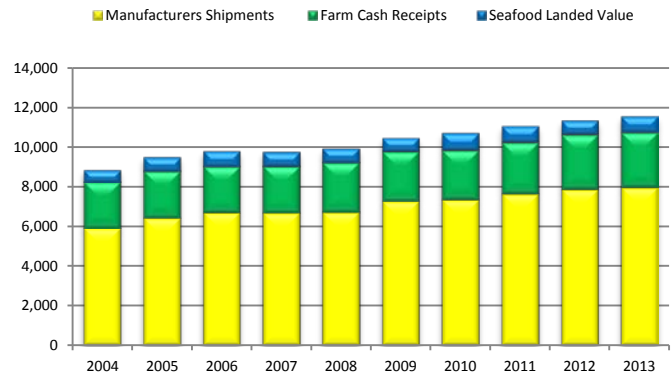
AGRIFOODS KEY FACTS

- ❖ **Sales: \$11.6 billion**
 - ❖ **GDP: \$3.8 billion**
 - ❖ **Share of Provincial Total GDP: 1.9%**
 - ❖ **Exports: \$2.7 billion**
- Total sales of B.C. agrifoods at \$11.6 billion are up two per cent over 2012.
 - Total sales include \$2.8 billion agriculture + \$0.8 billion seafood + \$8.0 billion in manufacturers' shipments.
 - Growth in sales occurred in the combined aquaculture and commercial fishing sector (up 15 per cent), the food and beverage manufacturing sector (up one per cent) and the primary agriculture sector (up 0.6 per cent) in 2013 over 2012.
 - Total estimated agrifoods GDP, at \$3.8 billion, fell 1.2 per cent over 2012.
 - B.C.'s agrifoods sector accounts for 1.9 per cent of B.C.'s total GDP which was \$196.5 billion in 2013.

AGRIFOODS PRODUCTS EXPORT PROFILE

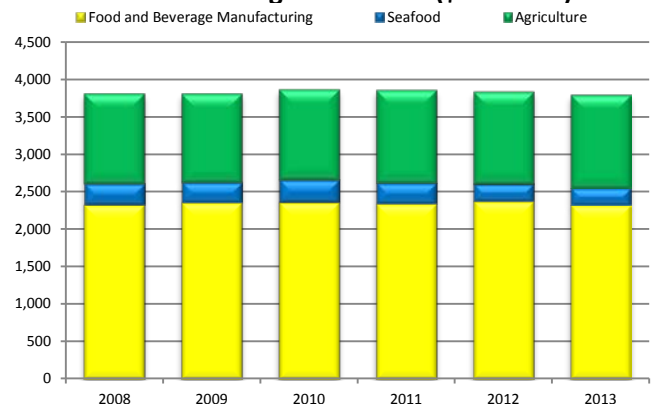
- B.C. exported \$2.7 billion in agrifoods products to more than 140 markets in 2013. Total agrifoods exports were up over eight per cent over 2012.
- This growth in exports was due to an 11 per cent increase in the value of B.C.'s agriculture product exports and a four per cent increase, in the value of seafood exports.
- Top Five Export Markets: U.S. (68 per cent), China (nine per cent), Japan (six per cent), Hong Kong (three per cent) and Taiwan (two per cent).
- Agriculture product shipments contributed 66 per cent and seafood product shipments contributed 34 per cent to the total value of provincial agrifoods exports in 2013.
- The fastest growing of the top 10 export markets in 2013 were Bangladesh (1,816 per cent), the Philippines (42 per cent) and China (38 per cent).
- Top Five Exports: \$267 million in cultured Atlantic salmon; \$190 million in food preparations for manufacturing; \$155 million in blueberries; \$102 million in baked goods; and \$91 million in crab.

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



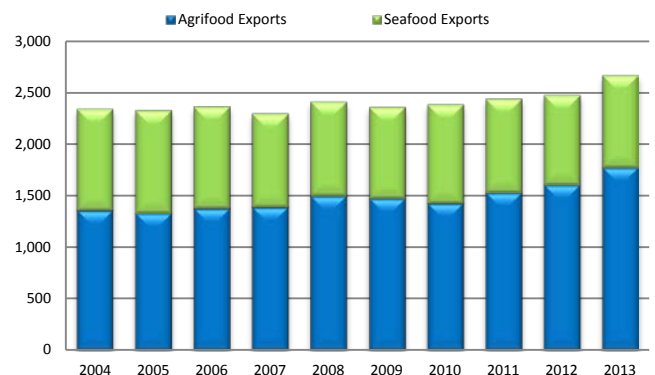
Source: Statistics Canada, Tables 002-000 and 304-0015, CANSIM database; and B.C. Ministry of Agriculture, Seafood Year in Review

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



Source: Statistics Canada, Table 379-0030, Cansim Database and B.C. Stats

B.C. Agrifoods Exports (\$ Millions)



Source: Statistics Canada, CATSNET Analytics

Sector Snapshot: B.C. Agriculture - 2013

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 2013, B.C. producers led the nation in sales of blueberries, cranberries, sweet cherries, raspberries, garlic, apricots and leeks.

AGRICULTURE KEY FACTS

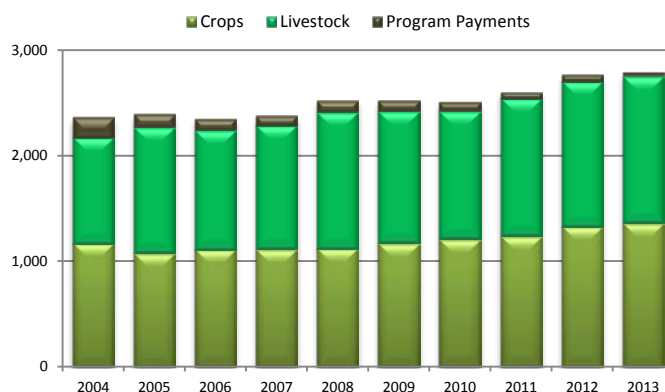
- ❖ **Farm Cash Receipts (FCR): \$2.8 billion**
- ❖ **GDP: \$1.2 billion**
- ❖ **Share of Provincial Total GDP: 0.6%**
- ❖ **Exports: \$1.8 billion**

- Primary agriculture in B.C. generated \$2.8 billion in FCR up 1 per cent over 2012.
- 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 2013: dairy products, chickens, eggs, floriculture, beef, nursery, greenhouse peppers, greenhouse tomatoes, mushrooms and blueberries.
- B.C. ranked second in FCR in: grapes, lettuce, peaches, pumpkins, pears, Brussels sprouts, plums/prunes, nectarines, spinach, mushrooms, greenhouse tomatoes, greenhouse peppers, greenhouse cucumbers, floriculture products and nursery products.
- 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.

AGRICULTURE PRODUCTS EXPORT PROFILE

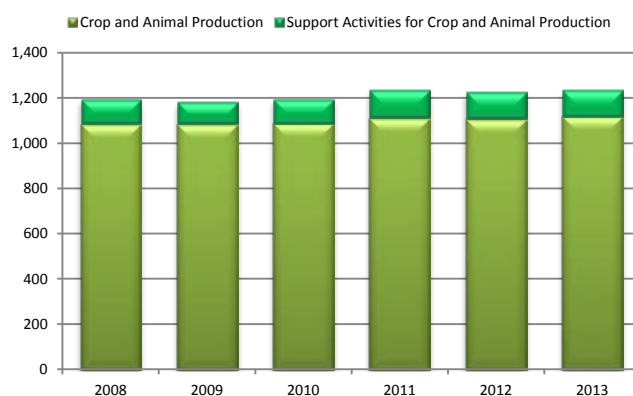
- Agriculture export products include primary production products & post-farm processed products.
- B.C. exported \$1.8 billion worth of agriculture products to more than 140 markets in 2013, an increase in value of 11 per cent over 2012.
- Top Five Export Markets: U.S. (76 per cent), China (four per cent), Japan (four 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 Bangladesh (1,816 per cent), South Africa (183 per cent) and China (45 per cent).
- Top Five Exports: \$190 million in food preparations for manufacturing; \$154 million in blueberries; \$102 million in baked goods; \$89 million in pork products; and \$80 million in chocolate and cocoa preparations.

B.C. Agriculture Sales (\$ Million)



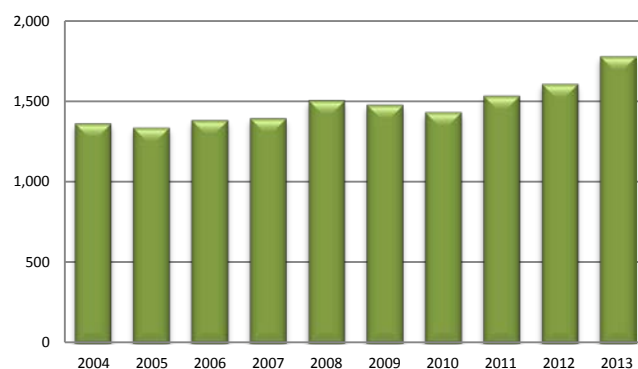
Source: Statistics Canada. Tables 002-000, CANSIM database.

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: B.C. Seafood – 2013

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, hake, tuna, other wild crabs, farmed clams, oysters & scallops.

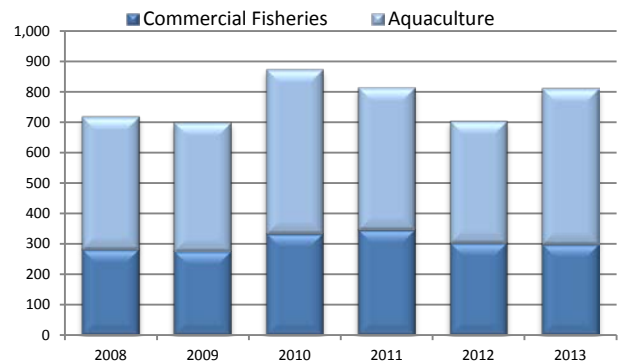
SEAFOOD KEY FACTS

- ❖ **Sales: \$810.5 million**
 - ❖ **GDP: \$238 Million**
 - ❖ **Share of Provincial Total GDP: 0.1%**
 - ❖ **Exports: \$902.6 million**
- Total sales of primary seafood production in B.C. were \$810.5 million in landed and farm-gate value from about 100 species, up 15 per cent in value from 2012.
 - Approximately 2,538 vessels harvested 155,400 tonnes of wild fish, shellfish and marine plants in 2013, up six per cent from 2012. The landed value of commercial capture fisheries decreased by one per cent to \$300.2 million in 2013 compared to 2012.
 - In 2013, 792 aquaculture operations occupied an estimated 8,567 hectares in the ocean and on land to produce 90,400 tonnes of cultured fish, shellfish and marine plants.
 - In 2013, cultured seafood production increased three per cent over 2012, while landed values rose 27 per cent to \$510 million.
 - The top 10 commodities in terms of sales in B.C. in 2013 were cultured Atlantic salmon, cultured Pacific salmon, halibut, geoduck clams, crabs, prawns, tuna, rockfish, hake and sablefish.
 - Total estimated GDP for seafood amounted to \$238 million and accounted for 0.1 per cent of B.C.'s total GDP.

SEAFOOD PRODUCTS EXPORT PROFILE

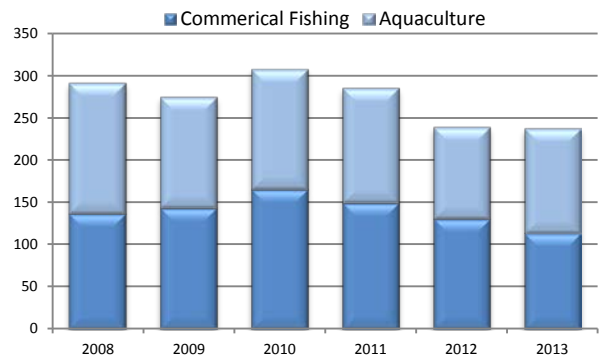
- Seafood products include primary production products and post-farm and post-vessel processed products.
- In 2013, B.C. exported \$903 million in seafood products to 62 markets, an increase of four per cent in value from 2012.
- Top Five Export Markets: United States (52 per cent), China (18 per cent), Japan (12 per cent), Hong Kong (5 per cent), and the Ukraine (3 per cent).
- The fastest growing markets of the top 10 export markets in 2013 were Germany (41 per cent), Taiwan (37 per cent) and China (35 per cent).
- Top Five Exports: \$267 million in cultured Atlantic salmon; \$91 million in crabs; \$62 million in hake; \$48 million in geoduck clams; and \$46 million in shrimp & prawns.

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



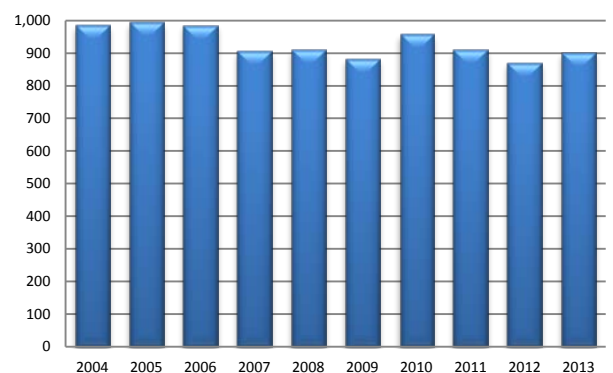
Source: B.C. Ministry of Agriculture. Seafood Year in Review

B.C. Aquaculture and Commercial Fisheries GDP



Source: B.C. Stats

B.C. Seafood Exports (\$ Millions)



Source: Statistics Canada, CATSNET Analytics