Welcome to the Ministry of Agriculture’s 2010 Agri-food Year in Review. As Canada’s most diverse agricultural province, British Columbia produces more than 200 commodities. Some, like salmon and blueberries are widely associated with our province, while others like hazelnuts and honey supply niche markets.

B.C. food products are in demand around the world as a trusted and great-tasting source of high-quality nutrition. In fact B.C. products were enjoyed in more than 135 countries last year. However agriculture and food production in B.C. does more than support our health and nutrition needs. They are a key part of our province’s diverse economy. Thanks to our hard-working producers and processors, the agri-food sector generated close to $9.6 billion in revenues in 2010 and directly employed more than 61,000 British Columbians. An additional 237,500 British Columbians support their families through agriculture-related employment such as wholesaling, food service and grocery retailing.

The Province has worked hard to ensure B.C. agriculture products can reach new markets. The Pacific Gateway is North America’s closest connection to Asian markets, and is a vital link in delivering hundreds of millions of dollars worth of B.C. food products to customers in China and Japan each year. Agriculture creates jobs for British Columbians in our farming and coastal communities, while the food processing and distribution chain creates jobs and encourages investment across the province.

I hope the following pages inspire you to experience the amazing array of agriculture and aquaculture products from British Columbia. The Ministry of Agriculture offers lots of information and ideas about food grown and produced in our province at www.gov.bc.ca/agri and www.bcseafood.ca.

Don McRae

Minister of Agriculture
B.C.’s producers and processors generated $9.6 billion in combined gross revenues and sent $2.5 billion in exports to over 135 different countries.

British Columbia’s rich, fertile land, abundant fresh water supplies, and diverse geography enable the production of a wider array of agricultural products over a greater range of climatic zones than any other area in Canada. Over 200 different commodities were produced on nearly 20,000 B.C. farms in 2010, generating total farm sales of $2.4 billion.

B.C. producers led the nation in sales of blueberries, cranberries, sweet cherries and raspberries, and ranked second in sales of greenhouse tomatoes, greenhouse peppers, mushrooms and grapes. 71,804 acres of farmland were dedicated to fruit and vegetable production in 2010, generating over $686 million in farm sales.

The entire agri-food supply chain generated $40.2 billion in combined gross revenues and employed 298,700 people: nearly 34,000 people are estimated to have been employed in B.C.’s primary agriculture and aquaculture activities; 27,300 people in food and beverage processing; 12,200 in wholesaling; and 225,300 in food service and grocery retailing.

BRITISH COLUMBIA AGRICULTURE

B.C.’s producers and processors generated $9.6 billion in combined gross revenues and sent $2.5 billion in exports to over 135 different countries.
British Columbia produces a diverse variety of crops and animal products. In 2010, B.C. farms generated $2.4 billion in sales.

The top ten sectors in terms of farm sales include: dairy, poultry, greenhouse vegetables, floriculture, beef, field vegetables and mushrooms, nursery, berries and grapes, eggs, and tree fruits.

Total farm sales of crops amounted to nearly $1.2 billion in 2010. B.C. crops experiencing the highest growth in acreage include garlic, brussel sprouts, pumpkins, lettuce, spinach and highbush blueberries.

Total farm sales of livestock and poultry products amounted to more than $1.2 billion. Cattle, poultry and dairy producers are the mainstay of the industry, with significant production and growth occurring in niche products such as venison. At the end of 2010, there were 520,000 cattle and calves, 79,000 hogs, 44,500 sheep and lambs, 5,100 bison and 800 fallow deer on B.C. farms.

Along the value chain, the province's food and beverage processors generated nearly $7.2 billion in sales, wholesalers generated nearly $10.4 billion, and food service and grocery retailers generated $19.7 billion.
In 2010, British Columbia exported $2.5 billion worth of agriculture, fish and seafood products to over 135 different countries. Agriculture generated 61% of the total export value, followed by fish and seafood (25%) and aquaculture (14%). The top ten exports were: salmon ($511.1m), food preparations* ($157.7m), baked goods ($113.6m), blueberries ($106.7m), animal feed ($79.2m), animal fats ($76.5m), mushrooms ($69.6m), tomatoes ($68.5m), crab ($65.3m) and pork ($56.9m).

Country Export Highlights

Eighty-eight per cent ($2.2 billion) of the total export value was generated by our top five markets† – the United States, Japan, China, Hong Kong and South Korea.

<table>
<thead>
<tr>
<th>Country</th>
<th>Export Value ($ millions)</th>
<th>Export Share (%)</th>
<th>Top Products</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>1,642.4</td>
<td>66</td>
<td>Salmon, Food Preparations, Baked Goods, Blueberries, Tomatoes</td>
</tr>
<tr>
<td>Japan</td>
<td>296.3</td>
<td>12</td>
<td>Salmon, Animal Fats, Herring, Shrimp &amp; Prawns, Pork</td>
</tr>
<tr>
<td>China</td>
<td>118.5</td>
<td>5</td>
<td>Crab, Geoduck Clams, Herring, Salmon, Pork</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>70.3</td>
<td>3</td>
<td>Geoduck Clams, Crab, Cherries, Salmon, Pork</td>
</tr>
<tr>
<td>South Korea</td>
<td>56.4</td>
<td>2</td>
<td>Animal Fats, Food Preparations, Sardines, Wheat Flour, Animal Feed</td>
</tr>
<tr>
<td>Rest of World</td>
<td>303.4</td>
<td>12</td>
<td>Hake, Salmon, Food Preparations, Chicken &amp; Turkey, Pork</td>
</tr>
<tr>
<td>TOTAL B.C.</td>
<td>2,487.2</td>
<td>100</td>
<td></td>
</tr>
</tbody>
</table>

* Food preparations include syrups, pastes, powders and similar substances used in food & beverage manufacturing.
† Total export value has been reduced from $2.79 billion to $2.49 billion to account for an apparent discrepancy regarding exports of canola oil/olcakes & raw hides/skins. As a result, the following amounts were subtracted in the analysis of B.C.'s top five markets: China, $209.7 million; Hong Kong, $27.9 million; South Korea, $23.0 million.
The food and beverage processing industry was the largest among B.C.’s manufacturing industries in 2010, generating more than $7.2 billion in shipments and employing 14% of the province’s manufacturing workforce.

B.C.’s food and beverage processing industry ranked third largest in Canada in terms of number of establishments and people employed. The industry is comprised of more than 1,400 small- and medium-sized firms which provide the industry with operational flexibility and the ability to satisfy consumers’ diverse tastes and preferences. Most processors are strategically located in close proximity to raw material suppliers and B.C.’s highly-integrated transportation system, making it easy to access ingredients and ship finished goods. More than 90% of these processors had less than 100 employees in 2010.

B.C. enjoys a relatively strong local market, driven by the largest population amongst Canada’s western provinces and higher average annual food expenditures per household. These consumers insist on high food safety and quality food products produced in a sustainable manner, which is driving growth and innovation in B.C.’s food processing industry. Growing segments of B.C.’s food processing market include: ethnic, organic and functional foods; herbal and botanical products; specialty pet food; and nutraceuticals.

Strategically located at the crossroads of the Asia-Pacific marketplace, B.C.’s food and beverage processors are uniquely positioned to supply food markets across Canada, the United States and Asia. In 2010, exports of sugar-confectionary and cocoa products increased by 35.5%, from $42.5 to $57.2 million; exports of sauces, soups and food preparations increased by 29.6%, from $98.2 to $127.3 million; and beverage exports increased by 0.8%, from $136.9 to $138 million.
B.C.’s 318 beverage processors generated $1.2 billion in shipments, employed over 4,700 people, and exported $68.2 million worth of beverages to over 25 different markets in 2010.

B.C.’s skilled beverage processors produced internationally-renowned wines from grapes grown in B.C.’s hot Okanagan region, pristine water from B.C.’s natural glaciers, and healthy juices from B.C.’s top-quality fruits and vegetables. B.C.’s brewers and emerging artisan distillers also produced an impressive array of beer, liquors and spirits.

FRUIT AND VEGETABLE JUICE: With over 50 different types of fruits and vegetables grown in the province, B.C.’s beverage processors are perfectly located to produce some of the highest-quality fruit and vegetable juices in the world. From the disease-fighting benefits of B.C. blueberries, to the infection-preventing properties of B.C. cranberries, to the cholesterol-reducing properties of B.C. apples, beverage processors in B.C. have access to some of the healthiest, natural ingredients available. B.C. accounted for over one third of all fruit and vegetable juice products exported from Canada in 2010, with $46.5 million in juice products being shipped to 25 different markets.

WINE: B.C.’s maturing wine industry is recognized internationally – over 1,600 medals were won in 2010 by B.C. wineries in competitions around the globe. Although the B.C. wine industry has traditionally focused on supplying the strong domestic market, increased demand for high-quality B.C. wines in Asia has led to a rise in exports of nearly 300% since 2008, growing from $1.4 to $5.5 million. B.C. icewines – produced from grapes naturally frozen on the vine before harvest – are gaining international attention as some of the highest-quality dessert wines in the world.

OTHER BEVERAGES: Fresh glacial spring water is shipped from the mountains of B.C. to consumers around the world. B.C. exported $30.6 million worth of bottled water to over 10 different markets in 2010. B.C. also exported $14.5 million worth of beer and cider and $3.5 million worth of whiskey, vodka and other spirits. 98% of beer and cider exports were sent to the U.S. and over 80% of whiskey and vodka exports were sent to Hong Kong and Vietnam.
B.C. is Canada’s largest producer of blueberries, raspberries and sweet cherries, and second largest producer of cranberries, peaches, and grapes.

B.C.’s diverse climate enables the production of a wide variety of high-quality berries, wine grapes, tree-fruits and nuts on nearly 53,000 acres of farmland. B.C. ranked first in Canada in terms of fruit sales in 2010, generating total combined farm revenues of $230.4 million and accounting for over one-third of the total farm-gate value of fruit produced across the country.

BERRIES: Ideal growing conditions, close proximity to food packers and processors, and easy access to B.C.’s highly-integrated transportation system has made the Lower Mainland of B.C. one of Canada’s most important regions for berry production. B.C.’s berry growers generated sales of $117 million in 2010, accounting for over 50% of the province’s total fruit sales and nearly 38% of Canada’s total berry sales.

TREE FRUITS: B.C.’s Okanagan region is home to most of B.C.’s 800 tree-fruit orchards, which generated a combined annual revenue of $78 million in 2010 (30% of the total value of tree-fruit produced in Canada). Apples and sweet cherries are B.C.’s two largest tree-fruit crops. Cherry production has experienced significant growth in B.C. over the past few years as the industry continues to position itself to become a strong player in the global market. B.C.’s cherry growers are expecting to ship their first shipment of fresh cherries to China in 2012, after Chinese inspectors visited B.C. farms last summer. This will create another direct export opportunity for this important crop.

GRAPEs: Grape growers have steadily increased production over the past four years as demand for high-quality grapes from B.C.’s wine industry continues to grow. In 2010, B.C. produced 17.5 tonnes of wine and table grapes, an increase of 7.5% over 2009.

NUTS: B.C. growers are taking advantage of increased demand for heart-healthy hazelnuts. Hazelnut production has grown by six percent in the past four years, reaching almost 500 tonnes in 2010.

B.C. exported $237.4 million worth of fruit and nut products to 30 different countries in 2010. The top five fruit exports were blueberries, cherries, cranberries, apples, and raspberries.

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B.C. produces 95% of the highbush blueberries cultivated in Canada and is the third largest producer of highbush blueberries in the world.

Despite being part of the human diet for more than 13,000 years, it wasn’t until recently that blueberries gained international recognition as one of the world’s superfruits because of their high antioxidant content. Antioxidants are believed to help reduce the risk of cancer and other age-related diseases, which is driving demand for blueberries from health-conscious consumers around the world.

Increasing demand for functional foods is creating excellent opportunities for B.C.’s blueberry growers. The Fraser Valley and Lower Mainland regions boast some of the richest, most fertile soil in Canada, which is perfectly suited to berry production. In 2010, B.C. generated almost $60 million in total farm sales from the production of over 88 million pounds of blueberries.

With ideal growing conditions for highbush blueberries and efficient ground and air transportation close to packers, B.C.’s blueberry growers are positioned to take advantage of emerging global opportunities. In 2010, B.C. exported over $105 million worth of blueberries to the United States, Japan, Australia, China and New Zealand.

There are currently about 600 blueberry farmers in B.C. that expect to produce in excess of 100 million pounds of blueberries per year combined by 2012. The B.C. Blueberry Council promotes the industry and seeks out opportunities for B.C.’s blueberry exporters in markets throughout North America, Asia and Europe. In 2010, the B.C. Ministry of Agriculture completed an export market analysis study for the industry and then worked with the Council to promote B.C. blueberries on a trade mission to China and Japan.
More than 35 types of vegetables were commercially grown by B.C. farmers in 2010, generating an estimated total combined revenue of $455.7 million.

From asparagus to zucchini, B.C. boasts a delicious array of vegetables grown on over 19,000 acres of farmland. Although the majority of vegetables are grown in the fertile Fraser Valley region, fresh B.C. vegetables are available at farmers markets or farm-side stands in almost every community in the province.

B.C.’s greenhouse growers produced $276.5 million worth of vegetables in 2010, an increase of 12.4% from 2009. B.C. produced 32% of Canada’s greenhouse peppers, 27% of Canada’s greenhouse cucumbers, and 25% of Canada’s greenhouse tomatoes.

B.C.’s greenhouse growers are world leaders in the use of integrated pest management and innovative greenhouse technologies. These advantages have enabled the industry to remain competitive during the economic downturn, even with increased competition from the U.S. and the Netherlands. U.S. and Canadian borders were reopened to Dutch greenhouse peppers in 2010, resulting in a surge of imported produce that challenged prices and returns to producers. Despite this, farm sales of B.C.’s greenhouse peppers rose by four percent, from $84.2 to $87.4 million, showing the strength and resiliency of the industry.

B.C. farmers produced $179.2 million worth of field vegetables and mushrooms in 2010, accounting for almost ten percent of Canada’s total field vegetable and mushroom revenues. Mushrooms and potatoes were B.C.’s highest-value non-greenhouse vegetable crops in 2010, followed by beans, corn, lettuce, brussel sprouts, cabbage and carrots. Record summer rainfall reduced potato production by more than 50% in 2010, but production is expected to return to around 100,000 tonnes as soil and weather conditions continue to normalize.

B.C. exported $217.8 million worth of vegetable products to 33 different markets in 2010. The top five vegetable exports were mushrooms ($69.6 million), tomatoes ($68.5 million), peppers ($50.2 million), cucumbers ($13.9 million), and potatoes ($4.5 million). The United States continued to be the top market, receiving $205.1 million worth of vegetable products.

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British Columbia is the largest mushroom exporter and the second largest mushroom producer in Canada.

B.C.’s mushroom industry has developed a solid reputation for growing and harvesting some of the highest-quality mushrooms in North America. Commercially-grown mushrooms are produced year round, with a new crop being spawned weekly to ensure a continuous supply for consumers across Canada and around the world.

Agaricus bisporus, commonly known as the button mushroom, is the main crop grown in the province. B.C. produces the white button variety as well as a brown coloured strain that is grown to three different sizes – crimini (brown button or Italian brown), portabella and portabellini (small portabella). Several speciality mushrooms are also grown, including shiitake, oyster, maitake, enokitake, lobster, porcini, and chanterelles. Popular wild mushroom species that are commercially harvested in B.C. include pine mushrooms, morels, king boletes and Pacific golden chanterelles.

B.C. accounted for 38% of the mushrooms commercially grown across Canada in 2010, producing over 29,000 tonnes at a farm-gate value of $83.2 million. As a result of their high-quality and short shelf life, about 95% of B.C.’s commercially-grown mushrooms are sold fresh and about 60% are exported to nearby markets in the United States.

Although B.C. exported $69.6 million worth of mushroom products to over 15 different markets in 2010, more than 98% were destined for the top three markets of the United States (89%), Japan (7%) and France (2%). During the past five years, 86% of B.C.’s mushroom exports were sent to the U.S., nine percent were sent to markets in Asia, and five percent were sent to markets in Europe.

In the past five years large investments have been made in new compost technology known as Phase III tunnels. This technology has allowed for a 40% increase in production per unit area by shortening the production cycle from 10 weeks to 6 weeks on the farm. This technology is more energy efficient and environmentally friendly, and has reduced pest problems allowing for newly-certified organic production in the province. Currently 60% of B.C.’s commercially-grown mushrooms are produced using Phase III compost technology. More farms are expected to convert to this technology in the near future.
B.C. exported $306.1 million worth of live animals, meat and animal products to 80 different markets in 2010.

Livestock and poultry production is an economic cornerstone of many B.C. communities, with nearly 11 million acres of land used in the production of cattle, pigs, sheep, lambs, chickens, turkeys, bison, fallow deer and other animal products. Total farm sales of livestock and poultry products reached $1.2 billion in 2010.

B.C. had 79,000 hogs on its farms at the end of 2010, the majority of which are located in the Fraser Valley region. Consecutive years of low commodity prices for market hogs across North America, combined with rising input costs, has resulted in fewer farms and lower production as the B.C. hog industry shifts to speciality pork production. Newly branded B.C. pork, supported by a strongly-developed infrastructure of traceability, food safety, biosecurity and animal care, is now working to attract and secure new product market opportunities. B.C. exported $56.9 million worth of processed pork products to 23 different markets in 2010. Japan was B.C.'s largest export market, receiving over $22 million in frozen pork products.

B.C.'s poultry industry is the second largest agriculture industry in B.C. in terms of farm sales. Farmers generated $348.8 million in total combined revenues in 2010, with over 179 million chickens and turkeys being raised on more than 900 different farms. B.C. exported $30.5 million in processed poultry products to 31 different markets in 2010. The Philippines was the largest export market, receiving nearly $11 million in frozen chicken products.

B.C. had 520,000 cattle and calves spread across nearly 4,000 ranches and dairy farms at the end of 2010. The cattle industry produced 260.4 million pounds of beef at a farm-gate value of $204.7 million. B.C.'s dairy farmers produced 656.7 million litres of milk, generating $493.7 million in farm sales.
The beef industry contributed more than $200 million to B.C.’s economy in 2010, with over 4,000 ranches providing employment and income for thousands of British Columbians.

B.C.’s cattle ranches occupy over five million acres of private land and another 21 million hectares of government-owned rangeland that is tenured for grazing, providing the ranching industry with a unique advantage – B.C.’s beef cattle spend the majority of their lives eating lush green grass as they roam the natural landscape.

B.C. supplied 16.3% of the total calves raised in Canada’s largest beef production region in 2010. This region includes the three western provinces of Saskatchewan, Alberta and B.C.

As stewards of the land, B.C.’s cattle ranchers enjoy working with animals and respect the importance of treating them responsibly, which has resulted in an environmentally-sustainable industry that produces some of the highest-quality beef in the world. The B.C. cattle industry recently joined with other B.C. livestock and poultry farmers to initiate the B.C. Farm Animal Care Council – a group dedicated to fostering a greater understanding of the responsible way in which B.C. farmers and ranchers care for their animals.

The production of safe, high-quality beef products is being supported through the development of a national traceability system that enables industry and government to efficiently and effectively identify and respond to any food safety or quality issues. The Canadian Food Inspection Agency ensures that all Canadian beef meets strict quality and safety standards through a Cattle Identification System, Cattle Feed Safety System, Animal Disease Surveillance Unit and a Chemical Residue Monitoring Program. The industry supports a safe, high-quality beef production system by incorporating the principles of the Hazard Analysis and Critical Control Point (HACCP) System. Canadian law requires all federally-inspected meat processing facilities to develop HACCP systems for their beef product lines. These certified facilities are the only meat processing facilities that are allowed to export beef products out of Canada.

During the past two years, the Province of British Columbia has worked closely with the beef industry through the Ranching Task Force to identify actions that can be taken to increase B.C.’s capacity to provide high-quality, environmentally-sustainable beef. As a result of recommendations provided through the Ranching Task Force, the B.C. Ministry of Agriculture launched a successful trade mission to China and Japan in 2010 to promote B.C. beef, implemented an annual B.C. Beef Day celebration at the provincial legislature to increase the profile of the industry within the province, and invested five million dollars of federal and provincial funding to encourage and support innovation in the ranching sector.
Exports grew by 28% in 2010, with $41.8 million worth of grains and oilseeds shipped to over 60 different markets.

Grains and oilseeds dominate the northern landscape in B.C.’s beautiful Peace River region. Nearly 115,000 tonnes of grains and oilseeds were produced by B.C. farmers in 2010, generating $32.8 million in total farm sales. Despite being one of Canada’s smaller grain and oilseed producers, B.C.’s industry is efficient, skilled and uses modern technology to grow high-quality crops.

B.C.’s farmers produced 40,200 tonnes of wheat, 29,900 tonnes of canola, 23,100 tonnes of barley and 21,700 tonnes of oats in 2010. Generally, canola and the higher grades of wheat, oats and malting barley are either exported directly or moved into the Canadian processing sector. The lower grades of wheat, oats, and barley move into the domestic feed markets.

The industry has been challenged by periods of drought over the last few years which has hindered its ability to meet increased global demand for grains and oilseeds. However, farmers are working together within the B.C. Grain Producers Association (BCGPA) to conduct regionally-focused research that will enable the industry to overcome these challenges and be more competitive.

The short growing season in B.C. limits the choices of crops and varieties that can be grown, and requires very timely cultural operations. The BCGPA assists farmers by testing crops, evaluating new crop varieties for regional suitability, and researching herbicide systems, fertilizer blends and other important factors that contribute to the success of the industry.
Floriculture and nursery production generated nearly $405 million in total farm sales in 2010.

**FLORICULTURE:** Freshness and diversity are hallmarks of B.C.’s floriculture industry. With over 95 million cut flowers, 41 million bedding plants, 38 million potted plants and 35 million plant cuttings produced in 2010, floriculture was B.C.’s fourth largest sector in terms of farm sales.

In 2010, B.C. continued to produce a wide range of indoor potted plants – including poinsettias, orchids, potted mums, and tropical foliage and plants – as well as an array of cut flowers – including tulips, alstroemerias, chrysanthemums, gerberas and roses. Cut tulips accounted for 20% of B.C.’s cut-flower production in 2010.

**NURSERY:** Since the first nursery farms were established on Vancouver Island and Salt Spring Island in the mid 1880’s, B.C.’s nursery industry has grown to become Canada’s second largest sector in terms of farm sales.

Nursery was B.C.’s sixth largest sector in terms of farm sales in 2010. The cool spring weather made 2010 a challenging year for B.C.’s floriculture and nursery producers. This was further compounded by an increase in the value of the Canadian dollar relative to the U.S. dollar, making B.C. exports more expensive for customers south of the border. With 97% of B.C.’s floriculture and nursery exports destined for the U.S, the unfavourable exchange rate and weakened demand for nursery products in the U.S. were big issues for the sector. Despite this, exports to the U.S. still increased by three percent, rising from $53.8 to $55.4 million.
DATA SOURCES
• Farm gate and supply chain values, production, size, and employment data provided by Statistics Canada.
• Specific industry data obtained from industry associations, where necessary.
• Export data provided by Statistics Canada through the Global Trade Atlas database.

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