



AGRICULTURE, FISHERIES AND AQUACULTURE

SECTORS IN REVIEW

2002



New  Nouveau
Brunswick
CANADA

AGRICULTURE, FISHERIES AND AQUACULTURE

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AND AQUACULTURE
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Agriculture, Fisheries and Aquaculture

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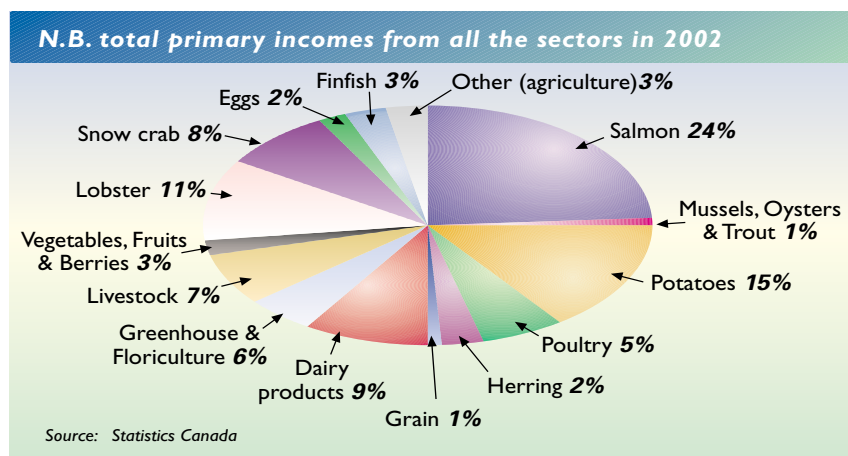
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Sectors in review (2002)

| | |
|-------------------------------|-------------------|
| Farm Cash Receipts | \$428.6 million |
| Commercial Fisheries landings | \$198.096 million |
| Aquaculture | \$202.574 million |
| Seafood Exports | \$884 million |
| Agri-Food Exports | \$433 million |
| Total Shipments | \$2.2 billion |



As the Minister responsible for agriculture, fisheries, and aquaculture in New Brunswick, I am especially proud to present to you the first edition of the Agriculture, Fisheries and Aquaculture Sectors in Review.

Although New Brunswick is geographically one of Canada's smaller provinces, big things are happening here in agriculture, fisheries, and aquaculture. These three sectors are an integral part of our province's rural communities generating more than 2.2 billion dollars in 2002. Exports play a vital role in the sectors prosperity with annual revenues of some 1.32 billion dollars.

In addition, these three food production sectors contribute to the direct and indirect employment of close to 30,000 New Brunswickers in the primary and value-added sectors. Thousands of other jobs in the service transportation, manufacturing and other sectors also depend on our food production economy.

I would like to confirm the government's intention to continue to invest in the total development of agriculture, commercial fisheries and aquaculture through the delivery of programs and services promoting development and innovation, allowing us to pursue a strategy of increasing primary production while fostering value-added opportunities in food and bio-product production.

The New Brunswick government and the Department of Agriculture, Fisheries and Aquaculture will work to promote the sustainable growth of these sectors through innovative partnerships and targeted policies and programs resulting in greater prosperity for New Brunswickers.

The agriculture, commercial fisheries and aquaculture sectors have been a vital part of this province for many generations, and we intend to make sure that they continue to prosper for many generations to come.

A handwritten signature in black ink, appearing to read 'D. Alward', written in a cursive style.

David Alward

Minister of Agriculture, Fisheries and Aquaculture

Agriculture Sector

Sector Overview

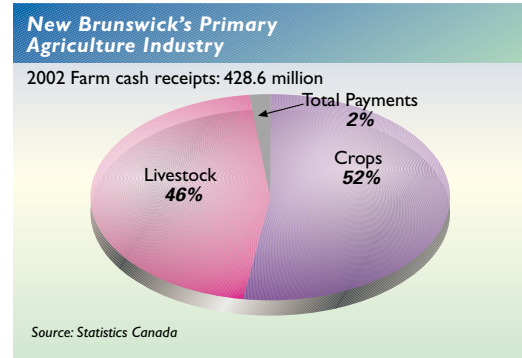
In Canada, the agri-food sector, from primary producer to consumer, generates close to \$130 billion in economic activity. In addition, this sector is a major contributor to Canada's exports, with \$21 billion a year in earnings.

In comparison, New Brunswick's agri-food sector generated **approximately \$428.6 million in farm cash receipts**, and close to **\$1.2 billion in processed food and beverage shipments** in 2002. New Brunswick also recorded the second highest increase in farm cash receipts in the country in 2002, for a growth rate of 50% per year over the past decade.

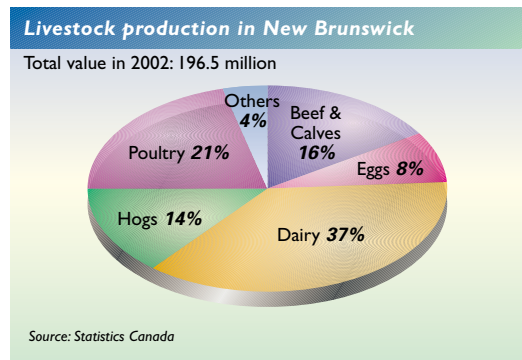
In New Brunswick, **almost all of primary agricultural production undergoes some form of processing** before reaching the market - more than in any other province in Canada. In fact, New Brunswick had the highest rate of value-added production in Canada in 2002.

New Brunswick's agriculture and agri-food sector is a diversified industry consisting of **3,034 farms**, of which nearly 1,800 can be regarded as commercial operations. The agriculture sector provides **approximately 8,000 jobs in primary production and 6,700 jobs in secondary processing activities**, primarily in rural communities.

Exports represented \$370 million in 2002. New Brunswick agri-food products are generally exported to a larger number of countries than other provincial exports, and the United States is usually the province's largest export market. **Potatoes** and potato products make up close to **50%** of all agri-food exports from the province.

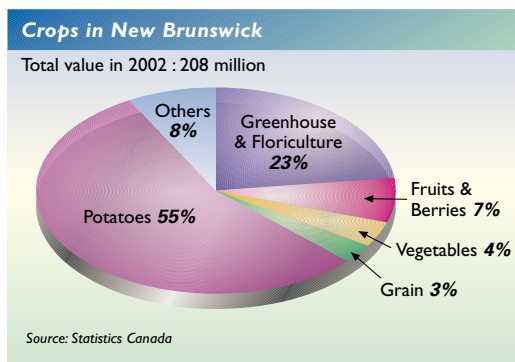


Dairy farm, Sussex area



Potato Exports

2002 Highlights



- New Brunswick’s processing rate is more than **300%**, the **highest in Canada**.
- The **blueberry** industry, with 9,716 hectares under cultivation, achieved a production level of 6.9 million kg, while the **cranberry** industry, with 121 hectares, achieved a level of 1.9 million kg. These two crops are currently in a strong expansion phase, accounting for **\$11 million in export revenues in 2002**.
- Exports to more than 26 countries continue to grow at a steady pace, rising from **\$155 million in 1993 to \$389 million in 2002**.

New Brunswick’s Agriculture and Agri-Food Industry (2002)



Boyce Farmer’s Market, Fredericton

| | |
|--------------------------------------|-----------------|
| Number of farms | 3,034 |
| Farmland - total, hectares | 383,560 |
| Land in crops, hectares | 147,159 |
| Total Farm Capital | \$1.5 billion |
| Farm Cash Receipts | \$428.6 million |
| 10-Year Growth Rate | 52 % |
| Value of food and beverage shipments | \$1.2 billion |
| 10-Year Growth Rate | 20 % |
| Agri-food Exports | \$389 million |
| 10-Year Growth Rate | 94 % |
| Employment - farm | 8,010 |
| Employment - processing | 6,680 |
| Crops: | |
| Potatoes | \$126 million |
| Greenhouse & Floriculture | \$53 million |
| Fruits & Berries | \$15 million |
| Vegetables | \$8 million |
| Grain | \$6 million |
| Others | \$17 million |
| Livestock: | |
| Dairy products | \$74 million |
| Poultry | \$41 million |
| Hogs | \$28 million |
| Beef & Calves | \$31 million |
| Eggs | \$15 million |
| Others | \$7 million |
| Government Payments | \$8 million |

Source: Statistics Canada and Department of Finance, New Brunswick

Commercial Fisheries Sector

Sector Overview

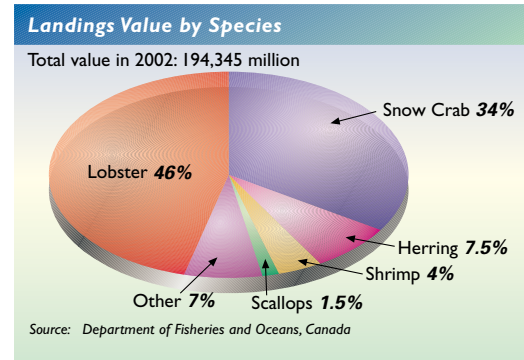
Commercial fishing has been the backbone of more than 150 New Brunswick coastal communities for generations. This tradition lives on today thanks to a solid, organized industry that continues to encourage the sustainable development of fishing through management that is sensitive to stock conservation issues. New Brunswick has two main fishing areas: the Gulf of St. Lawrence and the Bay of Fundy.

With landings of **122,225 tonnes in 2002 valued at over \$194 million**, the industry continues to thrive. New Brunswick's fleet of approximately 2,770 inshore, midshore, and offshore vessels employs over 7,000 fishermen. With a few exceptions, the fleet is made up of vessels less than 30 metres in length.

Close to 7,120 workers in 2002 were employed in **137 plants**. From frozen lobster meat to smoked salmon, seafood lasagna and shrimp fettuccine, these workers process 140 top-quality products to stringent international standards.

The main species by value caught by New Brunswick fishermen is **lobster**, which alone accounts for more than **46% of the landed value**, followed by **crab** with **over 34%**. Other important catches are herring, at almost 8% of landed value, shrimp with 4%, and scallops with 1.5%.

Fuelled by exports of fish and fish products reaching a value of **\$884 million in 2002**, the New Brunswick commercial fisheries sector continues to be a key contributor to the provincial economy.



Lobster Fishing



Wharf, Caraquet

2002 Highlights

- Landed value of snow crab **increased by \$27 million** in 2002.
- With landings of 612 tonnes, the **sea cucumber** industry is undergoing rapid expansion in the province. Exports of this species, highly prized on Hong Kong markets, are valued at **about \$1 million**.
- In terms of volume, **herring was the dominant catch** in 2002, accounting for **almost 56% of the landed volume**, followed by snow crab, lobster and shrimp.
- In 2002, the province was also involved in a complementary fishery for **smelt, alewife, eel, and rock crab**. This directed fishery contributes **\$4 million in revenue** to the economy.

Commercial Landings

| Species | Volume (MT) | | | Value (\$ 000Can.) | | |
|--------------|----------------|----------------|----------------|--------------------|------------------|------------------|
| | 2000 | 2001 | 2002 | 2000 | 2001 | 2002 |
| Lobster | 7,538 | 8,221 | 7,401 | 80,852 | 93,223 | 89,928 |
| Snow Crab | 8,482 | 7,193 | 11,948 | 56,029 | 38,065 | 65,840 |
| Herring | 78,413 | 73,714 | 68,730 | 14,029 | 15,930 | 14,551 |
| Shrimp | 5,333 | 6,993 | 6,679 | 7,338 | 8,208 | 7,502 |
| Scallops | 2,300 | 2,372 | 2,115 | 5,021 | 4,299 | 2,923 |
| Sea Urchin | 1,408 | 1,460 | 1,187 | 3,693 | 3,752 | 3,314 |
| Groundfish | 1,684 | 1,837 | 1,916 | 2,035 | 2,316 | 1,992 |
| Other | 8,430 | 10,127 | 22,249 | 7,186 | 8,814 | 8,295 |
| Total | 113,588 | 111,917 | 122,225 | \$176,183 | \$174,607 | \$194,345 |

Source: Department of Fisheries and Oceans, Canada

New Brunswick's Commercial Fishing Industry - 2002

| | |
|--|-----------------|
| Number of Boats | 2,772 |
| Number of active processing plants | 137 |
| Total Boat Capital | \$55.9 million |
| Commercial Landings Value | \$198 million |
| 10-Year Growth Rate | 82 % |
| Value-Added | \$700 million |
| Total Seafood Shipments | \$1,128,000,000 |
| Exports | \$884 million |
| 12-Year Growth Rate (1990 = \$257 million) | 164 % |
| Employment - fishery | 7,123 |
| Employment - processing (FTEs) | 5,020 |

Source: Department of Fisheries and Oceans, Canada and New Brunswick Department of Agriculture, Fisheries and Aquaculture



Crab Processing Plant

Aquaculture Sector

Sector Overview

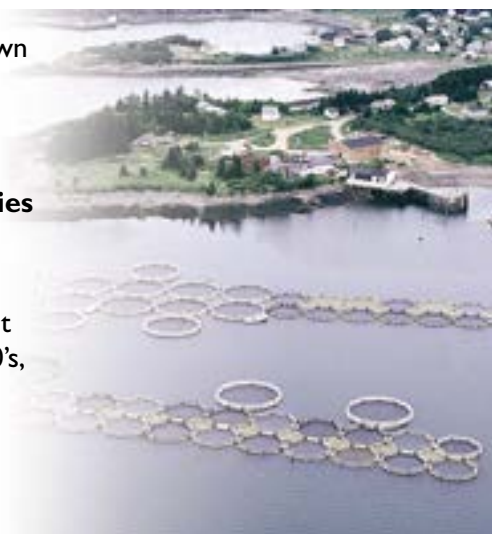
Since its origins in the early 1940s for oysters and late 1970s for Atlantic salmon and mussels, aquaculture in New Brunswick has grown dramatically over the years. In Canada, the aquaculture industry is currently worth around \$1 billion.

Aquaculture is New Brunswick's most rapidly growing resource industry. The salmon aquaculture industry, consisting of **41 companies and 97 sites** located mainly in the Bay of Fundy, produces about 10 million fish per year in salmon cages covering 1,500 hectares.

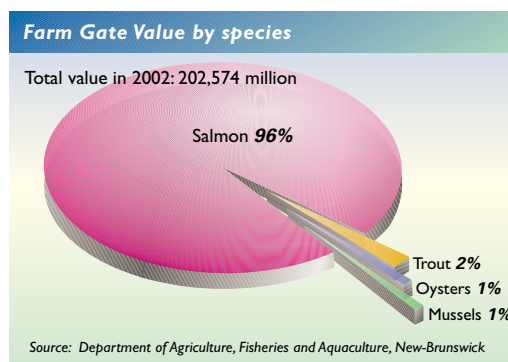
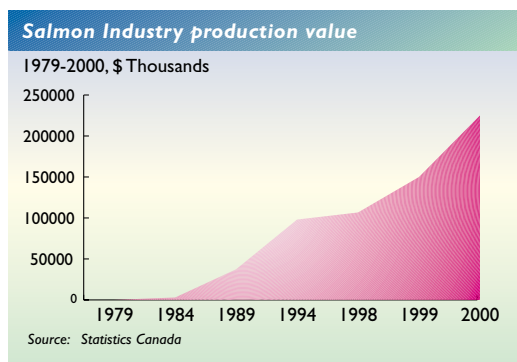
New Brunswick's aquaculture industry is currently the second largest in Canada. Worth approximately \$1 million annually in the early 1980's, the provincial salmon industry now boasts annual sales of nearly **\$240 million**.

New Brunswick also has a well-established shellfish industry that produces mussels and oysters, among other species. Some **50 commercial producers** operate along the province's east coast.

Over the past two decades, aquaculture has become a significant contributor to and a vital component of the provincial economy, particularly in small coastal communities.



Salmon aquaculture, Bay of Fundy



Aquaculture Products

| Species | Volume (MT) | | | Value (000 \$ Can.) | | |
|--------------|---------------|---------------|---------------|---------------------|----------------|----------------|
| | 2000 | 2001 | 2002 | 2000 | 2001 | 2002 |
| Mussels | 750 | 750 | 637 | 825 | 825 | 801 |
| Oysters | 620 | 744 | 1,235 | 1,700 | 2,040 | 1,173 |
| Salmon | 29,100 | 33,900 | 38,900 | 223,000 | 180,010 | 194,500 |
| Trout | 550 | 550 | 550 | 6,100 | 6,100 | 6,100 |
| Total | 31,020 | 34,450 | 41,322 | 231,625 | 188,975 | 202,574 |

Source: Statistics Canada, and Fisheries and Oceans Canada

2002 Highlights

- Salmon aquaculture sites are producing **38,900 tonnes of salmon** in 2002, bringing in **\$223.6 million in export revenues**. This industry provides one in four direct jobs in Charlotte County in southwestern New Brunswick.
- The most active mussel culture sites in New Brunswick are located in the Lamèque and Shippagan areas, producing more than **600 tonnes valued over \$800,000**.
- Oyster farming on the province's east coast is attracting a great deal of attention from entrepreneurs. In 2002, more than **19 million oysters** are seeded, and **100,000 oyster bags** are used for rearing purposes.



Oyster floating bags for suspended culture.

In 2002, 50 aquaculturists were very active, with 35 firms using suspended or rack culture techniques.

- In 2002, 54,000 young haddock are produced at the Aquarium and Marine Centre in Shippagan, New Brunswick and they are shipped to private enterprises for grow-out trials. **Around 150,000 kg** of fish are expected to be **marketed in 2003**.

New Brunswick's Aquaculture Industry - 2002

| | |
|---|-----------------|
| Number of Salmon sites | 97 |
| Area leased to Salmon sites | 1,500 hectares |
| Number of Shellfish sites | 521 |
| Area leased to Shellfish sites | 2,582 hectares |
| Farm Gate Value | |
| Salmon | \$194.5 million |
| Shellfish and Trout | \$8 million |
| 5-Year Growth Rate (salmon) | 83 % |
| Total Value-Added Sales | |
| Salmon | \$282.3 million |
| 5-Year Growth Rate (salmon) | 85 % |
| Exports | |
| Salmon | \$223.6 million |
| 5-Year Growth Rate (salmon) | 115 % |
| Employment (salmon) - farm, hatchery and other direct | 1,289 |
| Employment (salmon) - processing | 560 |

Source: Department of Agriculture, Fisheries and Aquaculture, New Brunswick

Mission of the Department of Agriculture, Fisheries and Aquaculture:

To promote sustainable growth of the Agriculture, Fisheries and Aquaculture sectors through innovative partnerships, targeted programs and policies resulting in greater prosperity for New Brunswickers.

**Department of Agriculture, Fisheries and Aquaculture**

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