


AGRICULTURE,
FISHERIES AND AQUACULTURE
SECTORS IN
REVIEW 2003



New  Nouveau
Brunswick
C A N A D A

Agriculture,
Fisheries and
Aquaculture

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Pêches et
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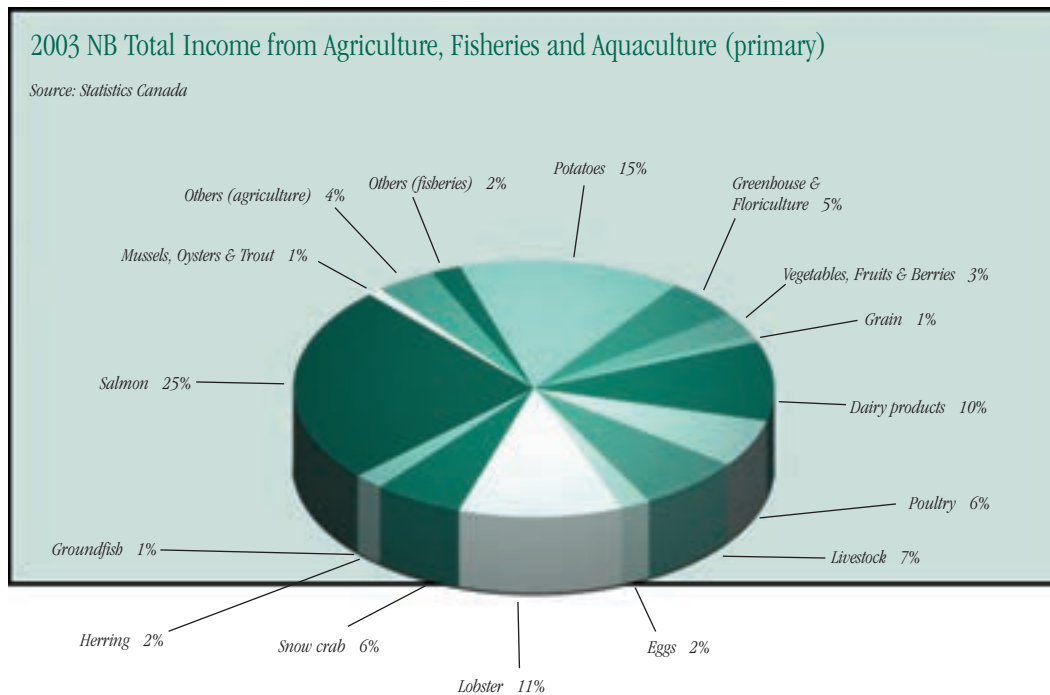


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INTRODUCTION

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

These three sectors are an integral part of the economic growth of our province. They are also crucial to the economies of our province's rural and coastal communities, generating more than \$2.26 billion in 2003. Exports play a vital role in these sectors prosperity with annual revenues of \$1.25 billion.

When the primary and value-added activities are considered, these three sectors contribute to the direct and indirect employment of close to 30,000 New Brunswickers. Transportation, manufacturing and other industries depend on food production to provide thousands of employment opportunities.

The Department of Agriculture, Fisheries and Aquaculture is proud to contribute to the success of the food production and processing industry in the province. By seeking opportunities for total development and through investments in research and innovation, these sectors will continue to thrive for years to come and contribute to greater prosperity for all New Brunswickers.

The agriculture, commercial fisheries and aquaculture sectors are an important and vibrant part of our history and will remain so for many generations. We intend to work closely with industry to continue to identify and take advantage of new opportunities with an emphasis on diversification, conservation and production of superior quality food and bio-products.



A handwritten signature in green ink, appearing to read 'DAVID ALWARD'.

David Alward
Minister of Agriculture, Fisheries and Aquaculture

SECTORS IN REVIEW (2003)

Farm Cash Receipts	\$404 million
Commercial Fisheries Landings	\$169 million
Aquaculture (Primary)	\$188 million
Seafood Exports	\$795 million
Agri-Food Exports	\$460 million
Total Shipments	\$2.26 billion

AGRICULTURE AND AGRI-FOOD SECTOR

Sector Overview

In Canada, the agri-food sector, from primary producer to consumer, generates close to \$130 billion per year in economic activities. In addition, this sector is a major contributor to Canada's exports, with nearly \$25 billion in export earnings. In comparison, New Brunswick's agri-food sector generated **\$404 million in farm cash receipts in 2003**, with potatoes, dairy products, and eggs and poultry accounting for over 60% of all farm income.

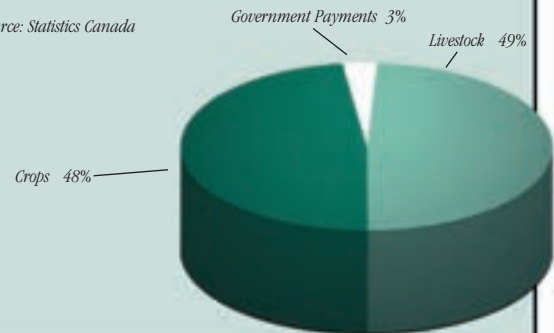
Agriculture is as important to New Brunswick's economy as its traditional family values are to its social fabric. Agriculture and the agri-food sector form a diversified industry consisting of **3,034 farms**, of which nearly 1,800 can be regarded as commercial operations. The agriculture sector provides more than **8,000 jobs in primary production** and nearly **6,700 jobs in secondary processing activities**, primarily in rural communities since **almost all primary agricultural production undergoes some form of processing** before reaching the market.

Potatoes, which alone account for approximately 25% of all farm income in New Brunswick, are the leading cash crop in the agricultural sector. There are **400 farms** cultivating 23,600 hectares of seed and table potatoes annually, and their primary production and related potato products make up more than **50%** of all agri-food exports from the province.

Agri-food **exports** brought in **\$460 million in 2003**. As a general rule, about 77% of all agri-food exports go to the United States and 8% go to Japan, which, together with the other Asian countries, now receives more exports than Europe.

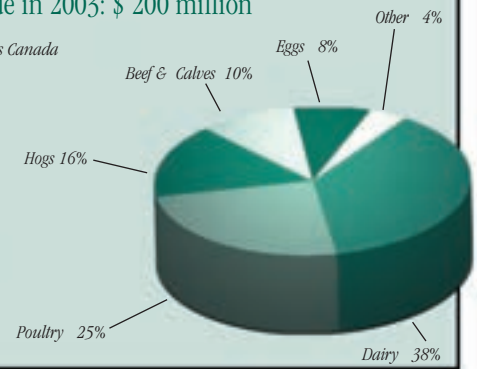
New Brunswick's Primary Agriculture Industry 2003
Farm cash receipts: \$ 404 million

Source: Statistics Canada



Livestock production in New Brunswick
Total value in 2003: \$ 200 million

Source: Statistics Canada



Dairy farm, Sussex

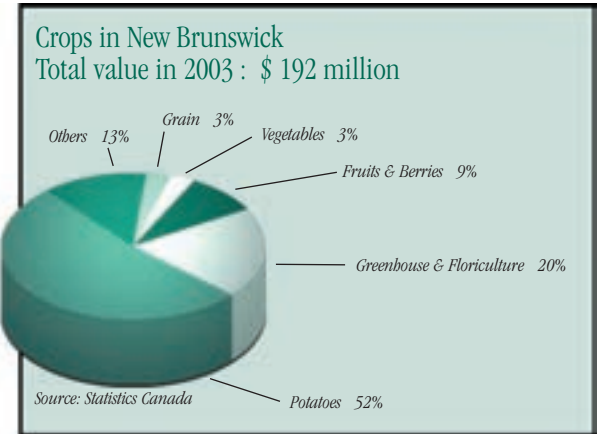


Potato Harvesters, Drummond



2003 Highlights

- Exports of fruits and vegetables and fruit and vegetable preparations rose from \$240 million in 2002 to \$278 million in 2003, thanks to new markets for French fries.
- The poultry industry, with an increase of 16%, or nearly \$7 million, reported the largest increase in the livestock sector; in crops, the value of fruits and berries rose by 17%, with production reaching \$18 million in 2003.
- Improved pollination services made it possible to increase wild blueberry production to nearly 11 million kg and to double the farm gate value of the previous year's results to \$10 million.
- The cranberry industry, with 202 hectares under cultivation, achieved a production level of 2.45 million kg. Farm cash receipts for this crop were nearly \$3 million in 2003.
- In terms of net increase in farm cash receipts, fruit production was the dominant sector, with growth of nearly 70%, followed by poultry and the greenhouse and floriculture sectors.



New Brunswick's Agriculture and Agri-Food Industry (2003)

Number of farms	3034
Farmland – total, hectares	383,560
Land in crops, hectares	147,159
Total farm capital	\$1.50 billion
Farm cash receipts	\$404 million
Value of food and beverage shipments	\$1.20 billion
Agri-food exports	\$460 million
Employment - farm	8,240
Employment - processing	6,540
Crops:	
<i>Potatoes</i>	<i>\$101 million</i>
<i>Greenhouse & Floriculture</i>	<i>\$39 million</i>
<i>Fruits & Berries</i>	<i>\$18 million</i>
<i>Vegetables</i>	<i>\$5 million</i>
<i>Grain</i>	<i>\$5 million</i>
<i>Others</i>	<i>\$24 million</i>
Livestock:	
<i>Dairy products</i>	<i>\$76 million</i>
<i>Poultry</i>	<i>\$48 million</i>
<i>Hogs</i>	<i>\$31 million</i>
<i>Beef & calves</i>	<i>\$20 million</i>
<i>Eggs</i>	<i>\$16 million</i>
<i>Others</i>	<i>\$9 million</i>
Government payments	\$12 million

Source: Statistics Canada
NB Department of Finance

COMMERCIAL FISHERIES SECTOR

Sector Overview

Thanks to its abundance of fish and seafood, New Brunswick has a well-established fishing industry that can count on a network of people dedicated to meeting the needs of the most demanding customers. With its two main fishing areas, the Gulf of St. Lawrence and the Bay of Fundy, the province has a solid, organized industry that continues to promote the sustainable development of the commercial fishery. Fuelled by exports of fish and seafood, the New Brunswick commercial fisheries sector remains a key contributor to the provincial economy.

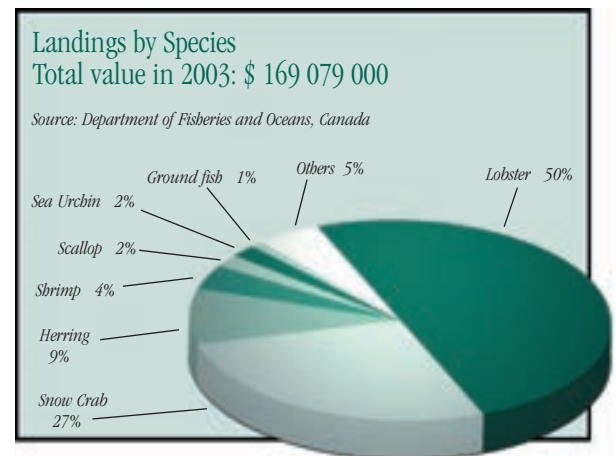
With landings of **112,114 tonnes in 2003 valued at over \$169 million**, the industry continues to thrive. New Brunswick's fleet of approximately 2,700 inshore, midshore, and offshore vessels employs over 7,000 fishermen.

Close to **7,120 workers** were employed in **137 plants** in 2003, pursuing the development and diversification of marine products processing activities, as well as the development of new value-added products. Already known around the world for the quality of its products, New Brunswick constantly strives to maintain its reputation for excellence.

The main species by value caught by New Brunswick fishermen are **lobster**, which alone accounts for more than **50% of the landed value**, followed by **snow crab** with **over 27%**. Other important catches are herring, at almost 9% of landed value, shrimp with nearly 4%, and scallops with over 2%.

The volume of Canadian fish and seafood exports in 2003 was approximately 630,000 tonnes (t), virtually the same as in 2002. Owing to a strengthened Canadian currency, the value of those exports declined slightly (by 5%) in 2003, compared with 2002 export values, which totalled \$4.7 billion.

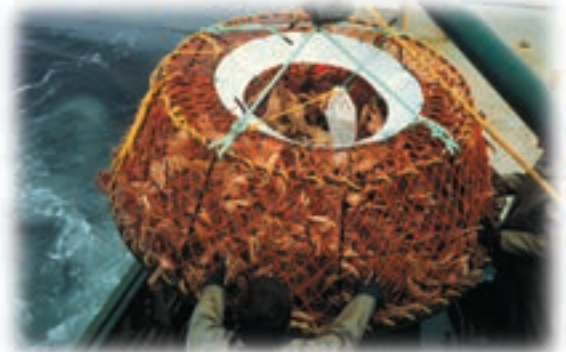
New Brunswick was Canada's **fourth** most valuable exporter of fish and seafood products in 2003, at \$794.5 million. The province exported 88,807 t of product, which represents a 14% drop in volume compared with 2002 and a 10% drop in value. The species with the highest export value are lobster (15,642 t valued at \$412.8 million) and snow crab (6,860 t valued at \$85.1 million), while total pelagic and groundfish exports were worth \$221.4 million and \$2.8 million, respectively.



Midshore fishing fleet



Snow Crab Trap



2003 Highlights

- In terms of volume, **herring was the dominant catch in 2003**, accounting for nearly 69% of the landed volume, followed by snow crab, lobster, and shrimp.
- Our Department, the industry, and DFO continued to make progress toward **commercial development** of species such as ocean quahaugs, marine worms, sea cucumbers, hagfish, rock crab, and Jonah crab.
- **About 6,000 small lobsters produced at the hatchery** at the Shippagan Marine Centre were seeded on an artificial site in the Caraquet region as part of the Homarus Inc. project, initiated in 2002 by the Maritime Fishermen's Union and carried out with the financial participation of several partners, including DAFA.
- For the second year in a row, intensive tagging of herring in the Bay of Fundy was conducted to allow for an **examination of the stock structure, movement patterns and migration routes**. The tagging effort was concentrated in weirs in the Bliss Island area and on Grand Manan and the West Isles and resulted in the placement of 32,570 tags.

Lobster fishing



Commercial Landings

Species	Volume (MT)			Value (\$000 Can.)		
	2001	2002	2003	2001	2002	2003
Lobster	8,270	7,560	7,101	93,835	91,246	84,968
Snow Crab	7,194	11,945	7,424	38 065	65,816	46,271
Herring	73,896	68,710	67,263	15 973	14,558	15,429
Shrimp	7,057	6,748	5,360	8,272	7,586	6,255
Scallop	2,377	2,521	2,537	4 081	3,543	3,610
Sea Urchin	1,460	1,189	1,226	4,014	3,315	3,445
Groundfish	1,842	1,923	595	2,258	2,573	940
Others	21,862	23,790	20,608	10,668	9,459	8,161
Total	123,958	124,386	112,114	\$177,166	\$198,096	\$169,079

Source: Department of Fisheries and Oceans, Canada

New Brunswick's Commercial Fishing Industry-2003

Number of Boats	2,700
Number of active processing plants	137
Commercial Landings Value	\$169 million
Value-Added	\$700 million
<i>Total Seafood Shipments</i>	<i>\$1.09 billion</i>
Exports	\$794 million
Employment - Fishery	7,000
Employment - Processing (FTEs)	5,020

Source: Department of Fisheries and Oceans, Canada

New Brunswick Department of Agriculture, Fisheries and Aquaculture

AQUACULTURE SECTOR

Sector Overview

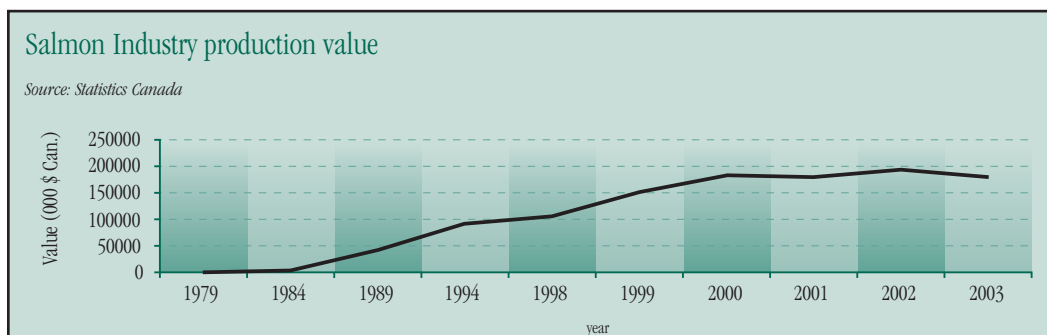
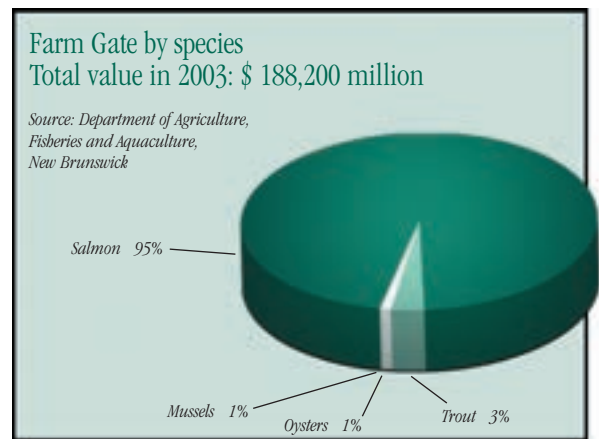
Commercial aquaculture, an industry worth about \$1 billion in Canada, got its start in this province in the 1970s and then expanded very rapidly in the 1980s. It is an important activity in terms of employment and the economy of New Brunswick, mainly in small coastal communities. It now contributes significantly to the food supply at the national level. Aquaculturists keep abreast of the latest developments in fish health, combined with growing expertise in the culture of molluscs and other aquatic species, and ensure New Brunswick's position as the aquaculture leader in Atlantic Canada.

The salmon aquaculture industry, which provides one in four jobs in Charlotte County, consists of **41 companies and 98 sites located in the Bay of Fundy** and produces nearly 10 million fish per year in salmon cages covering more than 1,500 hectares.

Worth approximately \$1 million annually in the early 1980s, the provincial salmon aquaculture industry now boasts annual sales of nearly \$283 million. **Farmed Atlantic salmon (33,100 t valued at \$179.0 million) was one of the three species with the highest export value in Canada;** for their part, shellfish exports totalled \$555.5 million in 2003.

New Brunswick also has a well-established shellfish aquaculture industry that produces mussels and oysters, among other species. The process by which shellfish are farmed is a combination of site location, water flow and nutrient content, growth and development of the basic seed supply, called spat, sturdy and efficient operating equipment, and some well-informed science and technology.

In 2003, **close to 60 oyster aquaculturists** completed a first production cycle: nine mussel aquaculturists held mussel licences, with four of them producing mussels for consumption on a commercial basis (+ 25 tonnes/years) and the rest specializing in seed mussels.



New Brunswick Aquaculture

Species	Volume (MT)			Value (\$000 Can.)		
	2001	2002	2003	2001	2002	2003
Salmon	33,900	38,900	33,100	180,010	194,500	179,000
Trout*	550	550	550	6,100	6,100	6,100
Oysters	744	1,235	2,350	772	1,173	2,500
Mussels	439	637	453	552	801	600
Total	35,633	41,322	36,453	\$187,434	\$202,574	\$188,200

Source: Department of Fisheries and Oceans, Canada *estimate

2003 Highlights

- Salmon aquaculture sites produced **33,100 tonnes of salmon** in 2003.
- Salmon aquaculture brought in **nearly \$150 million in export revenues** in 2003.
- Mussel aquaculturists in northeastern and southeastern New Brunswick set at least 150,000 socks, and their mussel aquaculture sites produced over **450 tonnes of mussels valued at more than \$600,000**.
- Oyster farming on the province's east coast is attracting a great deal of attention from entrepreneurs. In 2003, more than **32 million oyster seeds** and **136,000 oyster bags** were used for rearing purposes.
- The **development of production techniques** for other marine fish species continued with the placement of halibut, haddock, and cod on a number of marine sites in the Bay of Fundy.
- The rearing of **shortnose sturgeon** for meat and caviar took a major step toward commercialization with the construction of a new production facility in Pennfield.
- In 2003, **48,758 juvenile** haddock with a total biomass of 1,250 kg were produced at the Aquarium and Marine Centre and were shipped to private enterprises for grow-out trials.
- In 2003, alternate species precommercial trials in New Brunswick produced 77 metric tonnes of product, worth approximately \$1 million.

Mussel Harvesting



New Brunswick's Aquaculture Industry - 2003

Number of salmon sites	98
Area leased to salmon sites	1,545 hectares
Number of shellfish sites	525
Area leased to shellfish sites	2,700 hectares
Farm Gate Value	
<i>Salmon</i>	<i>\$179 million</i>
<i>Shellfish and trout</i>	<i>\$9.2 million</i>
Total Value-Added Sales	
<i>Salmon</i>	<i>\$263 million</i>
Exports	
<i>Salmon</i>	<i>\$147 million</i>
Employment (salmon) - farm, hatchery and other direct	1,289
Employment (salmon) - processing	687

Source: NB Department of Agriculture, Fisheries and Aquaculture

MISSION

The Department of Agriculture, Fisheries and Aquaculture's mission is to promote sustainable growth of the Agriculture, Fisheries and Aquaculture sectors through innovative partnerships, targeted policies and programs resulting in greater prosperity for New Brunswickers.



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