


AGRICULTURE, FISHERIES AND AQUACULTURE


SECTORS IN REVIEW

2002



New  Nouveau
Brunswick
C A N A D A

AGRICULTURE, FISHERIES AND AQUACULTURE



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AND AQUACULTURE
SECTORS IN REVIEW
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Agriculture, Fisheries and Aquaculture

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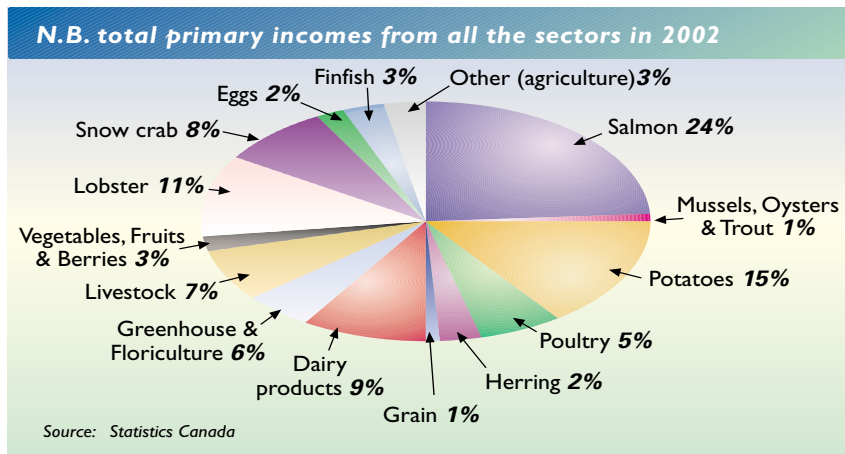
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Sectors in review (2002)

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 be 'DA' followed by a stylized flourish.

David Alward

Minister of Agriculture, Fisheries and Aquaculture

Agriculture Sector

Sector Overview

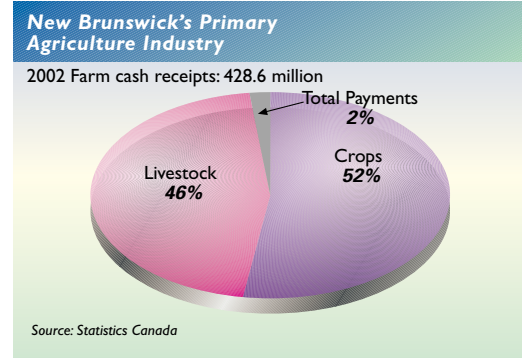
In Canada, the agri-food sector, from primary producer to consumer, generates close to \$130 billion in economic activity. In addition, this sector is a major contributor to Canada's exports, with \$21 billion a year in earnings.

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.

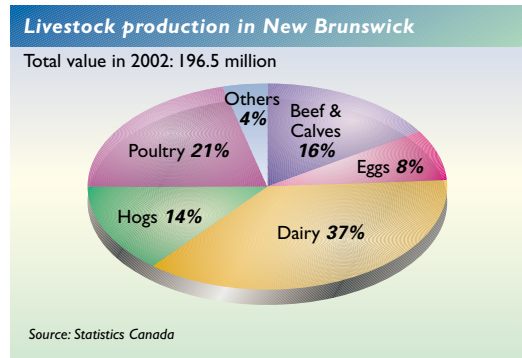
In New Brunswick, **almost all of primary agricultural production undergoes some form of processing** before reaching the market - more than in any other province in Canada. In fact, New Brunswick had the highest rate of value-added production in Canada in 2002.

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.

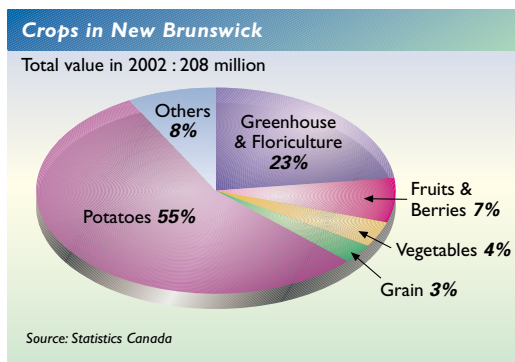


Dairy farm, Sussex area



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

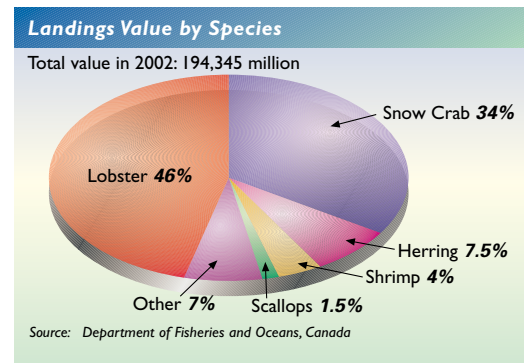
Commercial fishing has been the backbone of more than 150 New Brunswick coastal communities for generations. This tradition lives on today thanks to a solid, organized industry that continues to encourage the sustainable development of fishing through management that is sensitive to stock conservation 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.

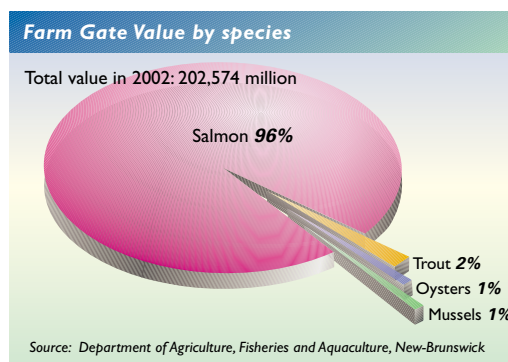
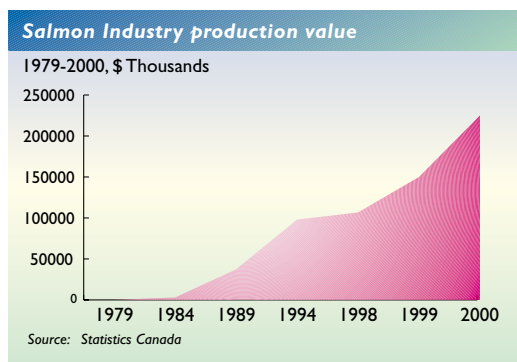
New Brunswick's aquaculture industry is currently the second largest in Canada. Worth approximately \$1 million annually in the early 1980's, the provincial salmon industry now boasts annual sales of nearly **\$240 million**.

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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