



AGRICULTURE, FISHERIES
AND AQUACULTURE
SECTORS IN
REVIEW 2004

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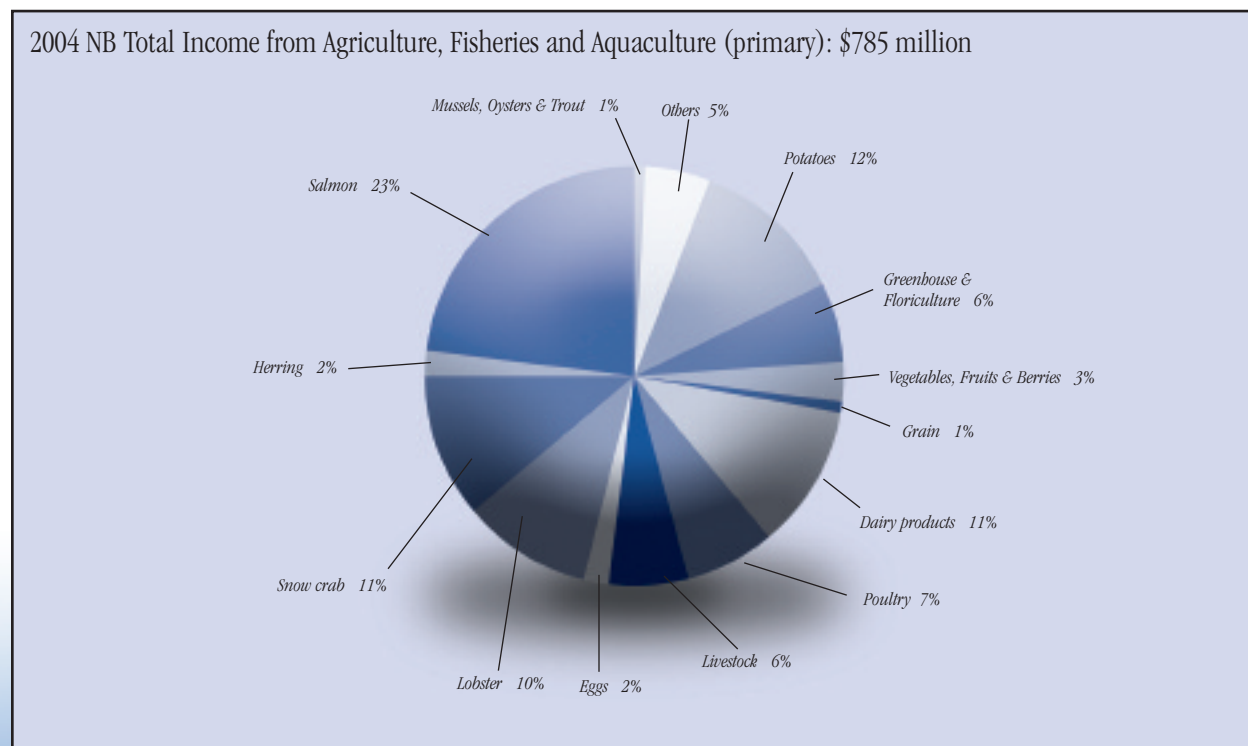
New  Nouveau
Brunswick
C A N A D A

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Source: Statistics Canada

INTRODUCTION

As the Minister responsible for the development of the agriculture, fisheries, and aquaculture sectors in the province, I am pleased to present you with the 2004 year-end review of these three important contributors to the economic prosperity of New Brunswick.

The Agriculture, Fisheries and Aquaculture Sectors in Review 2004 will give you an indication of the significant contribution of these sectors to the economic and social well-being of New Brunswickers.

One of the highlights of 2004 is an 11 percent increase in the combined food and beverage shipments, which totalled \$2.52 billion. Agri-food shipments performed extremely well, showing a 23 percent increase and reaching an unprecedented \$1.2 billion. New Brunswick was the fourth most profitable seafood exporter in Canada, with exports of \$824 million, which represented a 13 percent increase in volume over 2003.

The food production and processing industries of New Brunswick support the employment of 30,000 people, mostly from rural communities of the province. The industry's performance is testament to their hard work and dedication in presenting safe and high-quality food products to the world.

Recognizing the need to fully incorporate the benefits of innovation in the agriculture, fisheries and aquaculture sectors, we created a new Bio-Economy Team. The team's mandate is to increase innovation in the agriculture and marine sectors, develop new bio-economy business opportunities in the developing life science cluster and assist in attracting bio-science investments to New Brunswick.



A blue ink handwritten signature of David Alward, consisting of stylized initials and a surname.

David Alward
Minister of Agriculture, Fisheries and Aquaculture

SECTORS IN REVIEW – 2004

Farm Cash Receipts	\$419 million
Commercial Fisheries Landings	\$185 million
Aquaculture (Primary)	\$181 million
Seafood Exports	\$824 million
Agri-Food Exports	\$366 million
Total Food and Beverage Shipments	\$2.52 billion

AGRICULTURE AND AGRI-FOOD

Sector Overview

Recognized as a mainstay of the provincial economy, New Brunswick's agriculture and agri-food sector is a diversified industry with over 3,000 farms and 100 food processing plants. The sector accounts for over \$400 million in farm cash receipts annually and \$1.4 billion in processed food and beverage shipments. New Brunswick enjoys the highest level of value-added processing in Canada from its agriculture sector and its agri-products, which are currently exported to 82 countries. Before reaching the market, more than 80% of the province's agriculture production is directed towards processing, supporting key economic activity and thousands of jobs.

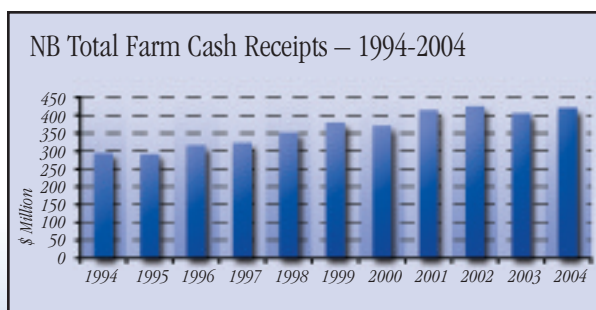
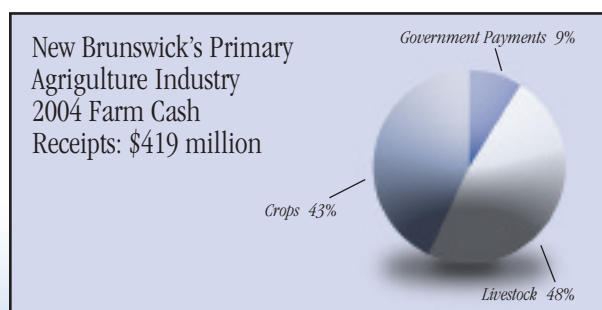


Holstein Cows

New Brunswick's Agriculture and Agri-Food Industry – 2004

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	\$419 million
Number of Processing Companies	100
Shipments of Processed Product and Beverage	\$ 1.4 billion
Processing Rate	280%
Value of Agri-Food and beverage shipments	\$1.37 billion
Agri-food exports	\$366 million
Employment - farm	8,240
Employment - processing	6,540

*2001 Census, land in crops increased by 10.3% over 1996, an increase of 21.7% over 1991, reversing a long decline in land used for crops in New Brunswick.



Major Commodities – Value

\$ Million

Year	2003	2004
Potatoes	\$101	\$87
Dairy	\$76	\$80
Poultry	\$48	\$51
Greenhouse & Floriculture	\$39	\$41
Hogs	\$31	\$29
Fruits & Berries	\$18	\$17
Eggs	\$16	\$17
Beef	\$20	\$16
Vegetables	\$5	\$6
Grain	\$5	\$5
Other	\$33	\$34
Government payments	\$12	\$36

Major Crops

Hectares

Year	2003	2004
Potatoes	23,877	23,675
Barley	16,997	16,188
Blueberries	9,713	9,713
Oats	8,499	8,903
Wheat	5,666	5,666

Exports of Agri-food Products

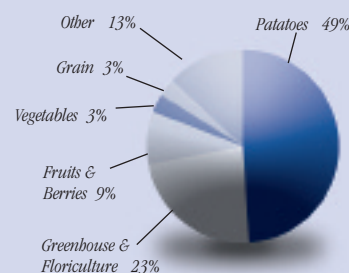
By Country – \$ Million

Year	2003	2004
U.S.	357.7	293.2
Venezuela	3.3	12.8
Japan	37.6	4.5
China	4.3	2.2
Korea	7.4	0.1
Phillippines	7.4	0.1

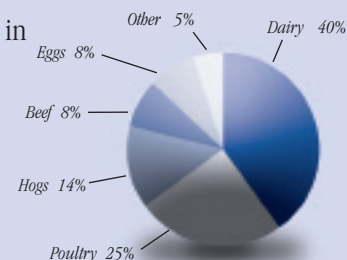
By Commodity – \$ Million

Year	2003	2004
Potatoes and potato products	234.3	208
Beer	43.2	38.7
Preparations of grain, pasta	42.1	38.3
Plants, live trees, foliage, etc.	41.2	24.4
Total Exports	459.6	366.5

Crops in New Brunswick
Total value in 2004:
\$180 million



Livestock production in New Brunswick
Total Value in 2004:
\$203 million



2004 Highlights

- Although the total value of potatoes was low, the value of agri-food and beverage shipments rose by \$170 million over 2003, reaching a total of \$1.37 billion in 2004.
- There was a net increase in farm cash receipts from 2000 to 2004. The value of crops went from \$168 to \$180 million, for a gain of \$12 million, driven by a rise in the value of the potato and fruit and berry sectors. In livestock production, dairy products and hogs were the dominant sectors, posting a \$15-million increase during that period.
- In the fruit and berry sector, 2004 was marked by an increase of more than 26% in raspberry production reaching a total of 80 MT.
- For the 101 hectares of processing carrots, estimates indicate that average yields were 61 tonnes/ha compared to 47 tonnes/ha in 2003. Improved soil preparation and adequate moisture during the season contributed to the increase.
- Accounting for 57% of exports, potatoes and related potato products are the main food products shipped by New Brunswick, followed by beer at 11%, plants at 10%, and flour products at 7%.

Sources for tables and graphics: Statistics Canada and New Brunswick Department of Agriculture, Fisheries and Aquaculture

COMMERCIAL FISHERIES

Sector Overview

With a fishing fleet of close to 3,000 vessels and annual landings worth nearly \$200 million, the commercial fishing industry has long made a significant economic contribution to the province. The commitment of industry workers to delivering quality products makes New Brunswick a leader in the commercial and processing fisheries sectors. Fuelled by exports of fish and seafood reaching a value of \$824 million in 2004, New Brunswick's commercial fisheries sector continues to be a key contributor to the province's economy.



Snow Crab

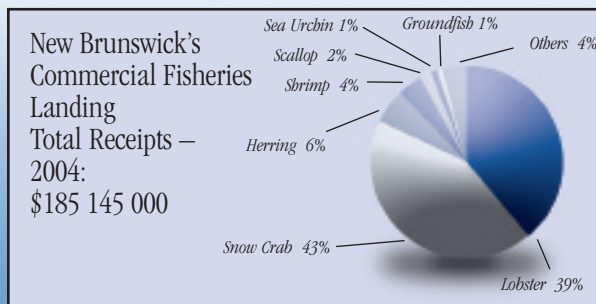
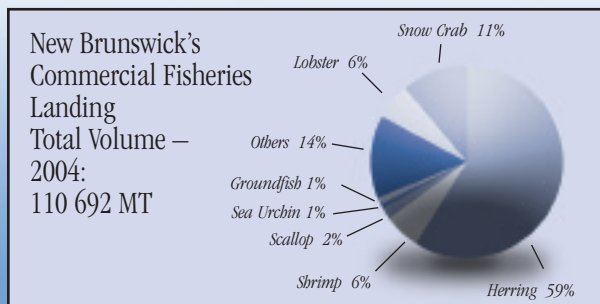
New Brunswick's Commercial Fishing Industry – 2004

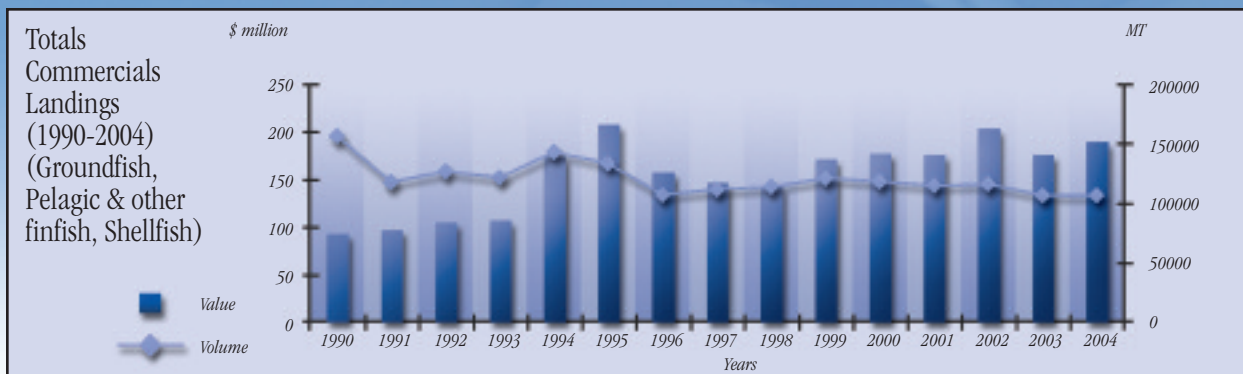
Number of Boats	2,649
Number of active processing plants	137
Commercial Landings Value	\$185 million
Total Seafood Shipments	\$1.146 billion
Exports	\$824 million
Employment – fishery	7,000
Employment - processing (FTEs)	5,020

New Brunswick's Commercial Fisheries Landings

Total Receipts – 2004: \$185 145 000

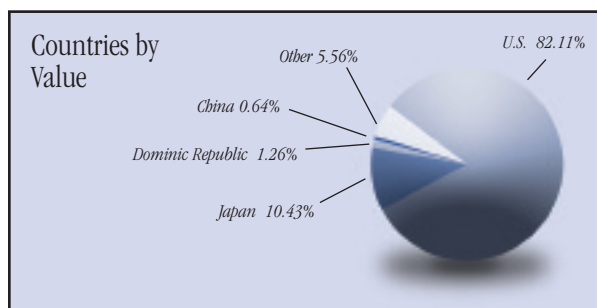
Species	Volume (MT)		Value (\$ Million)	
	2003	2004	2003	2004
Snow Crab	7,424	11,795	46.2	77.9
Lobster	7,101	6,433	84.9	72.9
Herring	67,263	64,749	15.4	11.8
Shrimp	5,360	6,998	6.2	7.7
Scallop	2,537	2,650	3.6	4.2
Sea Urchin	1,226	1,124	3.4	2.5
Groundfish	595	1,244	0.9	1.3
Others	20,708	15,699	8.2	6.7
Total	112,214	110,692	\$169	\$185





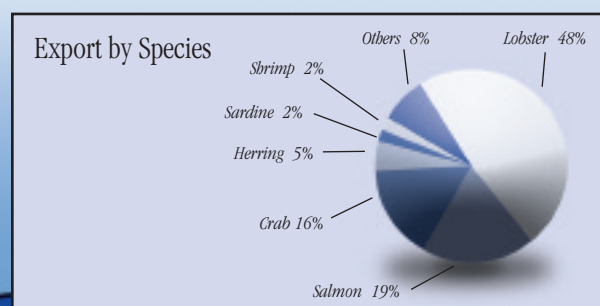
New Brunswick's Seafood Exports Countries by Value

Country	Value (\$ million)	
	2003	2004
U.S.	695.6	676.7
Japan	53.9	85.9
Dominic. Republic	14.1	10.3
Denmark	5.7	9.8
China	1.6	5.2
Other Caribbean	2.6	5.1
France	2.6	3.7
Belgium	2.0	3.1
United Kingdom	1.4	2.3
Other	15.0	21.9
Total	\$794	\$824



New Brunswick's Exports by Species

Species	Value (\$ million)	
	2003	2004
Lobster	412.5	388.8
Salmon	148.6	158.0
Crab	106.3	130.6
Herring	45.4	40.6
Sardine	20.9	19.6
Shrimp	14.6	18.3
Other	46.1	68.1
Total	\$794	\$824



2004 Highlights

- Despite the decline in landed volumes over the past few years, the shrimp and snow crab industries have seen their volumes rise by 24% and 28% respectively since 2000.
- Owing to a new abundance cycle for snowcrab, that sector had a good year, posting a 41% increase in landings, which represented nearly \$32 million in additional revenues.
- New Brunswick fishermen landed 18% more herring than in 2003. The Total Allowable Catch (TAC) for the Gulf shrimp also had an increase of 27.5%.
- Although the value of the Canadian dollar went up 7% in relation to the American dollar in 2004, New Brunswick was the fourth largest exporter of fish and seafood in Canada, at \$824.2 million.
- The province exported 101,179 tonnes of fish and seafood products, for a 13% increase in volume compared with 2003 and a 3% increase in value.
- The category with the most exports in 2004 was molluscs and crustaceans, at \$581.5 million, while pelagic and groundfish exports were valued at \$225.2 million and \$2.1 million, respectively.

Sources for tables and graphics: Department of Fisheries and Oceans Canada and New Brunswick Department of Agriculture, Fisheries and Aquaculture

AQUACULTURE

Sector Overview

A thriving salmon aquaculture industry in the Bay of Fundy combined with growing expertise in the culture of molluscs and other aquatic species ensures New Brunswick's position as the aquaculture leader in Atlantic Canada. Worth approximately \$1 million annually in the early 1980s, the provincial salmon industry now boasts annual sales in excess of processed and unprocessed products of \$230 million. New Brunswick also has a well-established shellfish industry that produces mussels and oysters on the East coast of the province. Over the last two decades, aquaculture has become a significant contributor to and a vital component of the provincial economy, particularly in coastal communities.



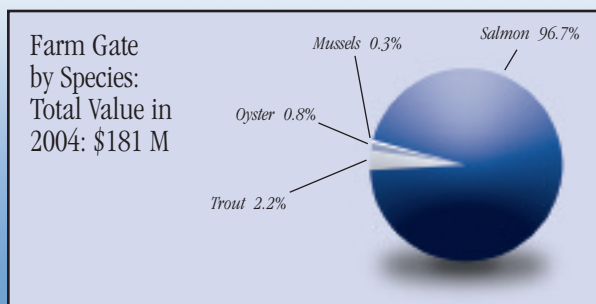
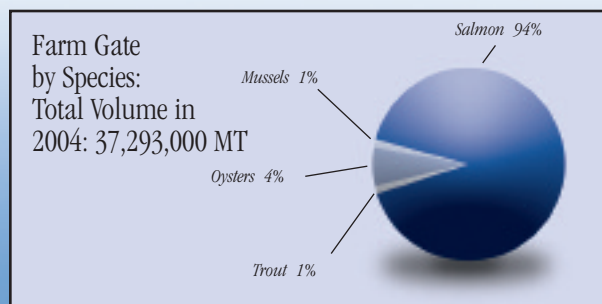
Atlantic Salmon

New Brunswick's Aquaculture Industry - 2004

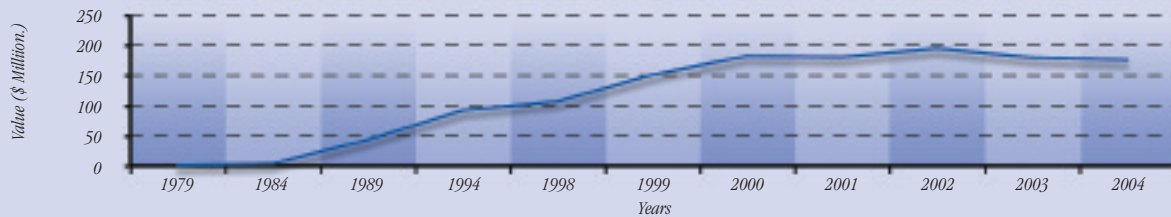
Number of salmon sites	99
Area leased to salmon sites	1,206 hectares
Number of shellfish sites	526
Area leased to shellfish sites	2,879 hectares
Farm Gate value	
<i>Salmon</i>	\$175 million
<i>Shellfish and Trout</i>	\$6 million
Total Aquaculture Value-Added Sales	\$247 million
Exports	
<i>Salmon</i>	\$158 million
Employment (salmon) - farm, hatchery and other direct	1,289
Employment (salmon) - processing	560

New Brunswick's Aquaculture – 2004

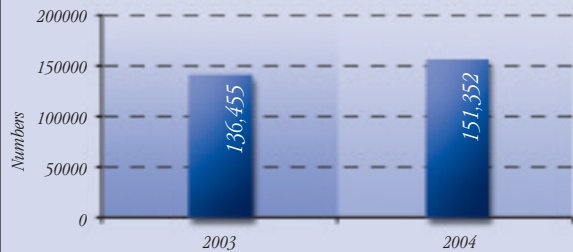
Species	Volume (MT)		Value (\$ Million)	
	2003	2004	2003	2004
Salmon	33,100	35,000	\$179.0	\$175.0
Trout	550	400	\$6.1	\$4.0
Oysters	2,350	1,443	\$2.5	\$1.5
Mussels	453	450	\$0.6	\$0.5
Total	36,453	37,293	\$188	\$181



Salmon Industry Production Value

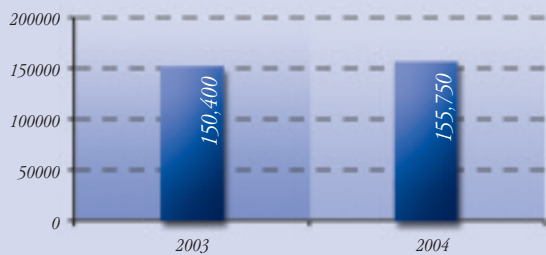


Number of Oyster Bags in production



To estimate the number of oysters, multiply the number of bags by 500.

Numbers of Mussels Socks in production



A sock is 2 to 2.3 metres in length, and yield varies between 7 and 9 kilograms of mussels per sock.

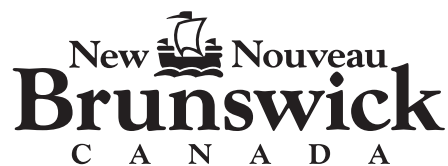
2004 Highlights

- Aquaculture in the Bay of Fundy Region in 2004: 96 sites licensed for salmon, five sites licensed for halibut, three sites licensed for haddock and six sites licensed for cod, with 13 salmon processing plants and 26 inland freshwater smolt facilities, which created 1,600 direct jobs.
- Aquaculture spin-off industries are: feed production, cage and net manufacturing, boat building/motor sales and repairs, fish processing, anchors, moorings and rope sales, transportation and construction industries, research and consultants, which created 2,900 indirect jobs.
- The province continues to lead on fish health advances with innovative diagnostic development at the molecular level and through investments in life sciences.
- Mussel aquaculturists in northeastern and southeastern New Brunswick set at least 150,000 mussel socks, and their aquaculture sites produced 450 tonnes of mussels valued at more than \$600,000 (\$1.2 million after processing).
- In 2004, oyster aquaculturists on the East coast seeded more than 40 million oysters and used over 165,000 oyster bags for rearing purposes.
- Oyster aquaculturists harvested about 6 million table oysters, most of which were marketed outside the province. Oyster aquaculture production is valued at \$1.5 million (\$3 million after processing).

Sources for tables and graphics: Department of Fisheries and Oceans Canada and New Brunswick 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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