

A PORTRAIT OF THE CANADIAN AGRI-FOOD SYSTEM

A Portrait of the Canadian Agri-Food System

Economic and Policy Analysis Directorate
Policy Branch
December 1997

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Publication No. 1947E

Aussi disponible en français sous le titre de:
Portrait du circuit agroalimentaire canadien

Preface

A Portrait of the Canadian Agri-Food System, previously known as “The Chartbook”, returns to a “graphics only” presentation. This document provides a graphical snapshot of the Canadian agri-food system and a limited view of Canada’s role in the world. It is primarily intended to be an “easy to use” source document for both senior management and for departmental analysts who might have a variety of interests. Although the need for qualitative or explanatory text has not diminished, more customized documents, involving graphics, data and narrative descriptions or explanations, will be developed for specific purposes, when and as required.

The graphical format enables us to increase the length of the document and the range of topics covered. Within the “traditional” sections of the document greater provincial or regional detail is now provided. As well, three new sections have been included: an overview of food retail and food service structure and performance; comparisons of Canada’s agri-food system with a selected number of other nations; and an overview of environmental indicators in the Canadian agri-food system. In this edition, the content of these new sections is somewhat exploratory and subsequent versions should see these sections strengthened.

The other new feature of this edition of ***A Portrait of the Canadian Agri-Food System*** is the revised format. A new page layout and an improved section identification feature are two of many changes. In addition, an Intranet version of this document will be accessible through the EPAD home page. For this edition, the Intranet version will be simply an electronic copy of the hardcopy document; however, it is anticipated that in the future, the form and presentation of the Intranet version will evolve into a product which takes full advantage of the Internet technology and allow users to be interactive with the information.

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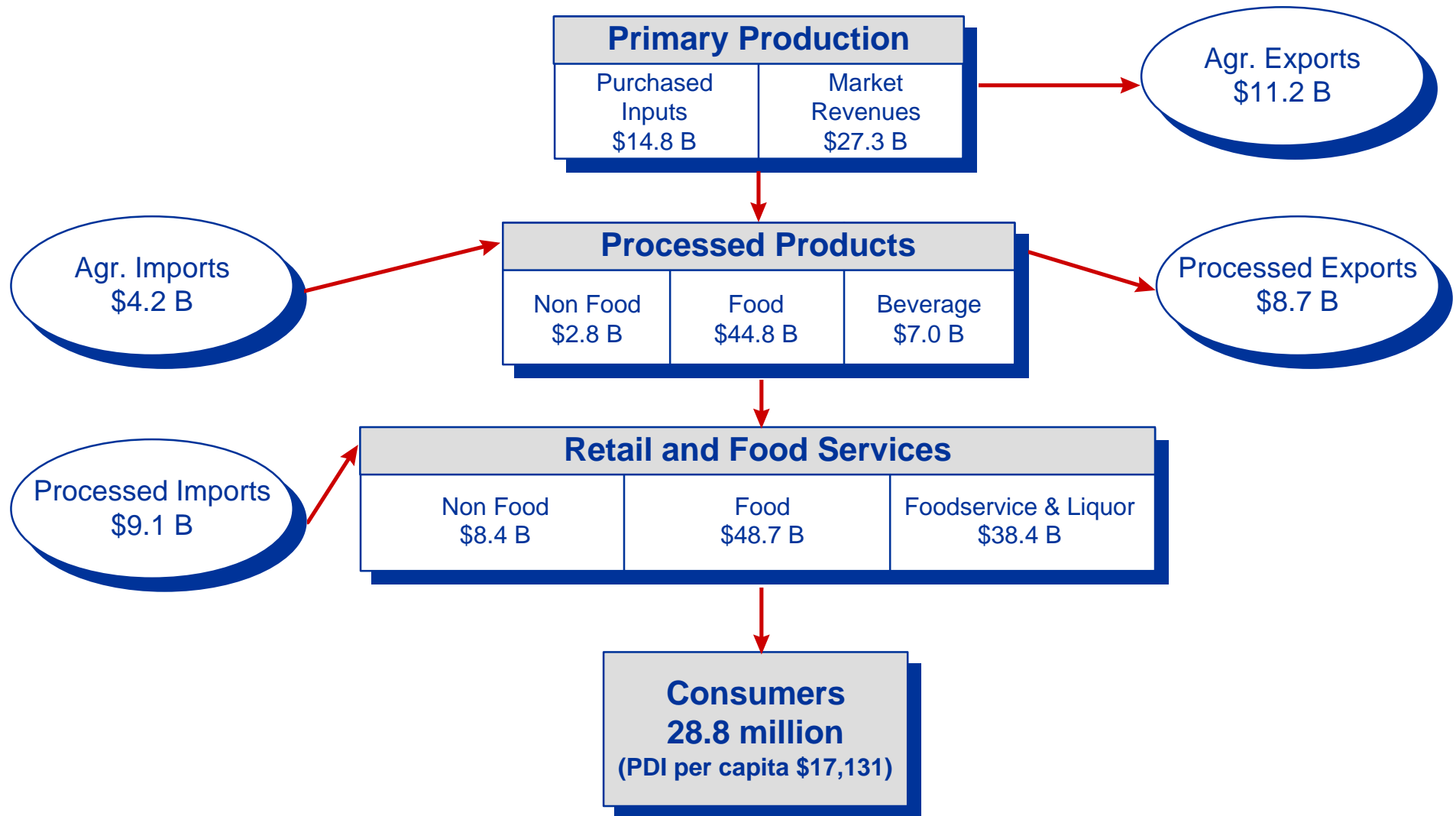
Section 7

Section 8

Agri-Food Output and Employment

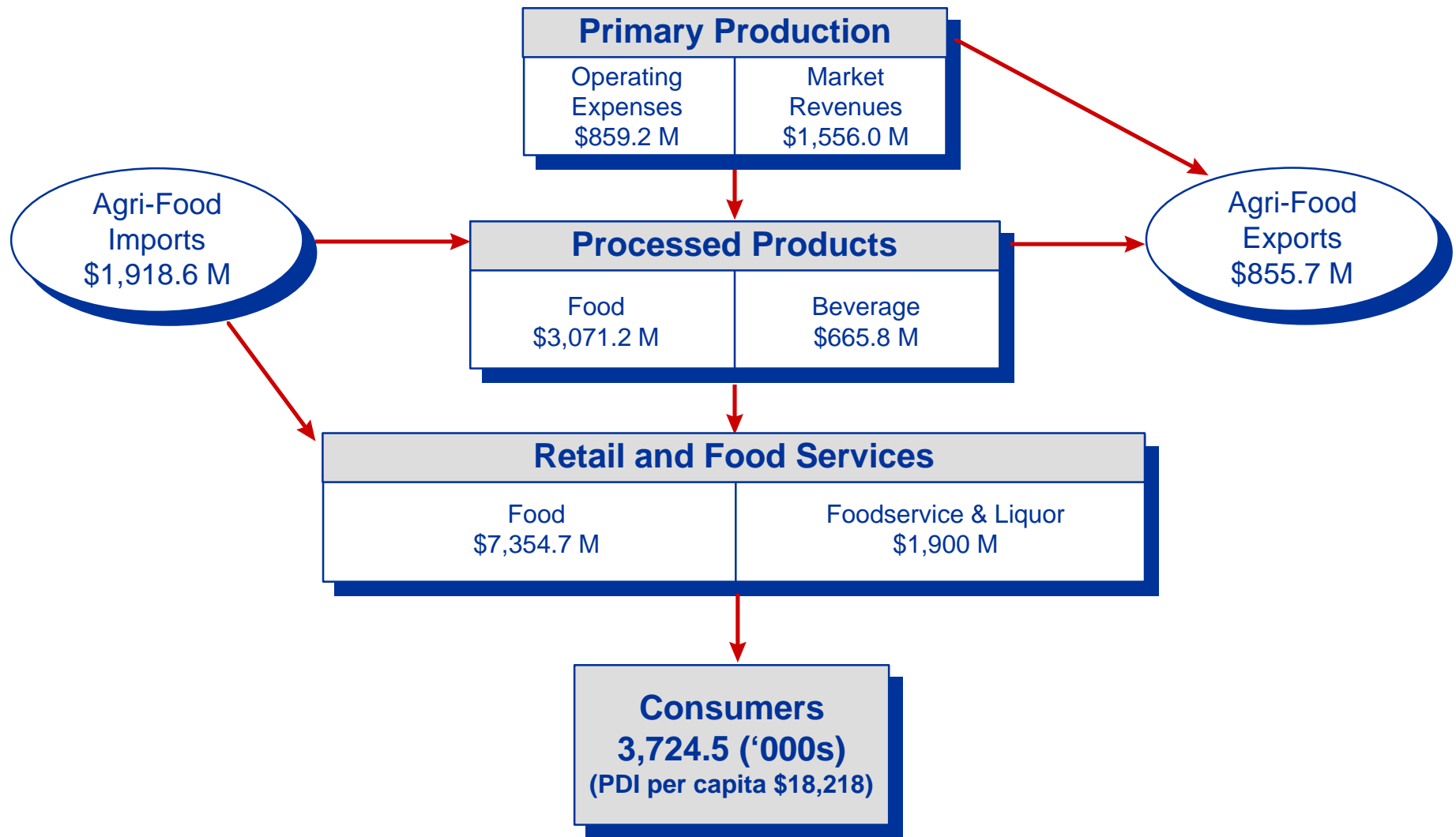
Canada

Agri-Food System Value of Gross Output, 1996



Sources: Statistics Canada - Cansim, Agriculture Economic Statistics, Family Expenditures in Canada, AAFC - Farm Income, Financial Conditions and Government Assistance Data Book, Trade Database.

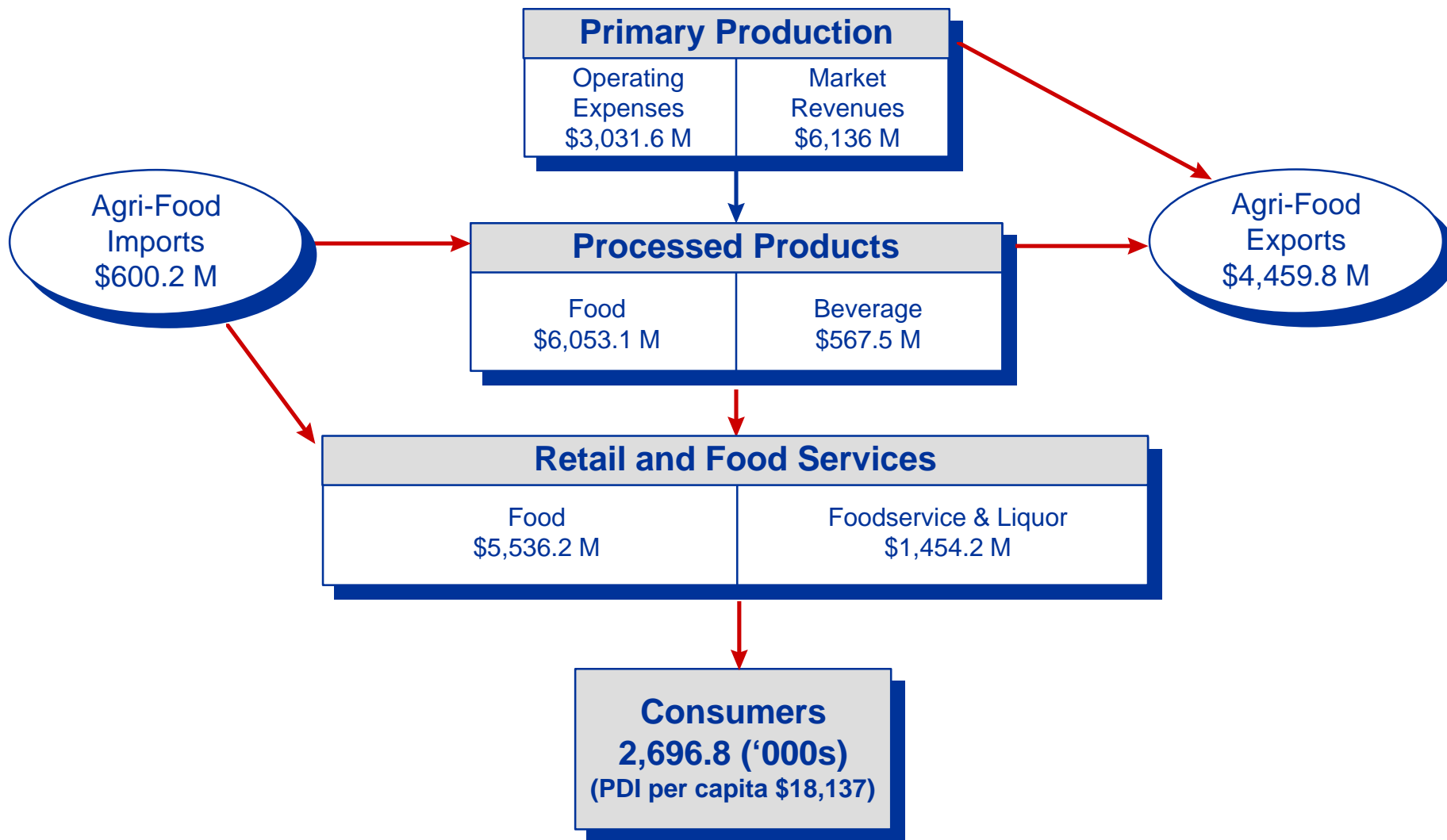
British Columbia Agri-Food System Value of Gross Output, 1996



Sources: Statistics Canada - Cansim, Agriculture Economic Statistics, Family Expenditures in Canada.
AAFC - Farm Income, Financial Conditions and Government Assistance Data Book, Trade Database.
Canadian Grocer.

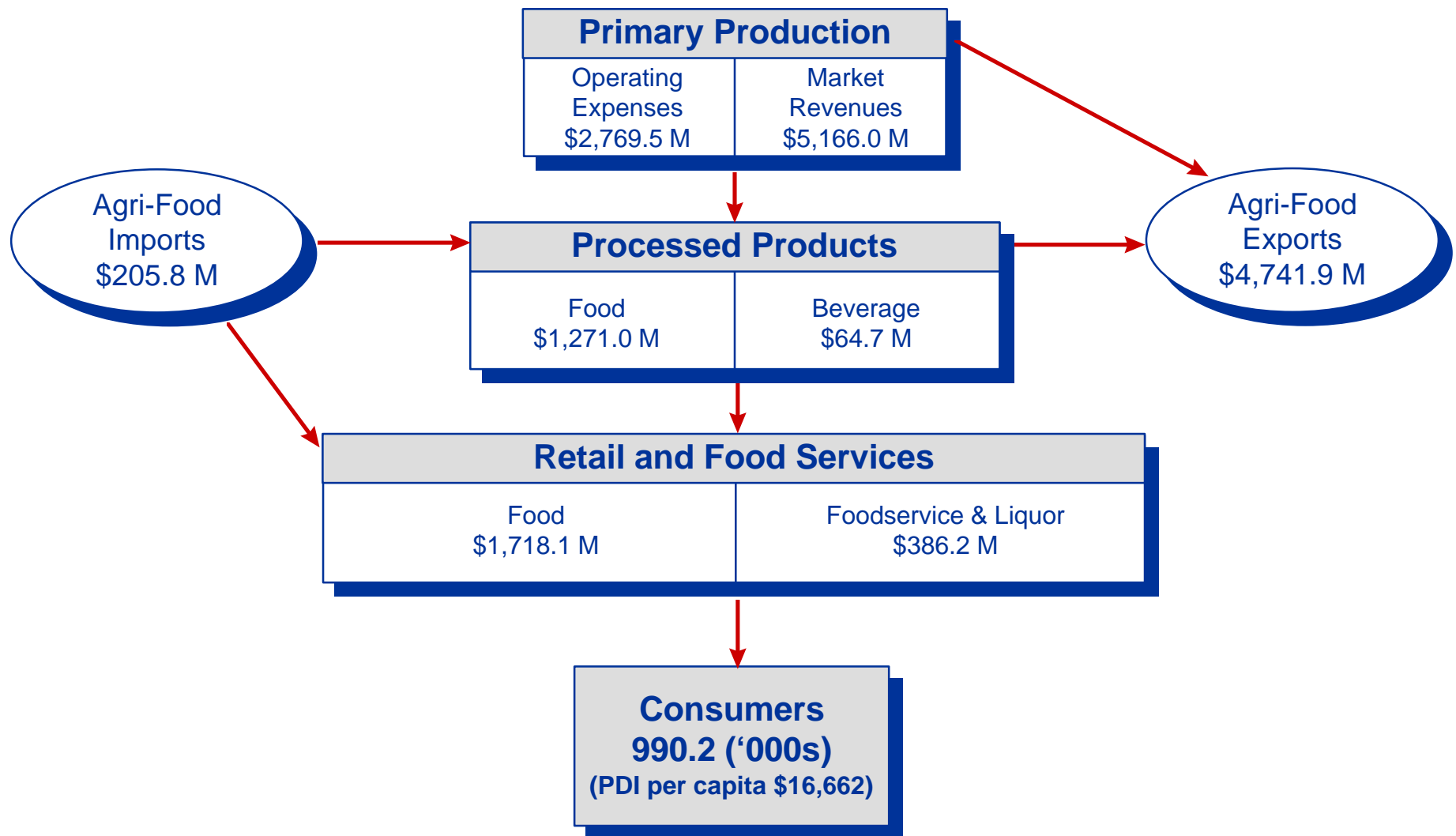
Alberta

Agri-Food System Value of Gross Output, 1996



Sources: Statistics Canada - Cansim, Agriculture Economic Statistics, Family Expenditures in Canada.
 AAFC - Farm Income, Financial Conditions and Government Assistance Data Book, Trade Database.
 Canadian Grocer.

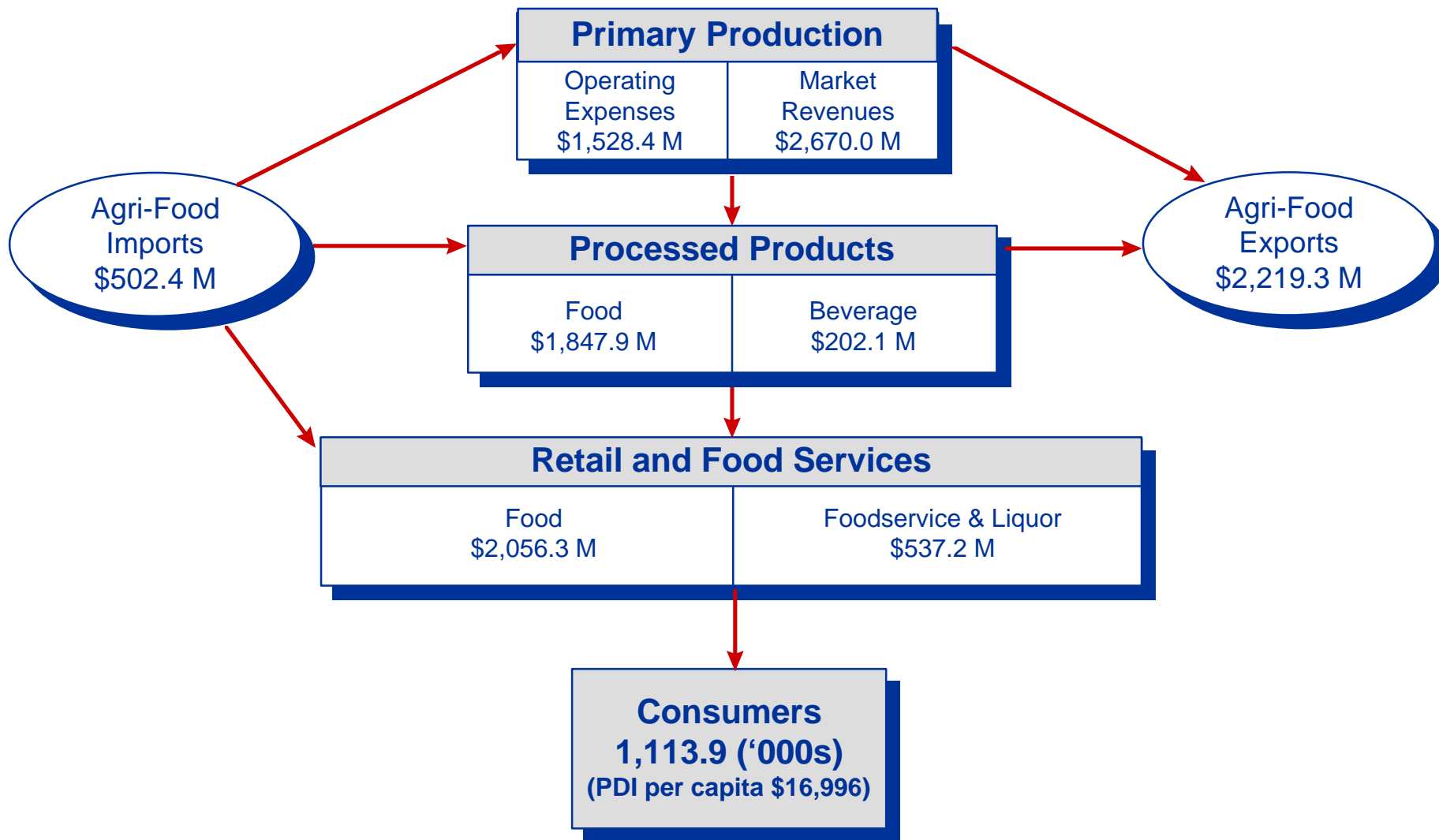
Saskatchewan Agri-Food System Value of Gross Output, 1996



Sources: Statistics Canada - Cansim, Agriculture Economic Statistics, Family Expenditures in Canada.
AAFC - Farm Income, Financial Conditions and Government Assistance Data Book, Trade Database.
Canadian Grocer.

Manitoba

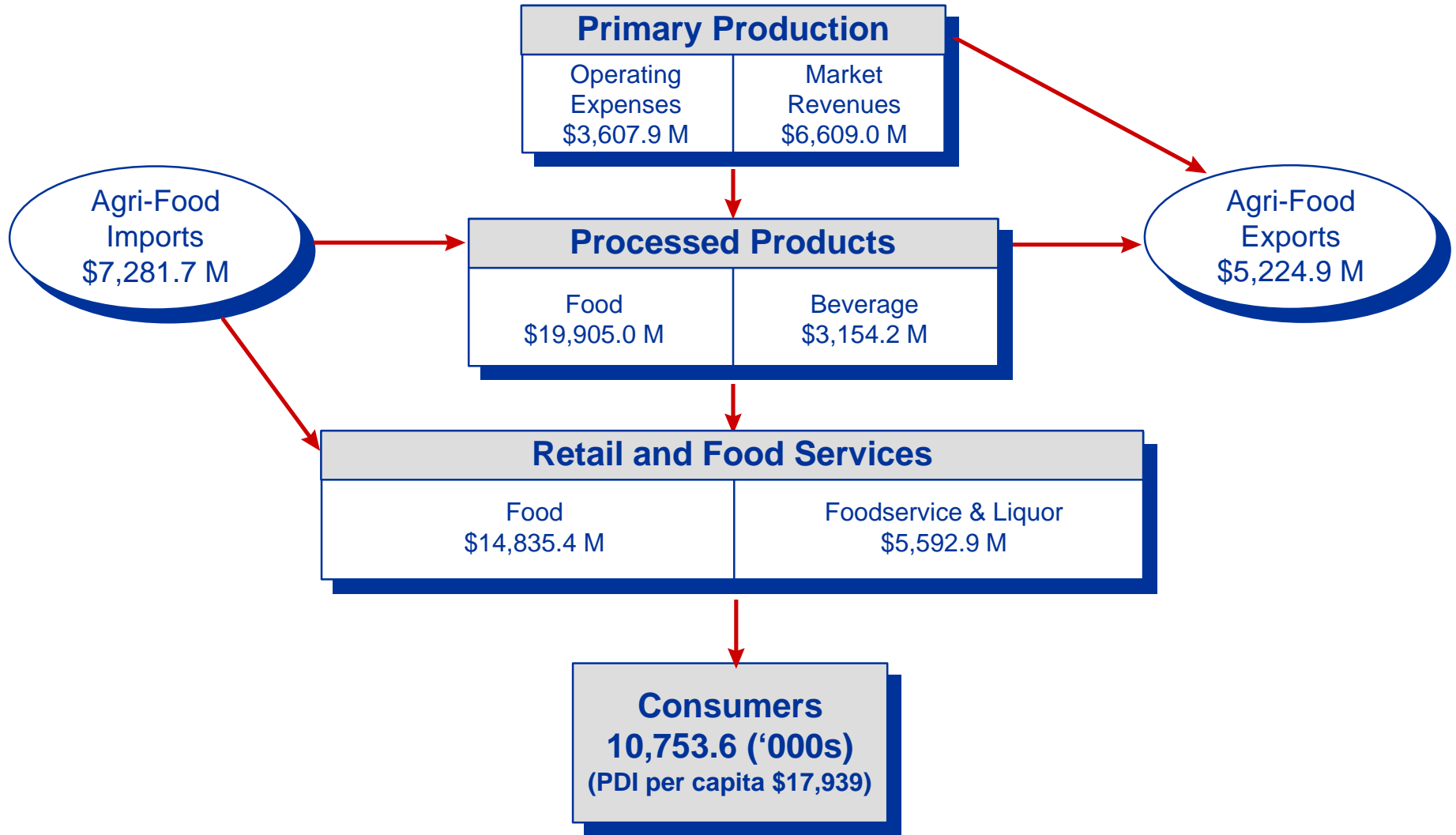
Agri-Food System Value of Gross Output, 1996



Sources: Statistics Canada - Cansim, Agriculture Economic Statistics, Family Expenditures in Canada.
 AAFC - Farm Income, Financial Conditions and Government Assistance Data Book, Trade Database.
 Canadian Grocer.

Ontario

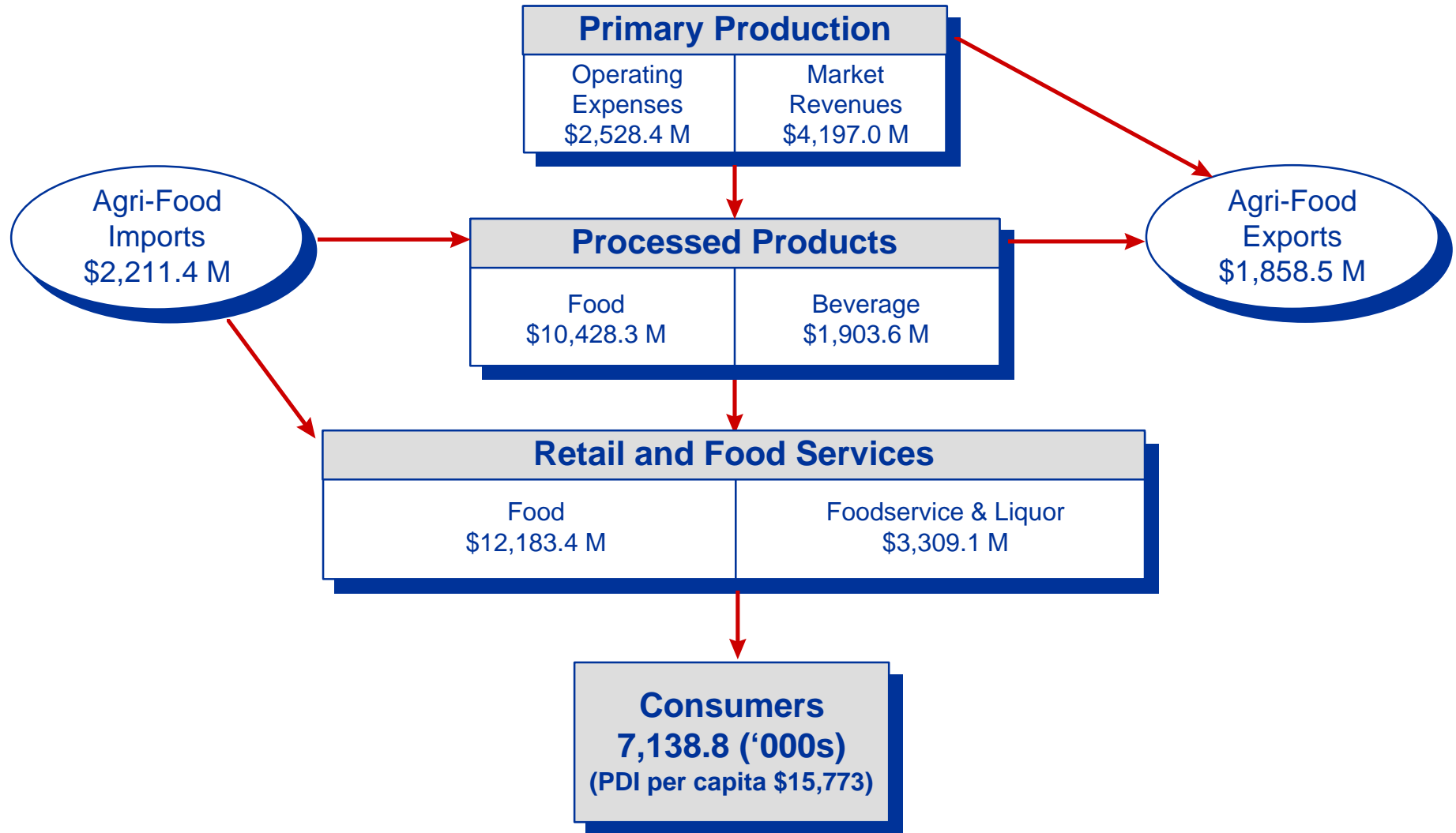
Agri-Food System Value of Gross Output, 1996



Sources: Statistics Canada - Cansim, Agriculture Economic Statistics, Family Expenditures in Canada. AAFC - Farm Income, Financial Conditions and Government Assistance Data Book, Trade Database. Canadian Grocer.

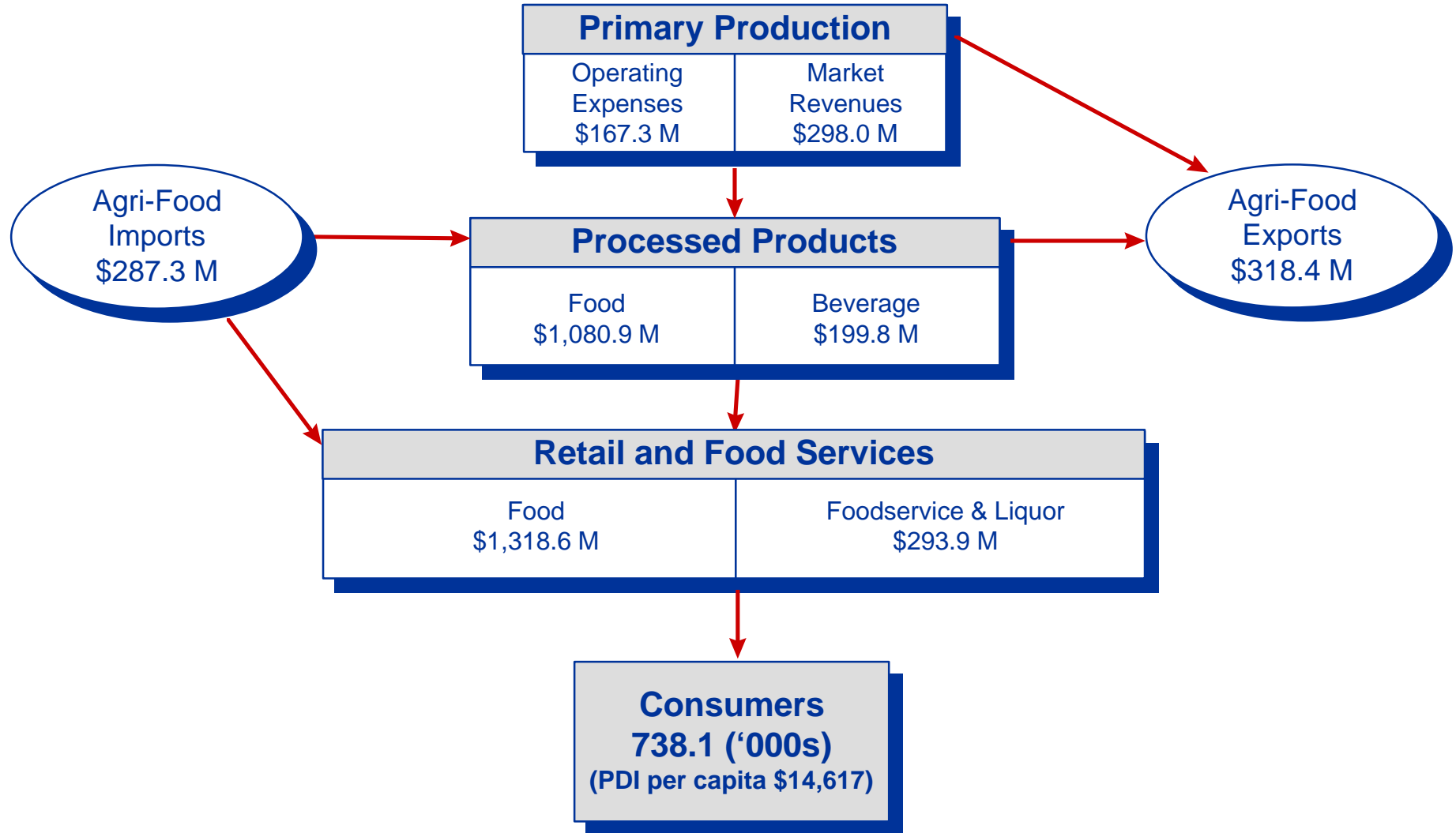
Quebec

Agri-Food System Value of Gross Output, 1996



Sources: Statistics Canada - Cansim, Agriculture Economic Statistics, Family Expenditures in Canada.
 AAFC - Farm Income, Financial Conditions and Government Assistance Data Book, Trade Database.
 Canadian Grocer.

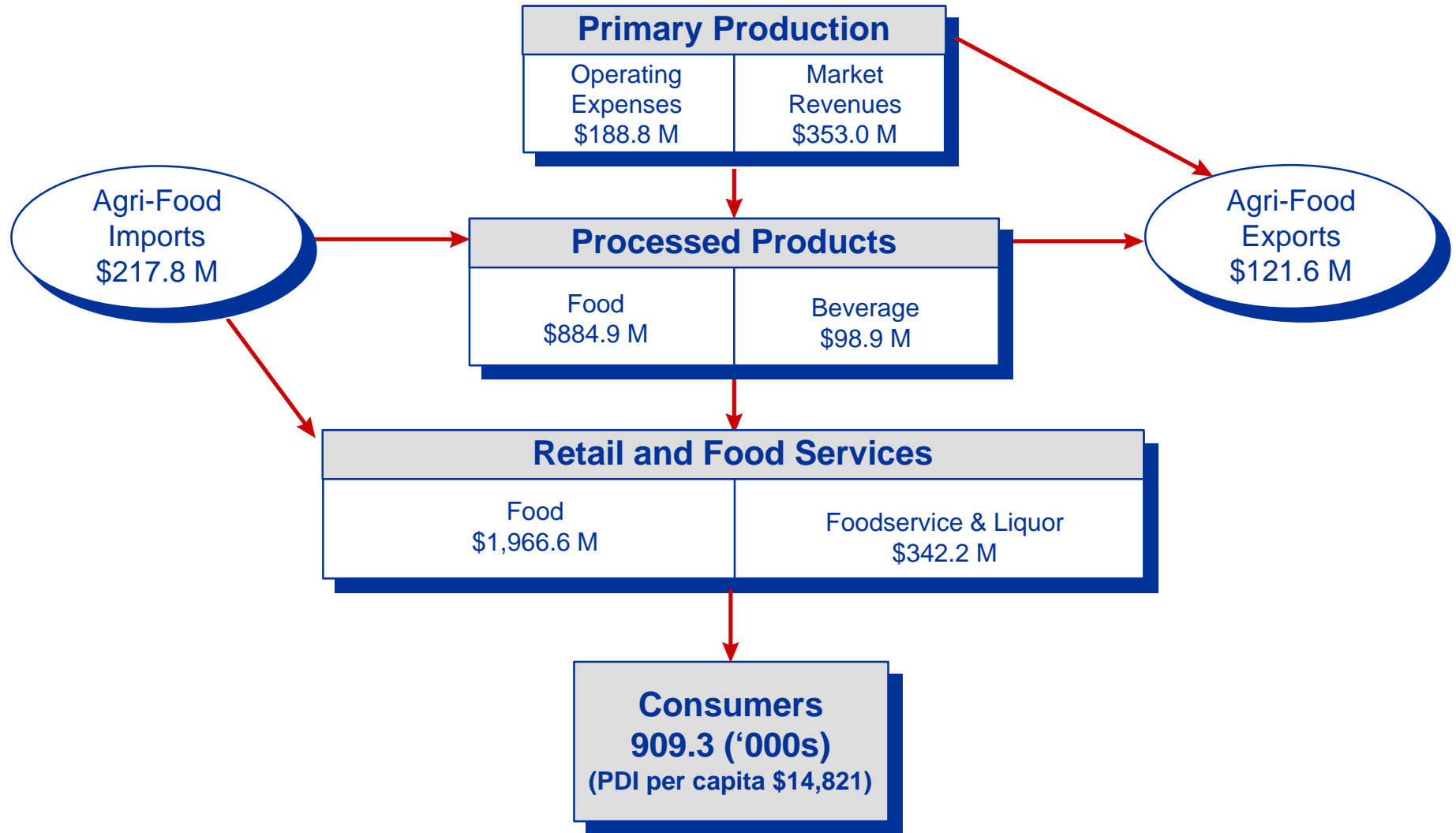
New Brunswick Agri-Food System Value of Gross Output, 1996



Sources: Statistics Canada - Cansim, Agriculture Economic Statistics, Family Expenditures in Canada. AAFC - Farm Income, Financial Conditions and Government Assistance Data Book, Trade Database. Canadian Grocer.

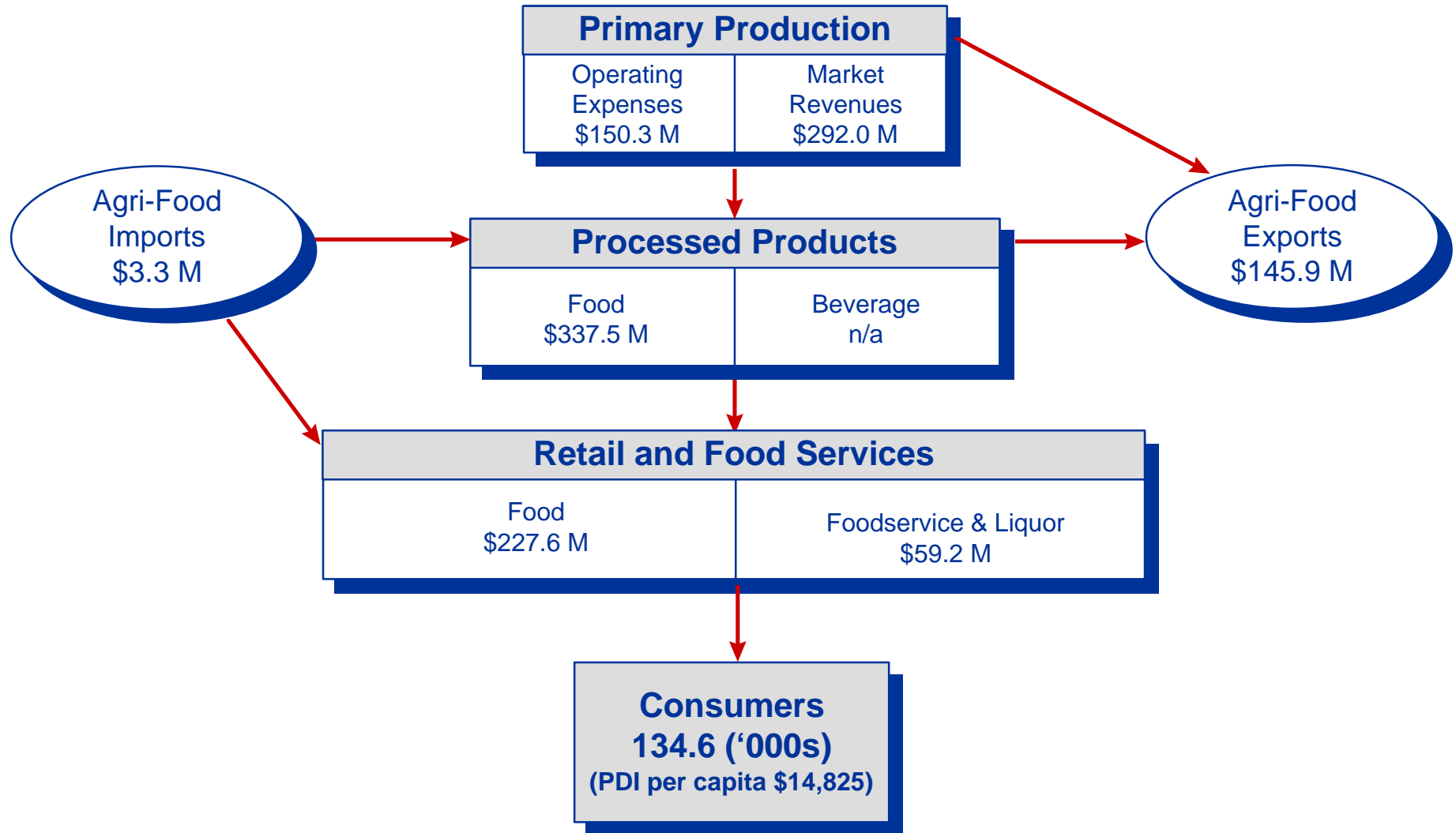
Nova Scotia

Agri-Food System Value of Gross Output, 1996



Sources: Statistics Canada - Cansim, Agriculture Economic Statistics, Family Expenditures in Canada. AAFIC - Farm Income, Financial Conditions and Government Assistance Data Book, Trade Database. Canadian Grocer.

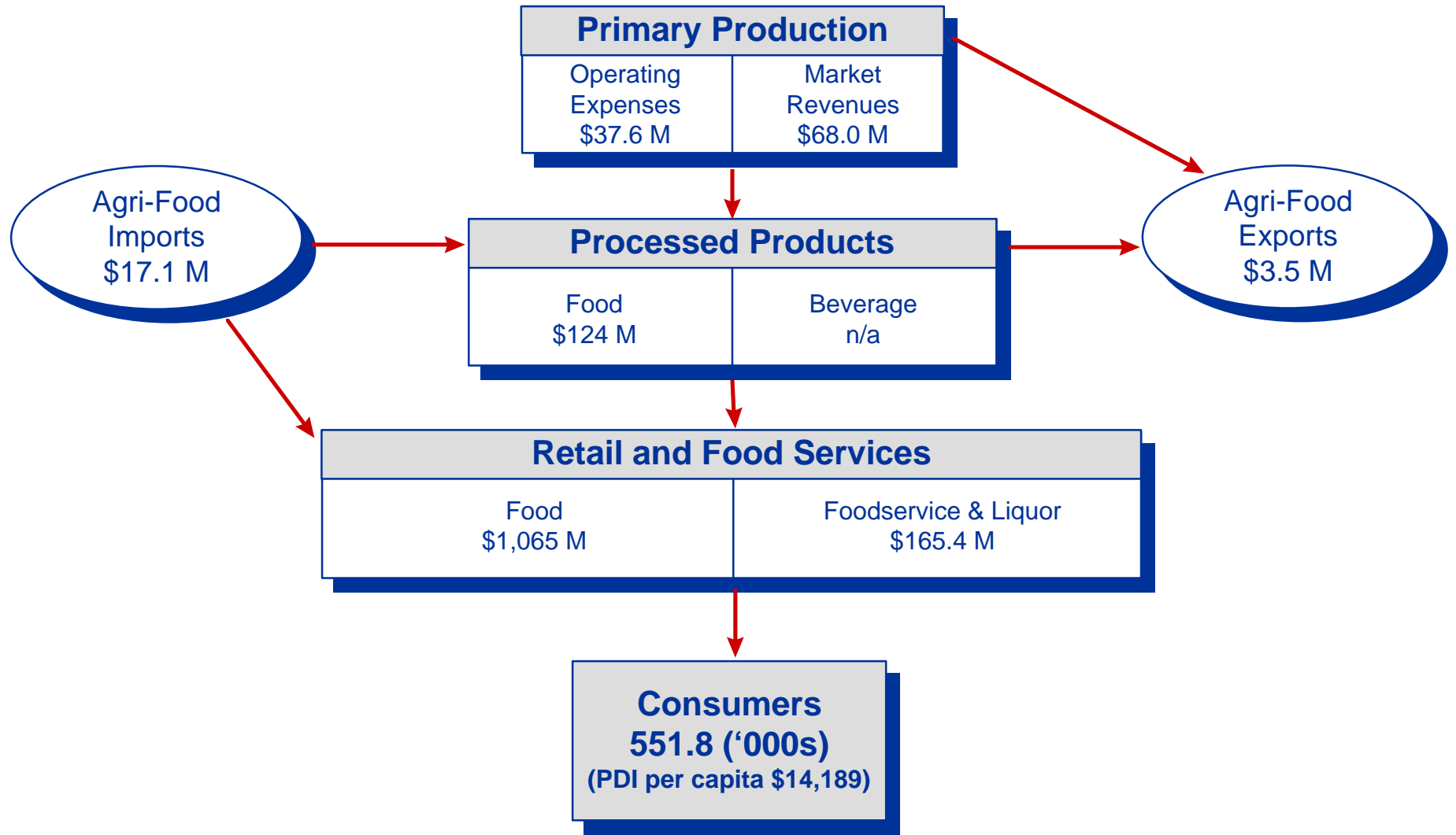
Prince Edward Island Agri-Food System Value of Gross Output, 1996



Sources: Statistics Canada - Cansim, Agriculture Economic Statistics, Family Expenditures in Canada.
AAFC - Farm Income, Financial Conditions and Government Assistance Data Book, Trade Database.
Canadian Grocer.

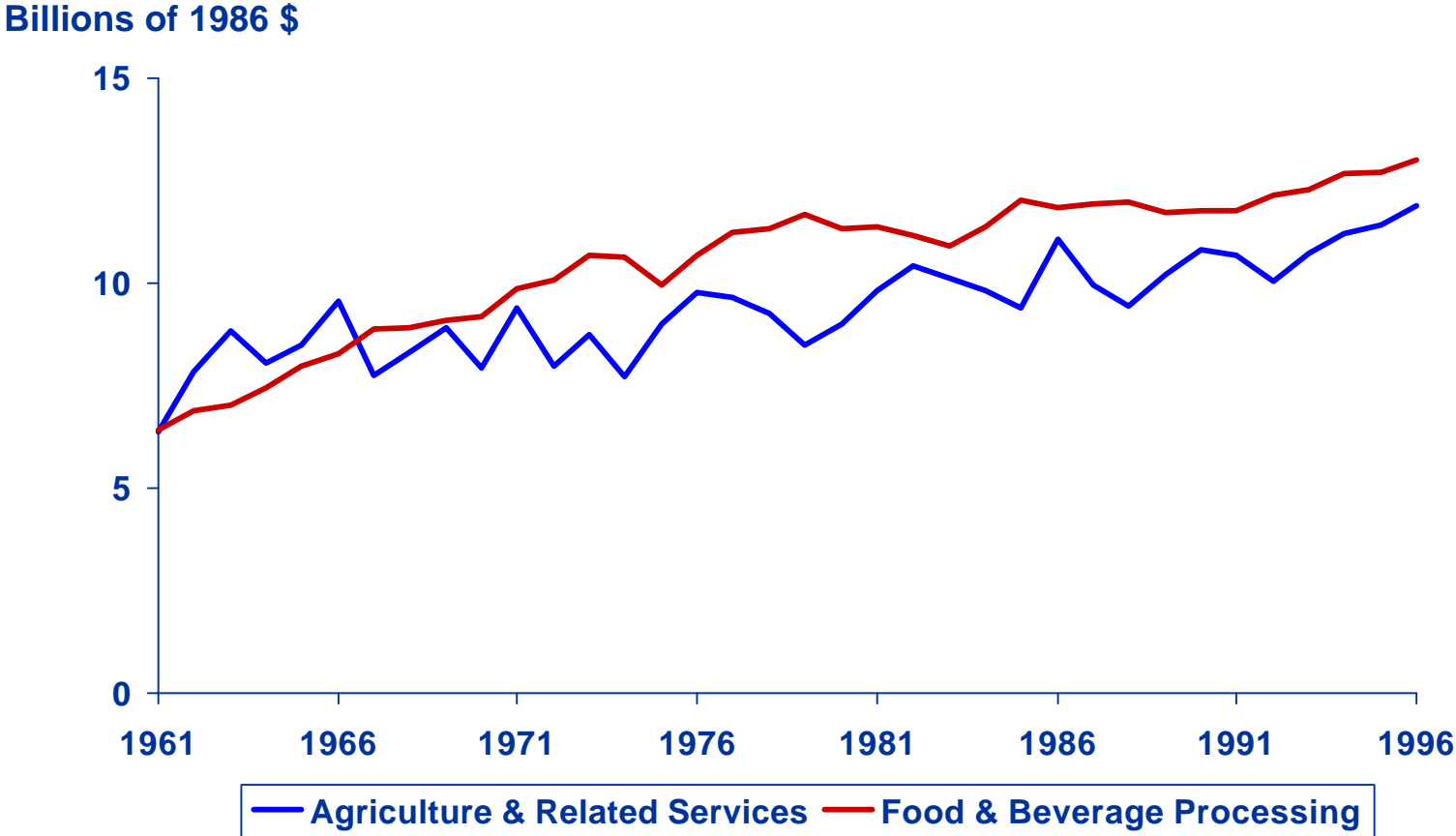
Newfoundland

Agri-Food System Value of Gross Output, 1996



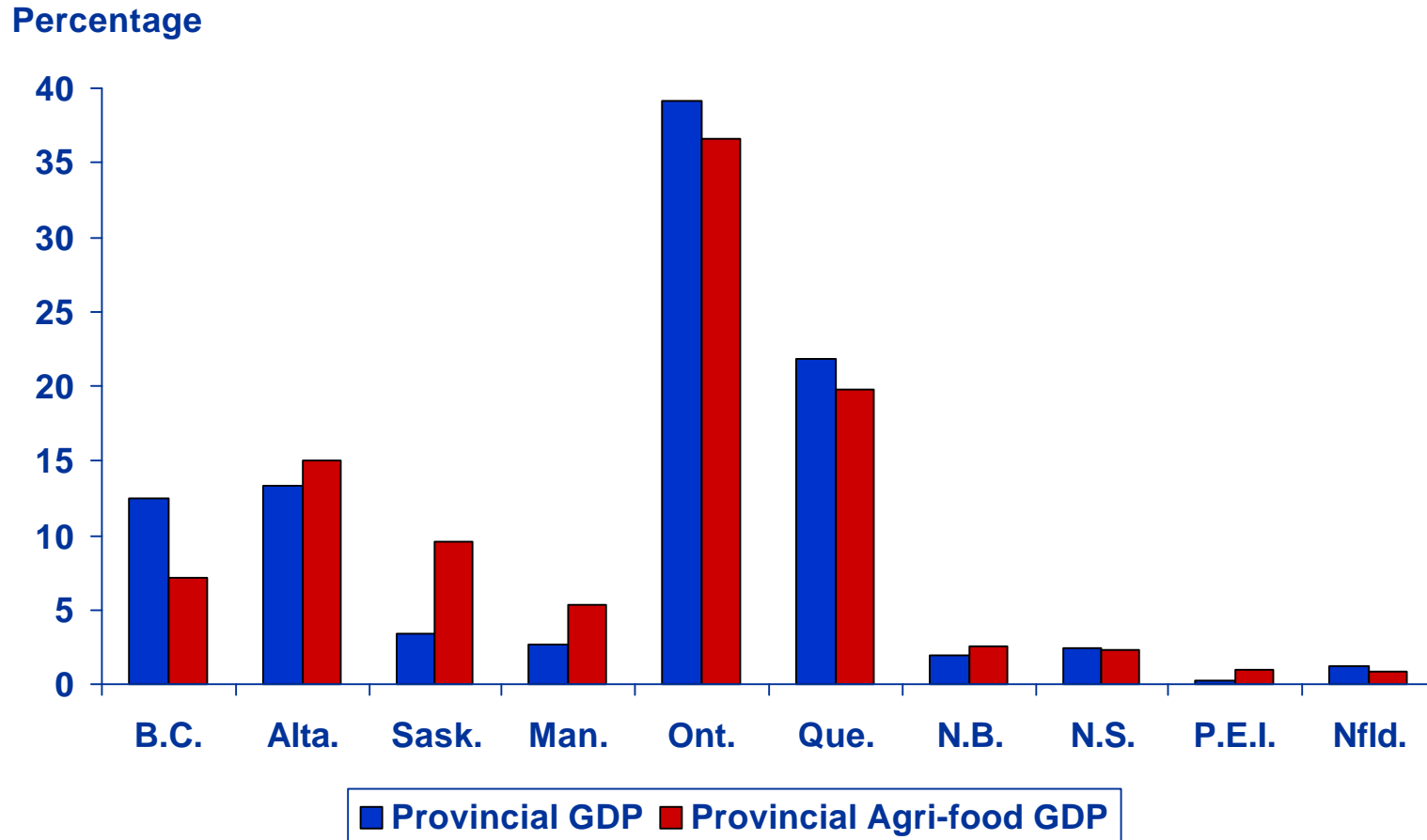
Sources: Statistics Canada - Cansim, Agriculture Economic Statistics, Family Expenditures in Canada.
 AAFC - Farm Income, Financial Conditions and Government Assistance Data Book, Trade Database.
 Canadian Grocer.

GDP Growth



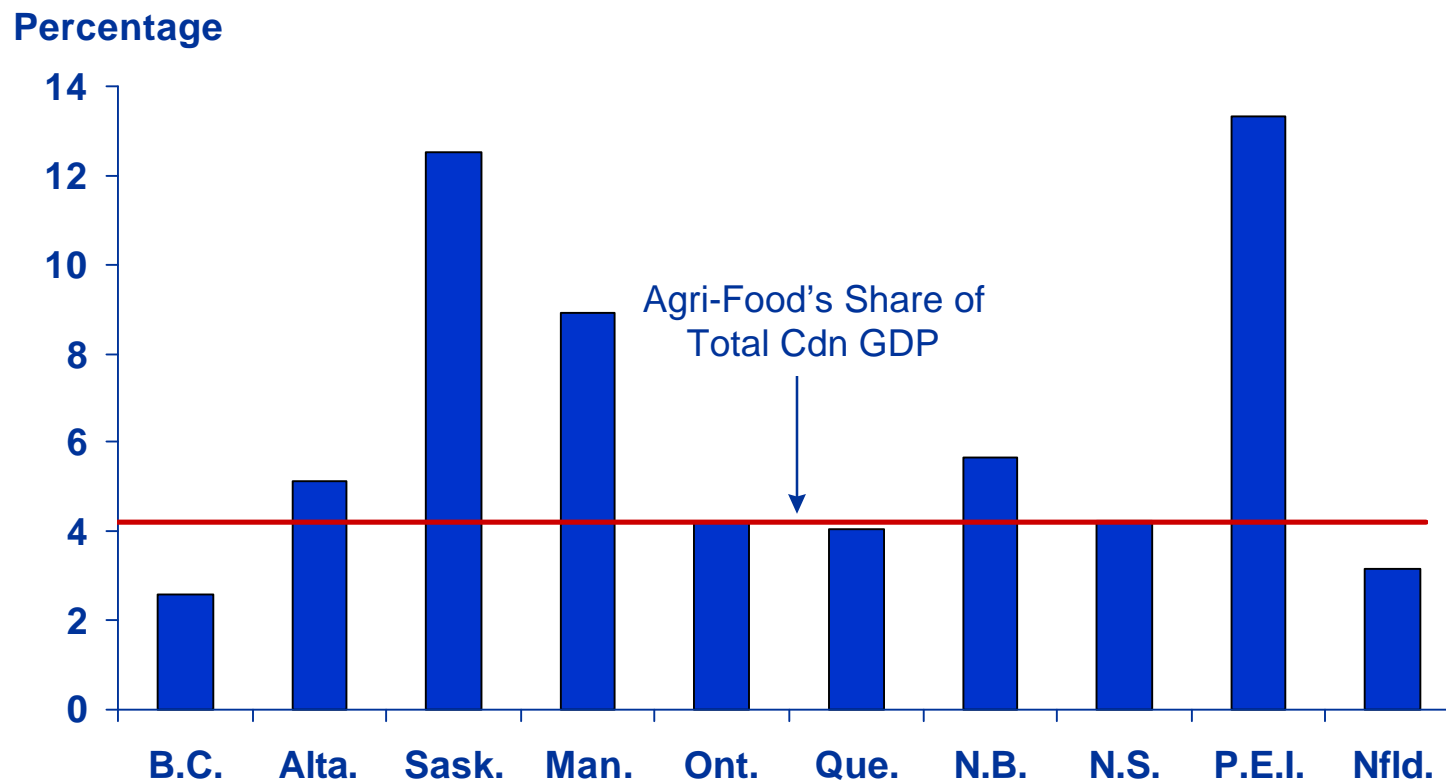
Source: Statistics Canada, Cansim

Provincial Shares of Canadian GDP and Canadian Agri-Food GDP, 1996



Source: Statistics Canada, Cansim

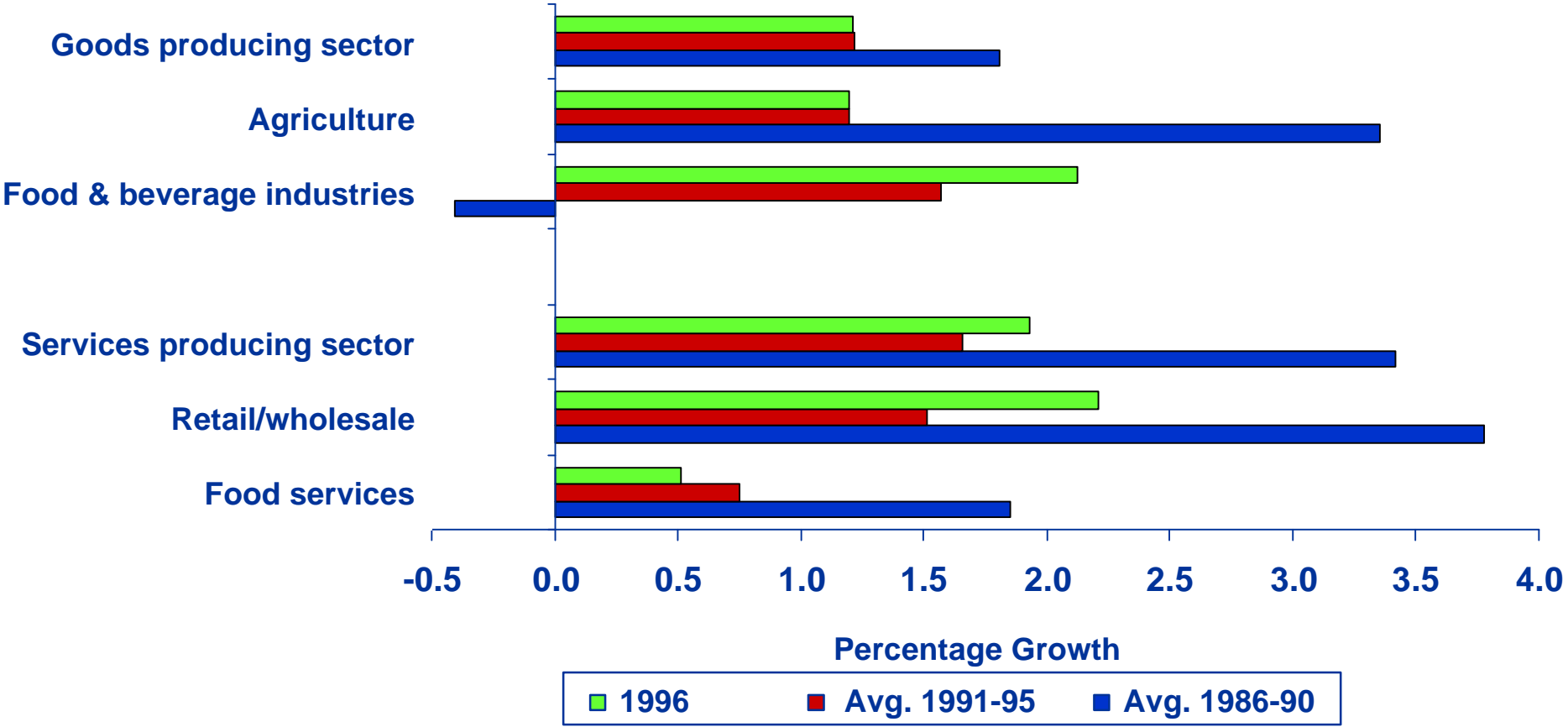
Agri-Food Share of Provincial GDP, 1996



Source: Statistics Canada, Cansim

GDP Growth

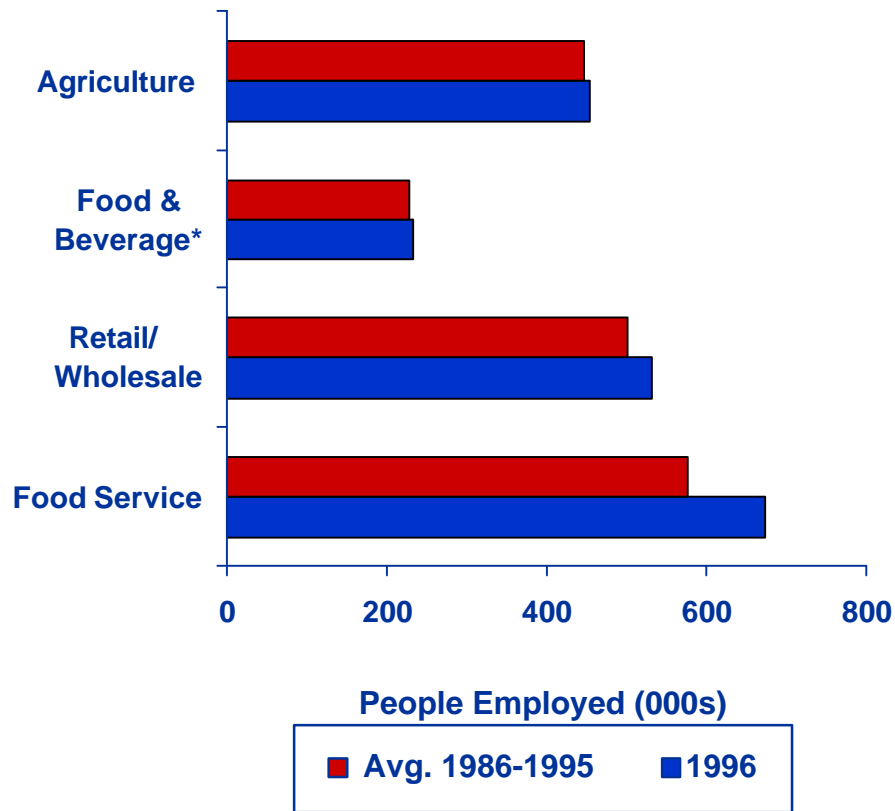
Major Sectors of Agri-Food System Relative to Total Economy



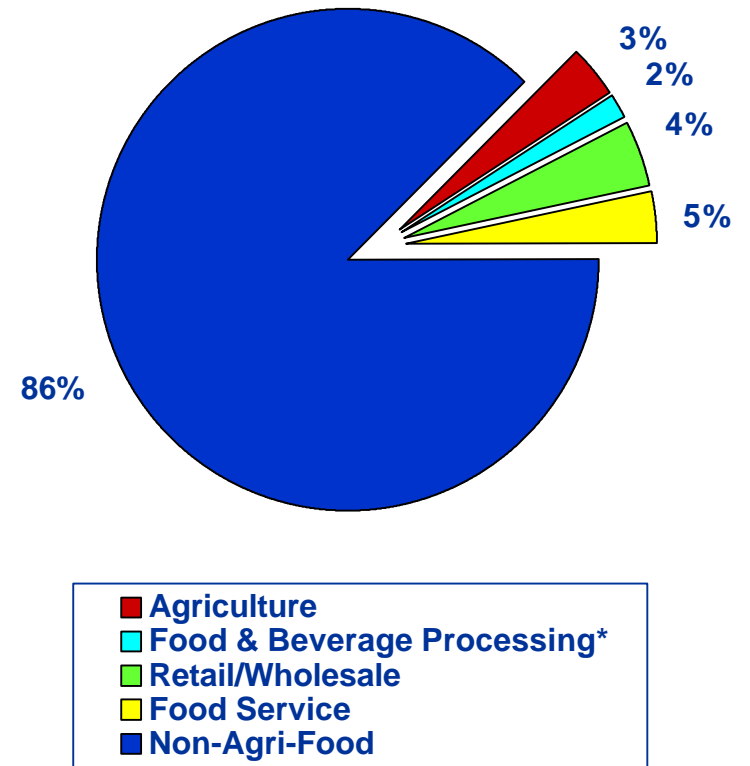
Source: Statistics Canada, Cansim

Canada Agri-Food System Employment

Employment Growth



Employment Share 1996

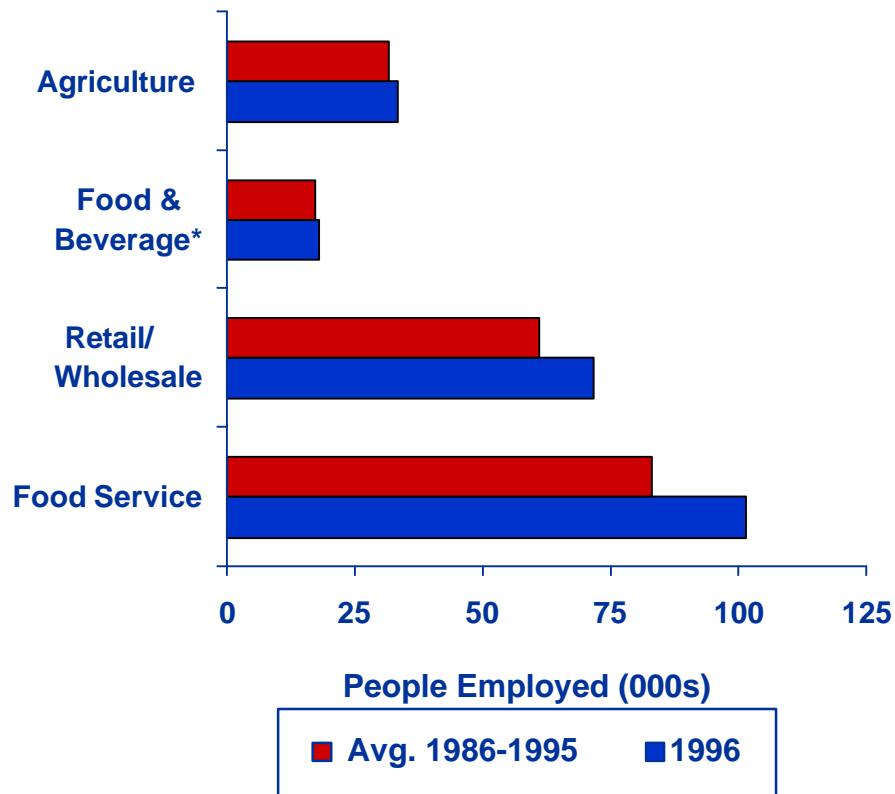


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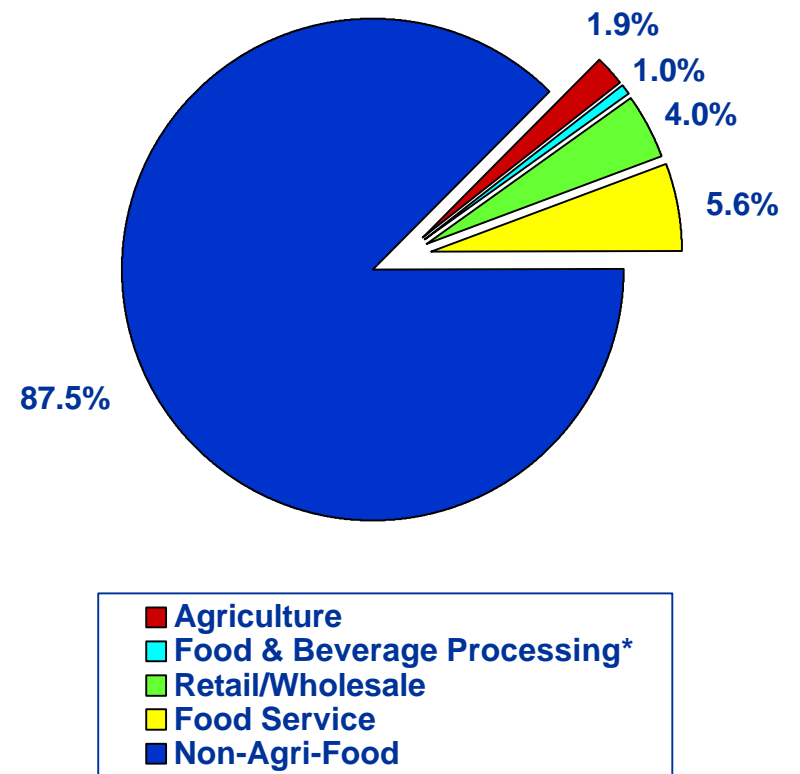
Source: Statistics Canada, Labour Force Survey.

British Columbia Agri-Food System Employment

Employment Growth



Employment Share - 1996

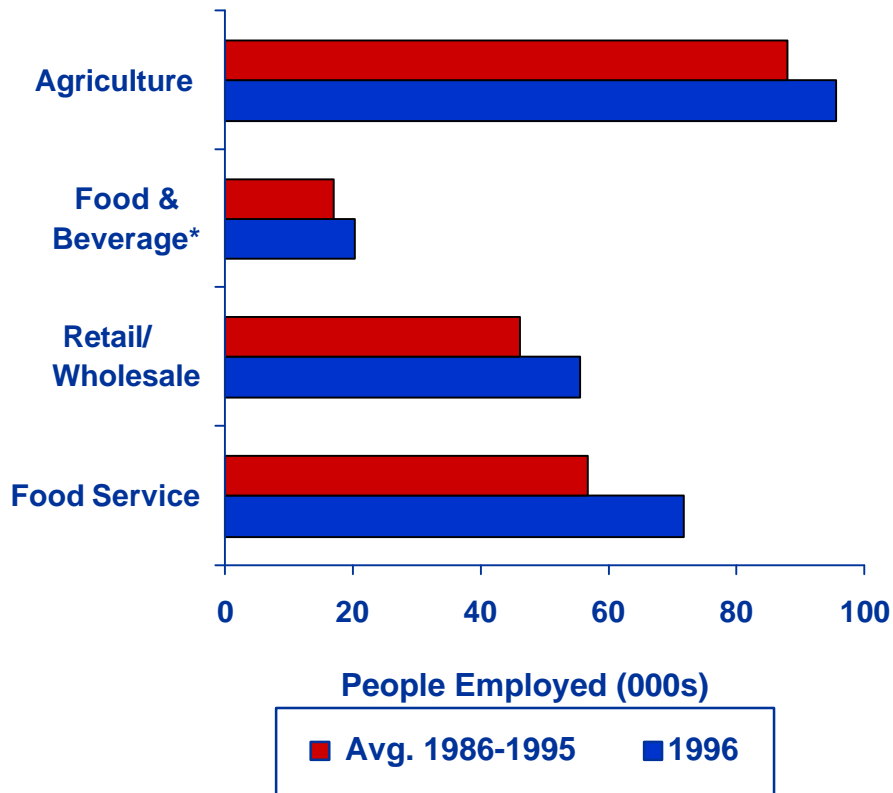


*Excludes fish processing.

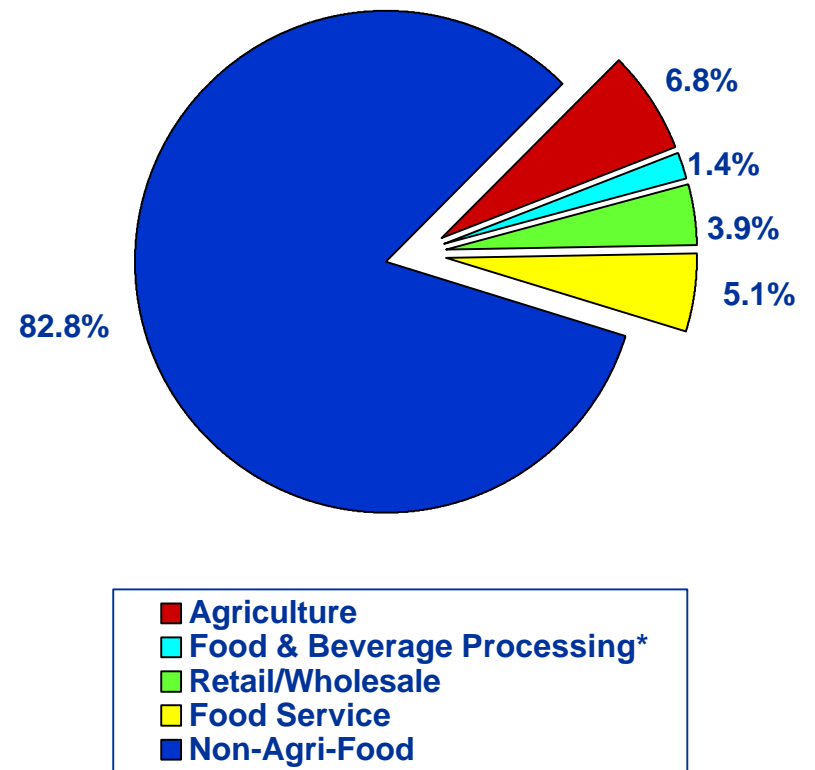
Source: Statistics Canada, Labour Force Survey.

Alberta Agri-Food System Employment

Employment Growth



Employment Share - 1996

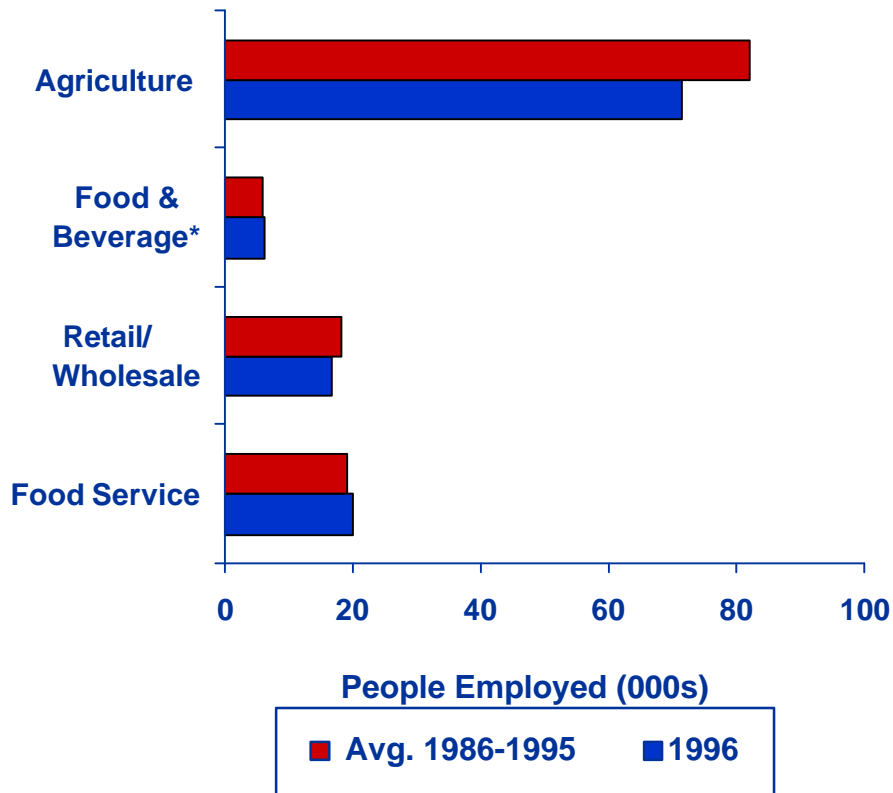


*Excludes fish processing.

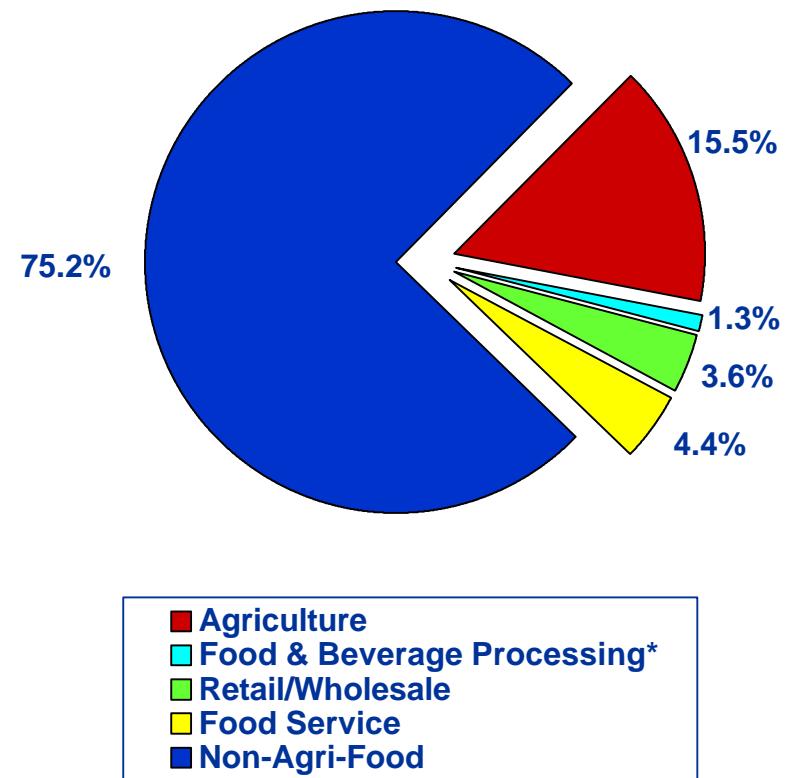
Source: Statistics Canada, Labour Force Survey.

Saskatchewan Agri-Food System Employment

Employment Growth



Employment Share - 1996

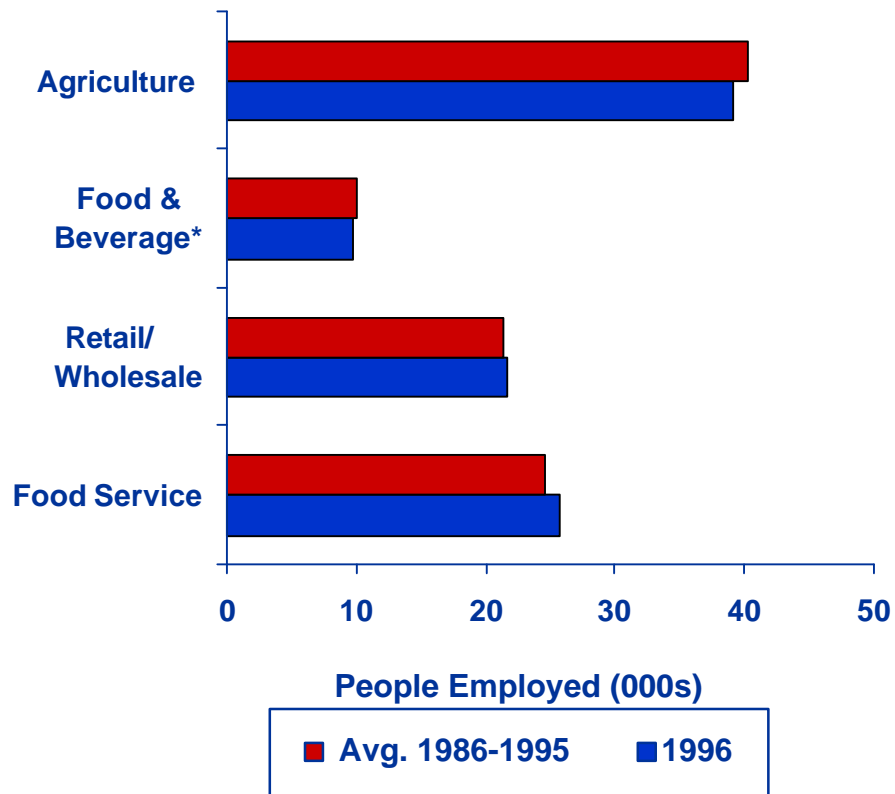


*Excludes fish processing.

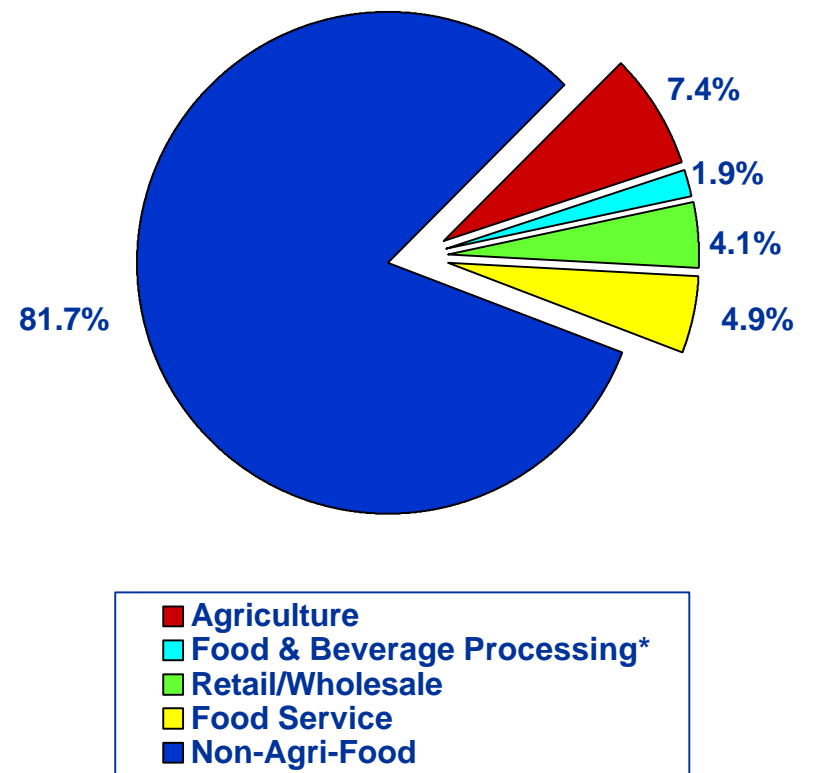
Source: Statistics Canada, Labour Force Survey.

Manitoba Agri-Food System Employment

Employment Growth



Employment Share - 1996

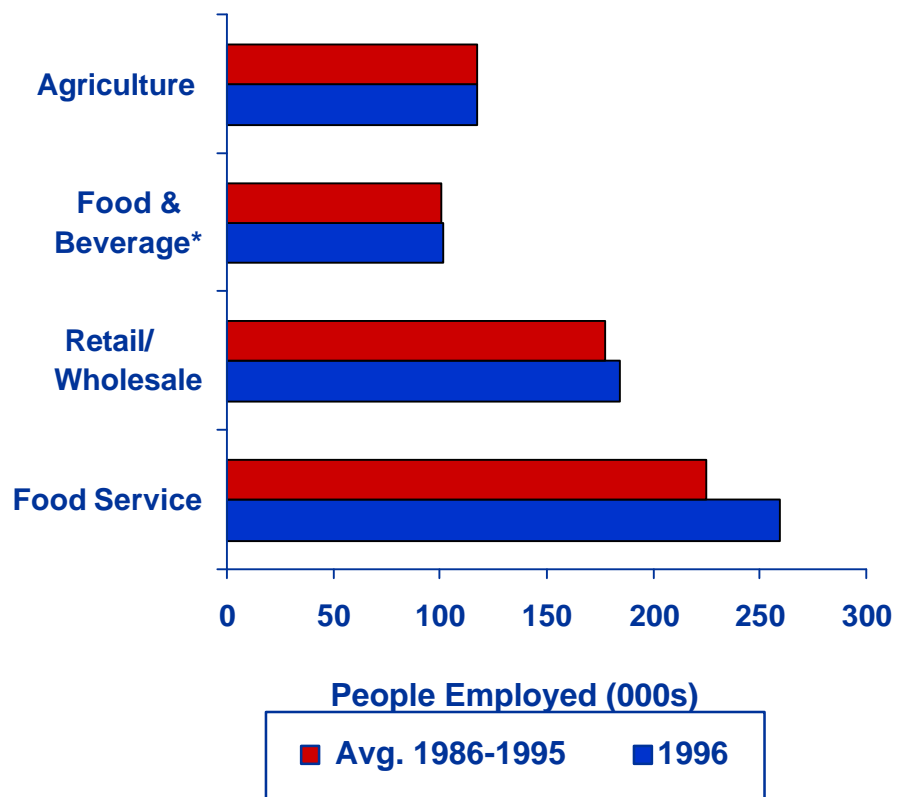


*Excludes fish processing.

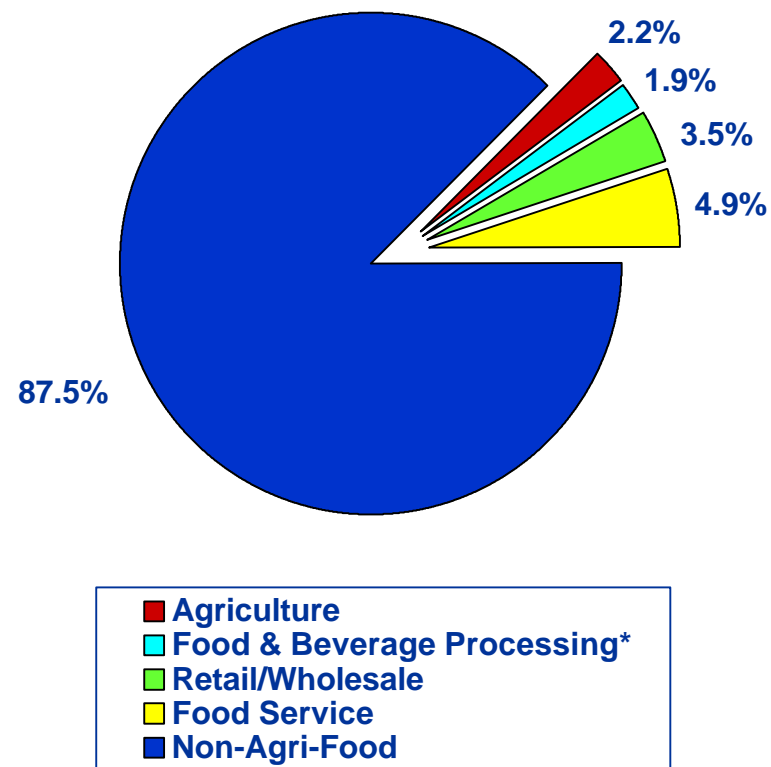
Source: Statistics Canada, Labour Force Survey.

Ontario Agri-Food System Employment

Employment Growth



Employment Share - 1996

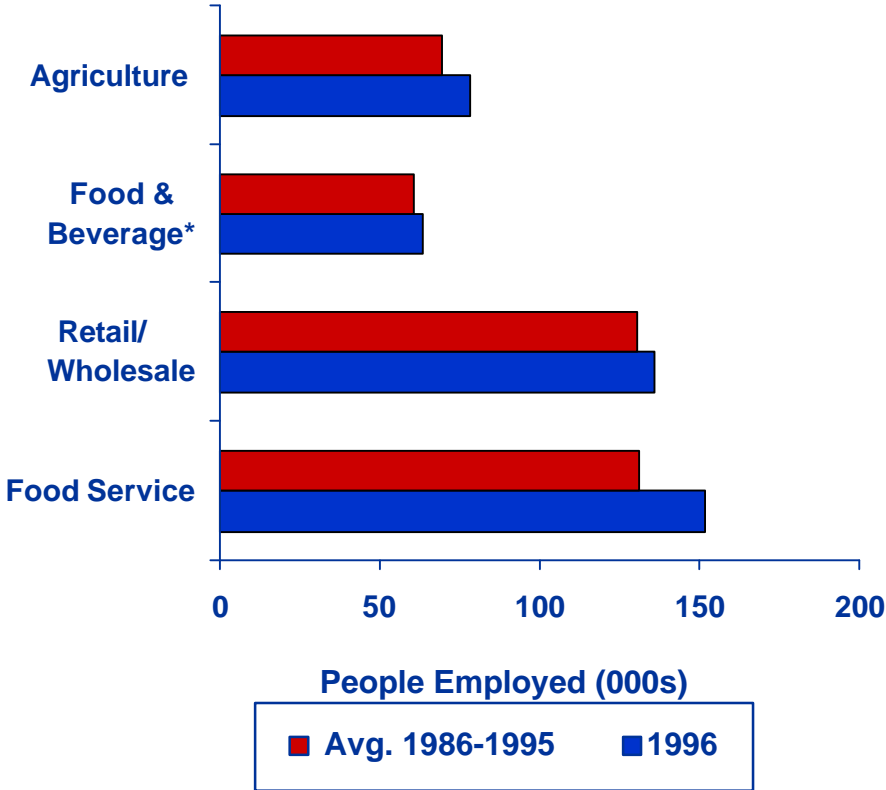


*Excludes fish processing.

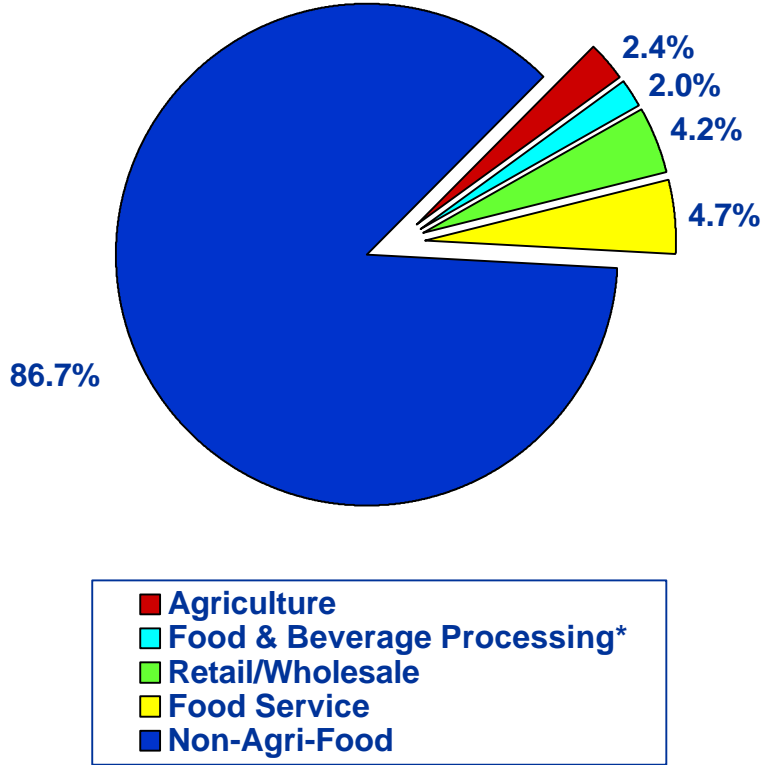
Source: Statistics Canada, Labour Force Survey.

Quebec Agri-Food System Employment

Employment Growth



Employment Share - 1996

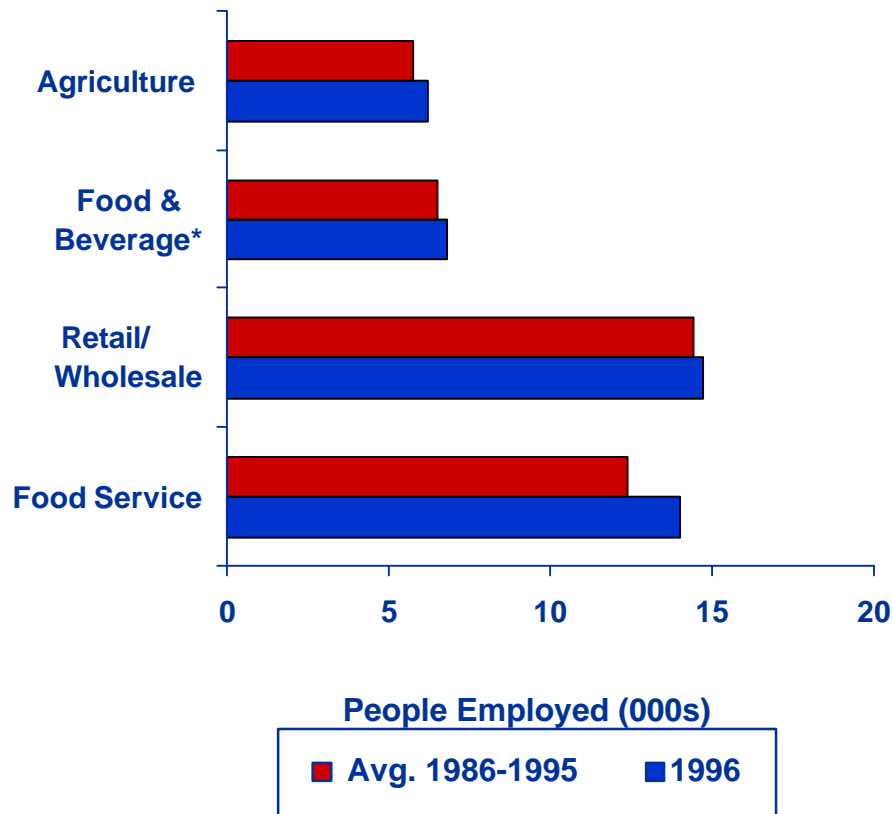


*Excludes fish processing.

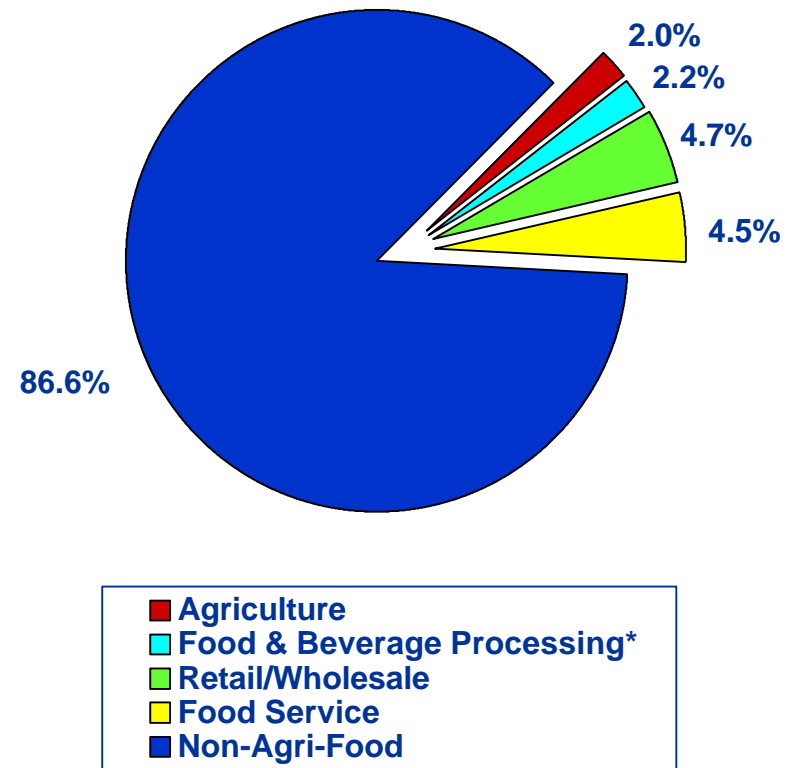
Source: Statistics Canada, Labour Force Survey.

New Brunswick Agri-Food System Employment

Employment Growth



Employment Share - 1996

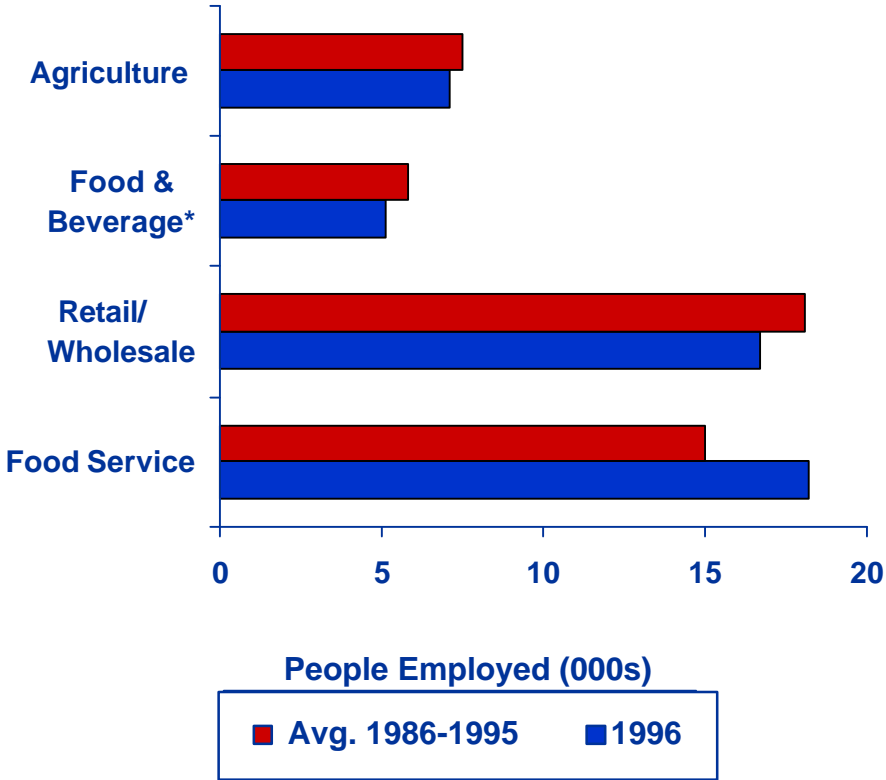


*Excludes fish processing.

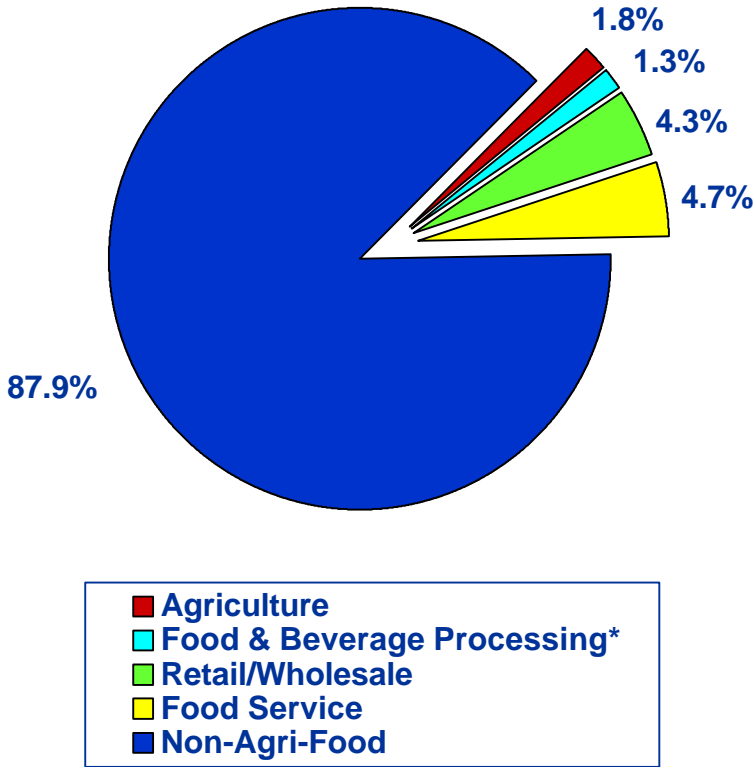
Source: Statistics Canada, Labour Force Survey.

Nova Scotia Agri-Food System Employment

Employment Growth



Employment Share - 1996



*Excludes fish processing.

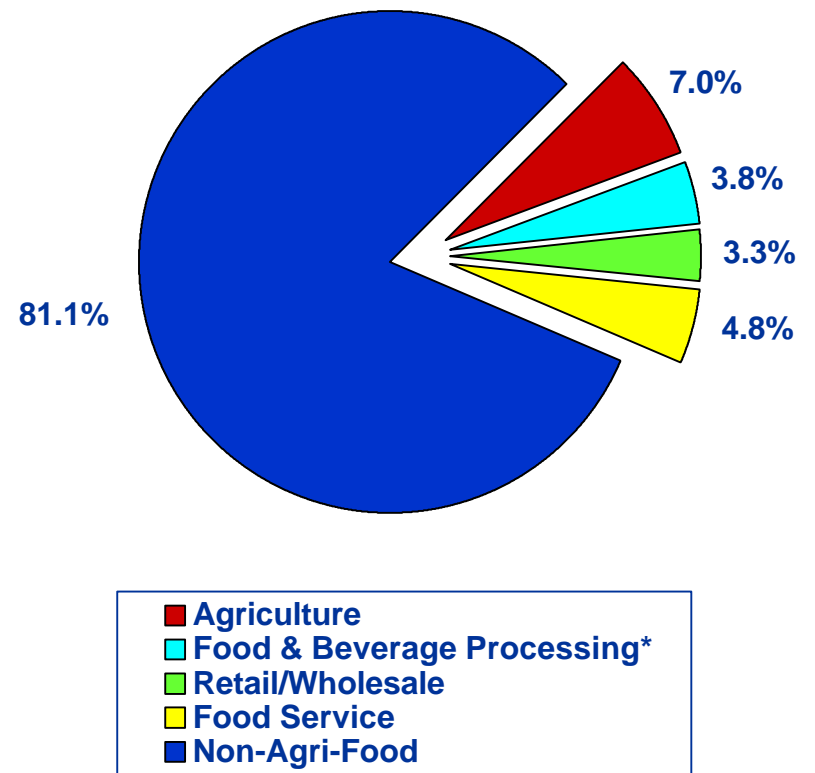
Source: Statistics Canada, Labour Force Survey.

Prince Edward Island Agri-Food System Employment

Employment Growth



Employment Share - 1996

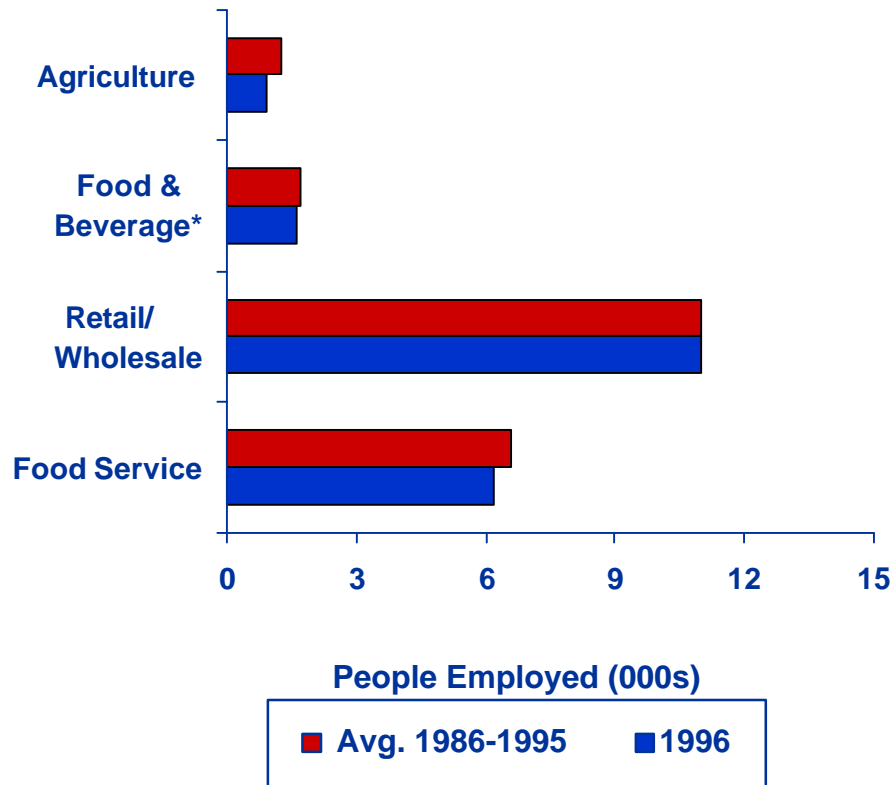


*Excludes fish processing.

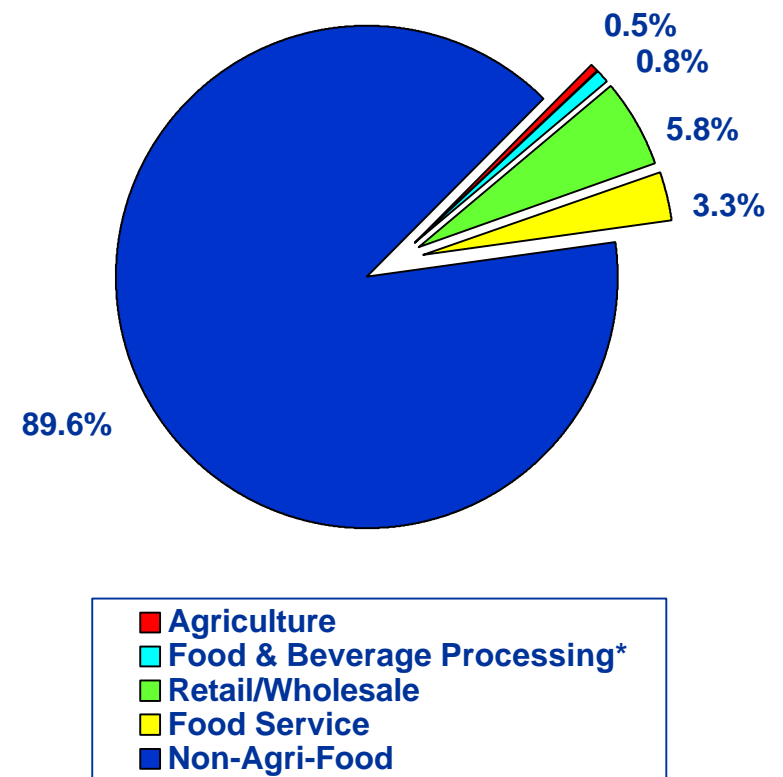
Source: Statistics Canada, Labour Force Survey.

Newfoundland Agri-Food System Employment

Employment Growth



Employment Share - 1996



*Excludes fish processing.

Source: Statistics Canada, Labour Force Survey.

Glossary of Terms

Agri-Food System

Includes the primary agriculture sector, the food & beverage & non-food processing sector, the distribution sector and the food services sector.

Agri-Food (Provincial & National GDP comparisons)

Includes agriculture and related service industries and food and beverage processing industries.

GDP (Gross Domestic Product)

Total value of final goods and services produced within a nation's border during a year.

PDI (Personal Disposable Income)

Personal income minus personal taxes. Disposable income is either spent on the consumption of goods and services or saved.

Canadian Agri-Food Trade

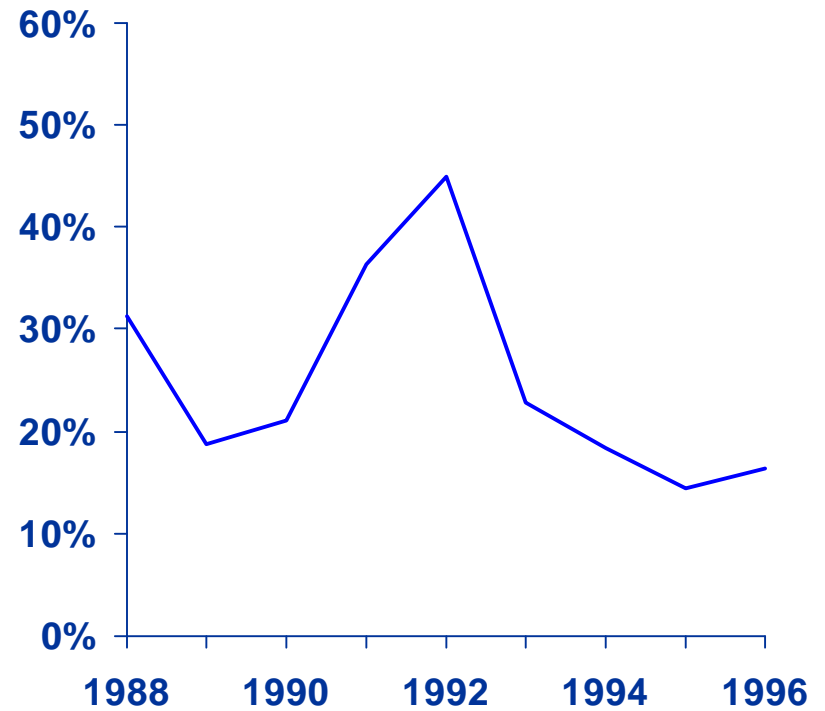
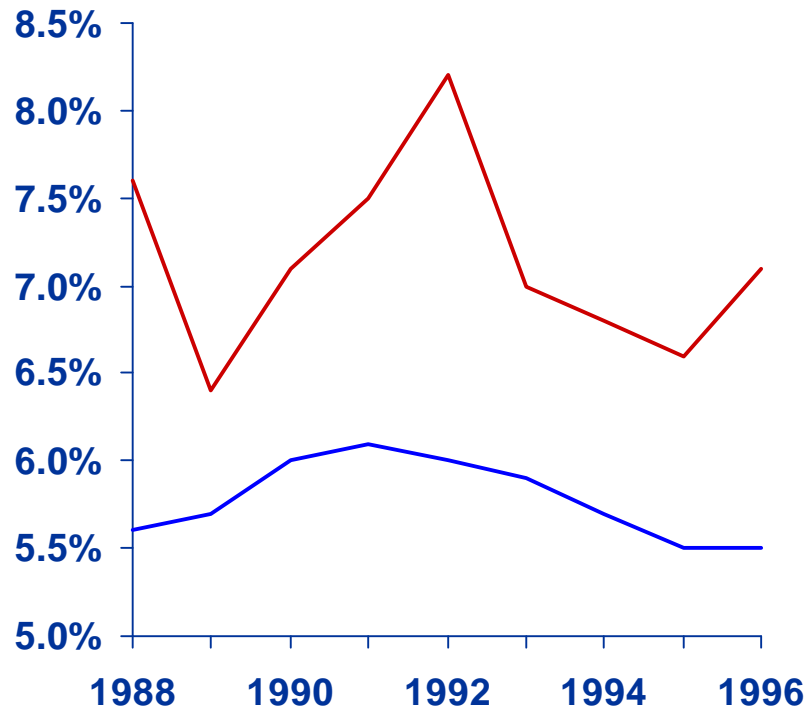
Canadian Agri-Food Share of Total Trade

Imports and Exports

Trade Balance

Percentage of Total Canadian Merchandise Trade

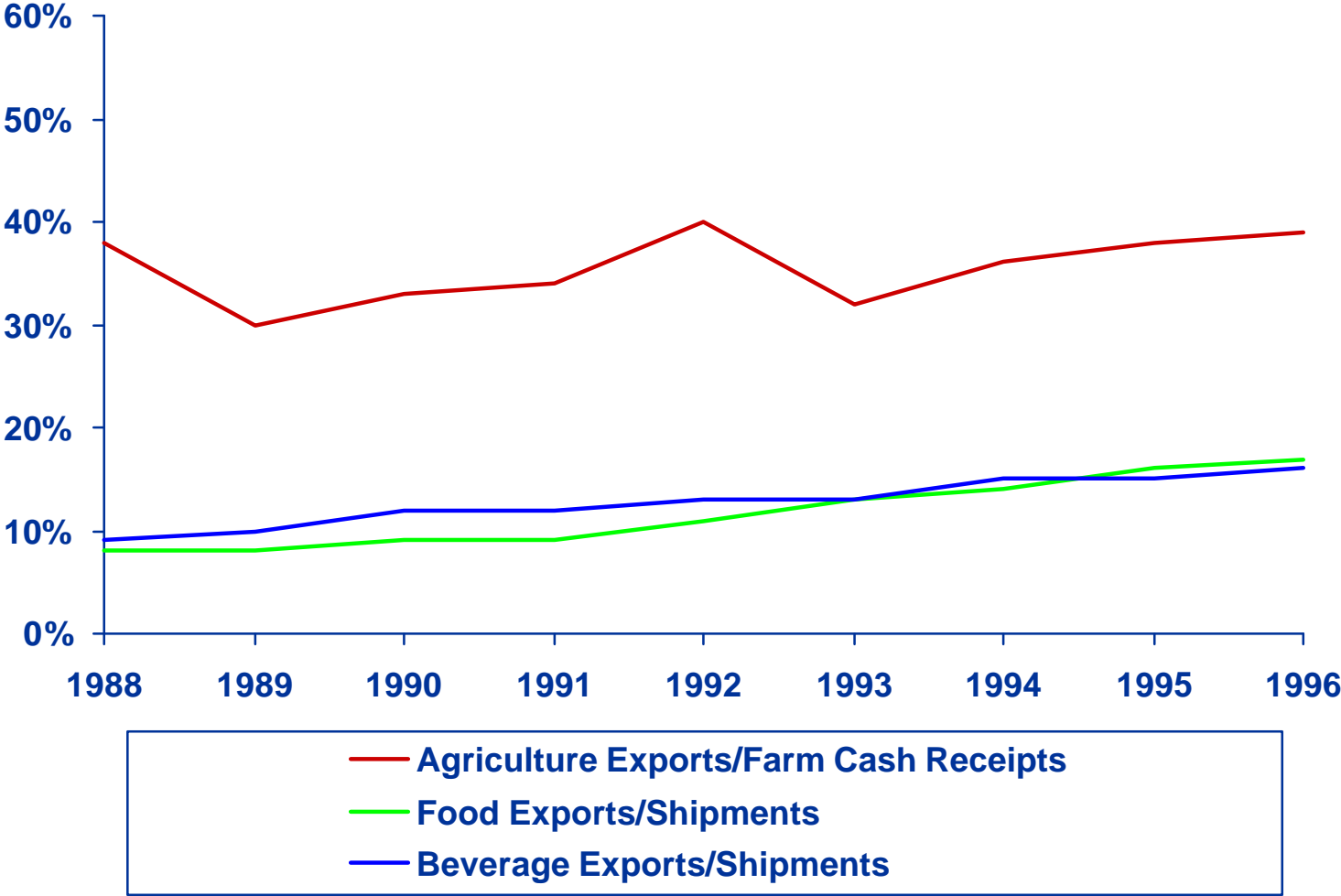
Percentage of Total Canadian Merchandise Trade



— Imports — Exports

Source: Statistics Canada, Cansim

Export Intensity



Source: AAFC Trade Database.

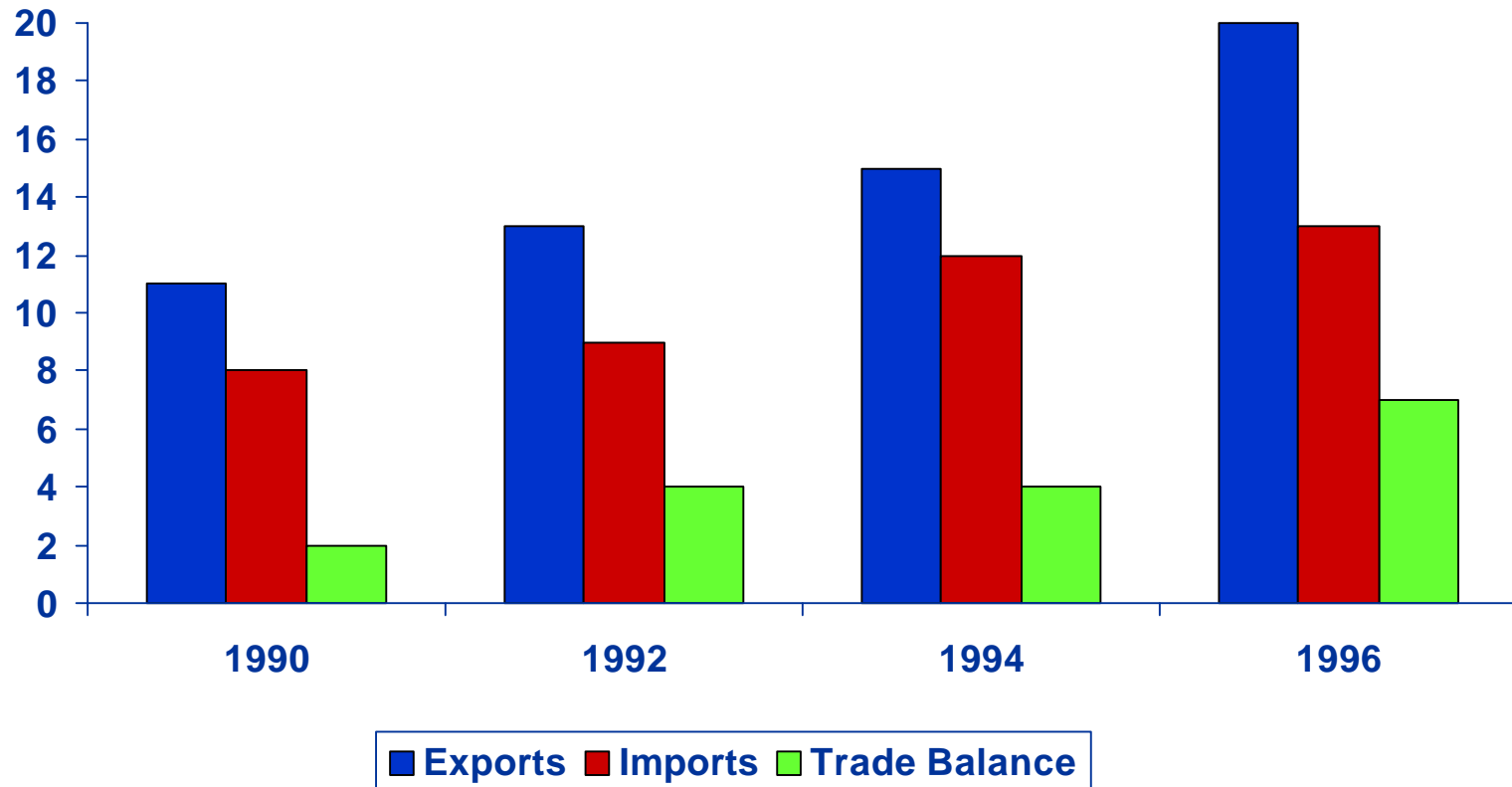
Graph 2-2

Graph 2-3

Canadian Agri-Food Trade

Total Trade

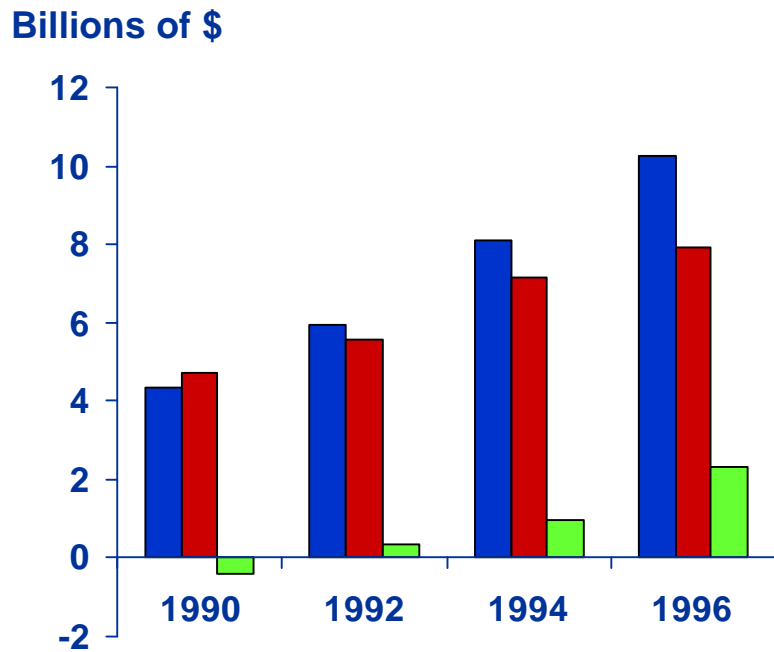
Billions of \$



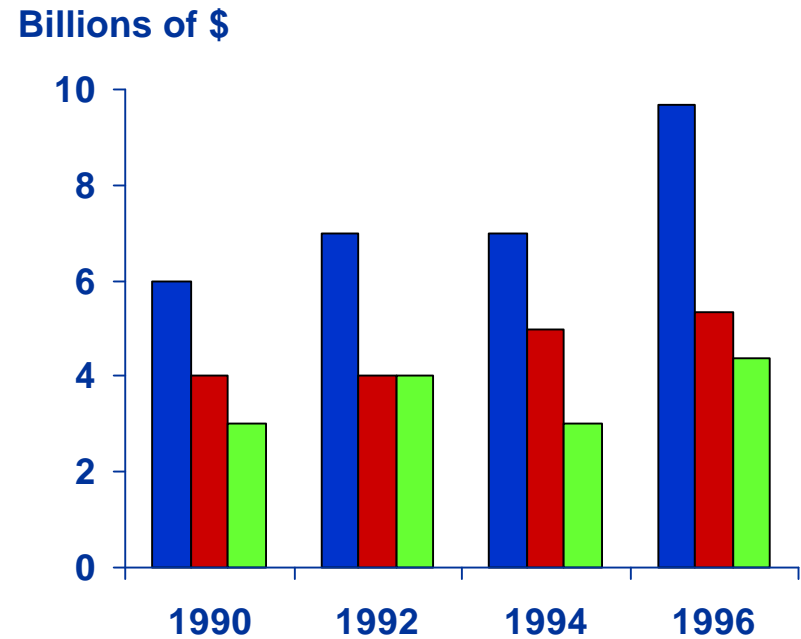
Source: AAFC Trade Database.

Canadian Agri-Food Trade

Trade with the US



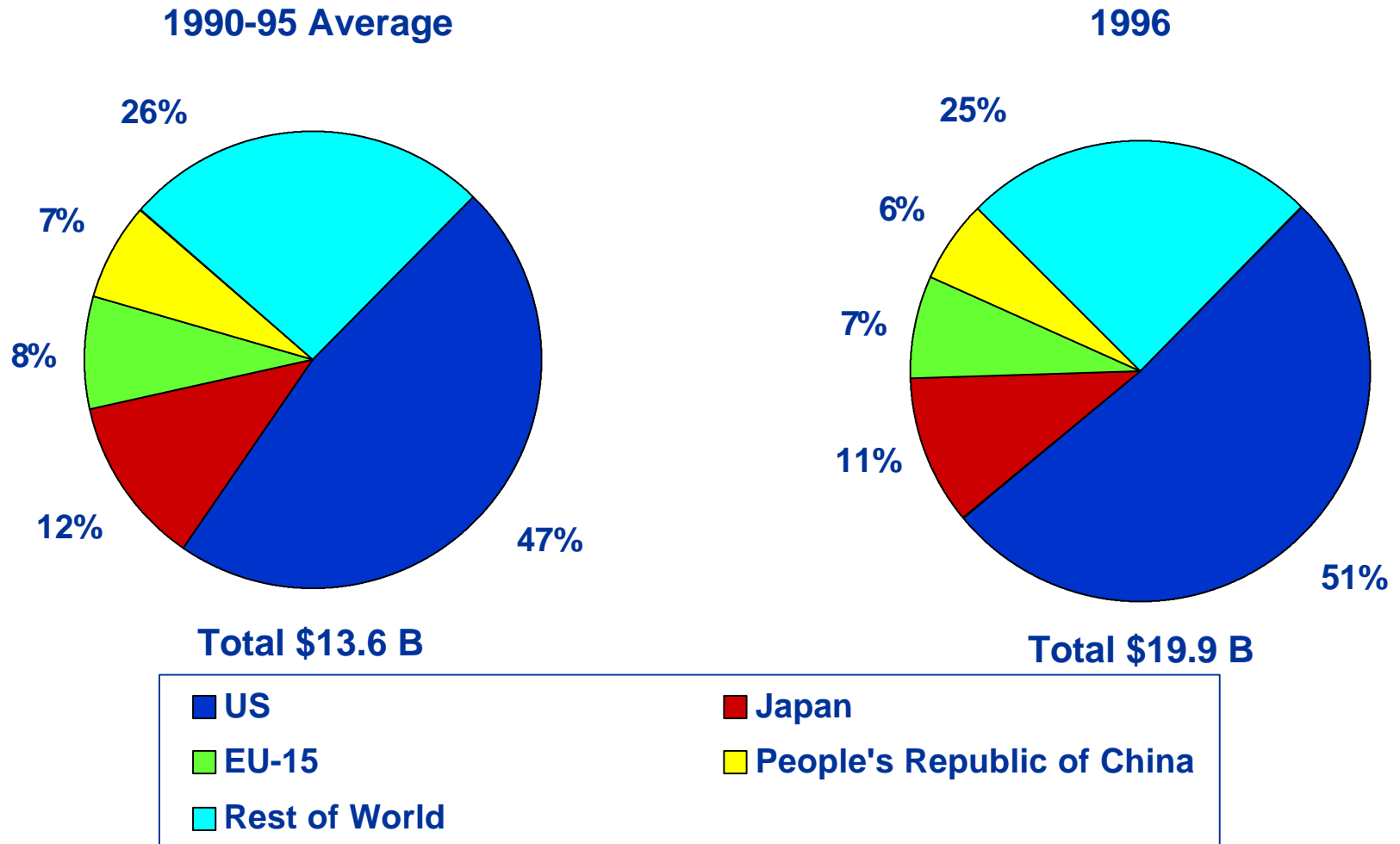
Trade with the Remainder of the World



Source: AAFC Trade Database.

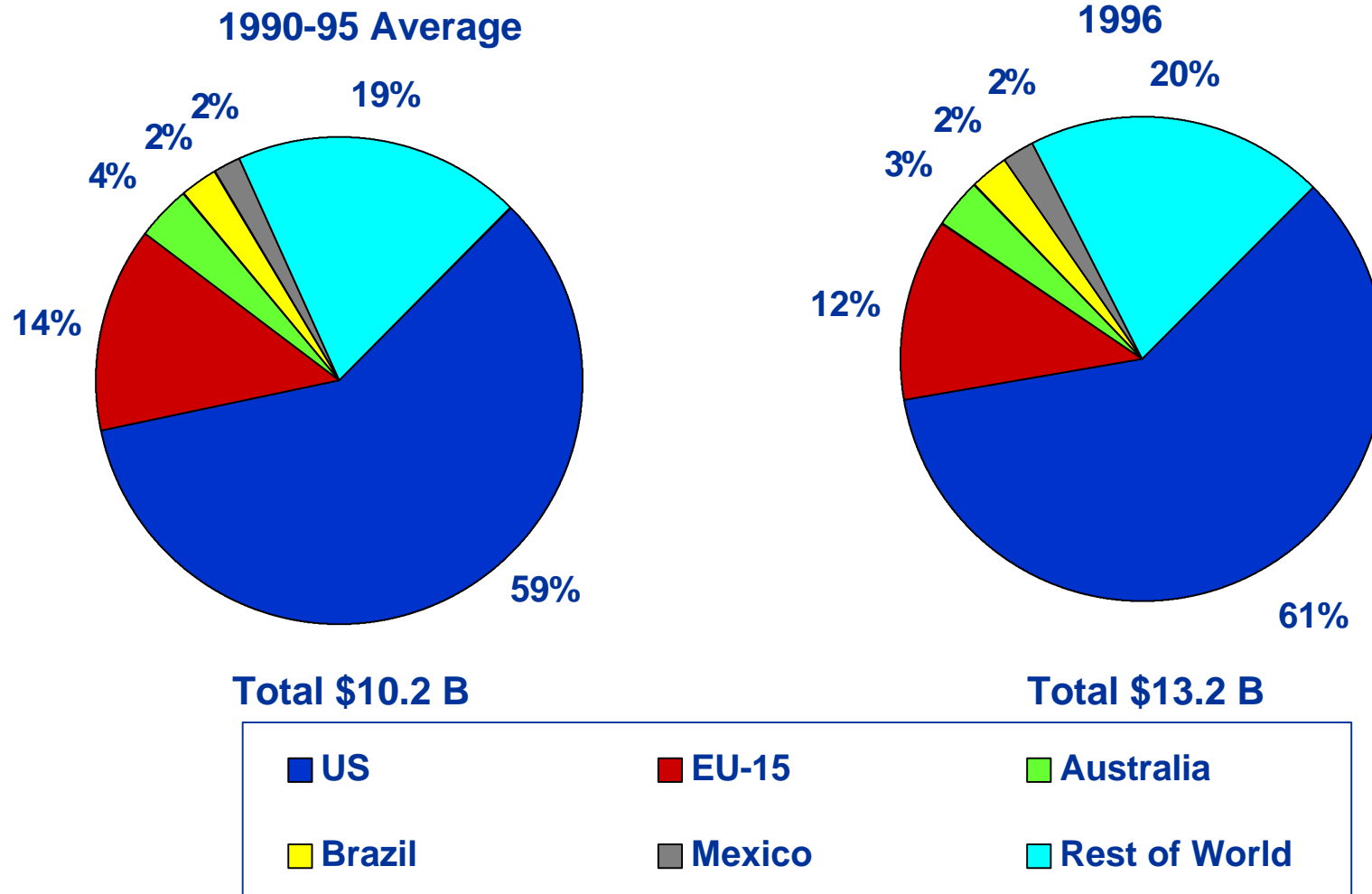
Graph 2-5

Canadian Agri-Food Exports by Destination



Source: AAFC Trade Database.

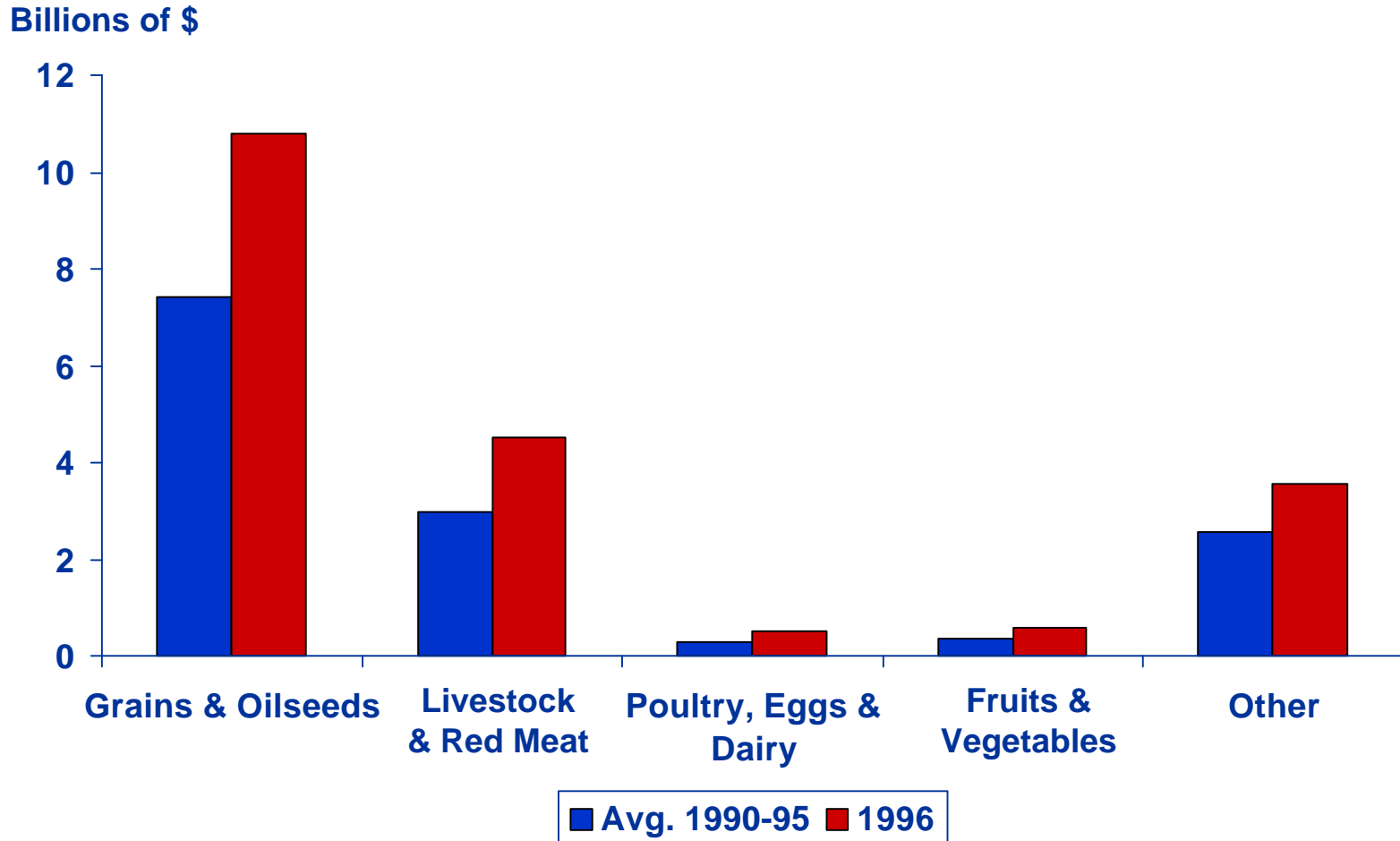
Canadian Agri-Food Imports by Country of Origin



Source: AAFC Trade Database.

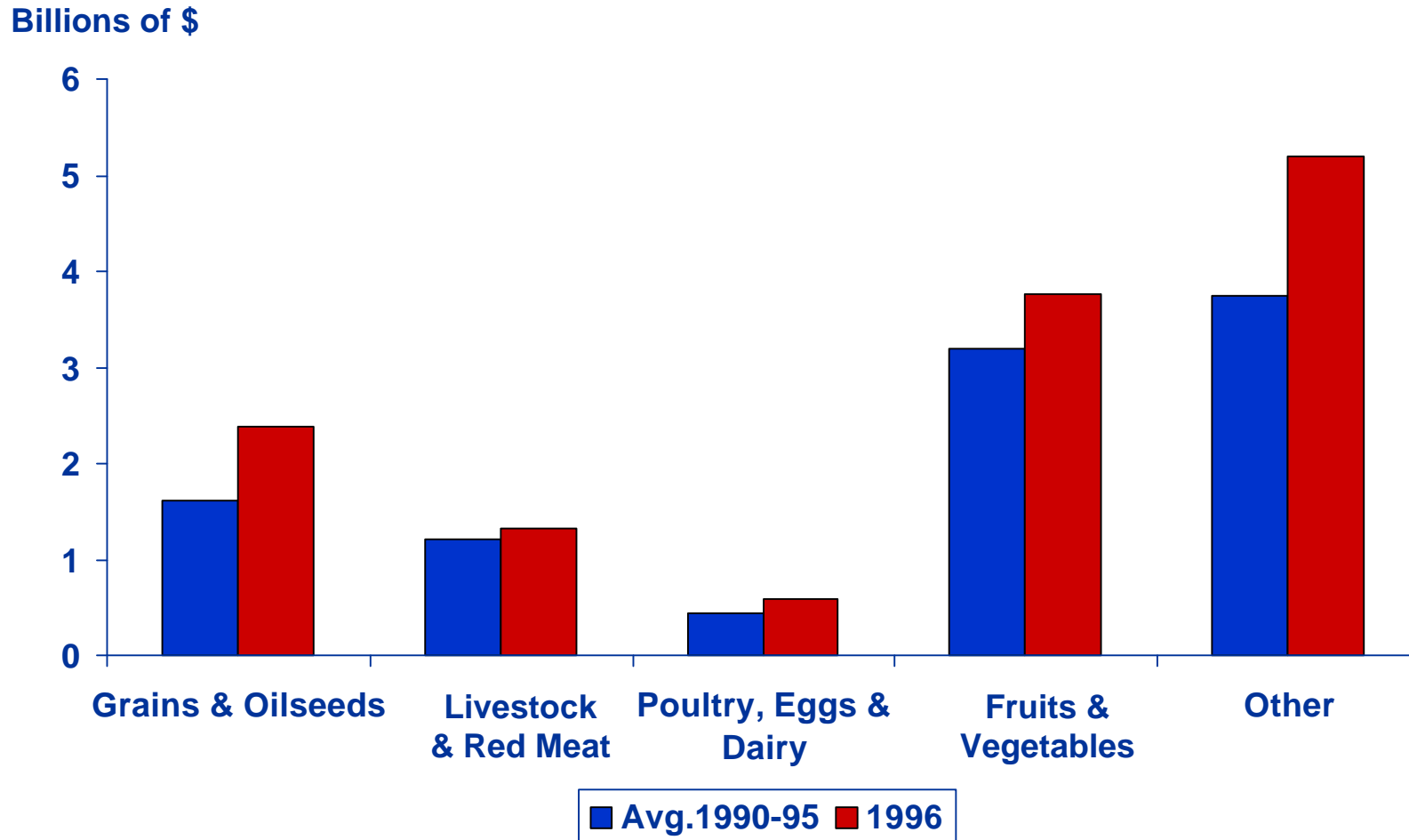
Graph 2-7

Canadian Agri-Food Exports by Commodity Group



Source: AAFC Trade Database.

Canadian Agri-Food Imports by Commodity Group

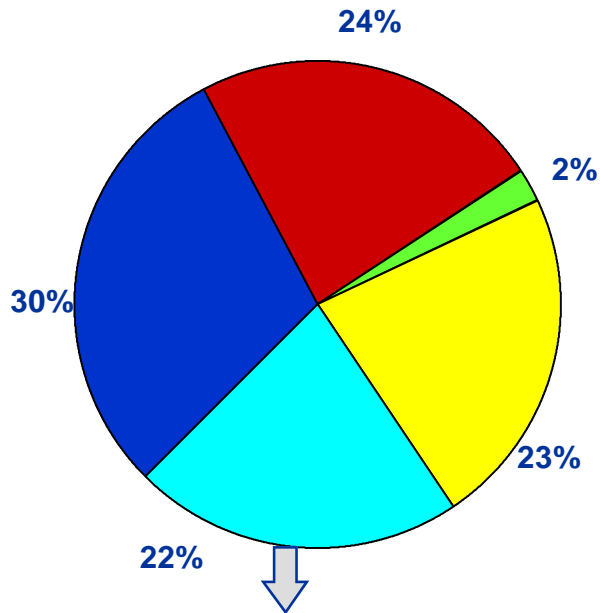


Source: AAFC Trade Database.

Graph 2-9

British Columbia Agri-Food Trade by Commodity Group, 1996

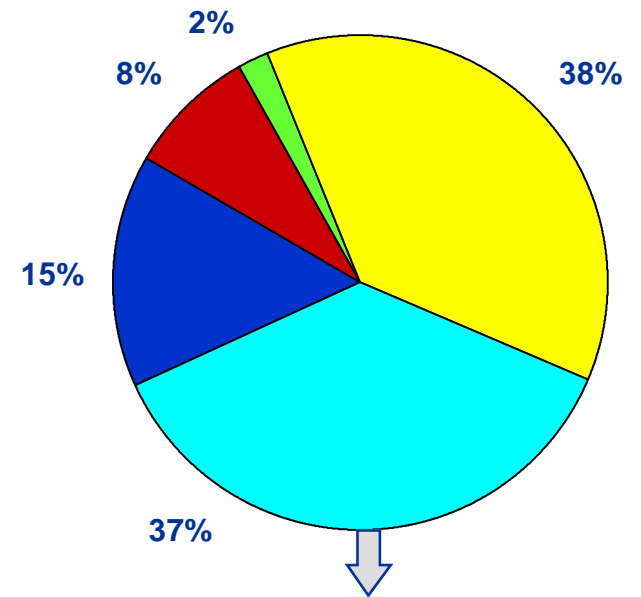
Exports
Total \$.9 B



Other

Bev.(Alc.& Non-Alc.)	45%
Other Agri-Food	24%
Floriculture & Nursery	17%
Remainder	14%

Imports
Total \$1.9 B



Other

Other Agri-Food	32%
Plantation Crops	22%
Bev.(Alc.& Non-Alc.)	21%
Sugar & Products	9%
Remainder	17%

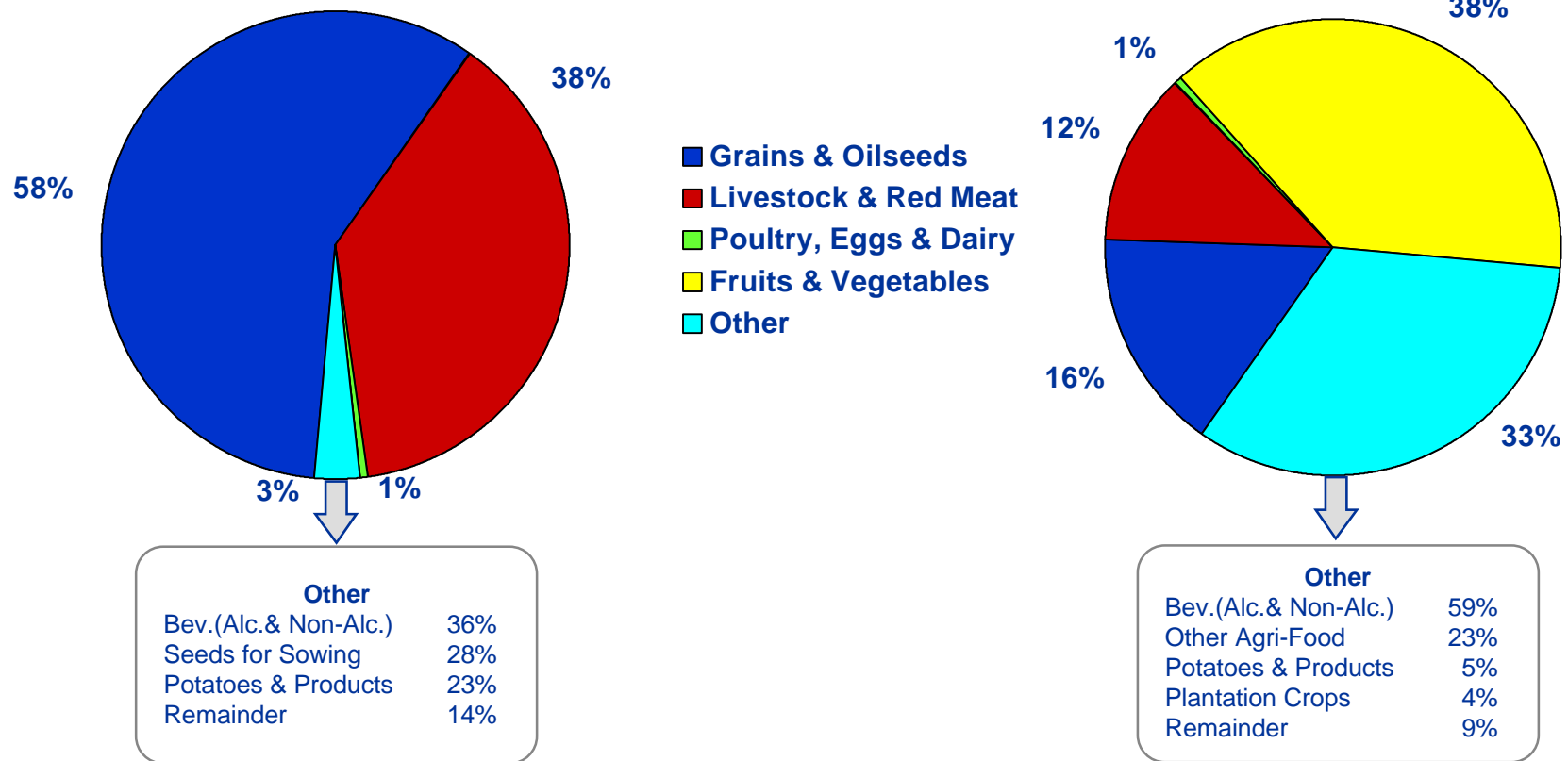
Source: AAFC Trade Database.

Alberta

Agri-Food Trade by Commodity Group, 1996

Exports
Total \$4.5 B

Imports
Total \$.6 B

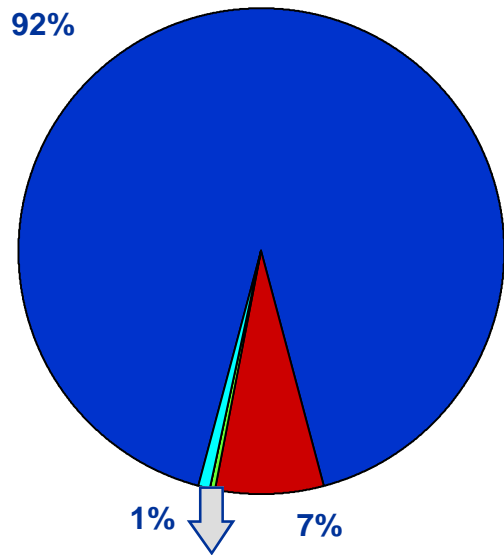


Source: AAFC Trade Database.

Graph 2-11

Saskatchewan Agri-Food Trade by Commodity Group, 1996

Exports
Total \$4.7 B

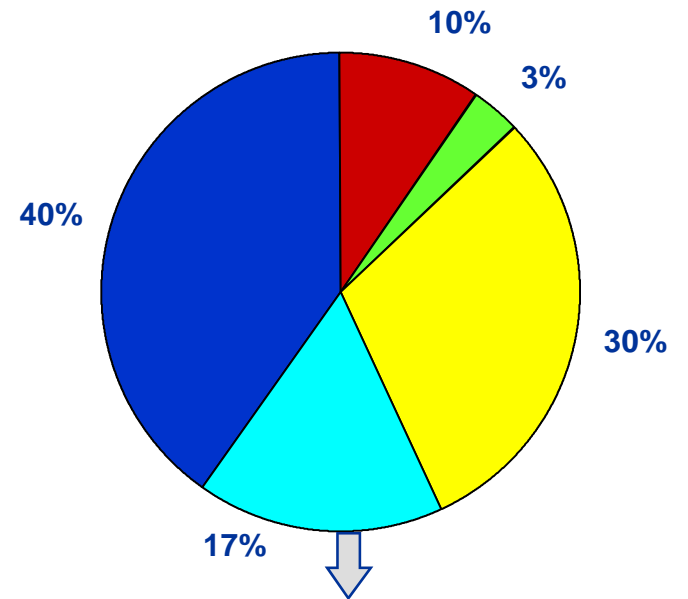


- Grains & Oilseeds
- Livestock & Red Meat
- Poultry, Eggs & Dairy
- Fruits & Vegetables
- Other

Other

Seeds for Sowing	54%
Other Agri-Food	34%
Potatoes & Products	10%
Remainder	2%

Imports
Total \$.2 B



Other

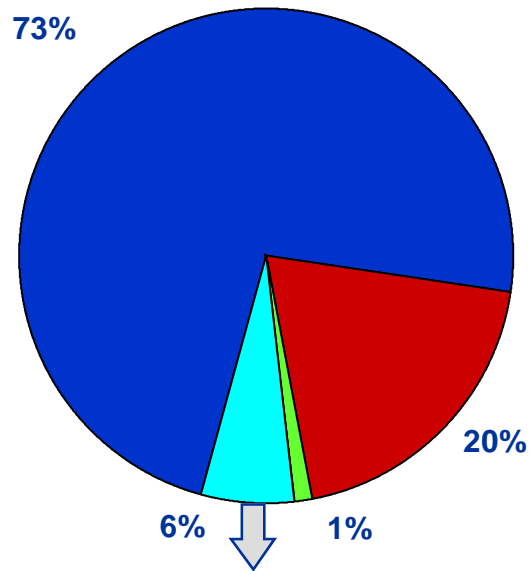
Bev.(Alc.& Non-Alc.)	39%
Other Agri-Food	39%
Sugar & Products	7%
Potatoes & Products	6%
Remainder	9%

Source: AAFC Trade Database.

Manitoba

Agri-Food Trade by Commodity Group, 1996

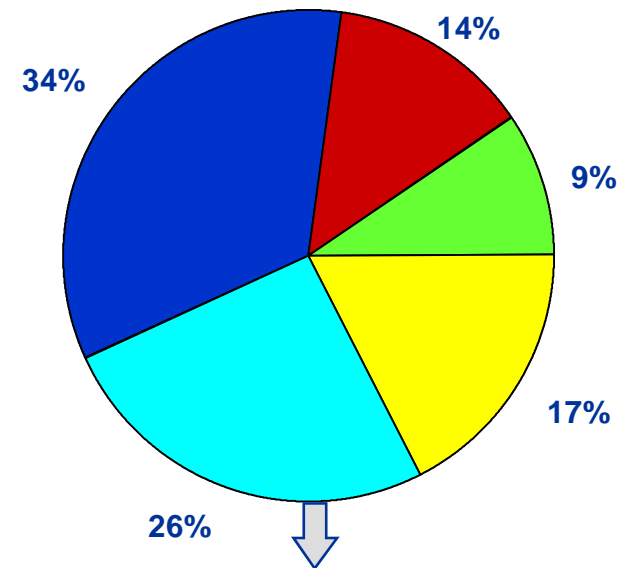
Exports
Total \$2.2 B



Other

Potatoes & Products	31%
Seeds for Sowing	24%
Vegetable Fibres	20%
Other Agri-Food	14%
Remainder	12%

Imports
Total \$0.5 B



Other

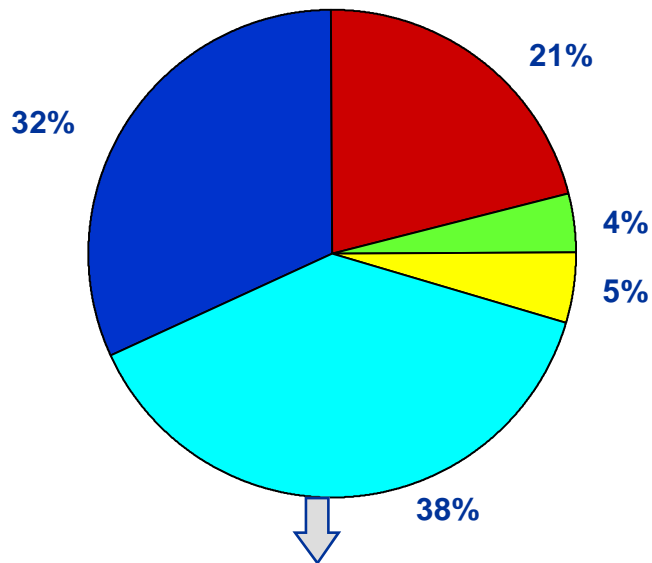
Other Agri-Food	44%
Bev. (Alc. & Non-Alc.)	17%
Manufactured Tobacco	9%
Floriculture & Nursery	8%
Potatoes & Products	8%
Remainder	13%

Source: AAFC Trade Database.

Graph 2-13

Ontario Agri-Food Trade by Commodity Group, 1996

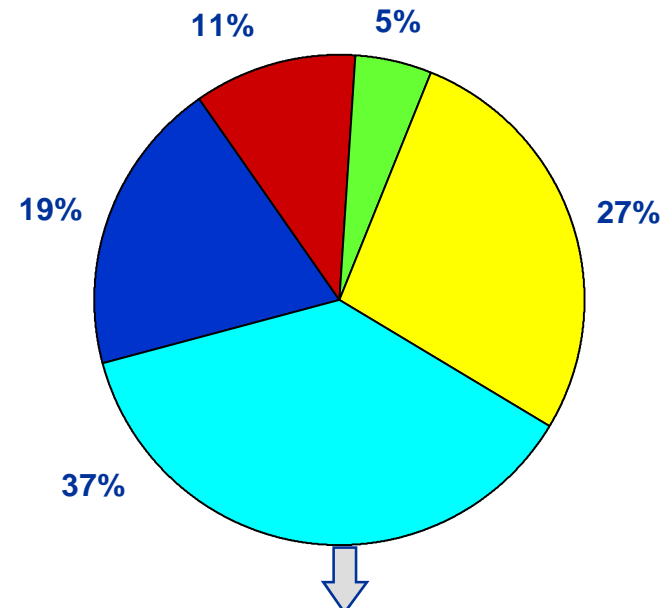
Exports
Total \$5.2 B



Other

Bev.(Alc.& Non-Alc.)	37%
Other Agri-Food	32%
Plantation Crops	9%
Tobacco Raw	7%
Floriculture & Nursery	7%
Remainder	8%

Imports
Total \$7.3 B



Other

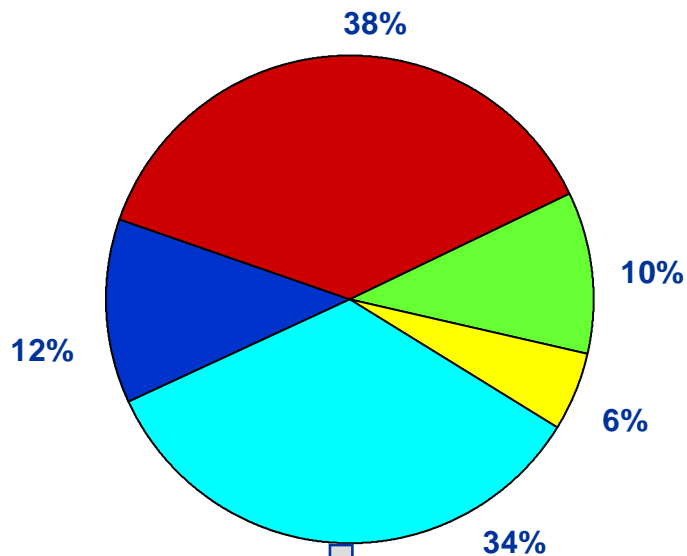
Other Agri-Food	38%
Plantation Crops	22%
Bev.(Alc.& Non-Alc.)	16%
Sugar & Products	7%
Floriculture & Nursery	5%
Remainder	12%

Source: AAFC Trade Database.

Quebec

Agri-Food Trade by Commodity Group, 1996

Exports
Total \$1.9 B

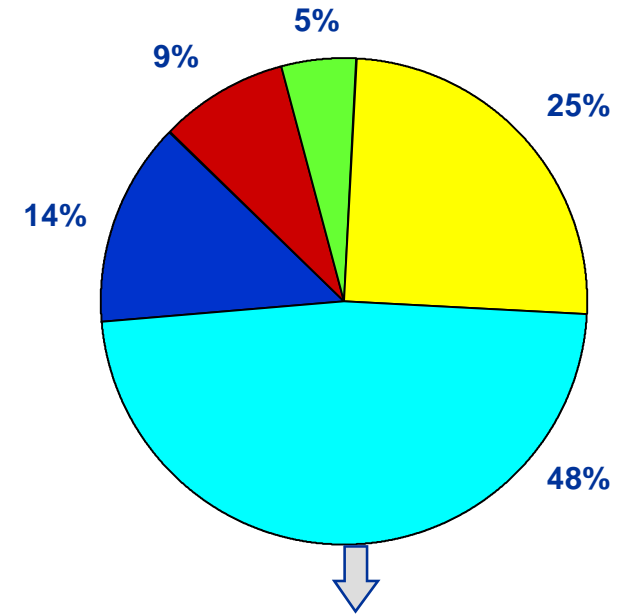


- Grains & Oilseeds
- Livestock & Red Meat
- Poultry, Eggs & Dairy
- Fruits & Vegetables
- Other

Other

Bev. (Alc. & Non-Alc.)	32%
Other Agri-Food	21%
Plantation Crops	16%
Maple Products	14%
Manufactured Tobacco	9%
Remainder	8%

Imports
Total \$2.2 B



Other

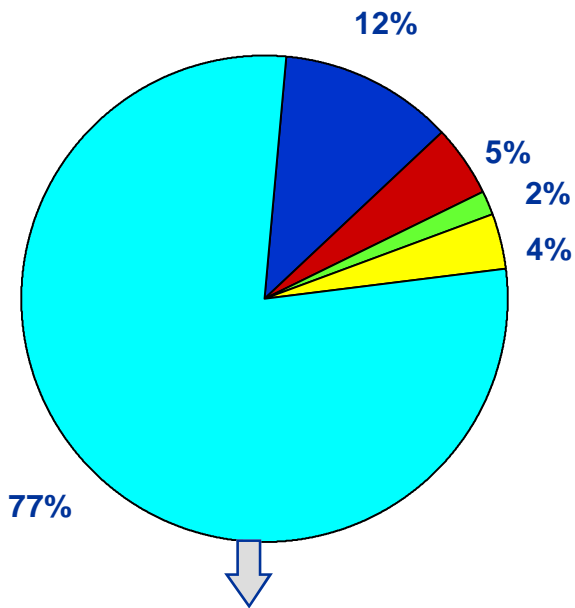
Plantation Crops	32%
Bev. (Alc. & Non-Alc.)	24%
Sugar & Products	17%
Other Agri-Food	13%
Vegetable Fibres	7%
Remainder	7%

Source: AAFC Trade Database.

Graph 2-15

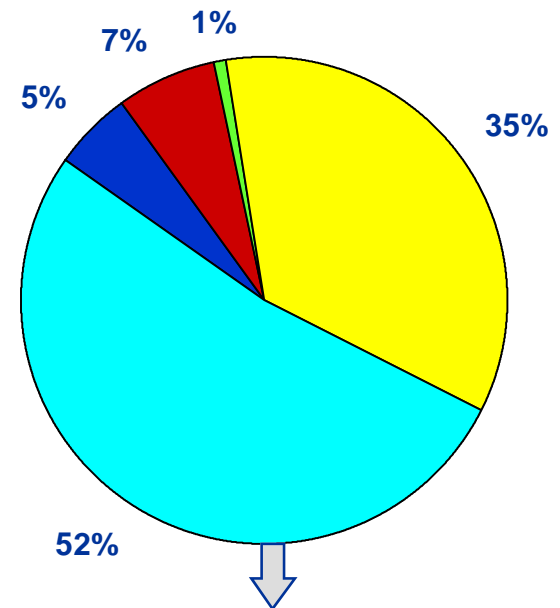
New Brunswick Agri-Food Trade by Commodity Group, 1996

Exports
Total \$.3 B



Other	
Potatoes & Products	74%
Bev. (Alc. & Non-Alc.)	16%
Remainder	9%

Imports
Total \$.3 B

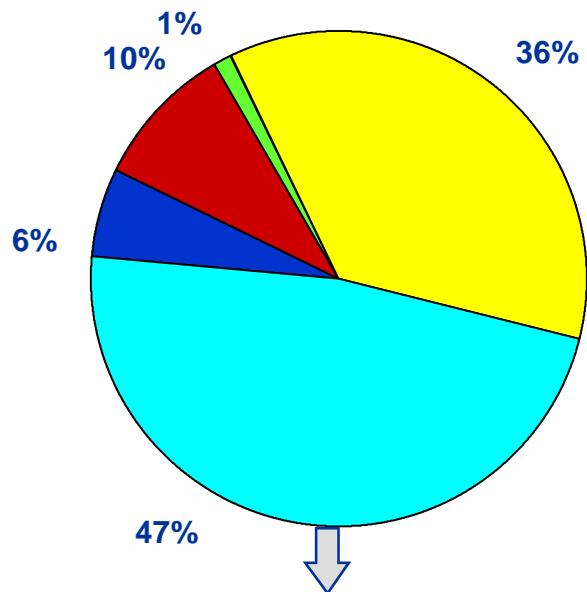


Other	
Sugar & Products	67%
Plantation Crops	17%
Remainder	17%

Source: AAFC Trade Database.

Nova Scotia Agri-Food Trade by Commodity Group, 1996

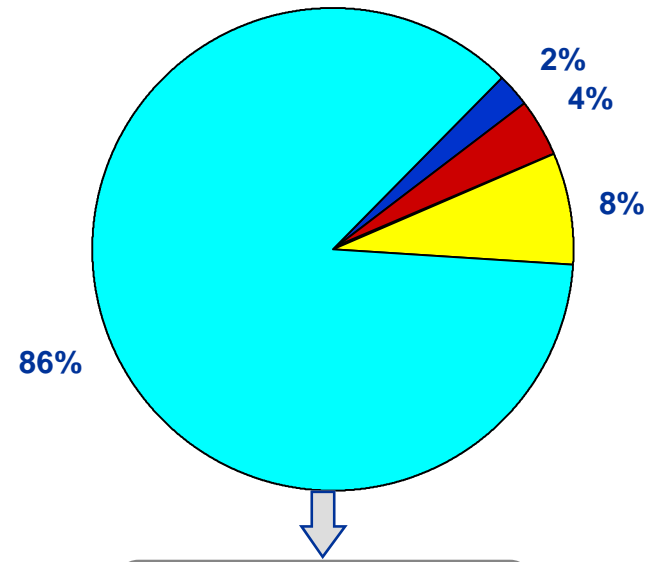
**Exports
Total \$.1 B**



Other	
Other Agri-Food	73%
Floriculture & Nursery	24%
Remainder	3%

- Grains & Oilseeds
- Livestock & Red Meat
- Poultry, Eggs & Dairy
- Fruits & Vegetables
- Other

**Imports
Total \$.2 B**



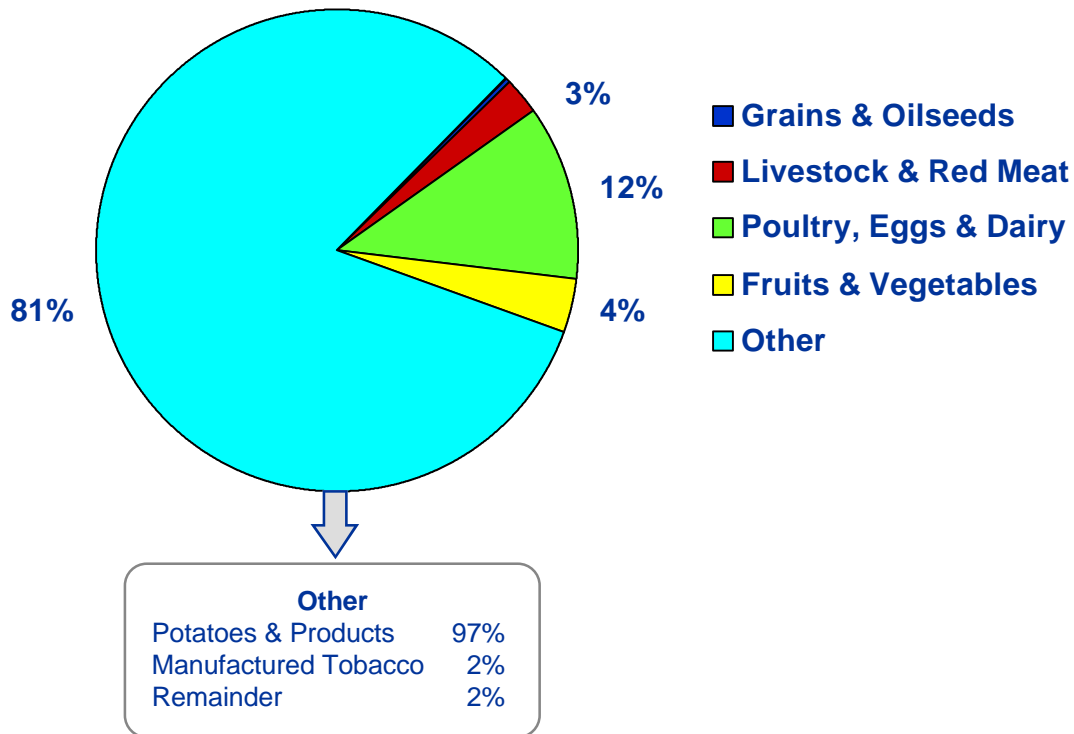
Other	
Plantation Crops	90%
Bev. (Alc. & Non-Alc.)	6%
Remainder	4%

Source: AAFC Trade Database.

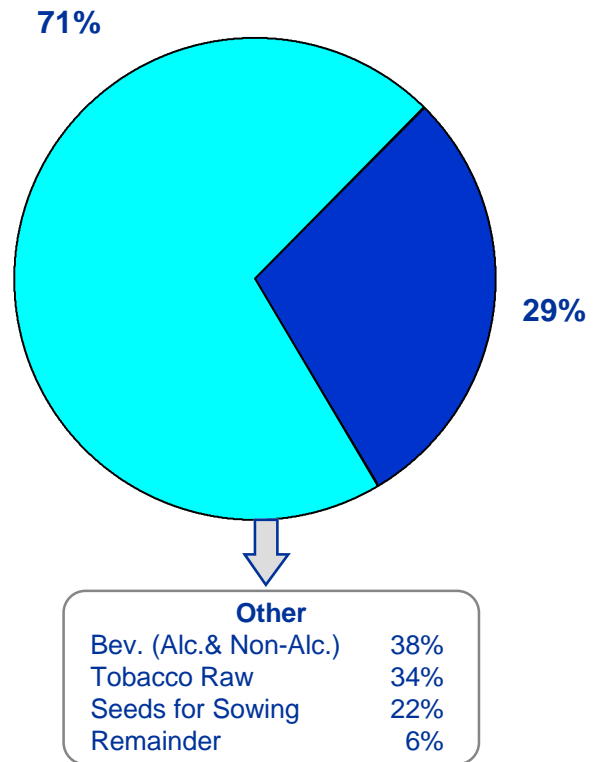
Graph 2-17

Prince Edward Island Agri-Food Trade by Commodity Group, 1996

Exports
Total \$.1 B



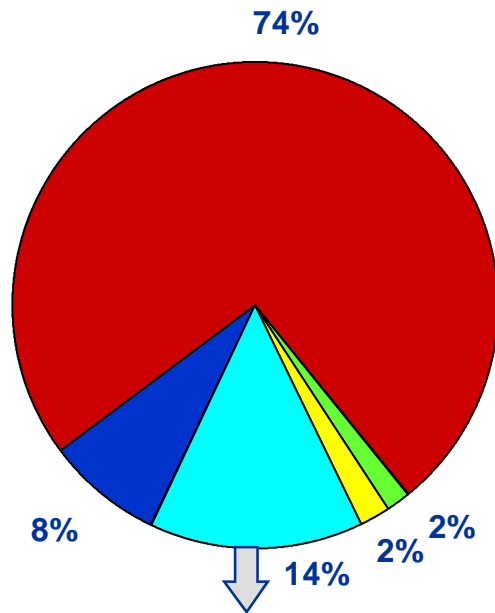
Imports
Total \$.003 B



Source: AAFC Trade Database.

Newfoundland Agri-Food Trade by Commodity Group, 1996

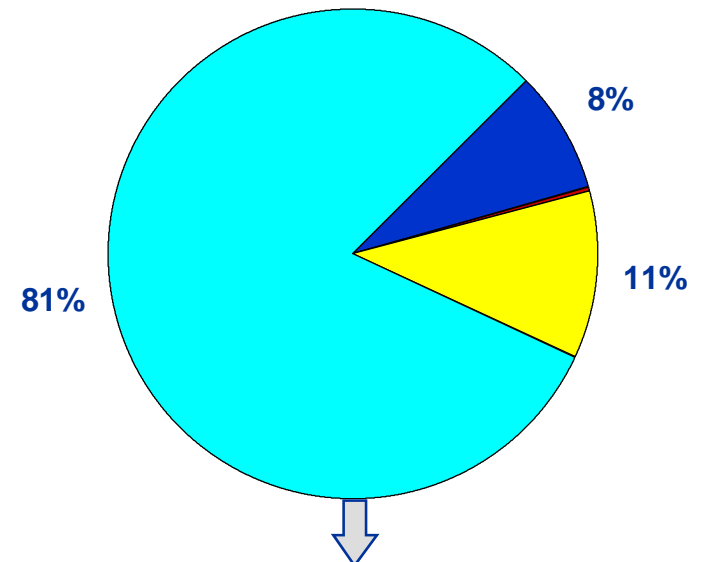
Exports
Total \$.003 B



Other	
Bev. (Alc.& Non-Alc.)	59%
Other Agri-Food	39%
Manufactured Tobacco	2%

- Grains & Oilseeds
- Livestock & Red Meat
- Poultry, Eggs & Dairy
- Fruits & Vegetables
- Other

Imports
Total \$.02 B



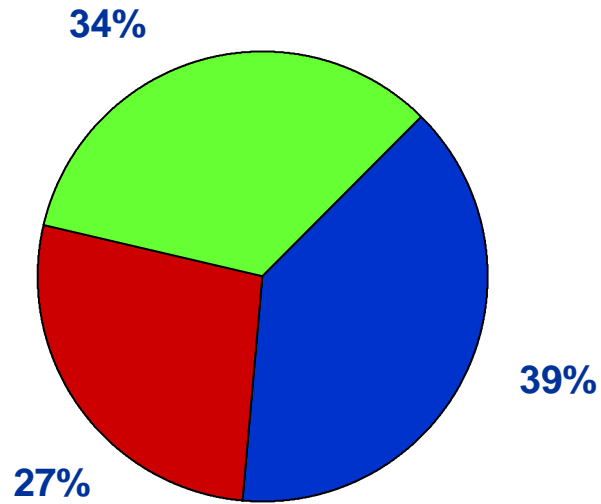
Other	
Bev. (Alc.& Non-Alc.)	53%
Plantation Crops	41%
Remainder	6%

Source: AAFC Trade Database.

Graph 2-19

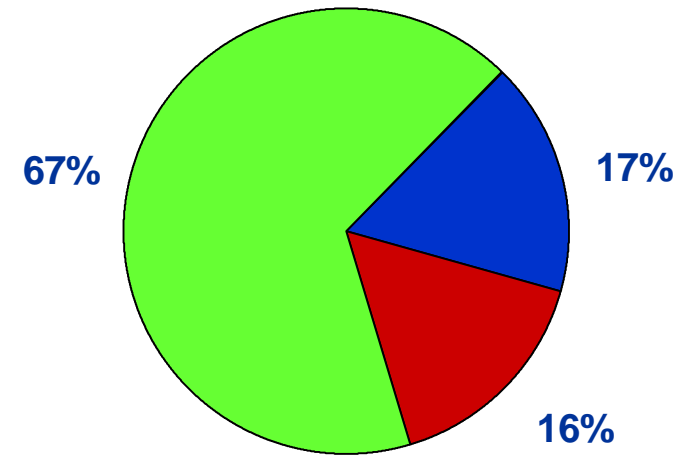
Canadian Agri-Food Trade by Degree of Processing, 1996

Exports



Total \$19.9 B

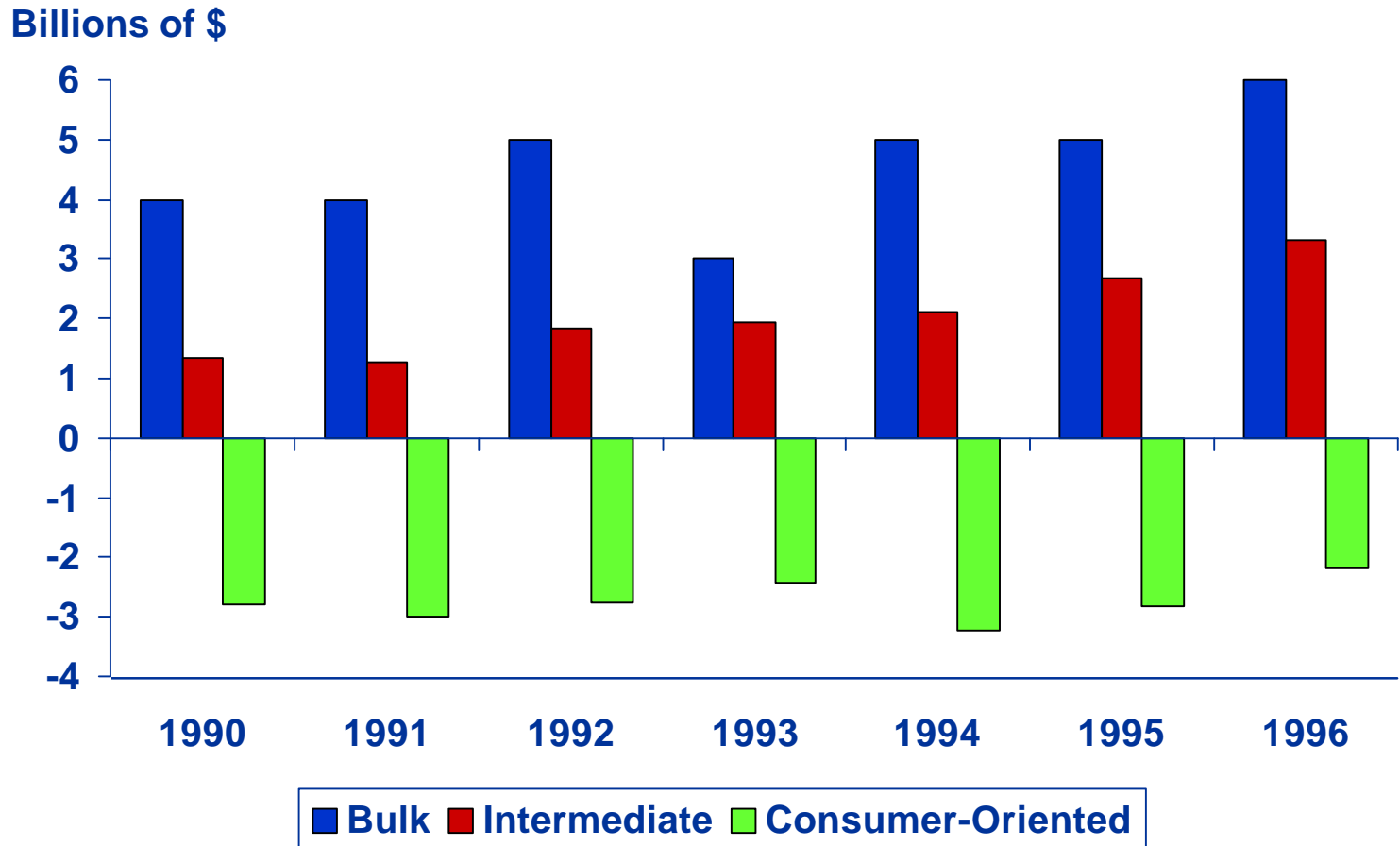
Imports



Total \$13.2 B

■ Bulk ■ Intermediate ■ Consumer-Oriented

Canadian Agri-Food Trade Balance by Degree of Processing, 1996



Source: AAFC Trade Database.

Glossary of Terms

Trade Balance

Exports less imports

Other Commodity Group

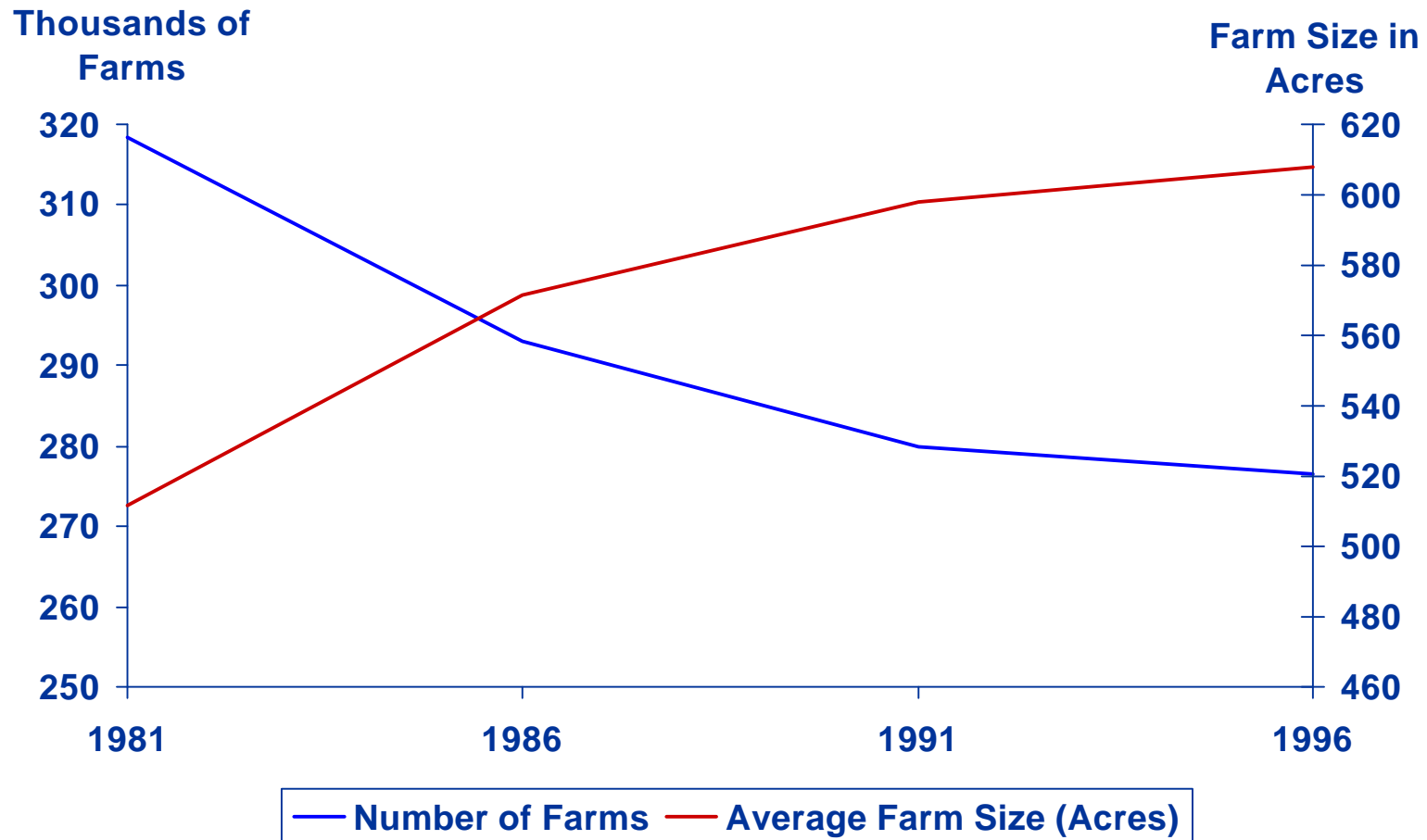
Includes potatoes & products, seeds for sowing, maple products, sugar & products, raw tobacco, vegetable fibres, plantation crops, floriculture & nursery products, essential oils, other agri-food products, alcoholic beverages, other beverages excluding juices, manufactured tobacco products, undenatured ethyl alcohol >80% vol.

Export Intensity

The value of agri-food exports as a percentage of total value received from the production of the agri-food products.

Agriculture Structure and Performance

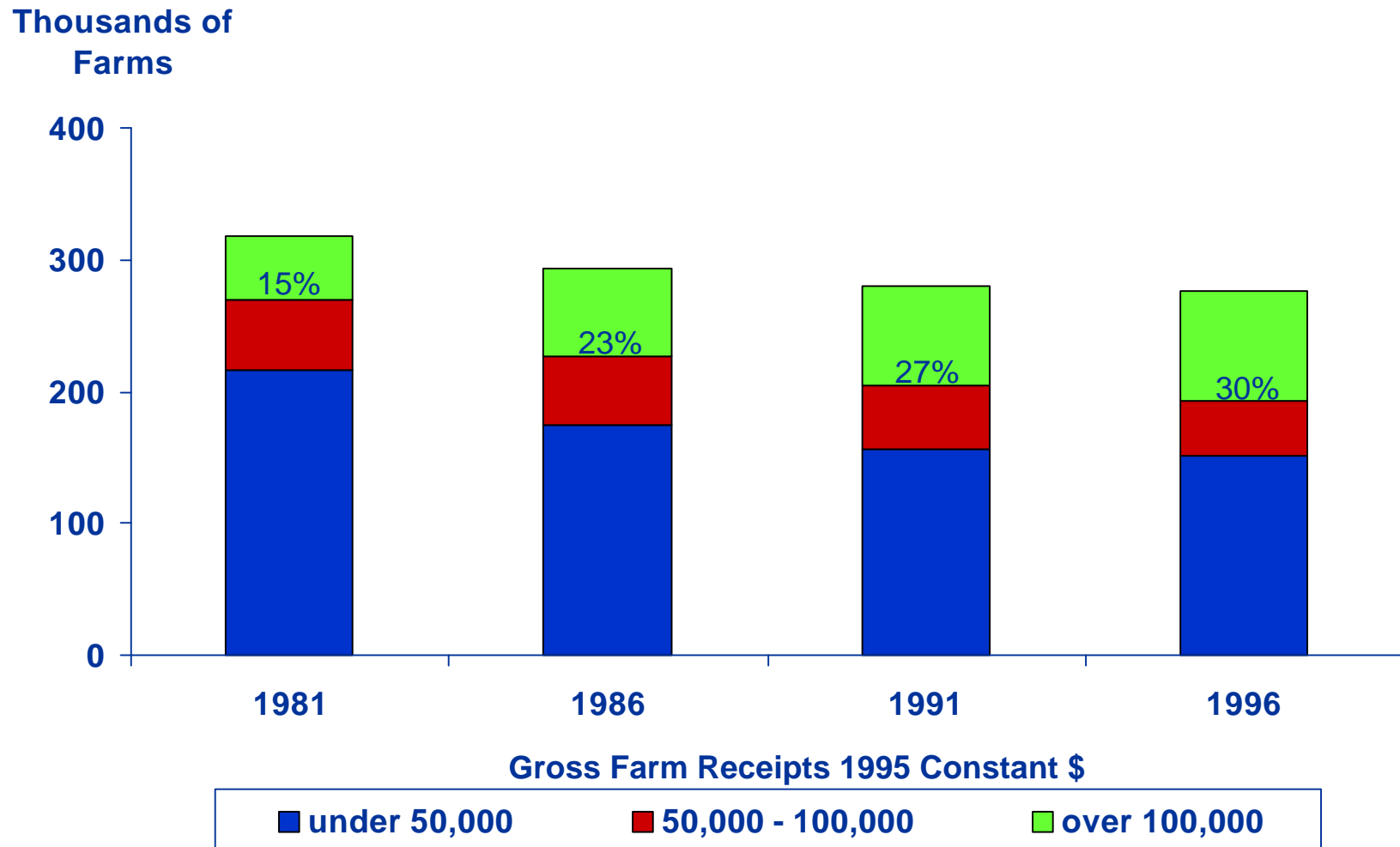
Number and Size of Farms



Source: Statistics Canada, Historical Overview of Canadian Agriculture.

Graph 3-1

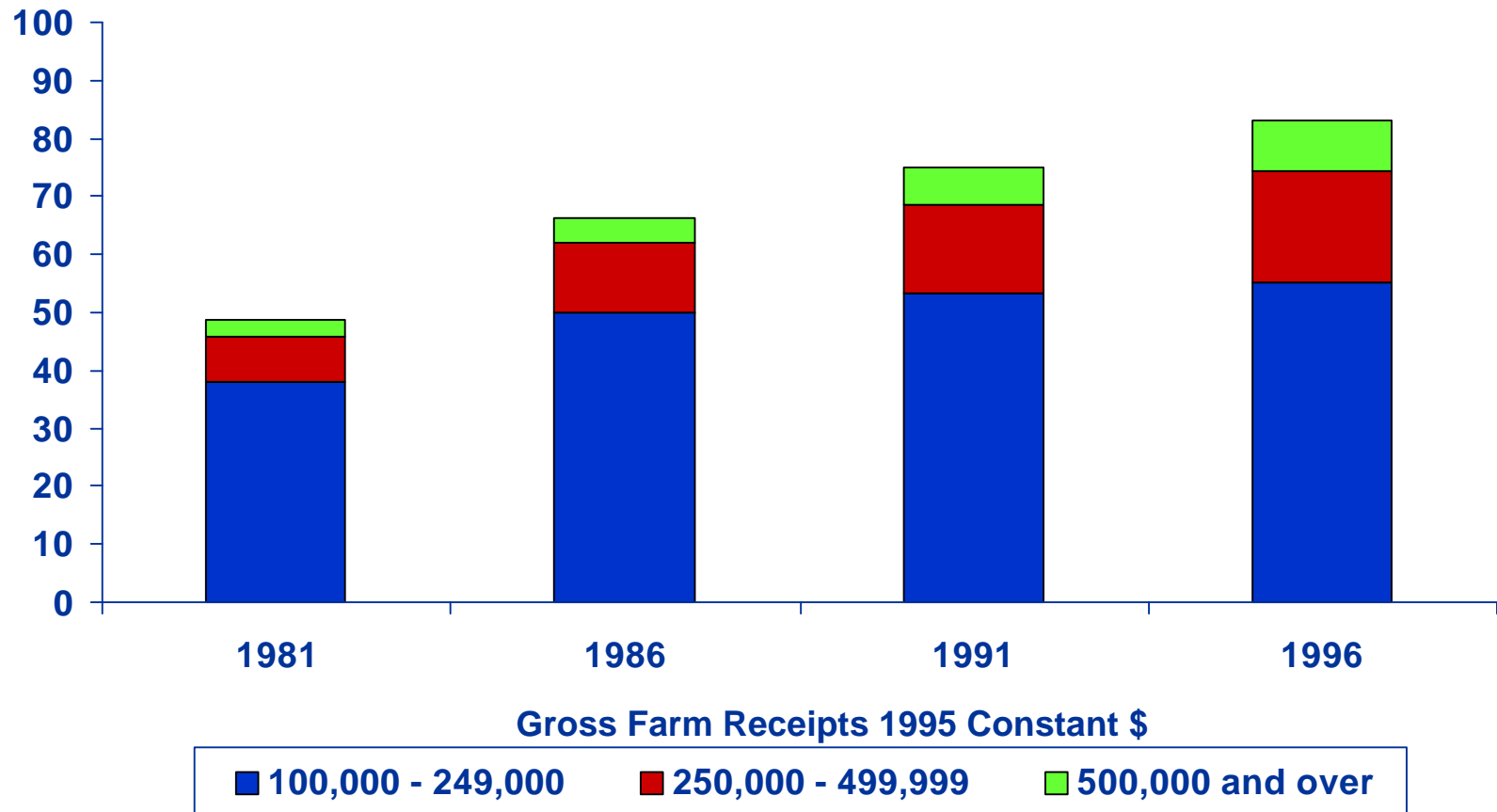
Number of Farms by Revenue Class



Source: Statistics Canada, Historical Overview of Canadian Agriculture.

Number of Large Farms by Revenue Class

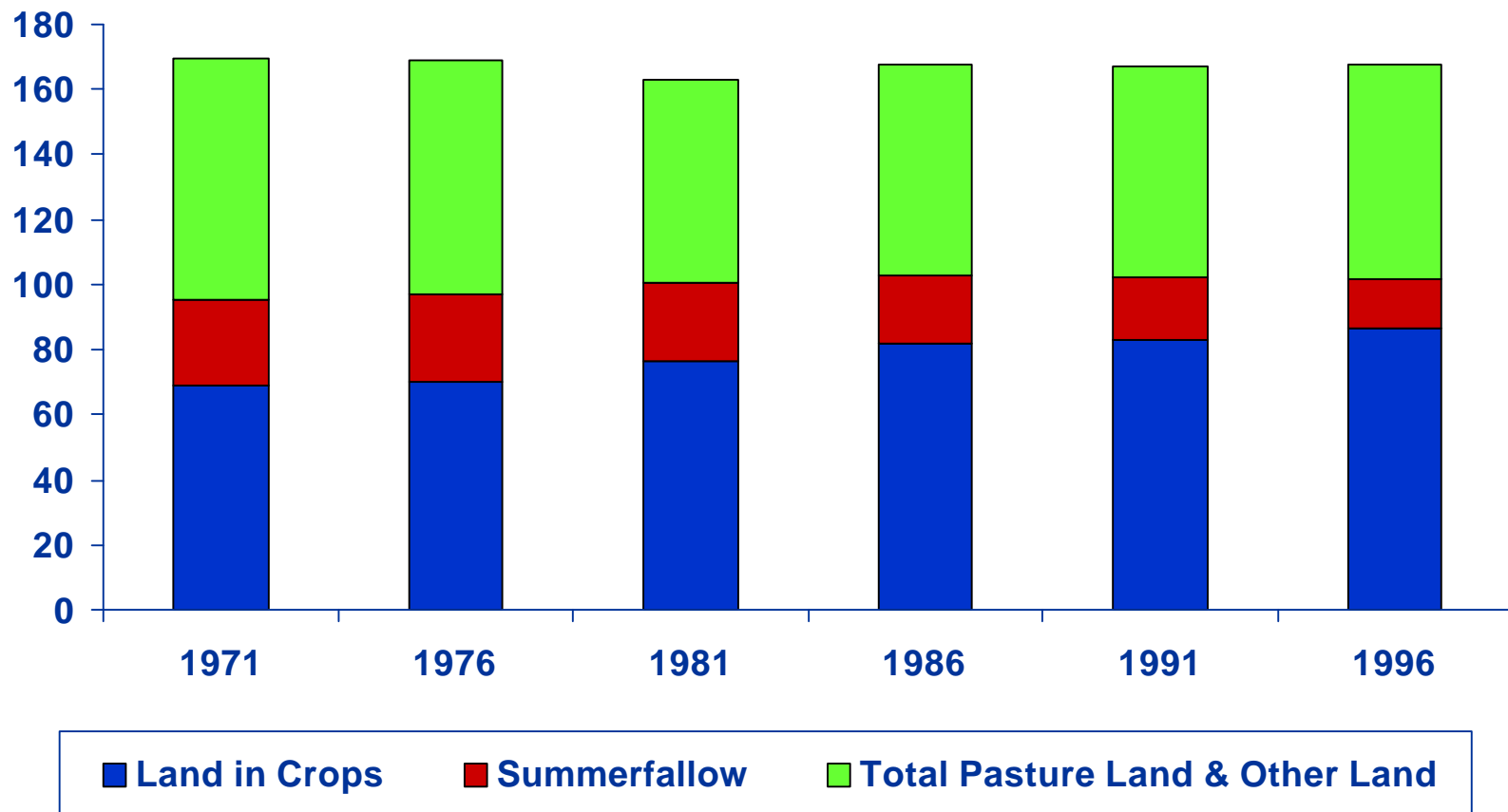
Thousands of
Farms



Source: Statistics Canada, Historical Overview of Canadian Agriculture.

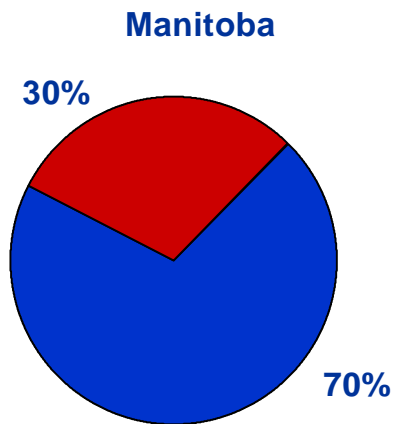
Use of Farm Land in Canada

Millions of Acres

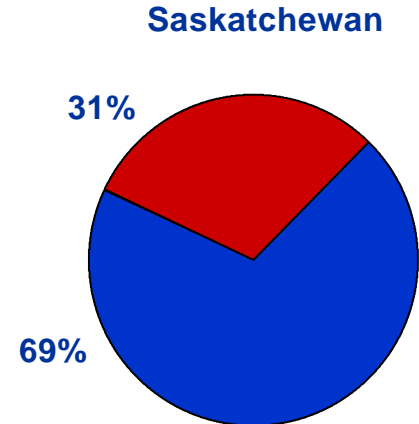


Sources: Statistics Canada - Census Overview of Canadian Agriculture: 1971-1991, 1996 Census of Agriculture National and Provincial Highlights

Western Canada: Land Use, 1996

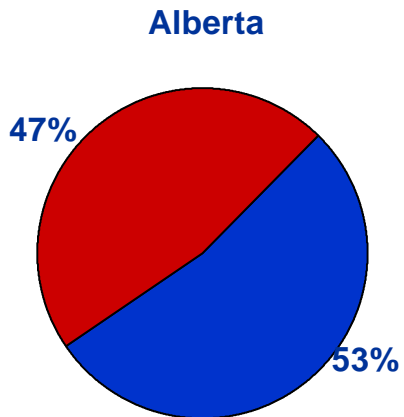


19,103,506 acres of farm land
11% of Canadian farm land

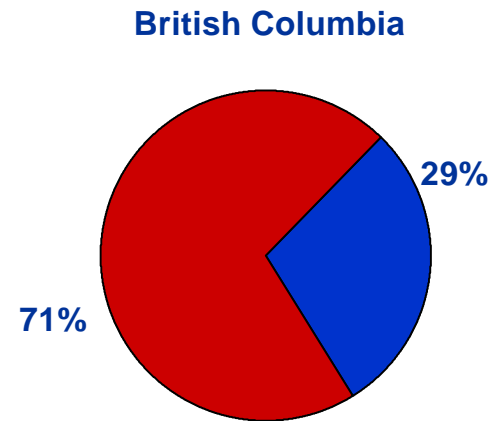


65,652,845 acres of farm land
39% of Canadian farm land

■ Land In Crops ■ Pasture Land



51,962,952 acres of farm land
31% of Canadian farm land

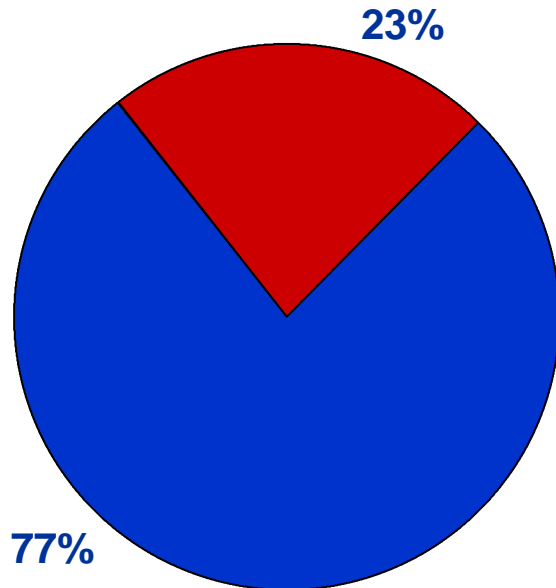


6,228,997 acres of farm land
3.7% of Canadian farm land

Source: Statistics Canada, 1996 Census of Agriculture National and Provincial Highlights.

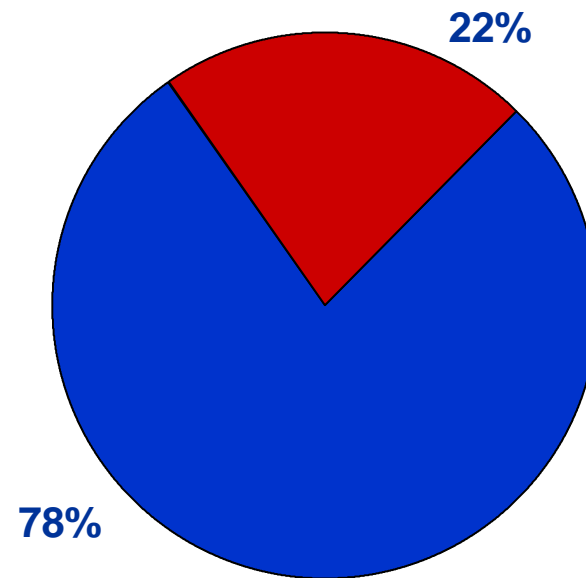
Central Canada: Land Use, 1996

Quebec



8,480,403 acres of farm land
5.0% of Canadian farm land

Ontario



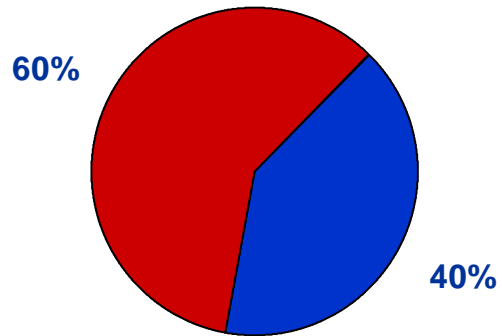
13,846,270 acres of farm land
8.2% of Canadian farm land

■ Land In Crops ■ Pasture Land

Source: Statistics Canada, 1996 Census of Agriculture National and Provincial Highlights.

Atlantic Canada: Land Use, 1996

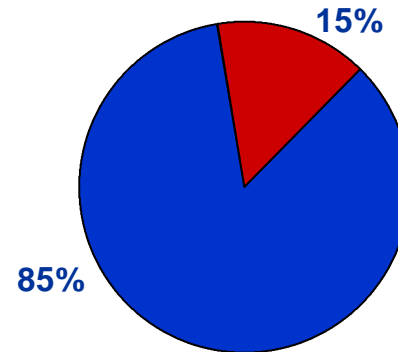
Newfoundland



107,709 acres of farm land
0.06% of Canadian farm land

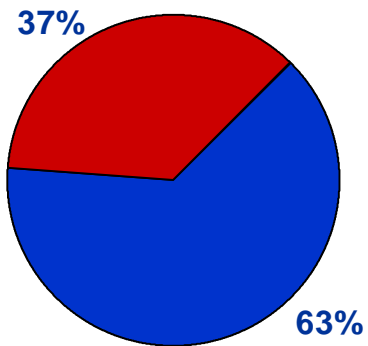
■ Land In Crops ■ Pasture Land

Prince Edward Island



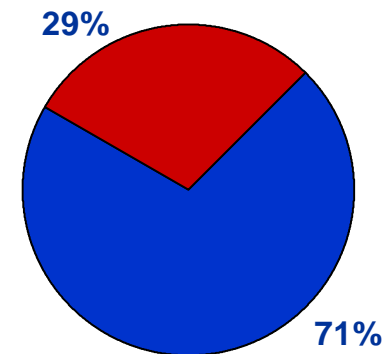
654,374 acres of farm land
0.39% of Canadian farm land

Nova Scotia



969,815 acres of farm land
0.58% of Canadian farm land

New Brunswick



930,067 acres of farm land
0.55% of Canadian farm land

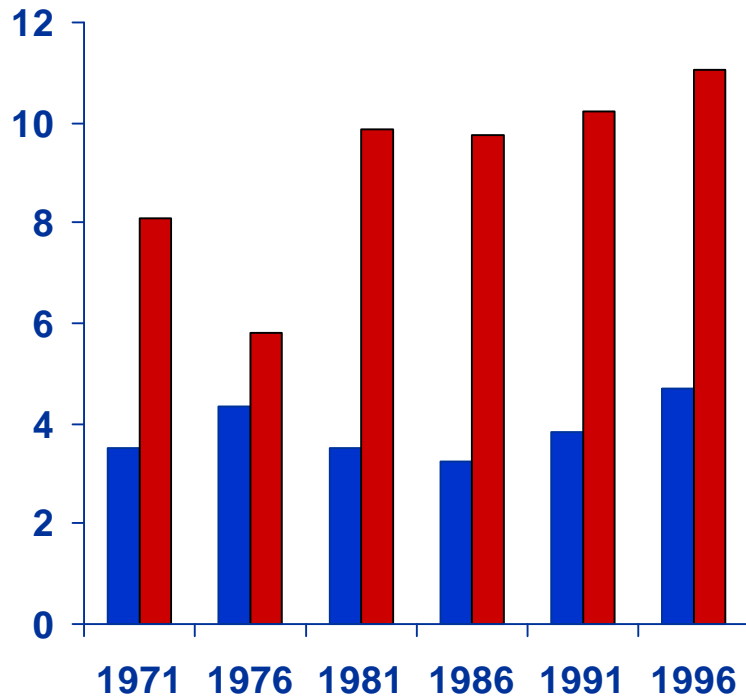
Source: Statistics Canada, 1996 Census of Agriculture National and Provincial Highlights.

Canada

Livestock Population Trends

Beef Cows and Pigs

Millions of Animals

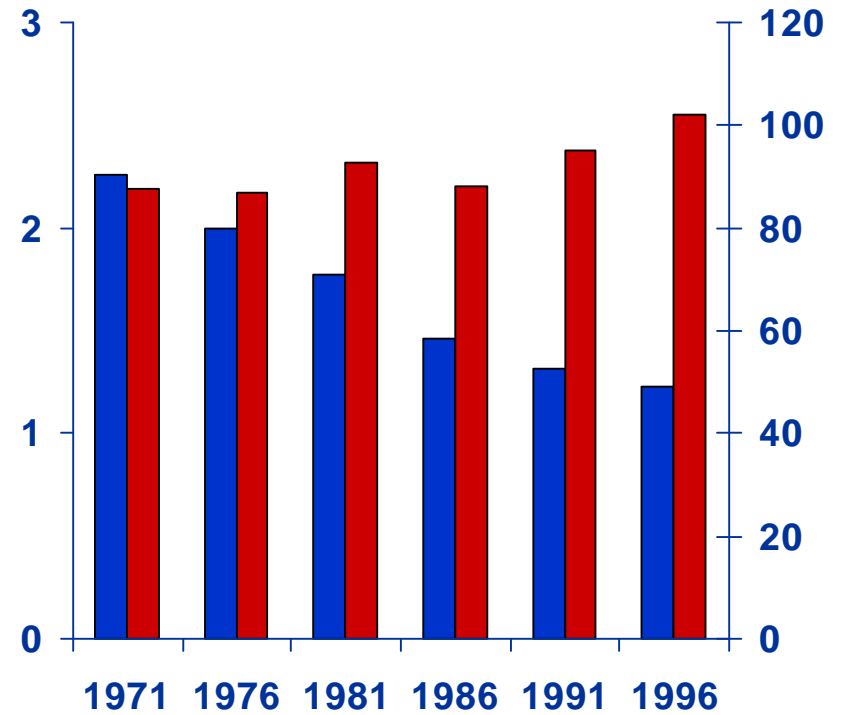


■ Beef Cows ■ Pigs

Dairy Cows, Hens and Chickens

Millions of Cows

Millions of Birds

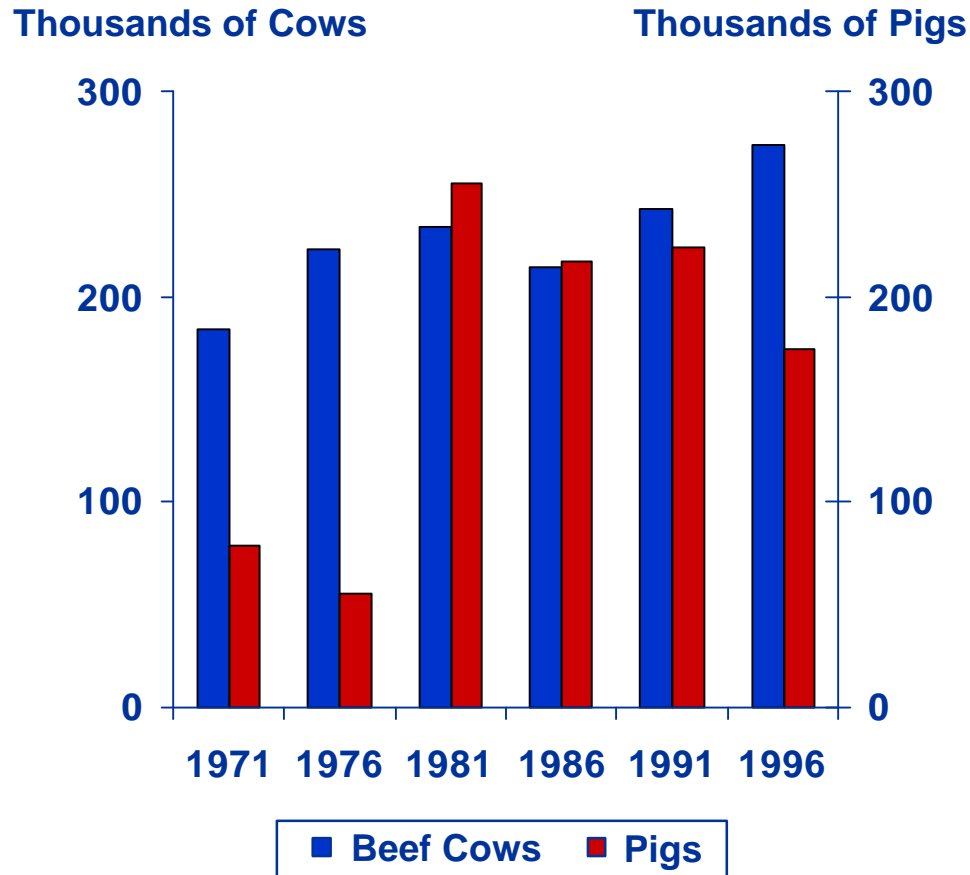


■ Dairy Cows ■ Hens & Chickens

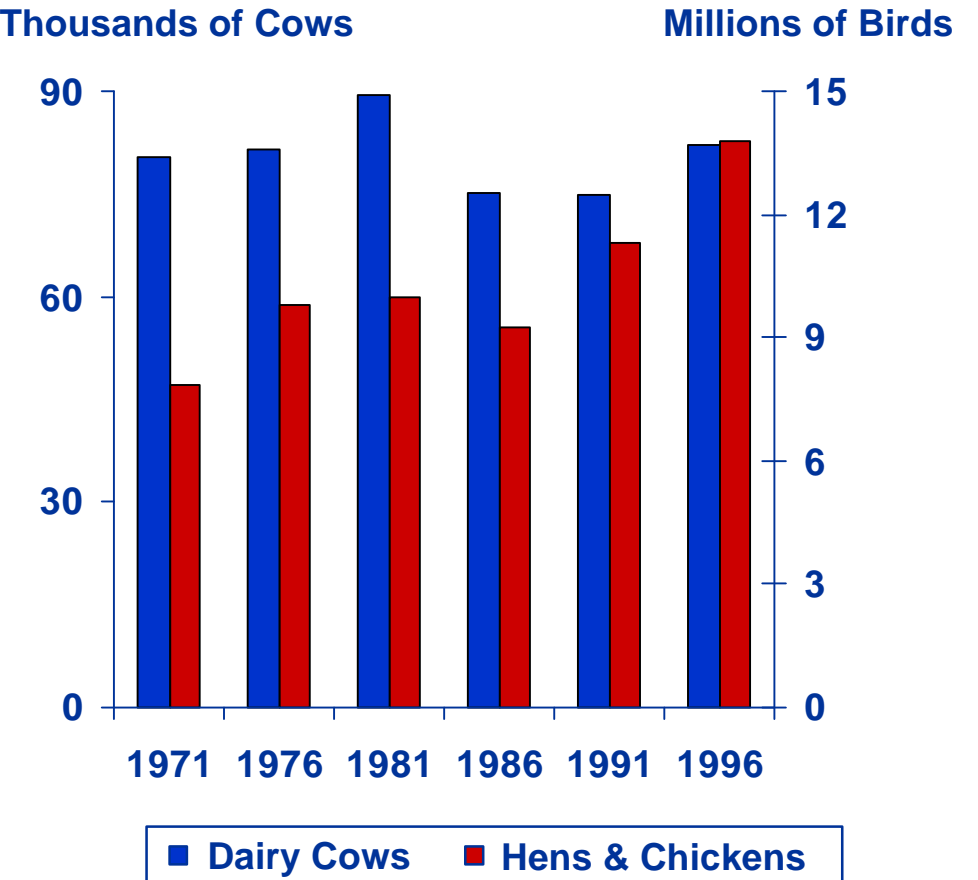
Sources: Statistics Canada, Census Overview of Canadian Agriculture: 1971-1991; 1996 Census of Agriculture National and Provincial Highlights.

British Columbia Livestock Population Trends

Beef Cows and Pigs



Dairy Cows, Hens and Chickens

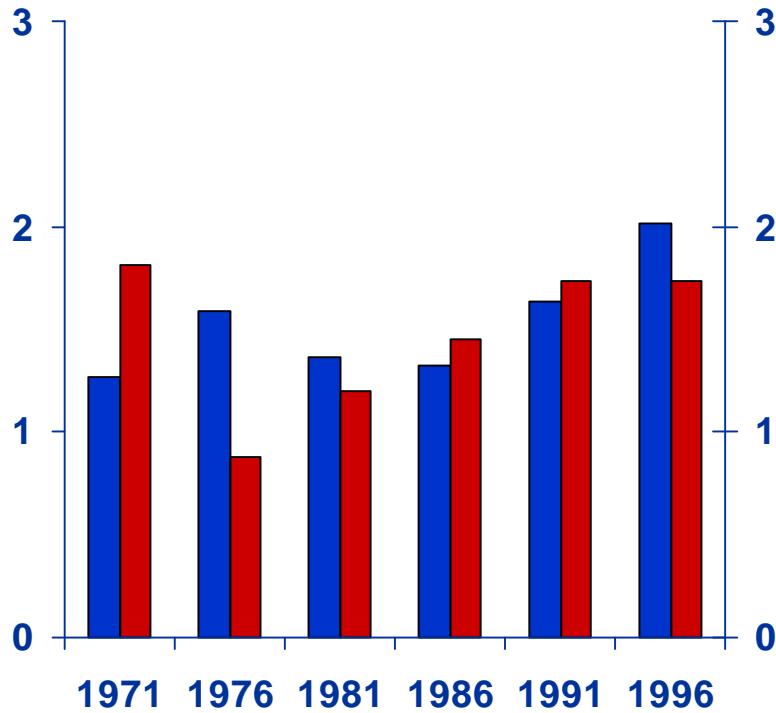


Sources: Statistics Canada, Census Overview of Canadian Agriculture: 1971-1991; 1996 Census of Agriculture National and Provincial Highlights.

Alberta Livestock Population Trends

Beef Cows and Pigs

Millions of Cows



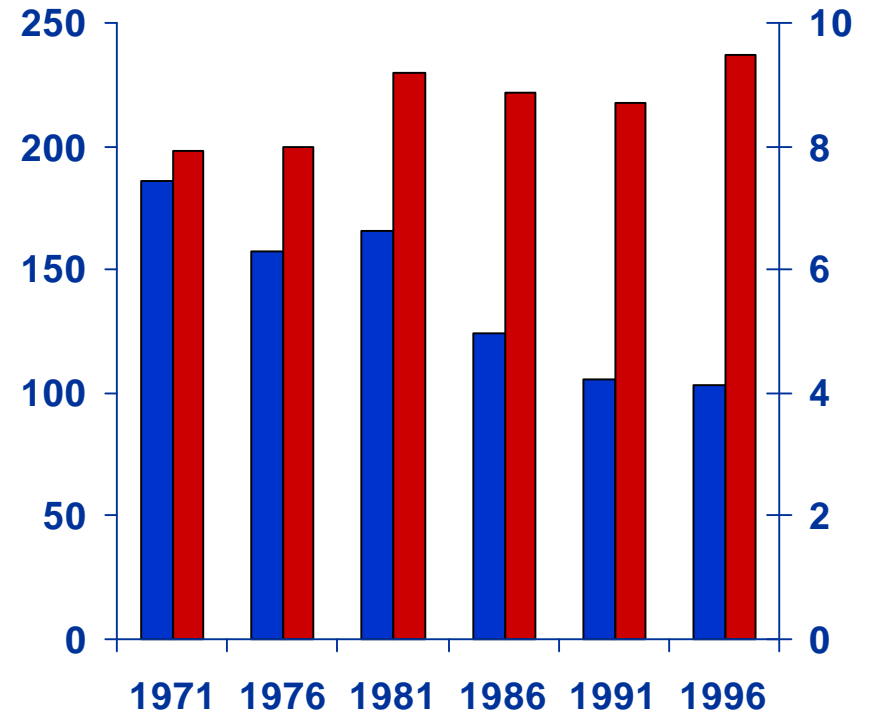
■ Beef Cows ■ Pigs

Dairy Cows, Hens and Chickens

Millions of Pigs

Thousands of Cows

Millions of Birds



■ Dairy Cows ■ Hens & Chickens

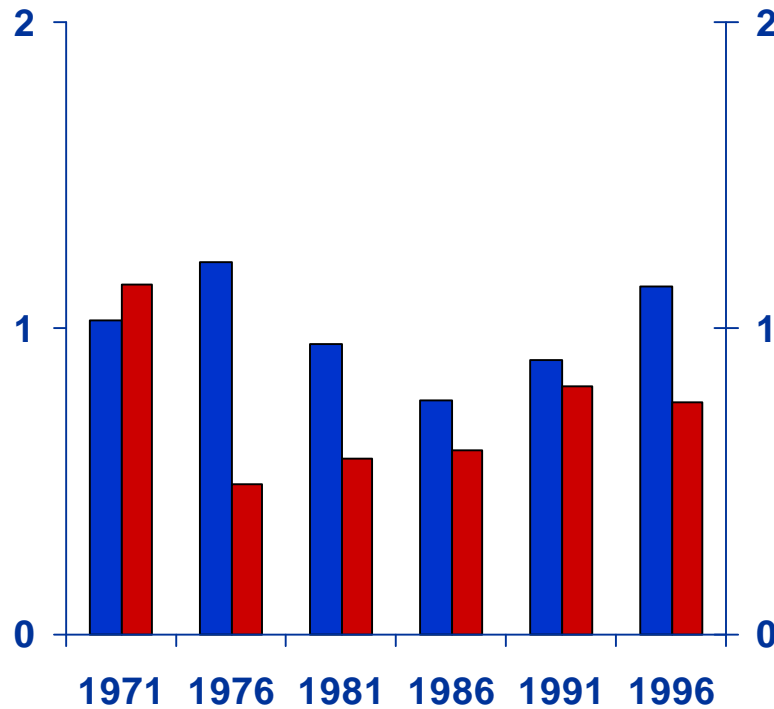
Sources: Statistics Canada, Census Overview of Canadian Agriculture: 1971-1991; 1996 Census of Agriculture National and Provincial Highlights.

Saskatchewan Livestock Population Trends

Beef Cows and Pigs

Millions of Cows

Millions of Pigs

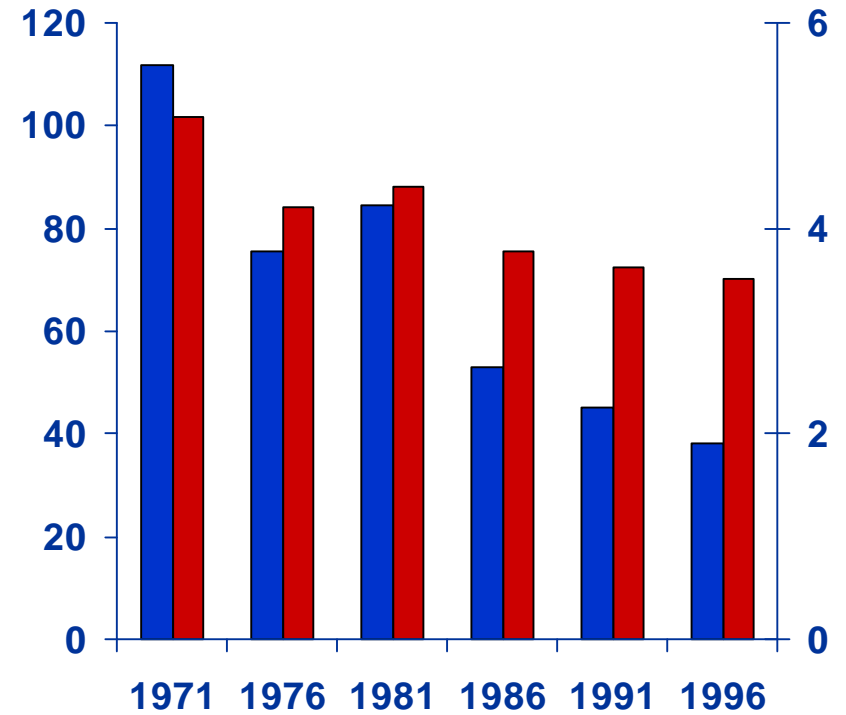


■ Beef Cows ■ Pigs

Dairy Cows, Hens and Chickens

Thousands of Cows

Millions of Birds

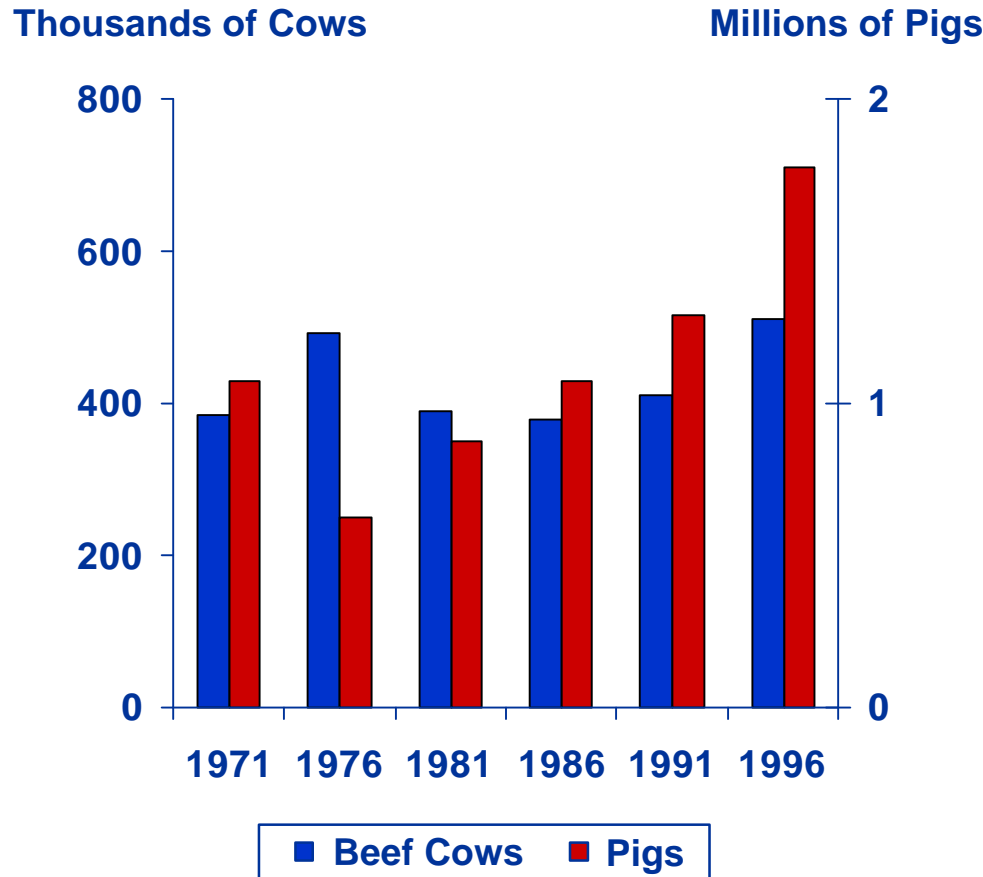


■ Dairy Cows ■ Hens & Chickens

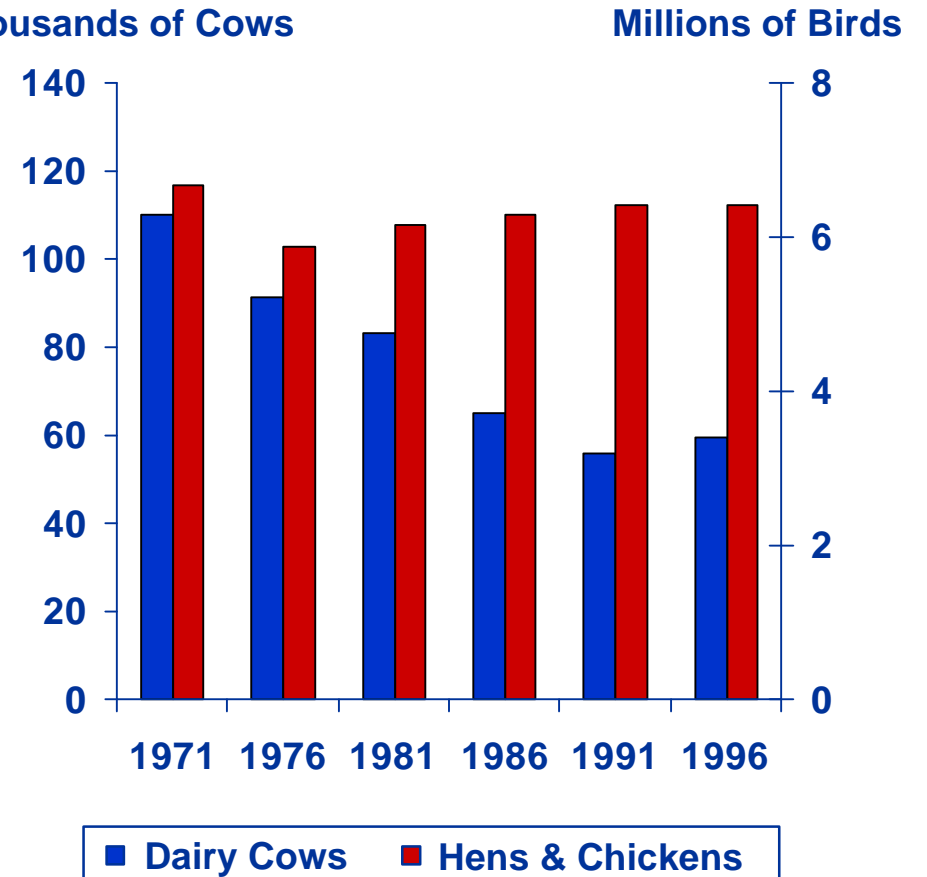
Sources: Statistics Canada, Census Overview of Canadian Agriculture: 1971-1991; 1996 Census of Agriculture National and Provincial Highlights.

Manitoba Livestock Population Trends

Beef Cows and Pigs



Dairy Cows, Hens and Chickens



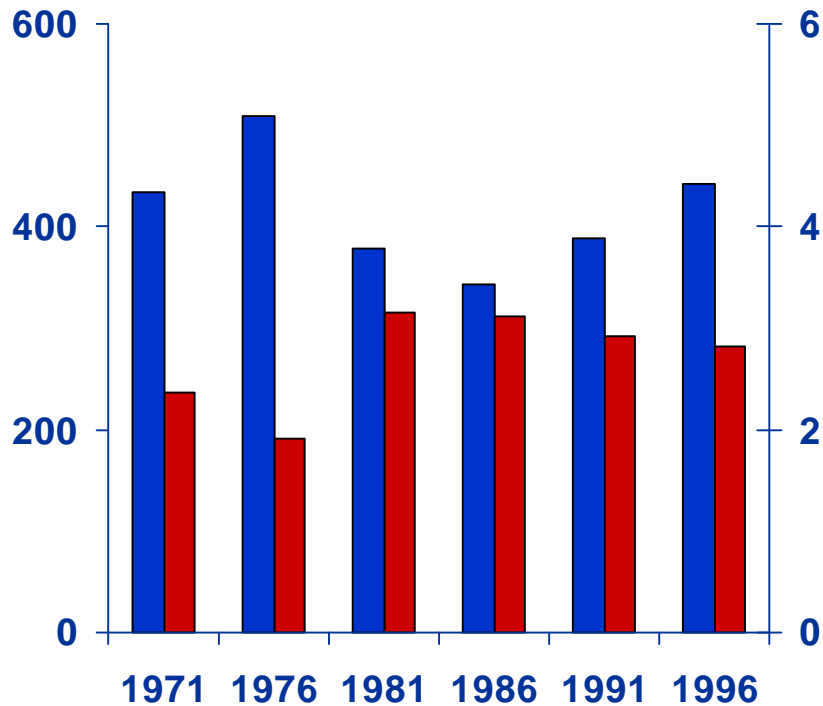
Sources: Statistics Canada, Census Overview of Canadian Agriculture: 1971-1991; 1996 Census of Agriculture National and Provincial Highlights.

Ontario Livestock Population Trends

Beef Cows and Pigs

Thousands of Cows

Millions of Pigs

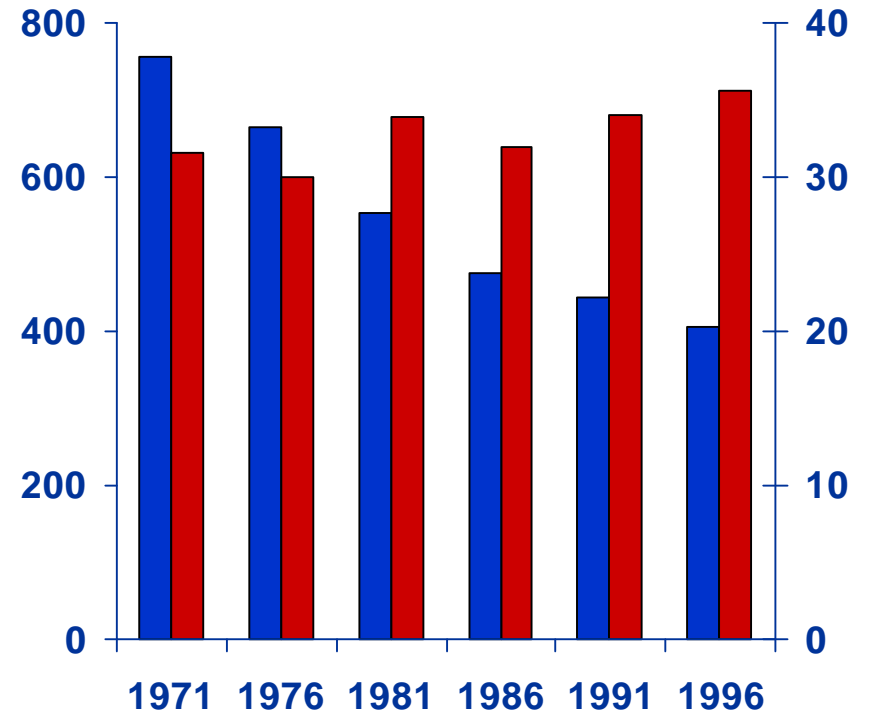


■ Beef Cows ■ Pigs

Dairy Cows, Hens and Chickens

Thousands of Cows

Millions of Birds

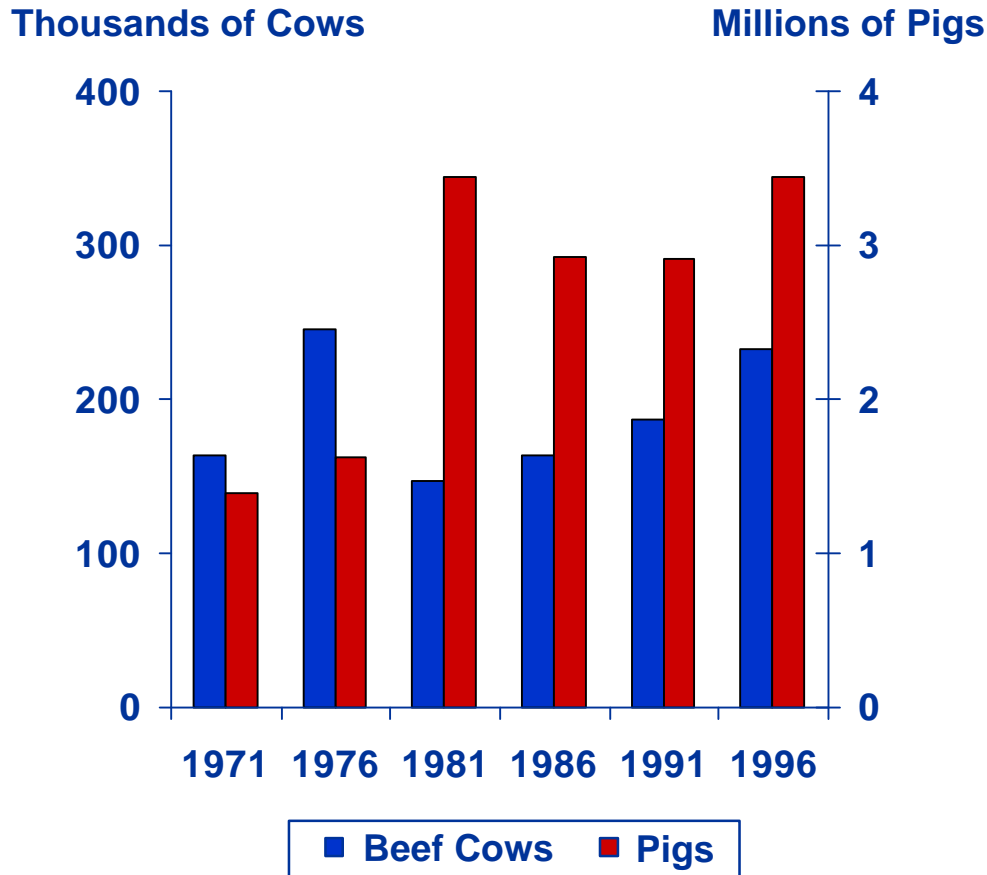


■ Dairy Cows ■ Hens & Chickens

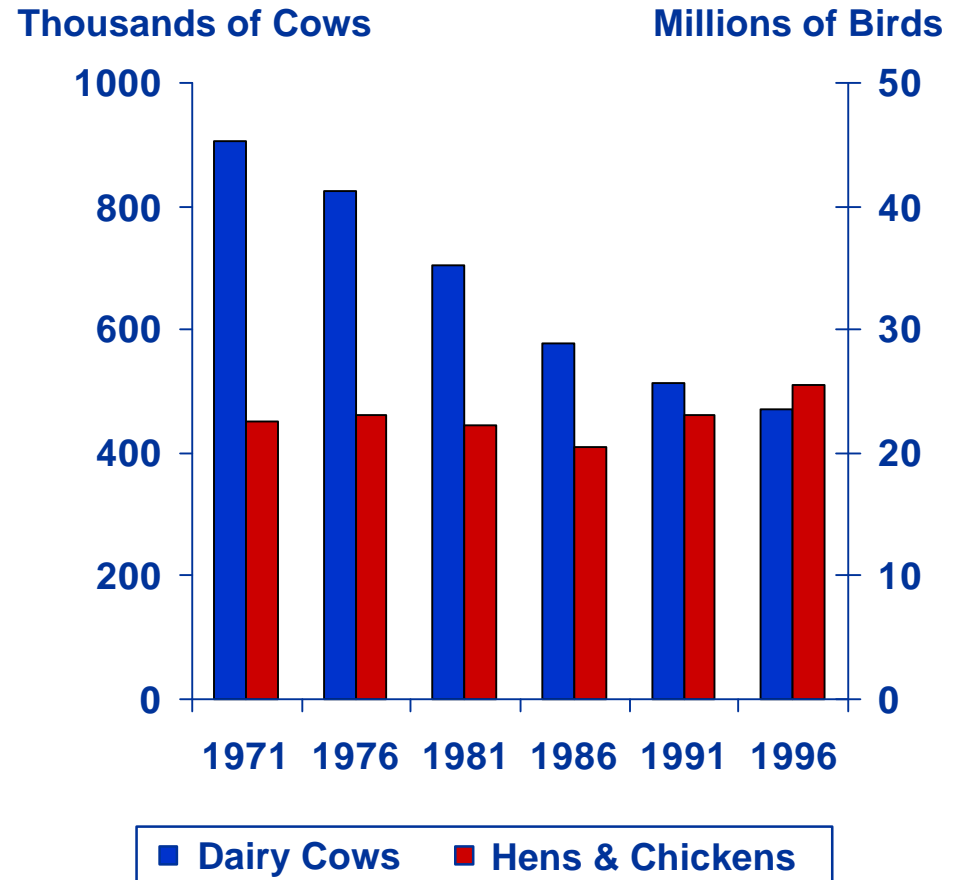
Sources: Statistics Canada, Census Overview of Canadian Agriculture: 1971-1991; 1996 Census of Agriculture National and Provincial Highlights.

Quebec Livestock Population Trends

Beef Cows and Pigs



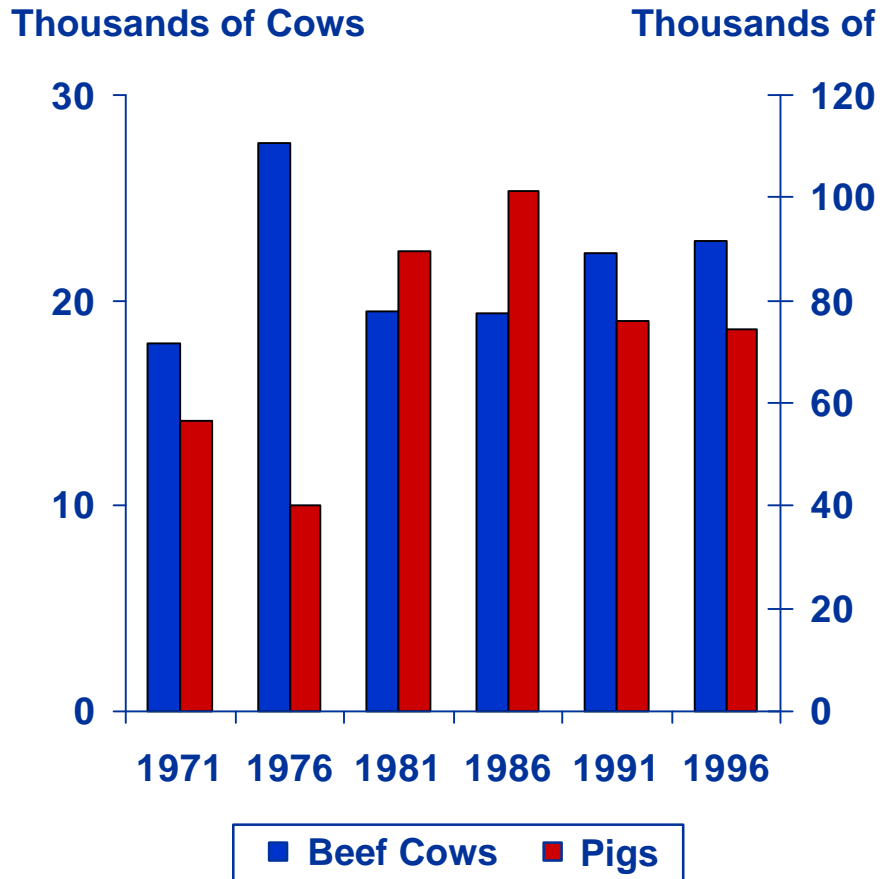
Dairy Cows, Hens and Chickens



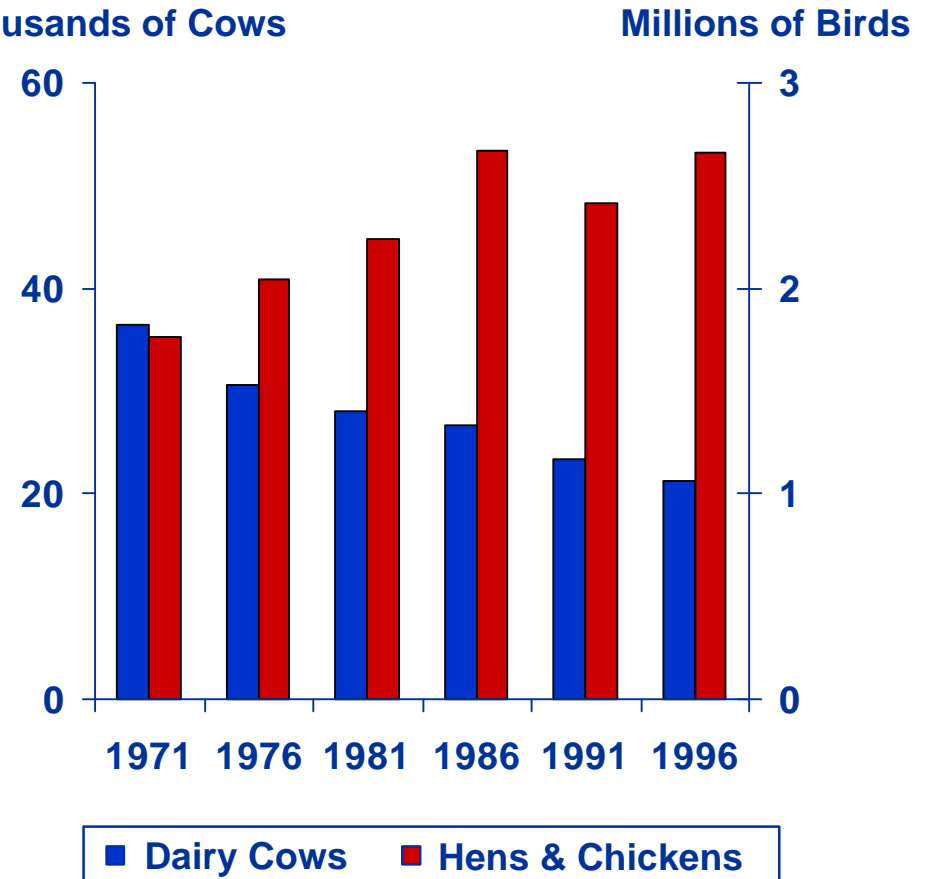
Sources: Statistics Canada, Census Overview of Canadian Agriculture: 1971-1991; 1996 Census of Agriculture National and Provincial Highlights.

New Brunswick Livestock Population Trends

Beef Cows and Pigs



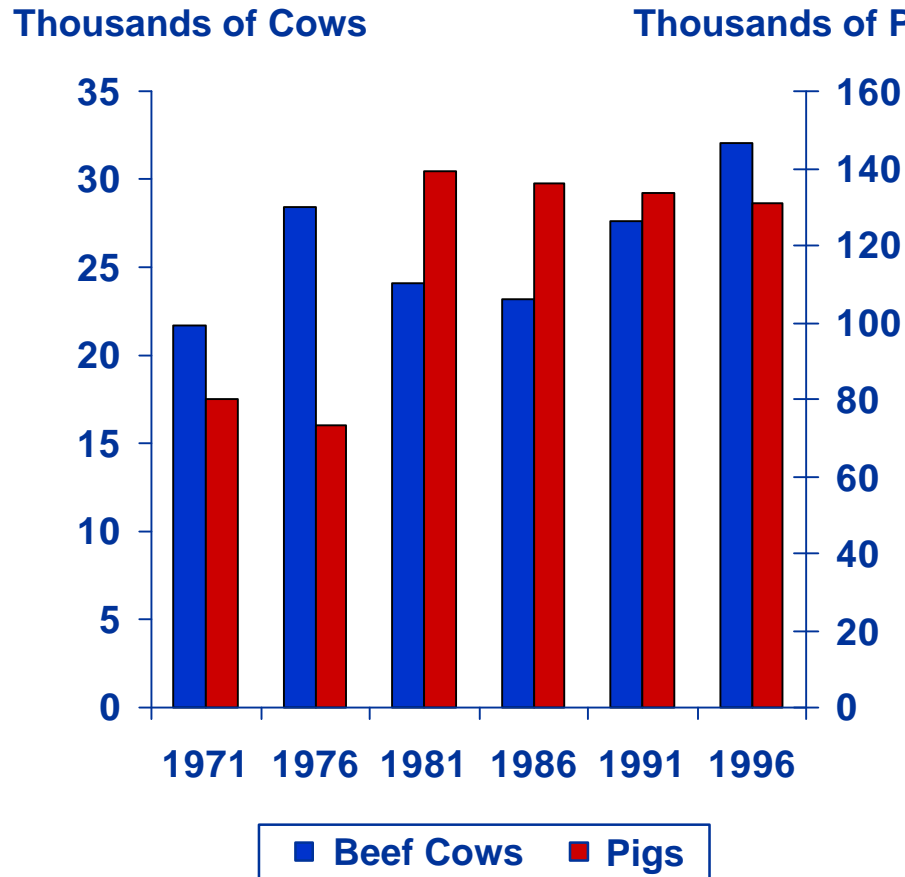
Dairy Cows, Hens and Chickens



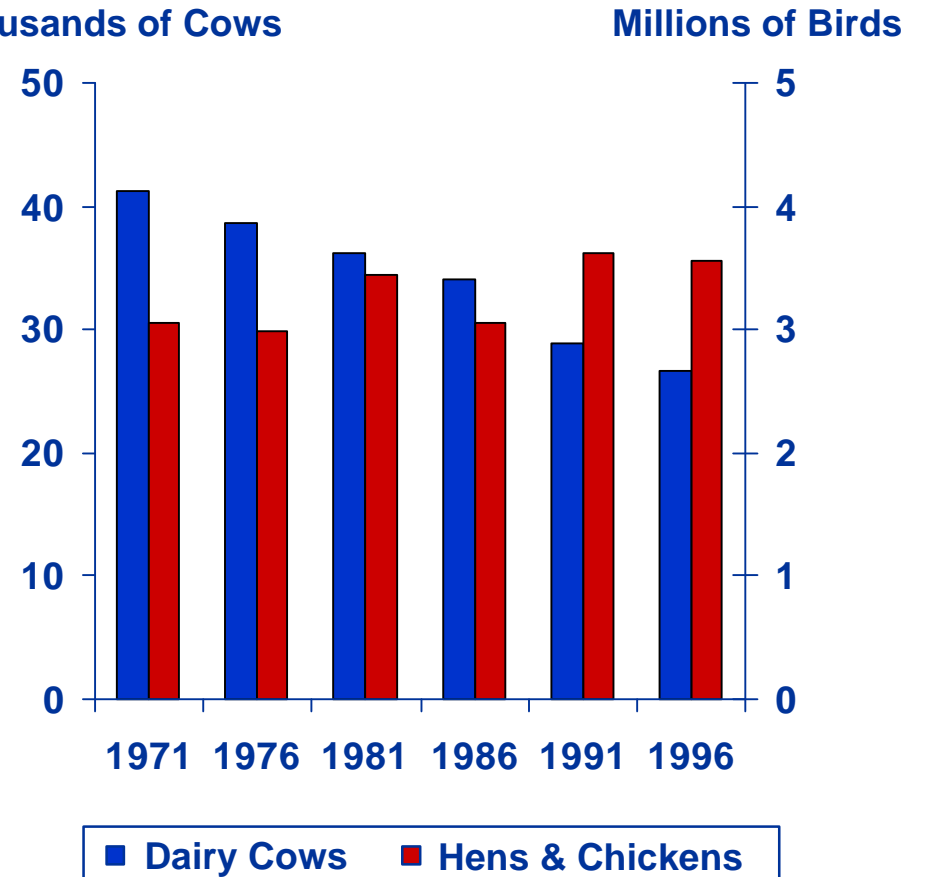
Source: Statistics Canada, Census Overview of Canadian Agriculture: 1971-1991; 1996 Census of Agriculture National and Provincial Highlights.

Nova Scotia Livestock Population Trends

Beef Cows and Pigs



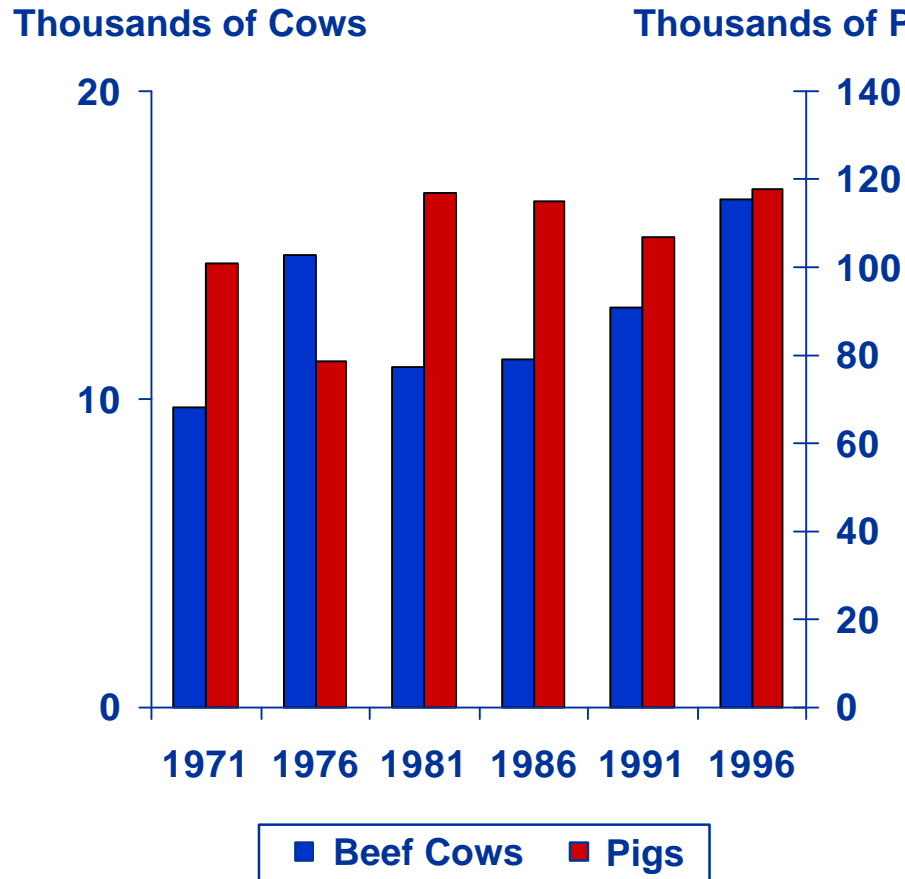
Dairy Cows, Hens and Chickens



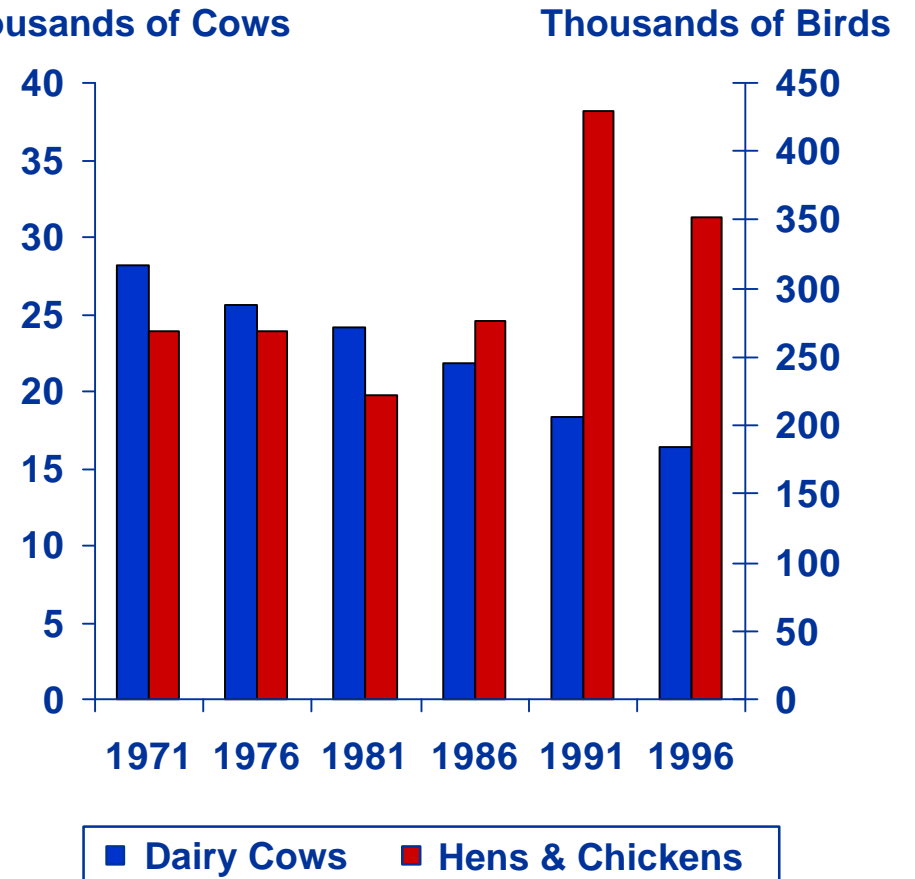
Source: Statistics Canada, Census Overview of Canadian Agriculture: 1971-1991; 1996 Census of Agriculture National and Provincial Highlights.

Prince Edward Island Livestock Population Trends

Beef Cows and Pigs



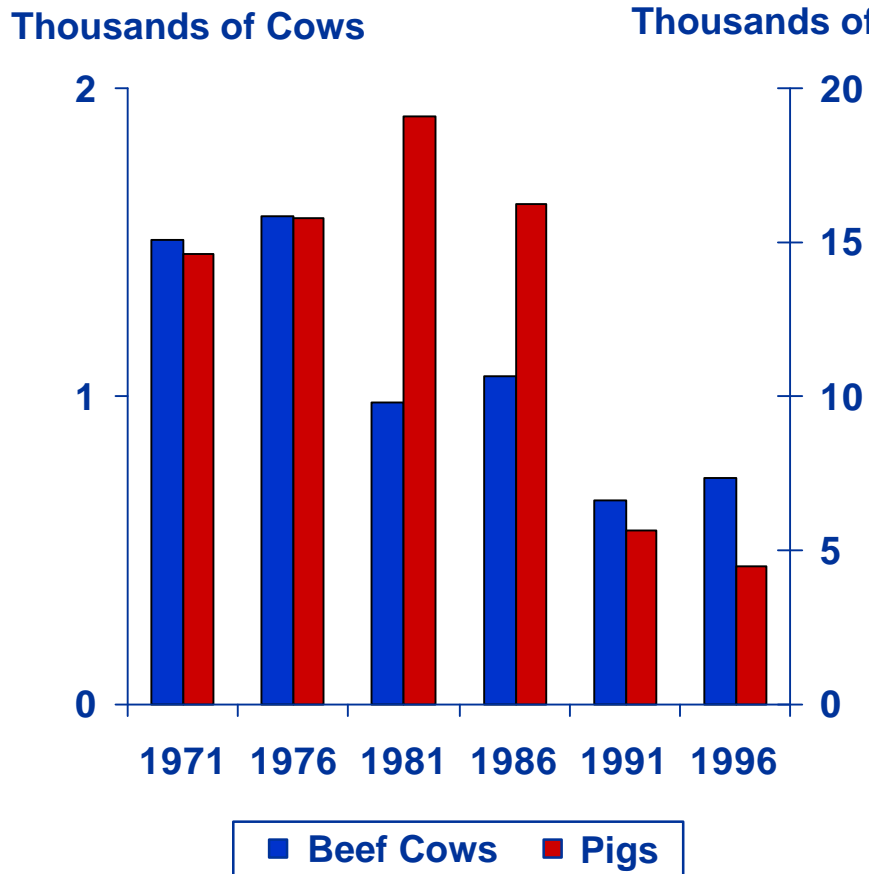
Dairy Cows, Hens and Chickens



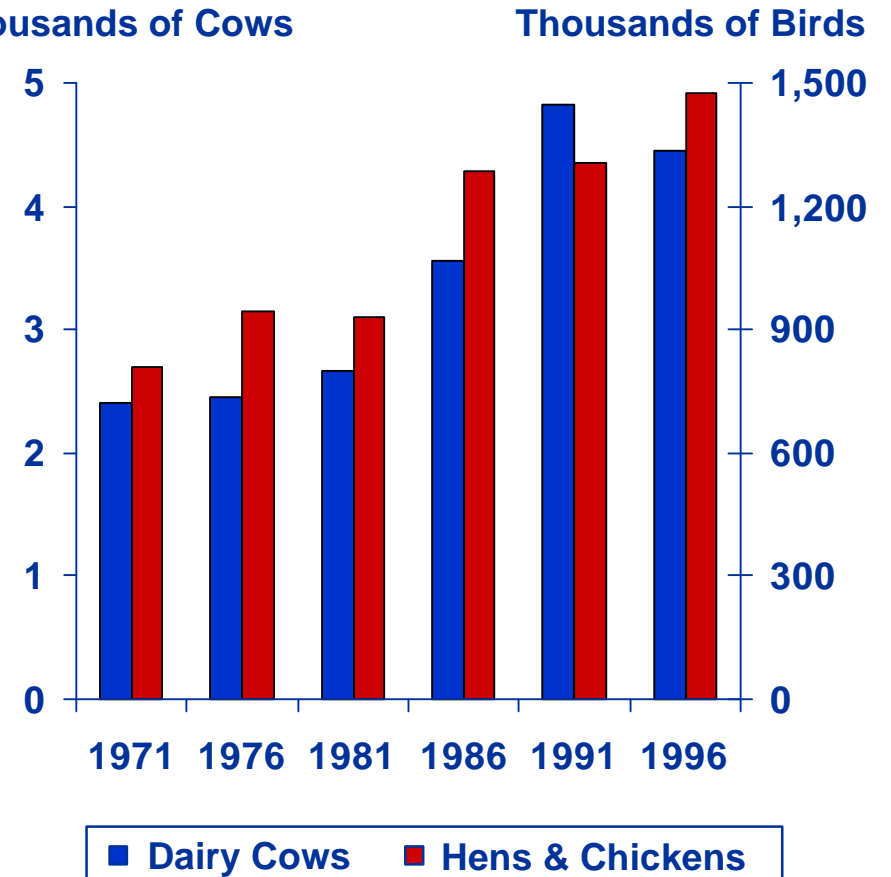
Source: Statistics Canada, Census Overview of Canadian Agriculture: 1971-1991; 1996 Census of Agriculture National and Provincial Highlights.

Newfoundland Livestock Population Trends

Beef Cows and Pigs



Dairy Cows, Hens and Chickens

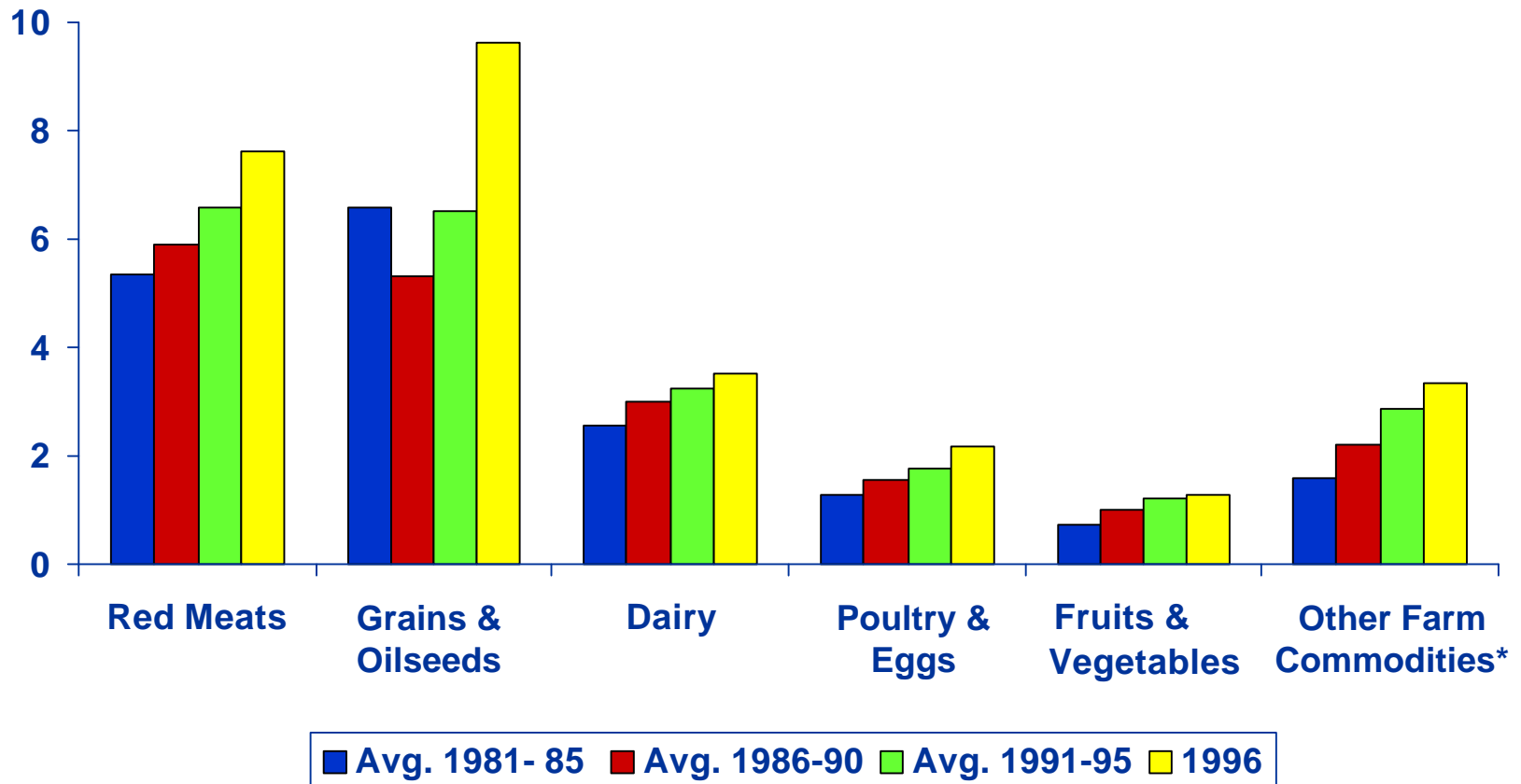


Source: Statistics Canada, Census Overview of Canadian Agriculture: 1971-1991; 1996 Census of Agriculture National and Provincial Highlights.

Canada

Farm Cash Market Receipts by Commodity Group

Billions of \$

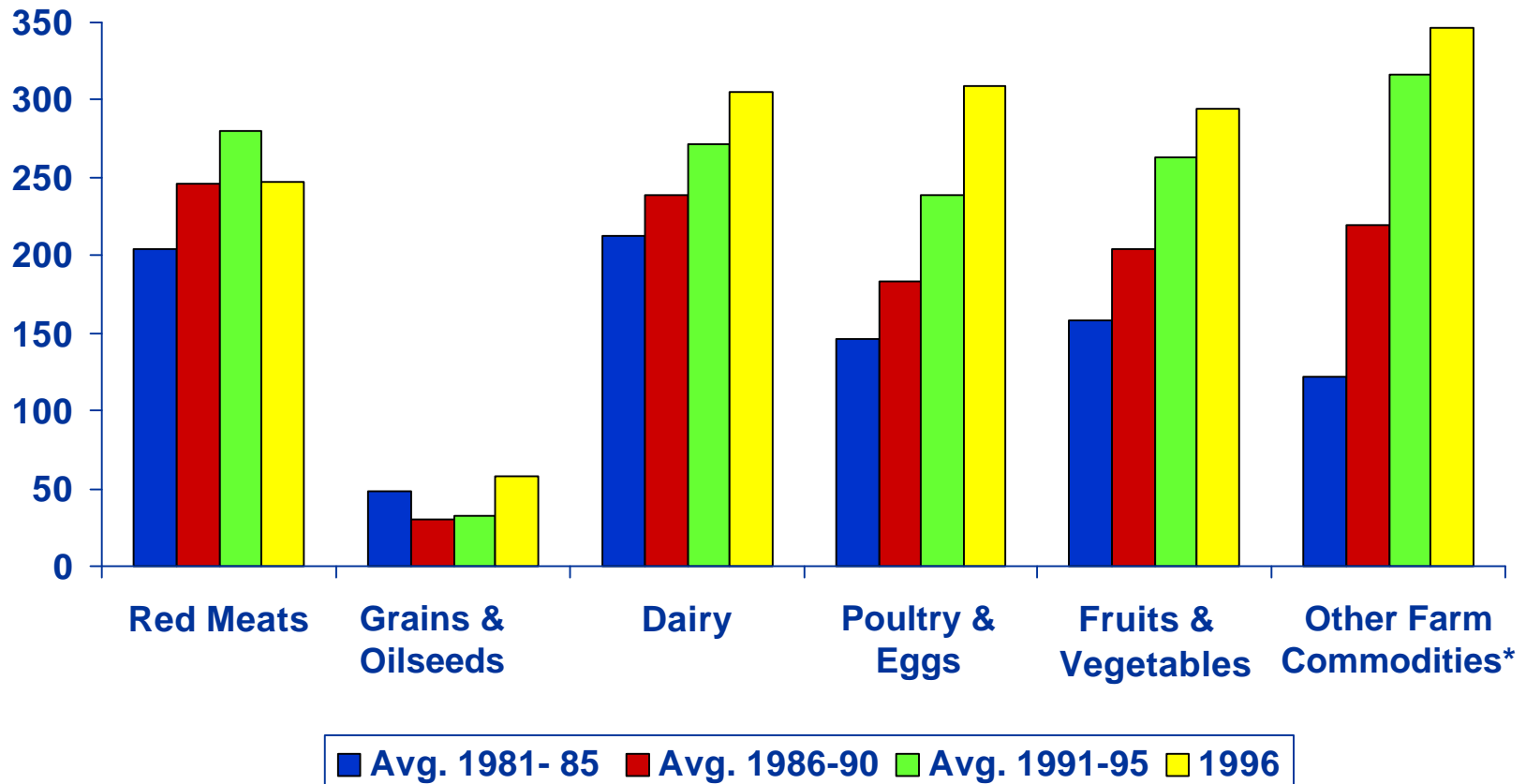


*Includes: Potatoes, Special Crops, Forage, etc.

Source: Statistics Canada Agriculture Division, Farm Income and Prices Section.

British Columbia Farm Cash Market Receipts by Commodity Group

Millions of \$



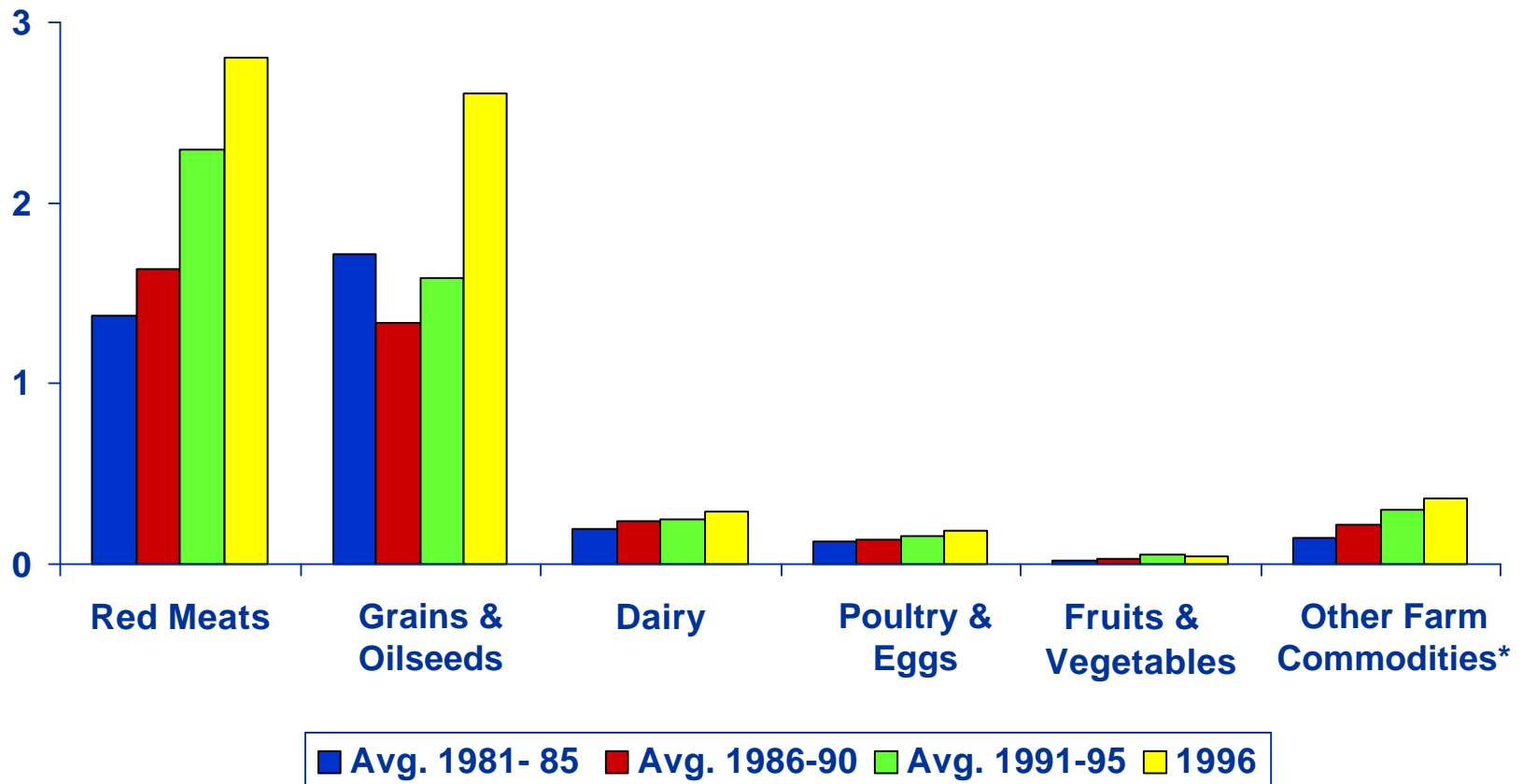
*Includes: Potatoes, Special Crops, Forage, etc.

Source: Statistics Canada Agriculture Division, Farm Income and Prices Section.

Alberta

Farm Cash Market Receipts by Commodity Group

Billions of \$

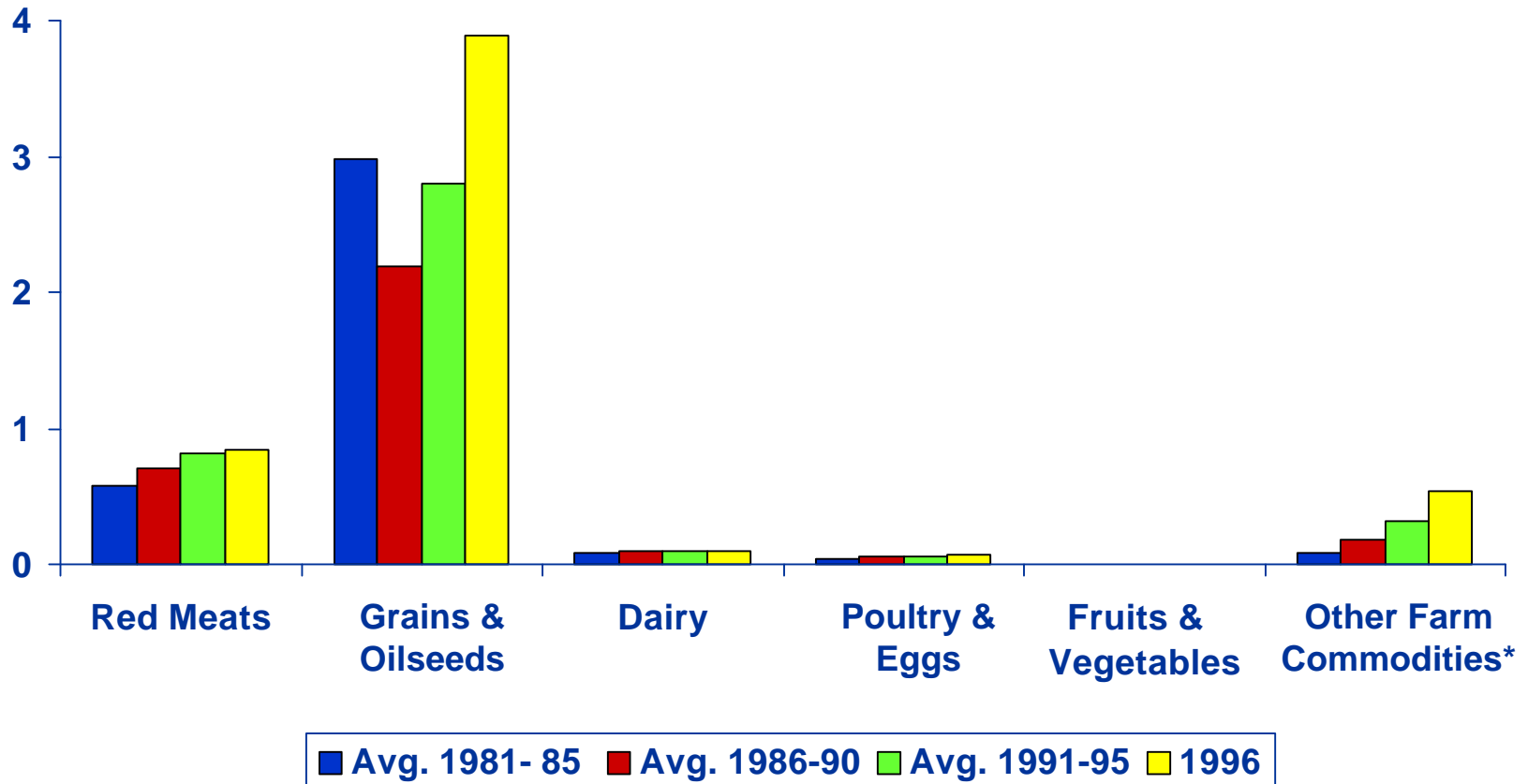


*Includes: Potatoes, Special Crops, Forage, etc.

Source: Statistics Canada Agriculture Division, Farm Income and Prices Section.

Saskatchewan Farm Cash Market Receipts by Commodity Group

Billions of \$

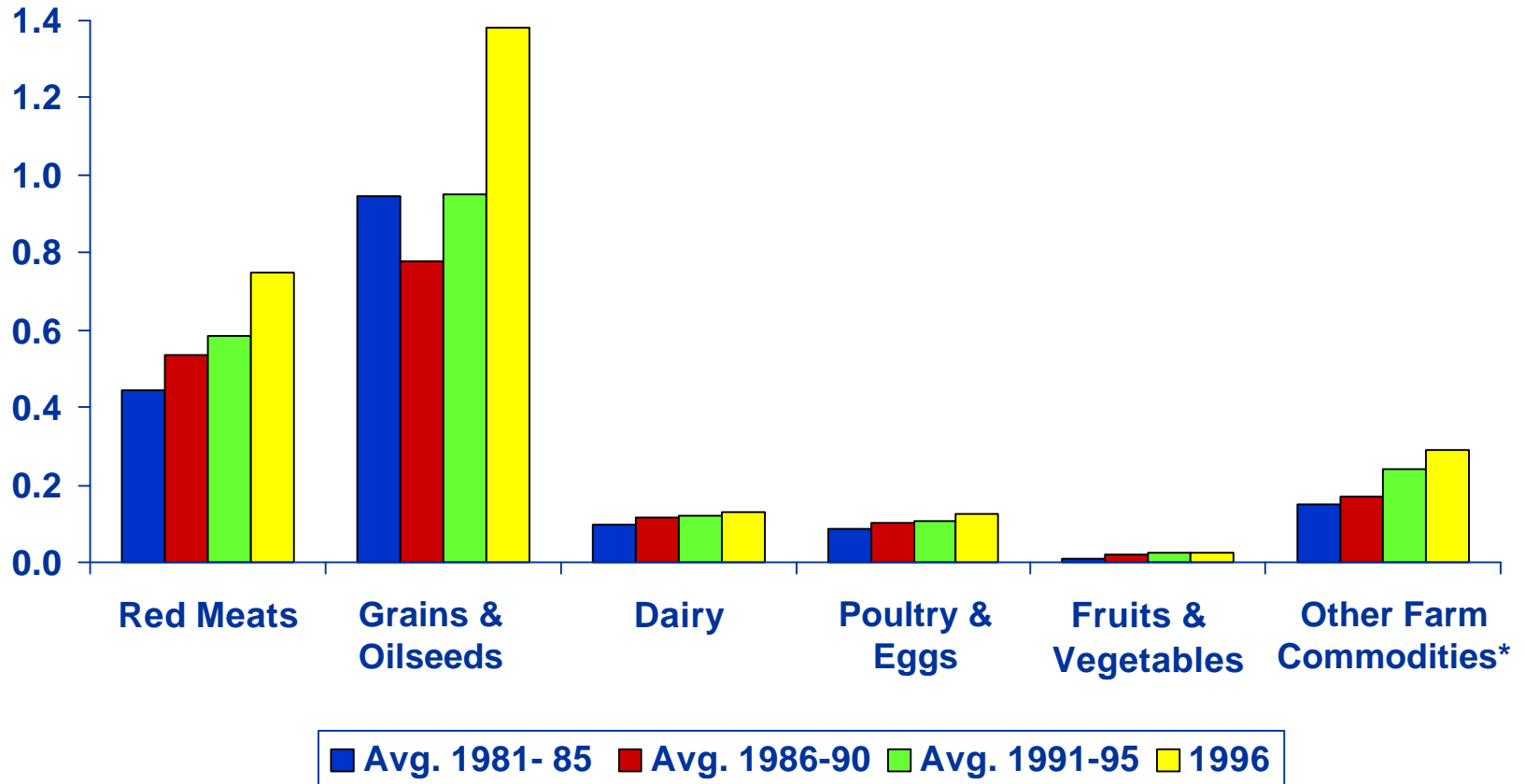


*Includes: Potatoes, Special Crops, Forage, etc.

Source: Statistics Canada Agriculture Division, Farm Income and Prices Section.

Manitoba Farm Cash Market Receipts by Commodity Group

Billions of \$



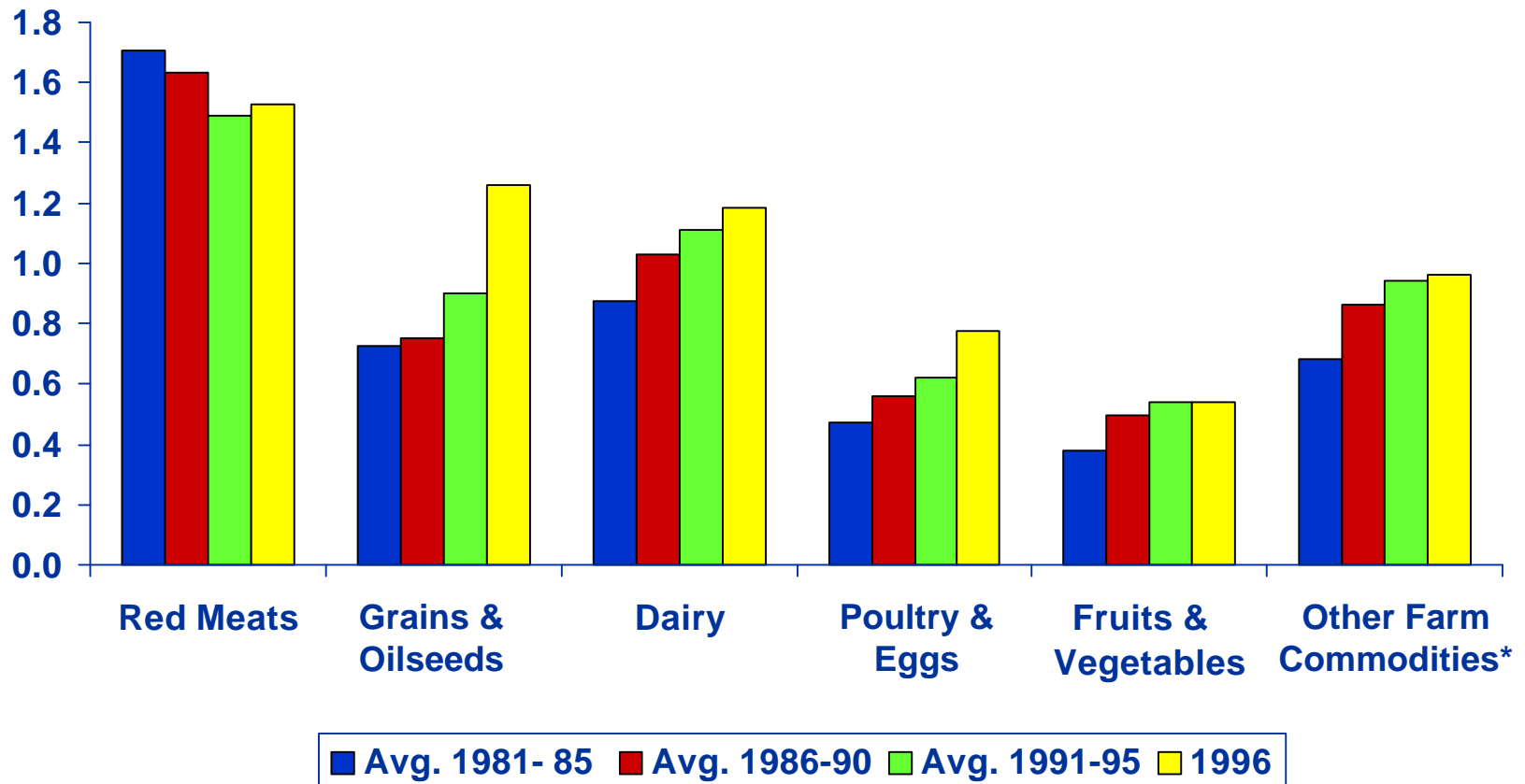
*Includes: Potatoes, Special Crops, Forage, etc.

Source: Statistics Canada Agriculture Division, Farm Income and Prices Section.

Ontario

Farm Cash Market Receipts by Commodity Group

Billions of \$



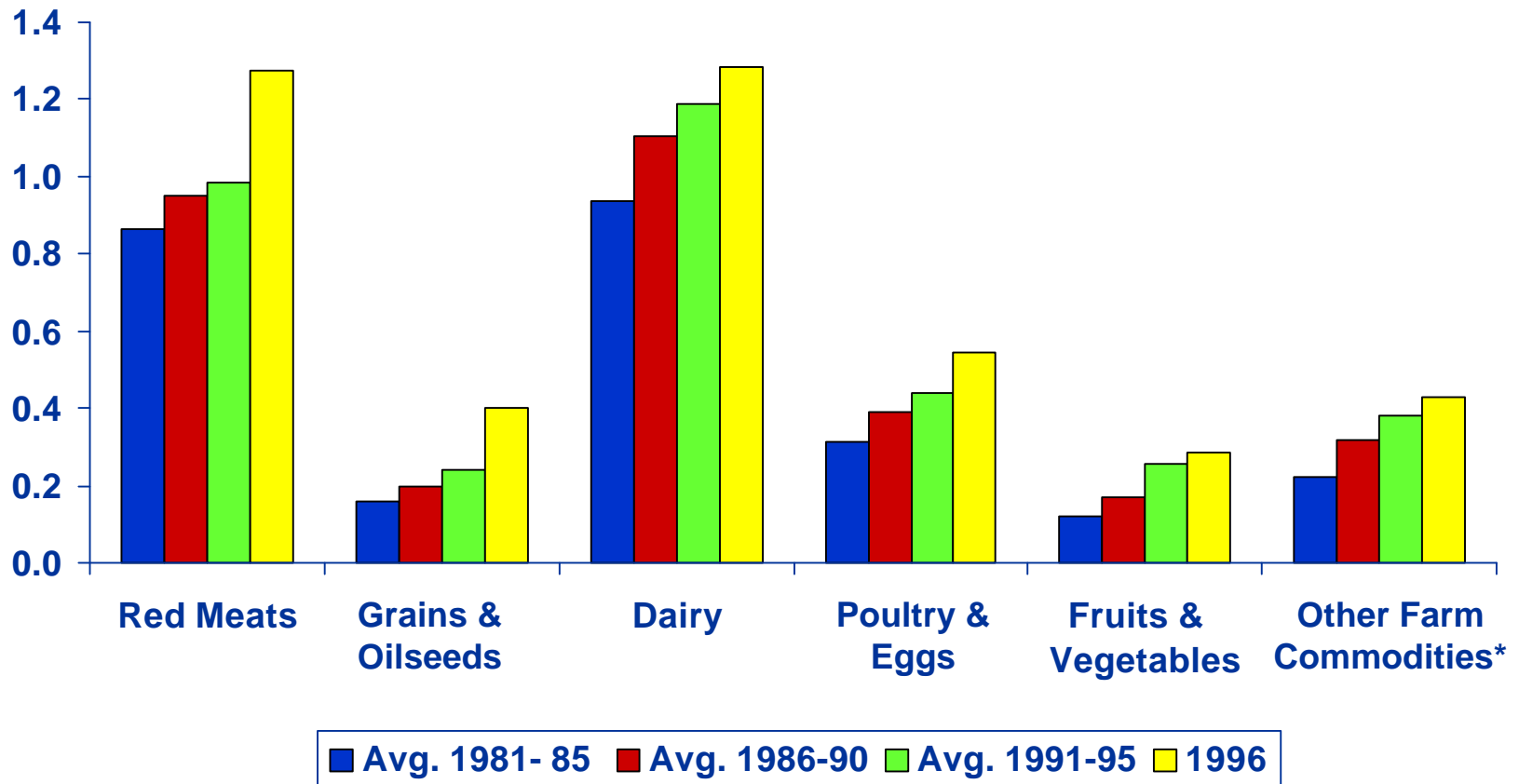
*Includes: Potatoes, Special Crops, Forage, etc.

Source: Statistics Canada Agriculture Division, Farm Income and Prices Section.

Quebec

Farm Cash Market Receipts by Commodity Group

Billions of \$

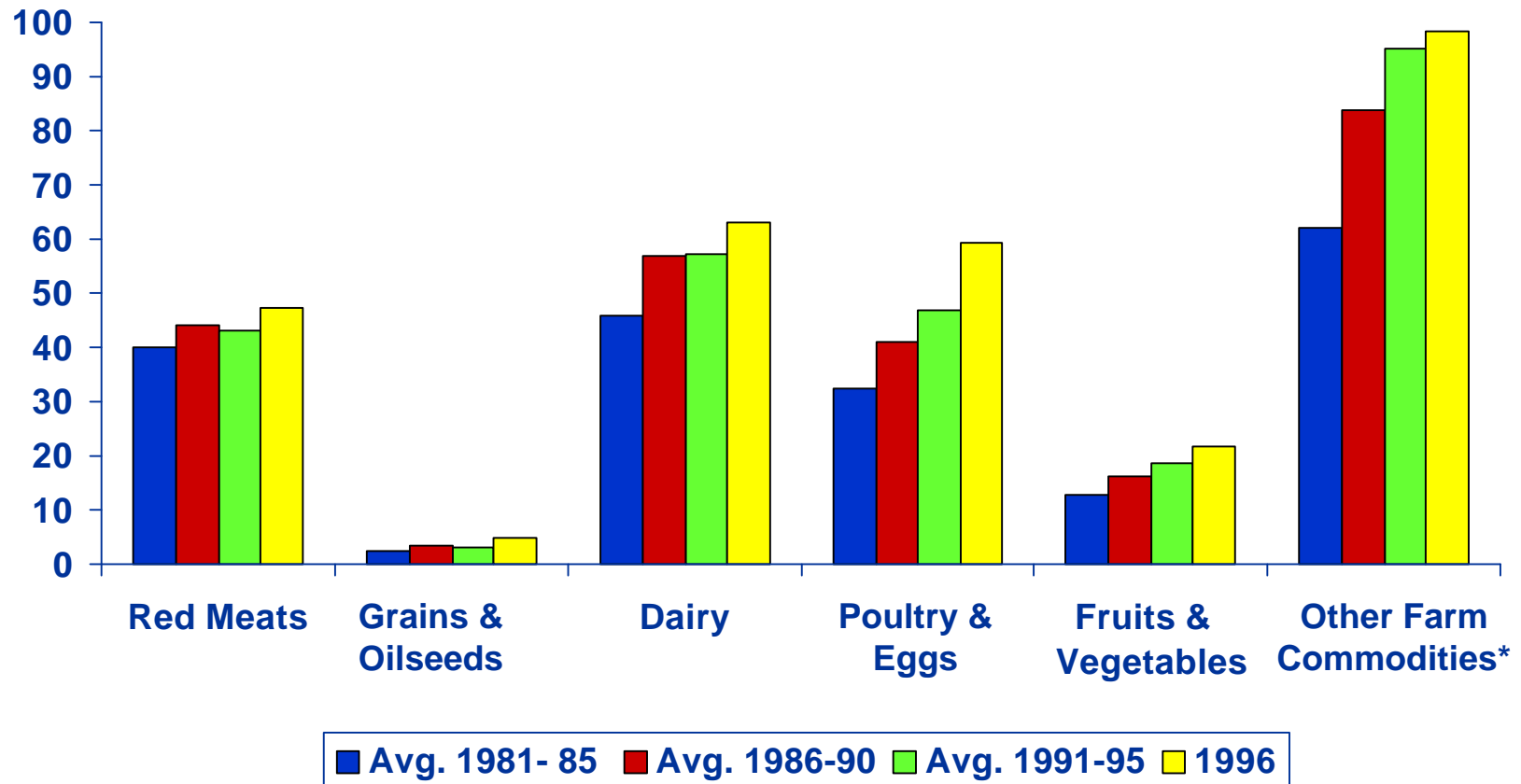


*Includes: Potatoes, Special Crops, Forage, etc.

Source: Statistics Canada Agriculture Division, Farm Income and Prices Section.

New Brunswick Farm Cash Market Receipts by Commodity Group

Millions of \$

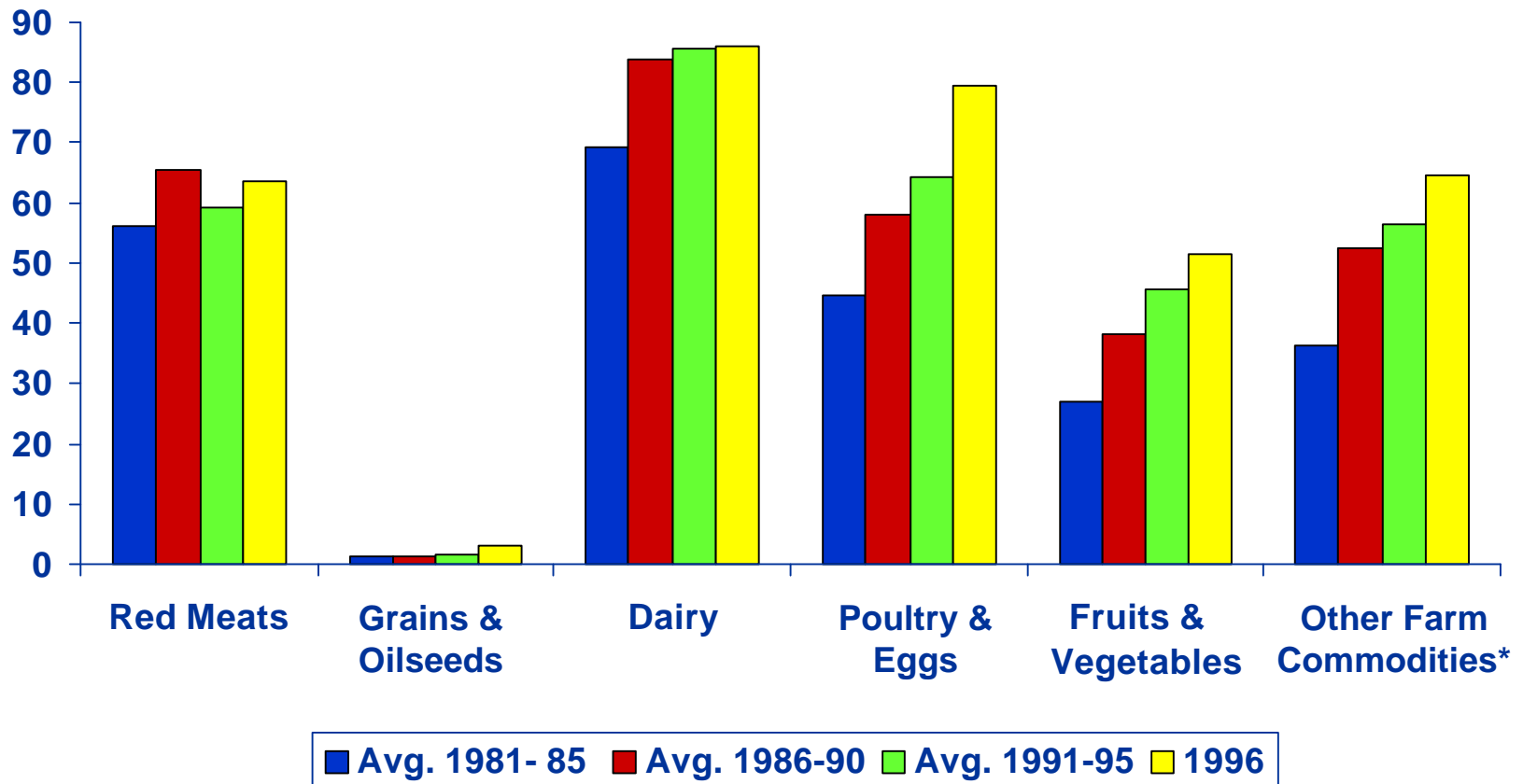


*Includes: Potatoes, Special Crops, Forage, etc.

Source: Statistics Canada Agriculture Division, Farm Income and Prices Section.

Nova Scotia Farm Cash Market Receipts by Commodity Group

Millions of \$

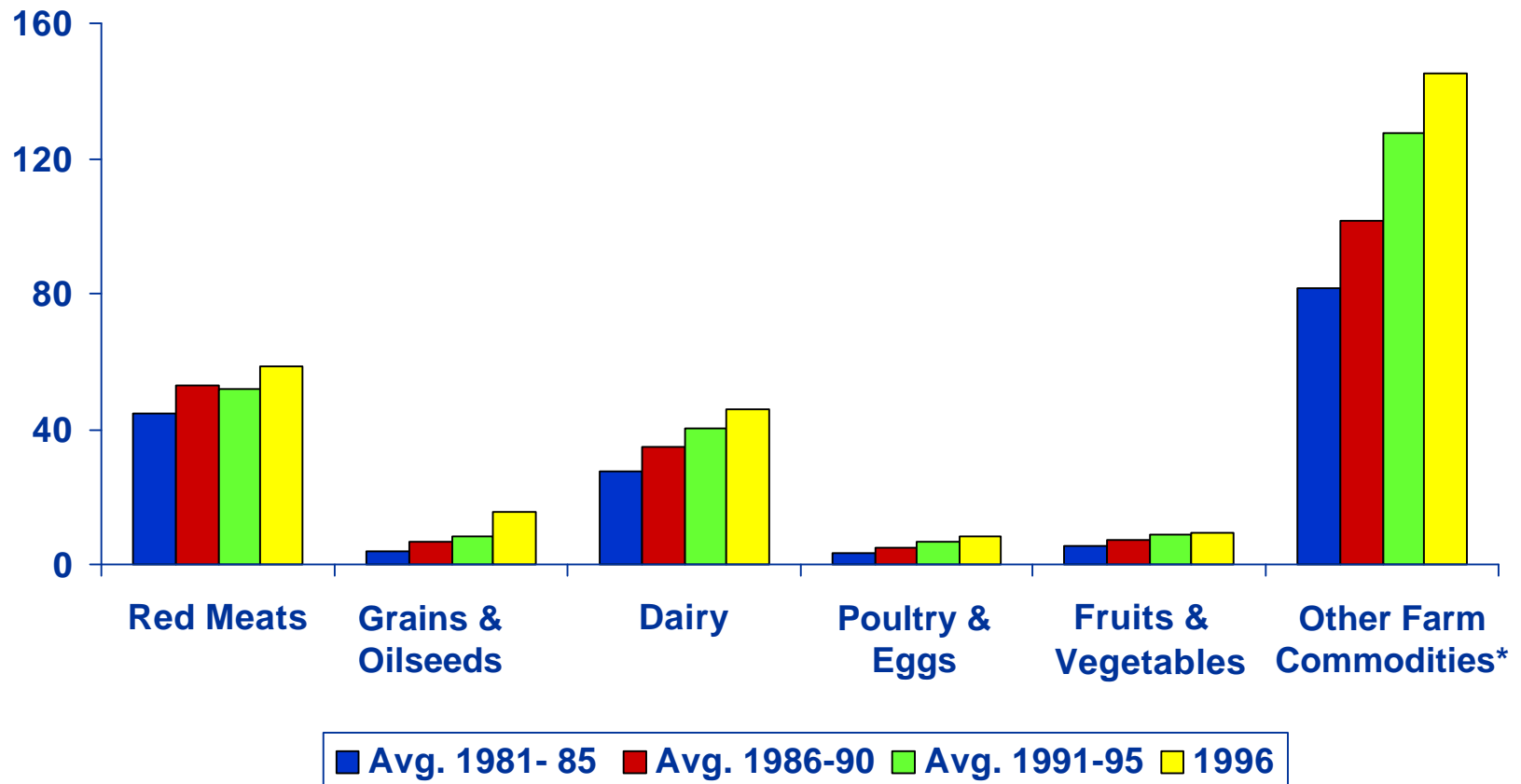


*Includes: Potatoes, Special Crops, Forage, etc.

Source: Statistics Canada Agriculture Division, Farm Income and Prices Section.

Prince Edward Island Farm Cash Market Receipts by Commodity Group

Millions of \$

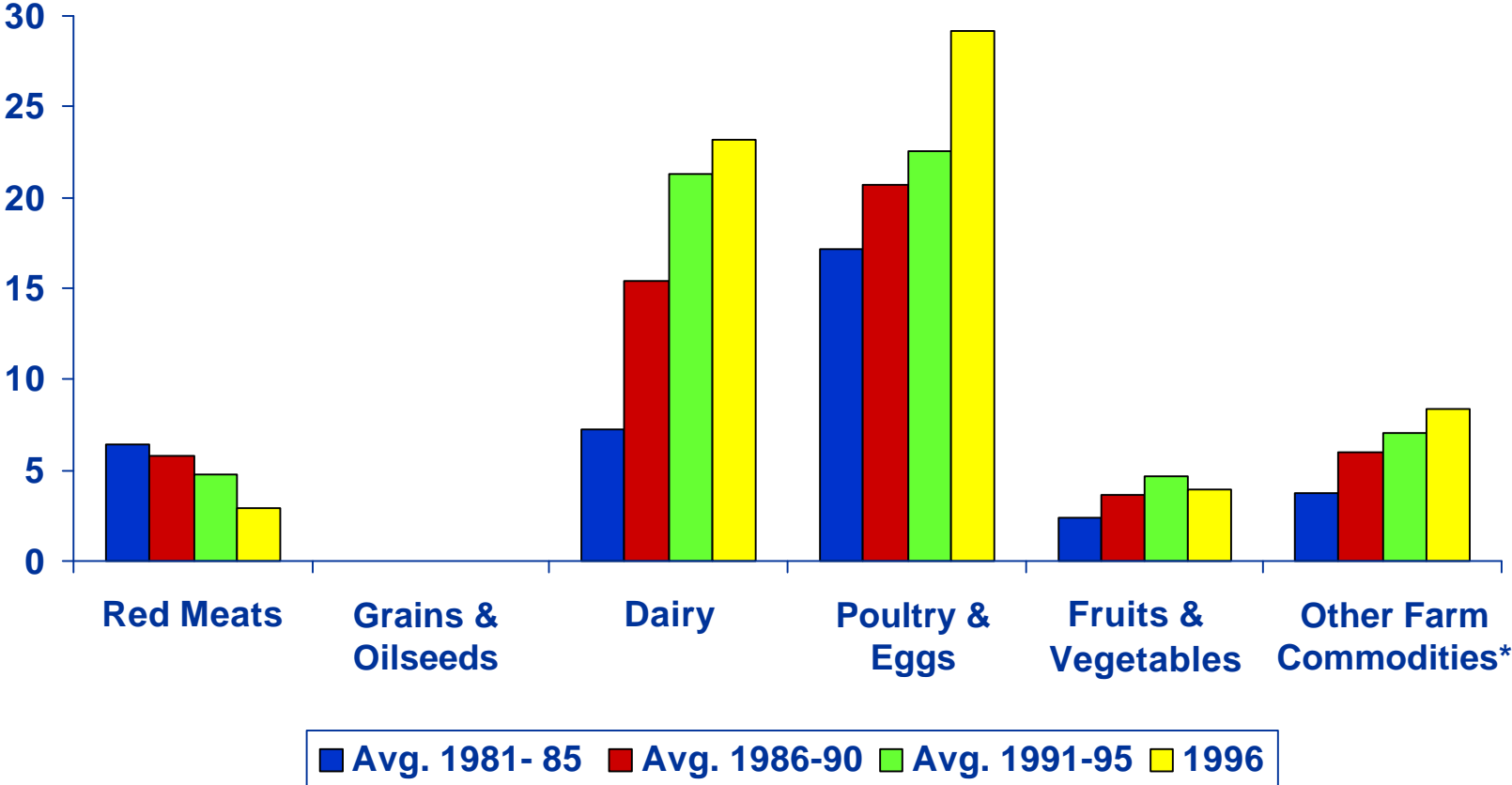


*Includes: Potatoes, Special Crops, Forage, etc.

Source: Statistics Canada Agriculture Division, Farm Income and Prices Section.

Newfoundland Farm Cash Market Receipts by Commodity Group

Millions of \$

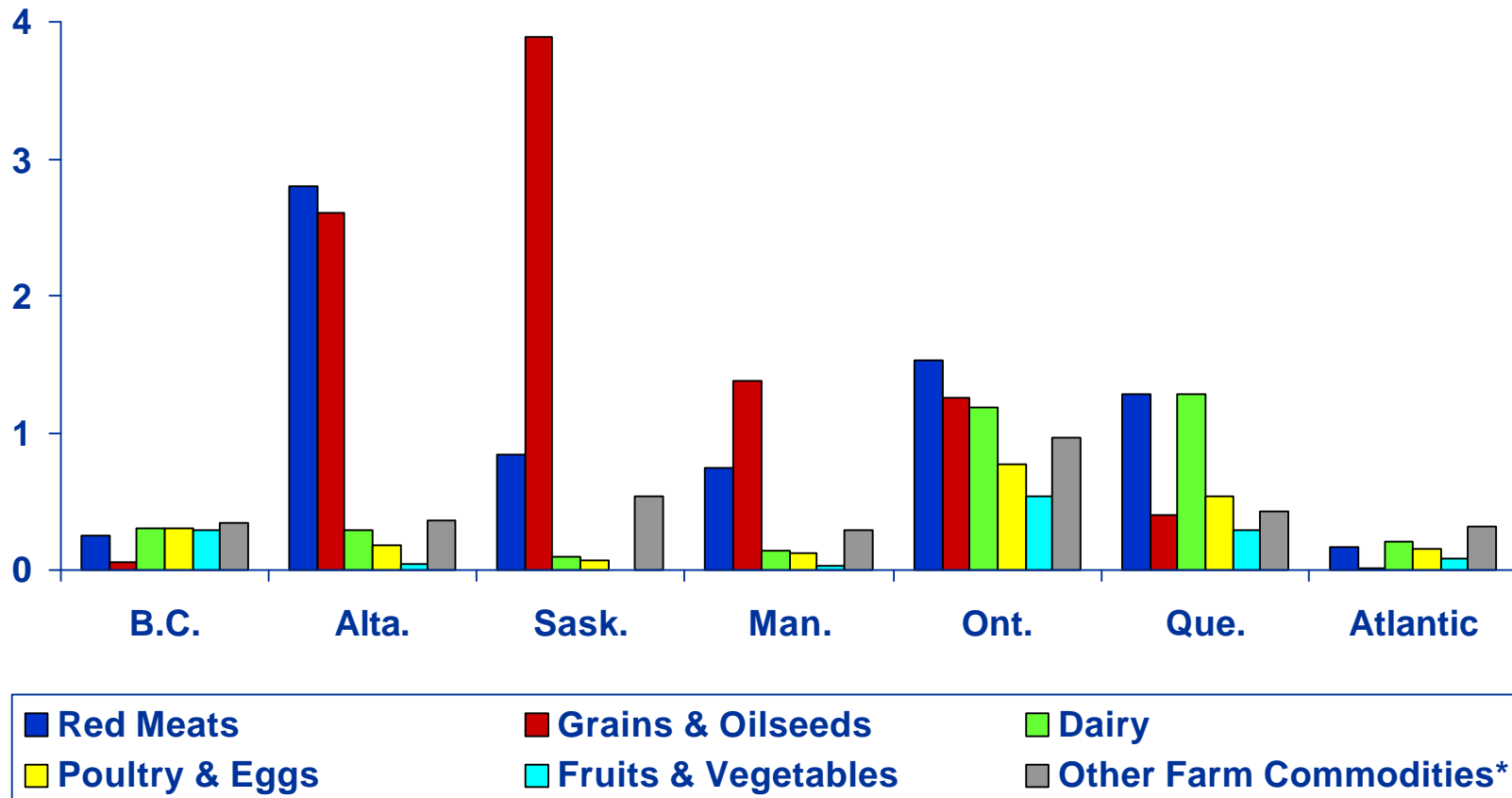


*Includes: Potatoes, Special Crops, Forage, etc.

Source: Statistics Canada Agriculture Division, Farm Income and Prices Section.

Farm Cash Market Receipts by Commodity Group & Province, 1996

Billions of \$

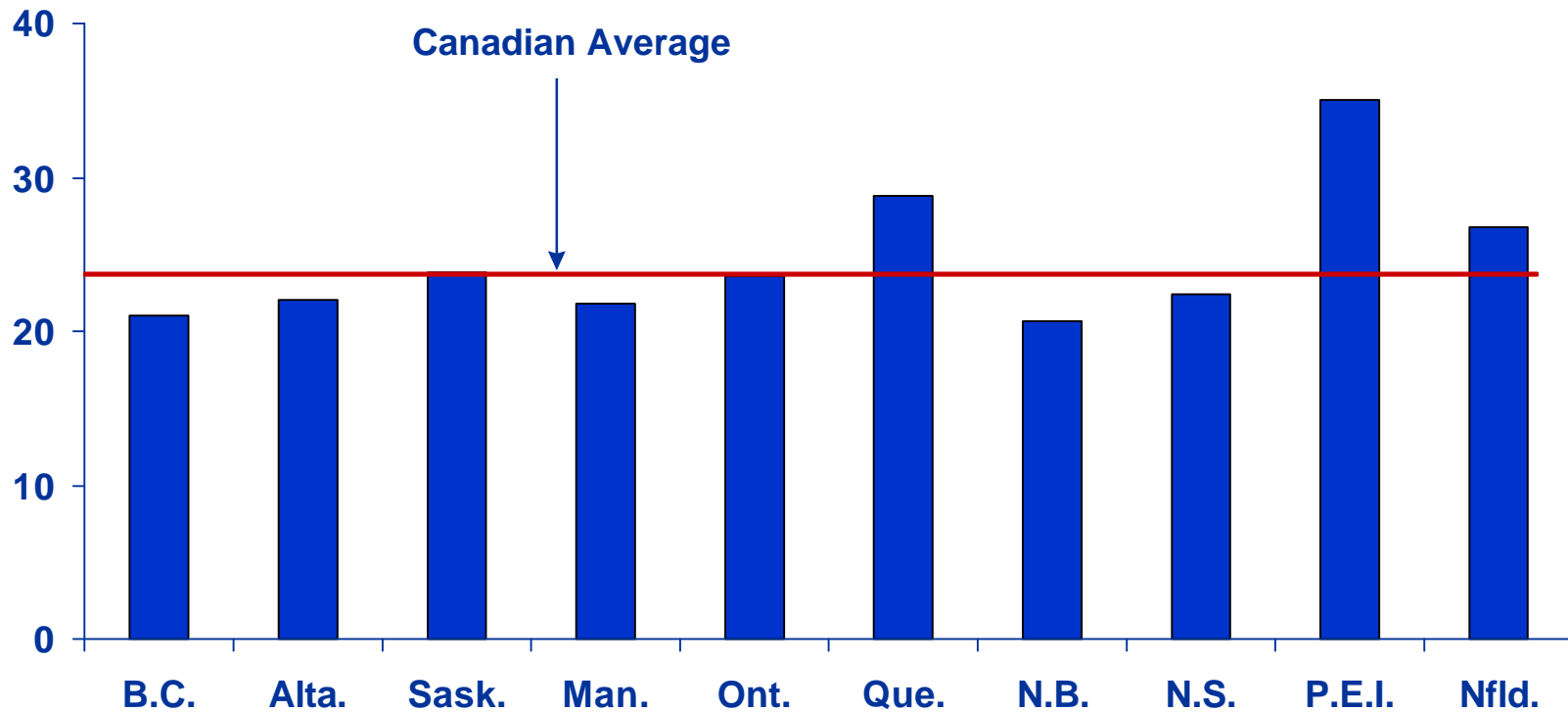


*Includes: Potatoes, Special Crops, Forage, etc.

Source: Statistics Canada Agriculture Division, Farm Income Prices Section.

Average Provincial Farm Income, 1995

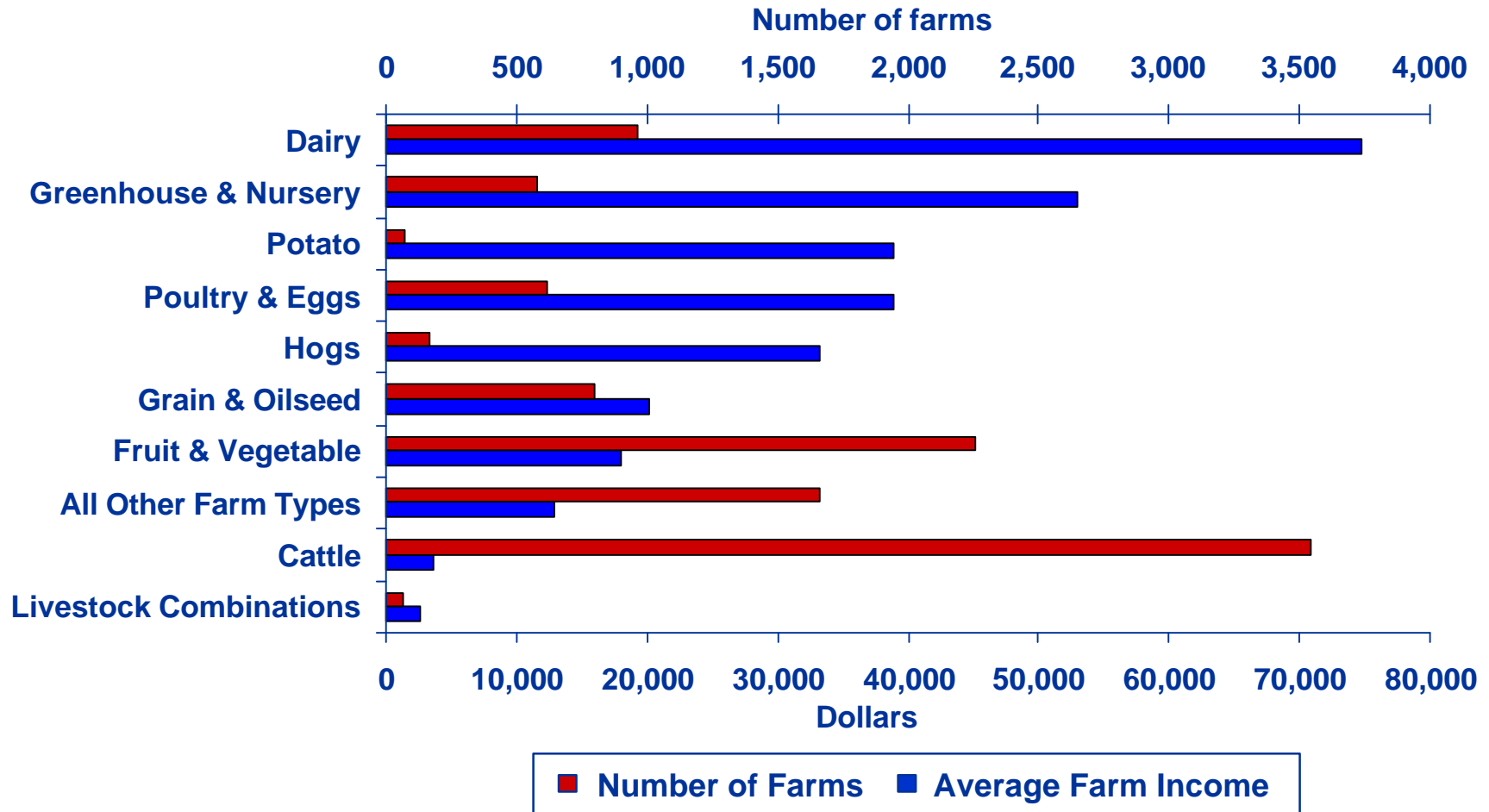
Thousands of \$



Source: Wholefarm Database.

Graph 3-32

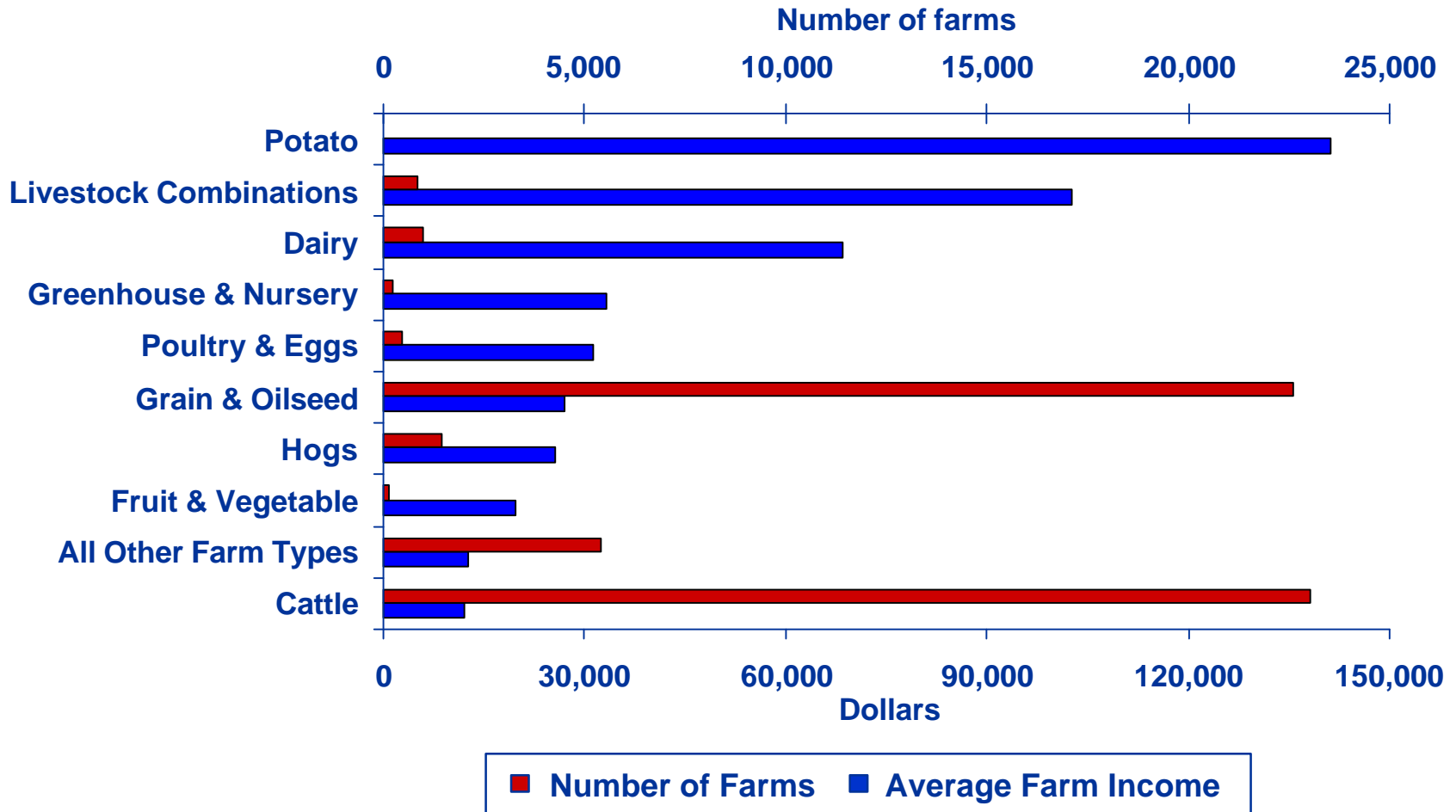
British Columbia Farm Income and Number by Farm Type, 1995



Source: Wholefarm Database.

Alberta

Farm Income and Number by Farm Type, 1995

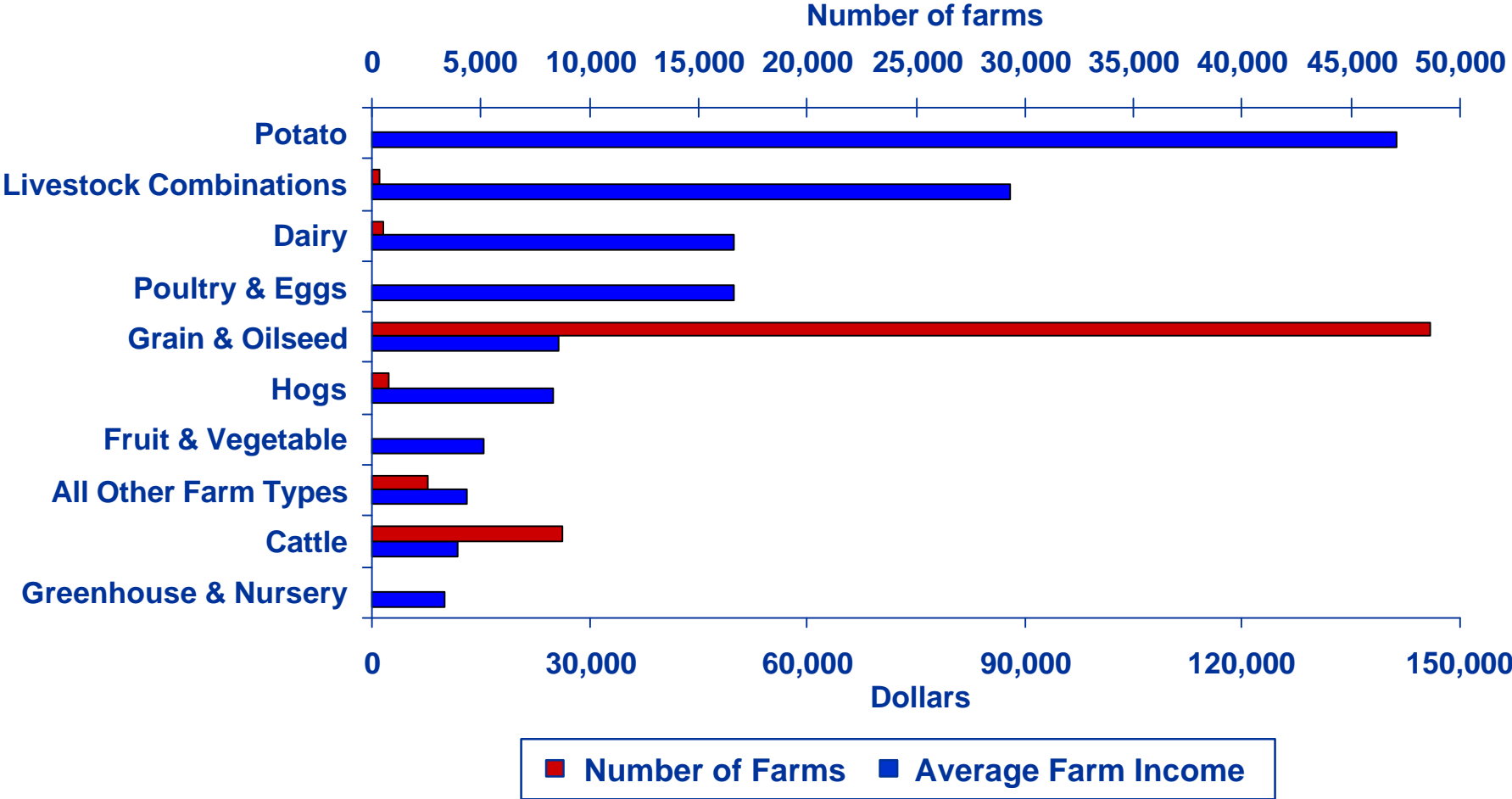


Source: Wholefarm Database.

Graph 3-33

Graph 3-34

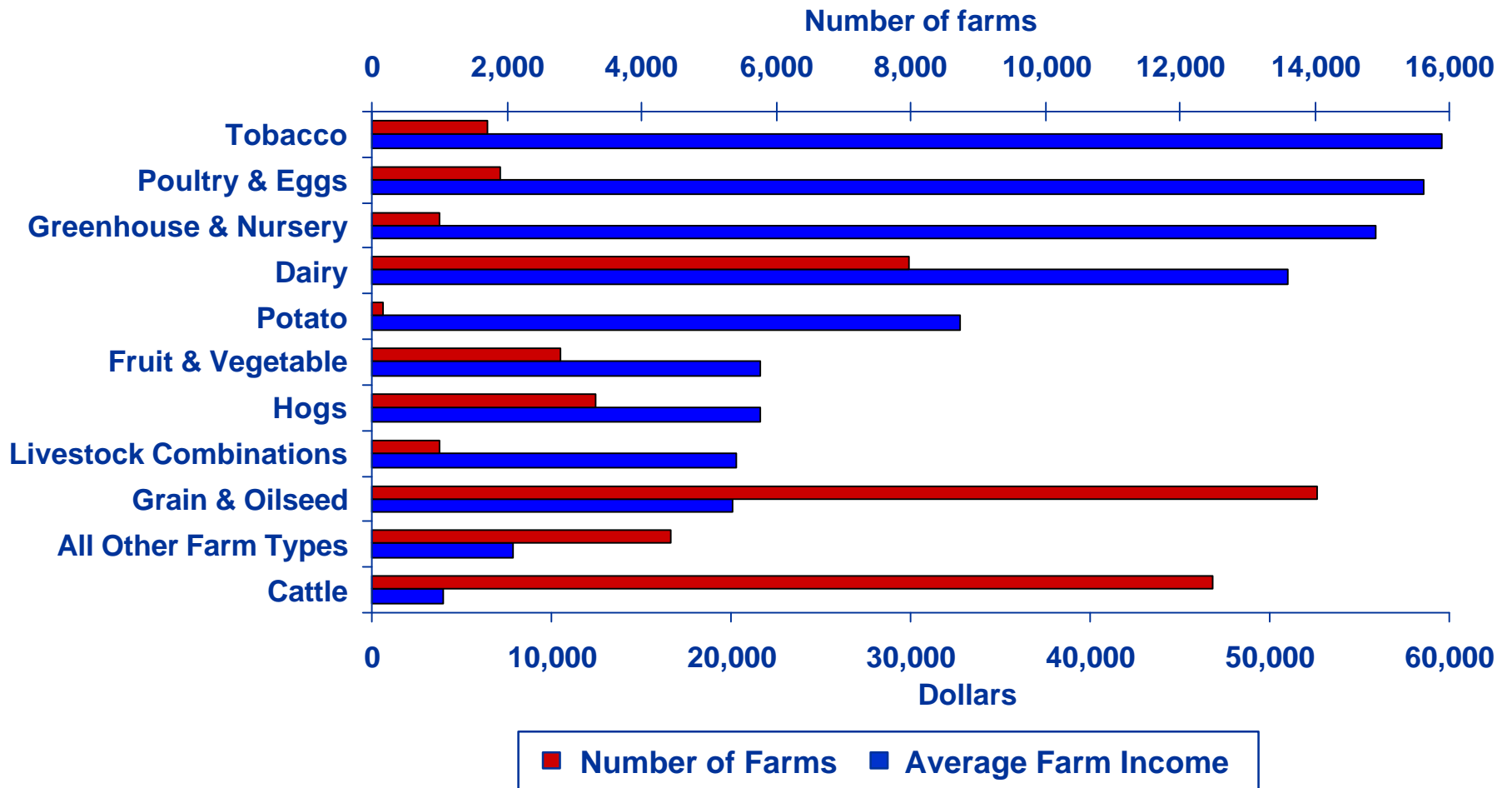
Saskatchewan Farm Income and Number by Farm Type, 1995



Source: Wholefarm Database.

Manitoba

Farm Income and Number by Farm Type, 1995



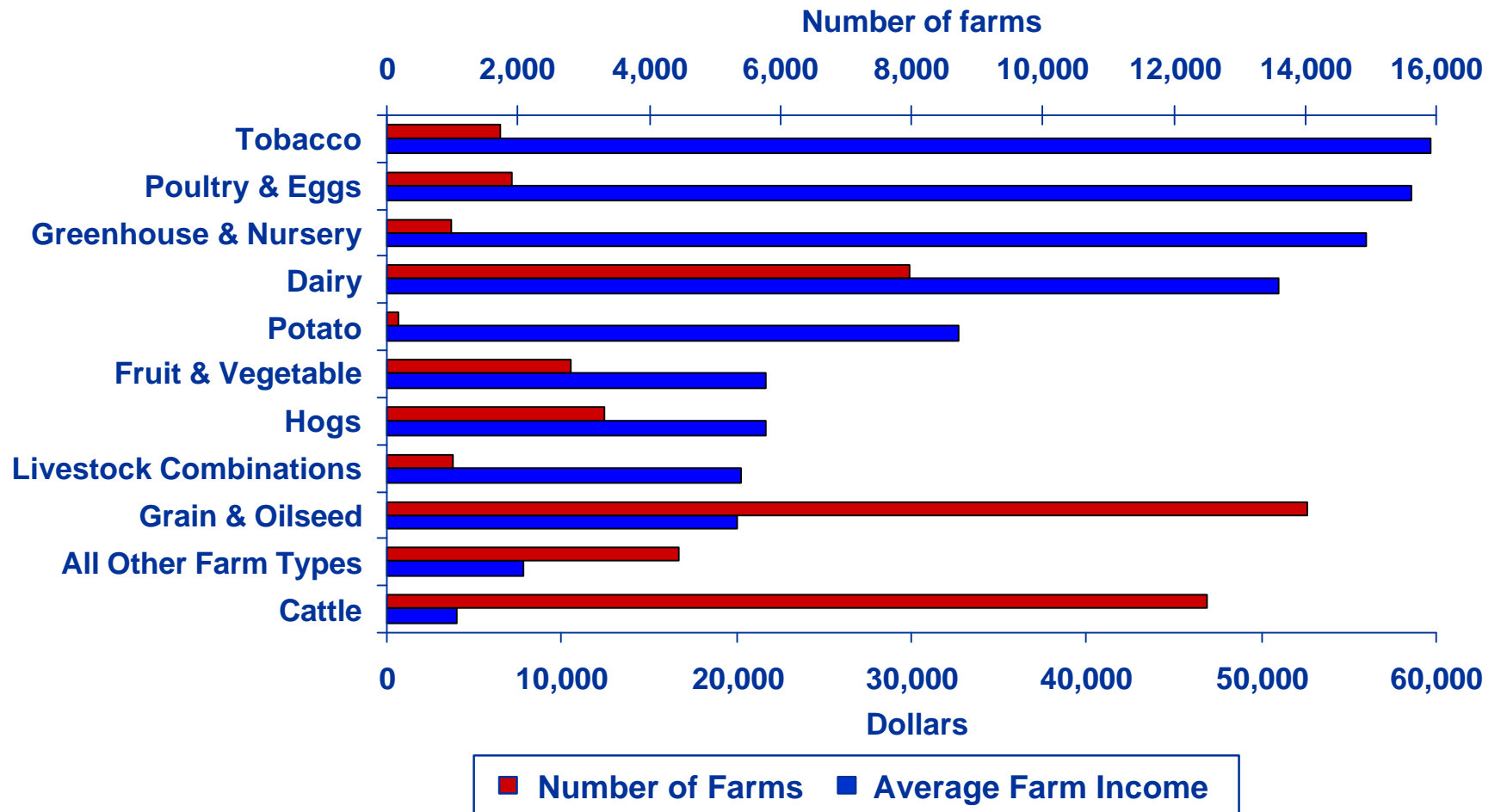
Source: Wholefarm Database.

Graph 3-35

Graph 3-36

Ontario

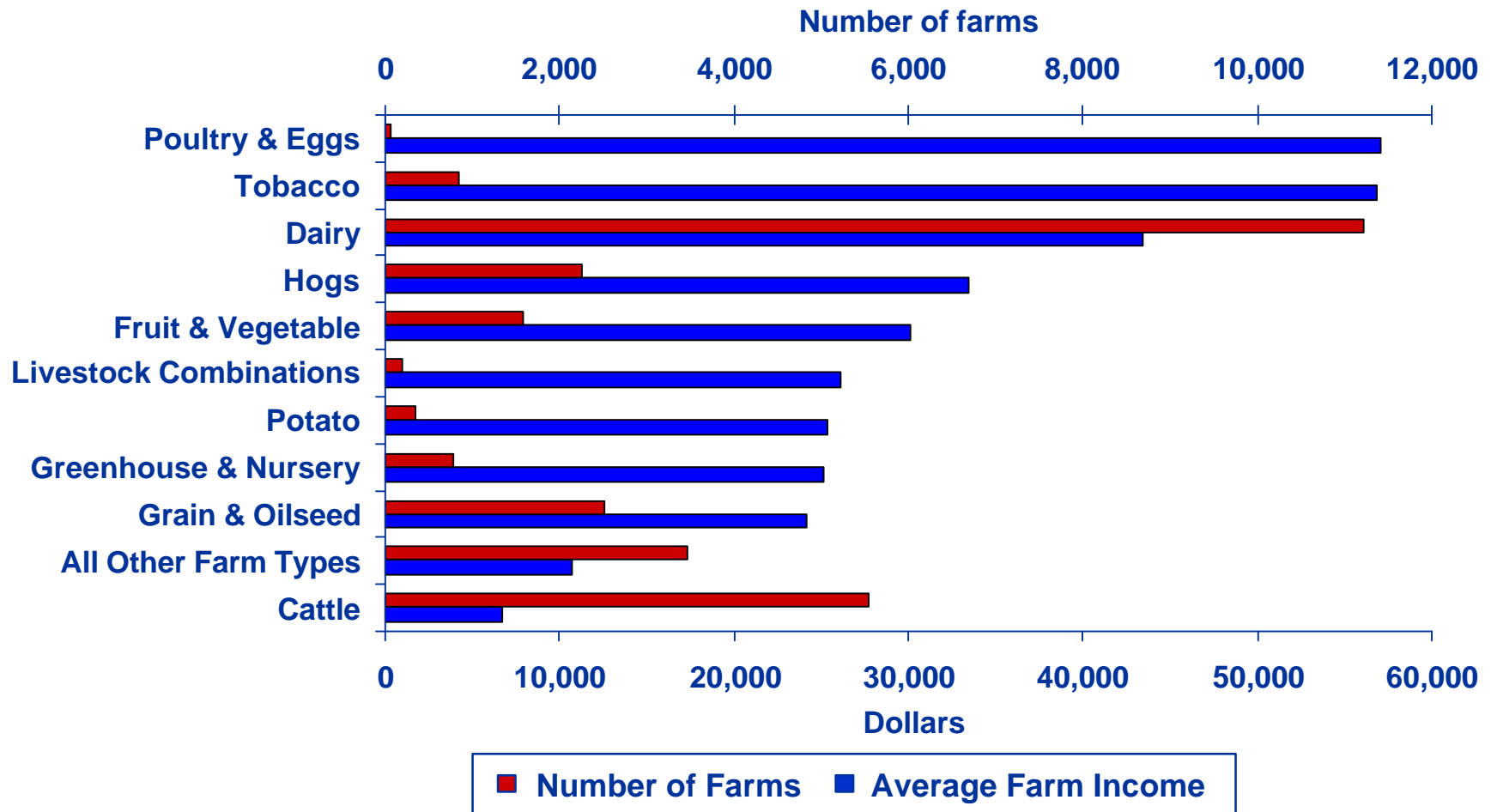
Farm Income and Number by Farm Type, 1995



Source: Wholefarm Database.

Quebec

Farm Income and Number by Farm Type, 1995

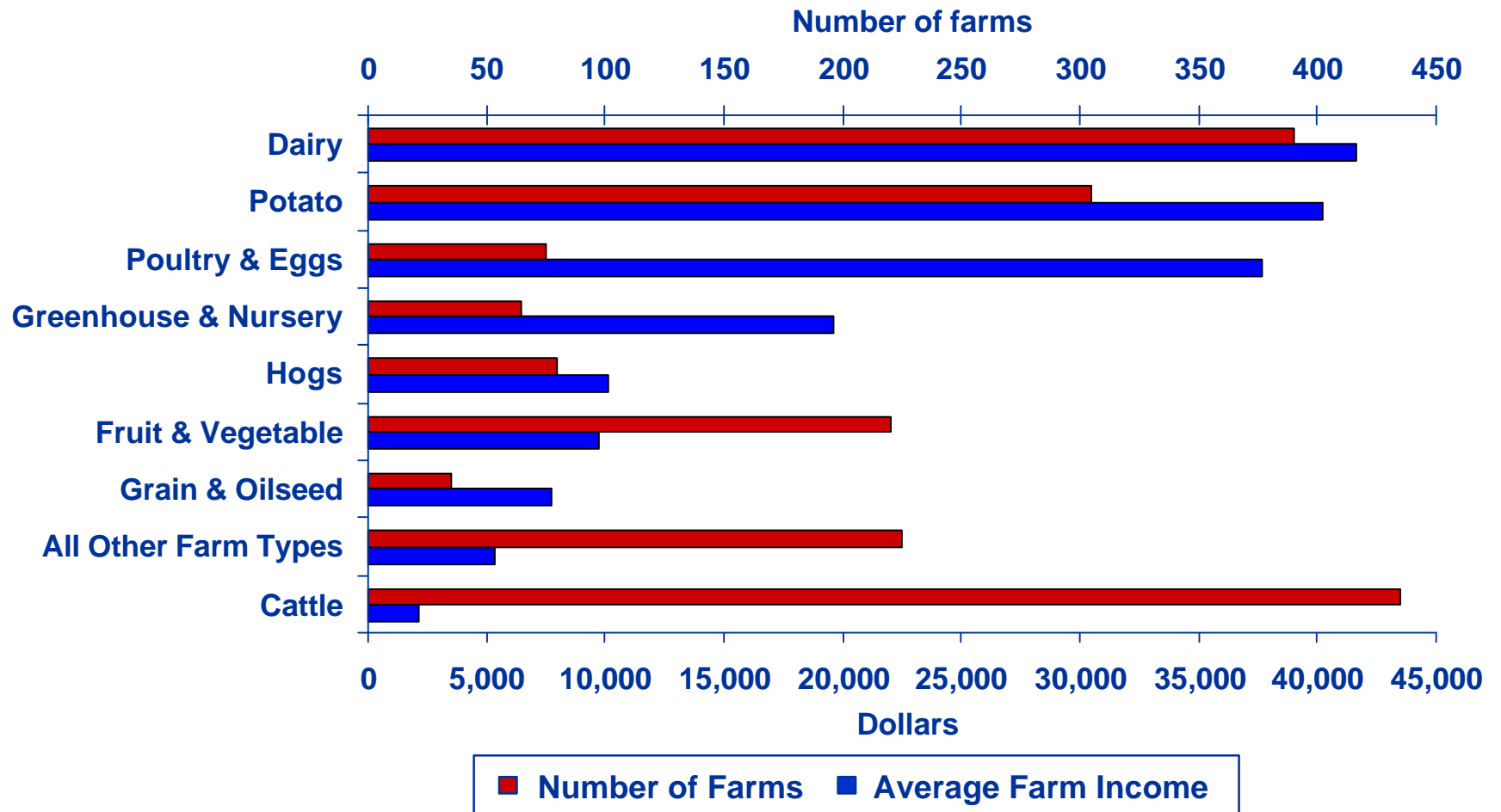


Source: Wholefarm Database.

Graph 3-37

Graph 3-38

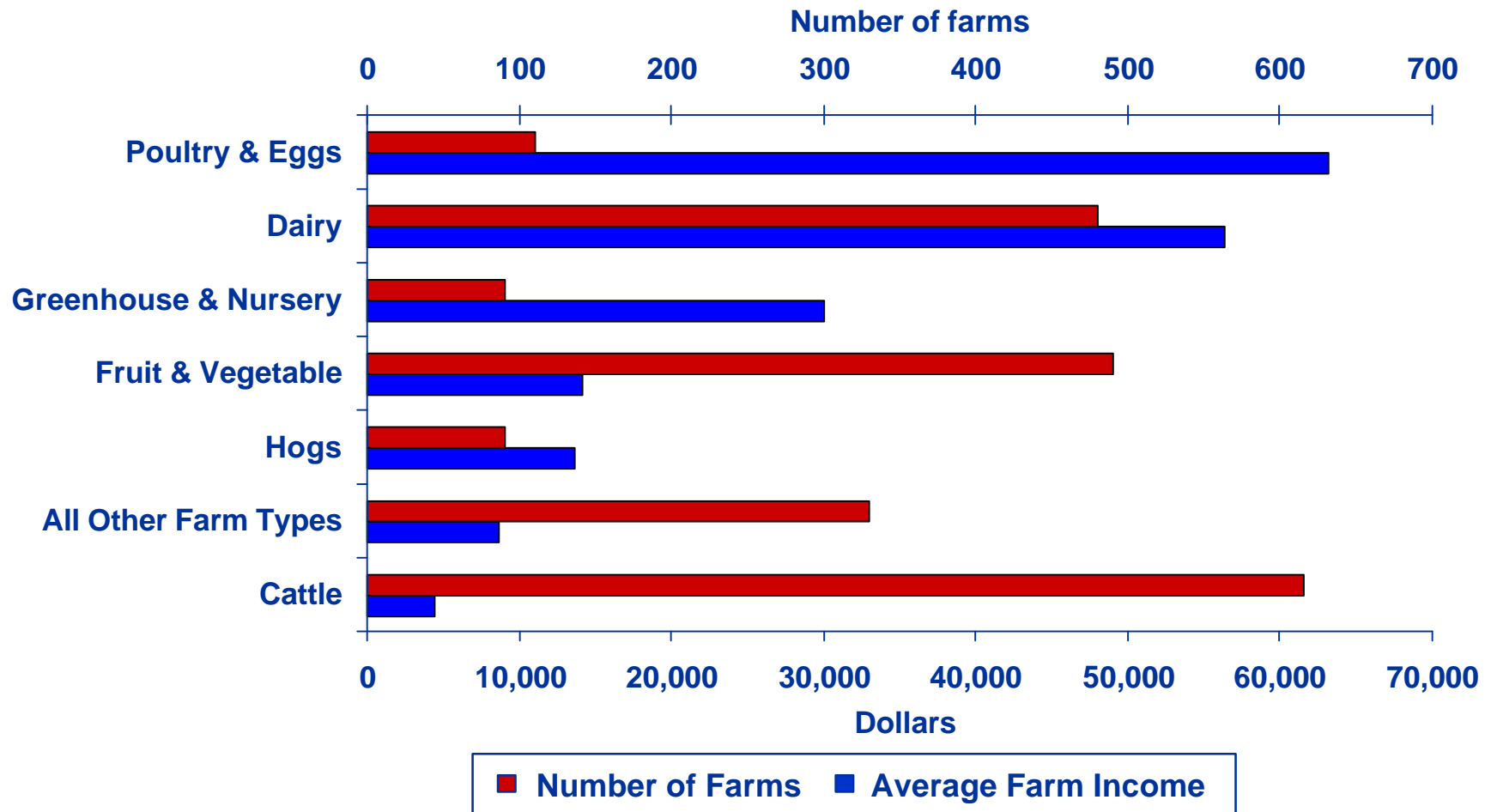
New Brunswick Farm Income and Number by Farm Type, 1995



Source: Wholefarm Database.

Nova Scotia

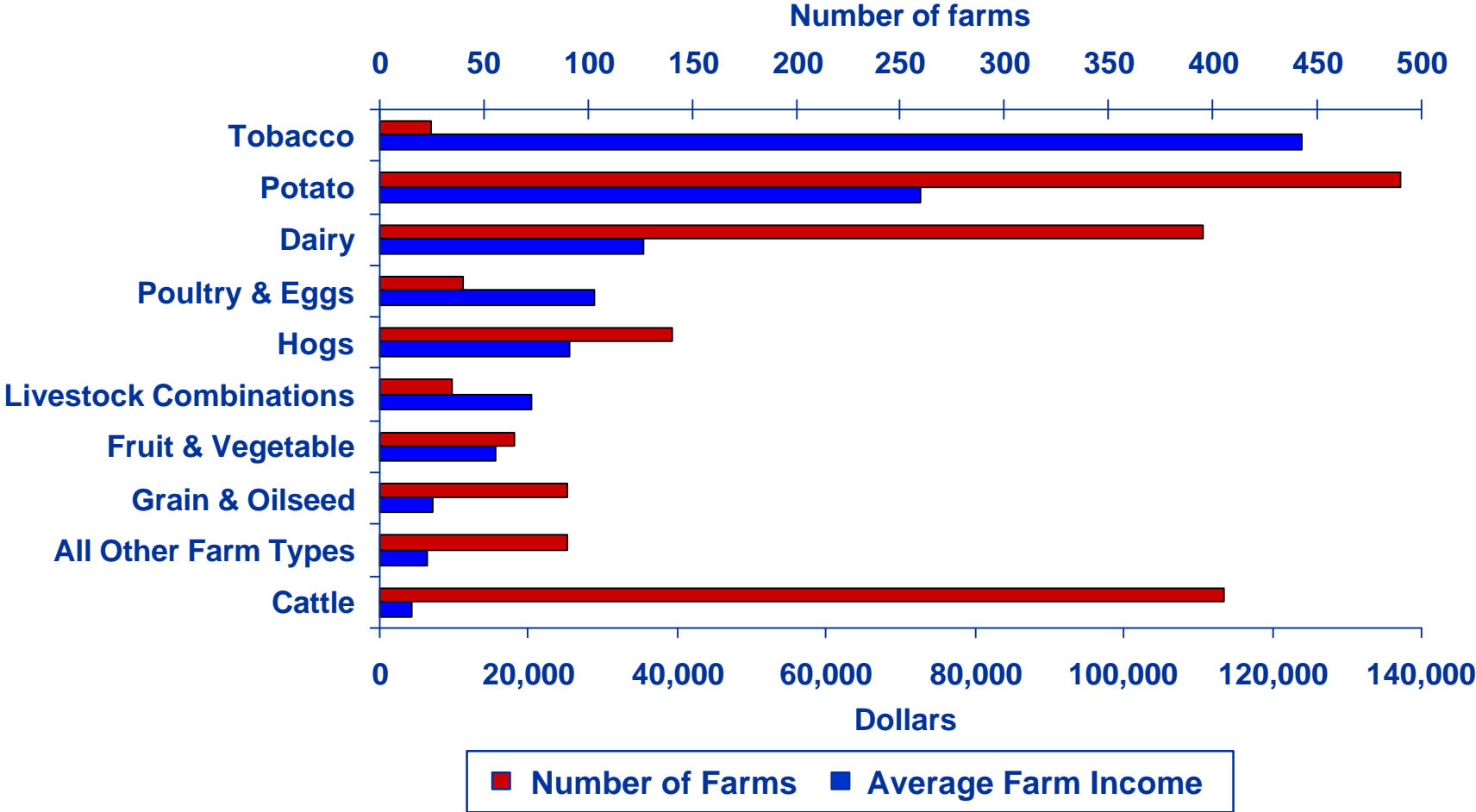
Farm Income and Number by Farm Type, 1995



Source: Wholefarm Database.

Graph 3-40

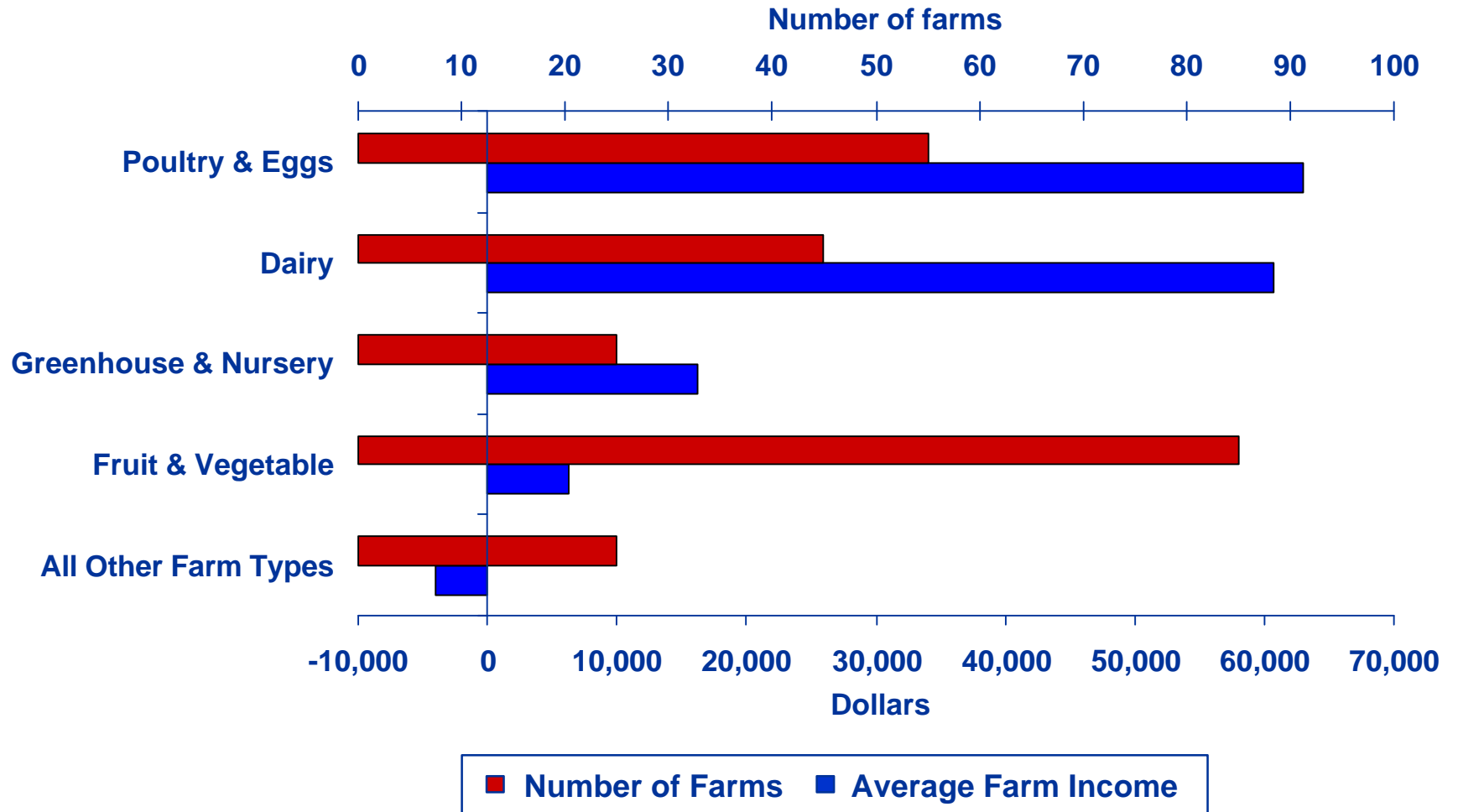
Prince Edward Island Farm Income and Number by Farm Type, 1995



Source: Wholefarm Database.

Newfoundland

Farm Income and Number by Farm Type, 1995

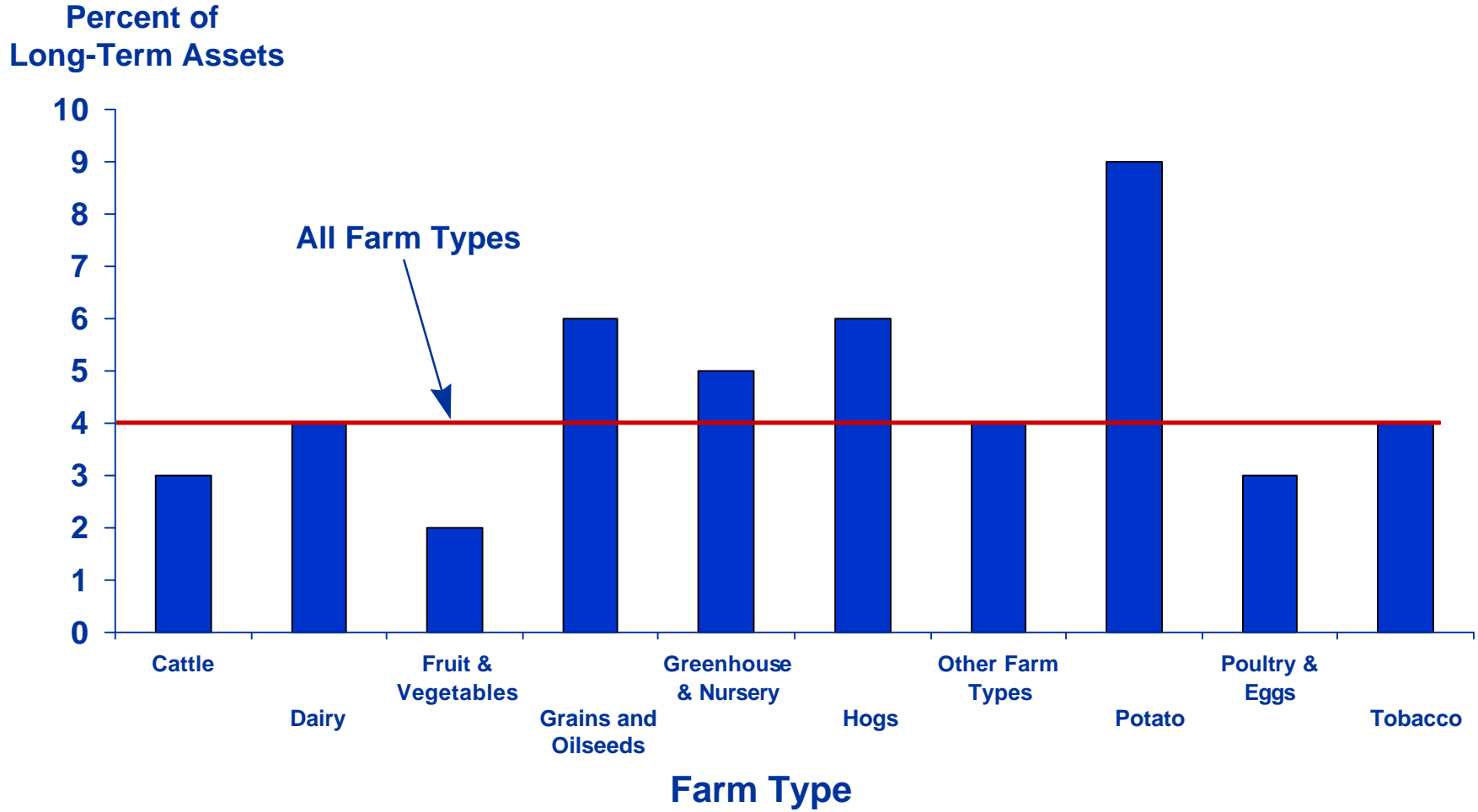


Source: Wholefarm Database.

Graph 3-41

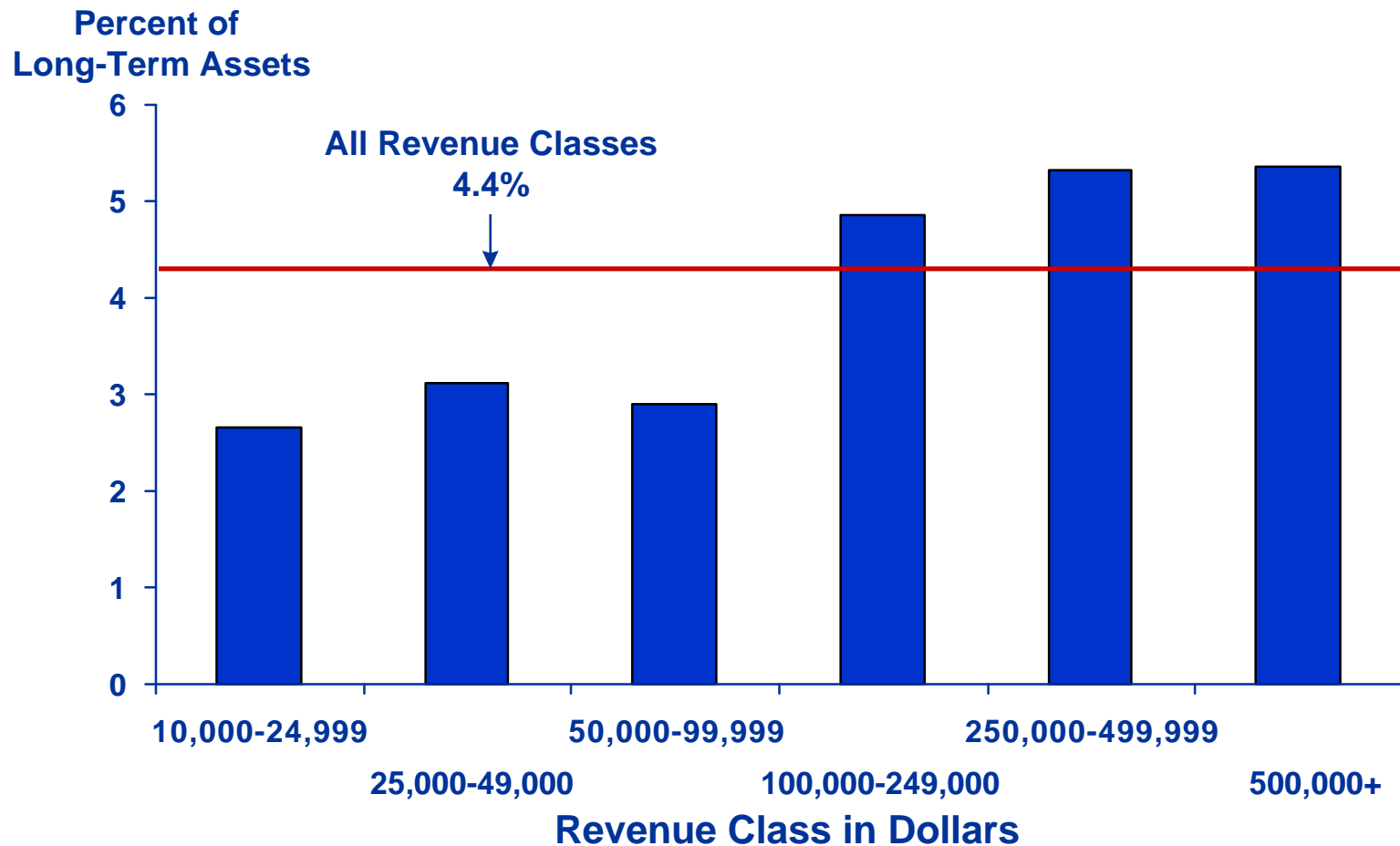
Canada

Net Capital Investment per Farm, 1995



Source: Farm Financial Survey, Wholefarm Database.

Net Capital Investment per Farm, 1995



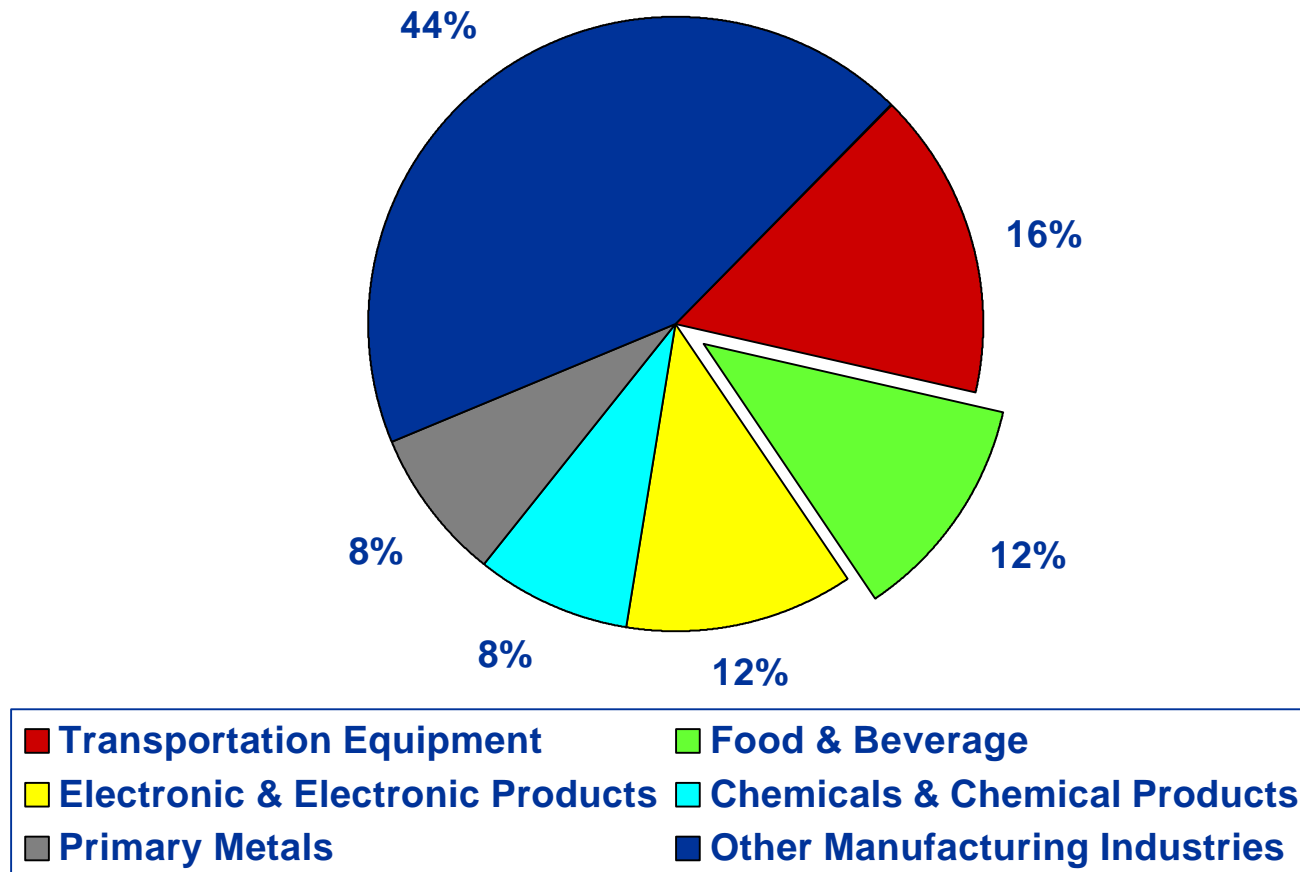
Source: Farm Financial Survey.

Glossary of Terms

Gross Farm Receipts	Gross farm receipts are compiled from census forms sent to all farms every five years. They include cash income from the sale of agricultural commodities as well as direct program payments to the agriculture sector.
Farm Cash Market Receipts	Farm cash market receipts are compiled from a sample of annual taxfiler data. They include cash income from the sale of agricultural commodities, but exclude direct program payments.
Land in crops	Includes field crops, vegetables, fruits & nursery crops. Since 1981, it has also included sod.
Other Farm Commodities	Includes sugar beets, potatoes, floriculture & nursery, tobacco, ginseng, mustard seed, sunflower seed, lentils, canary seed, dry beans, dry peas, forage & grass seed, hay & clover, maple products, forest products, misc. crops, wool, honey, fur, misc. livestock.
Farm Type	Commodity which accounts for 51% of the total farm cash receipts.
Farm Income	Farm income is defined as farm cash receipts less farm cash expenses. Expenses do not include non-cash items such as depreciation.

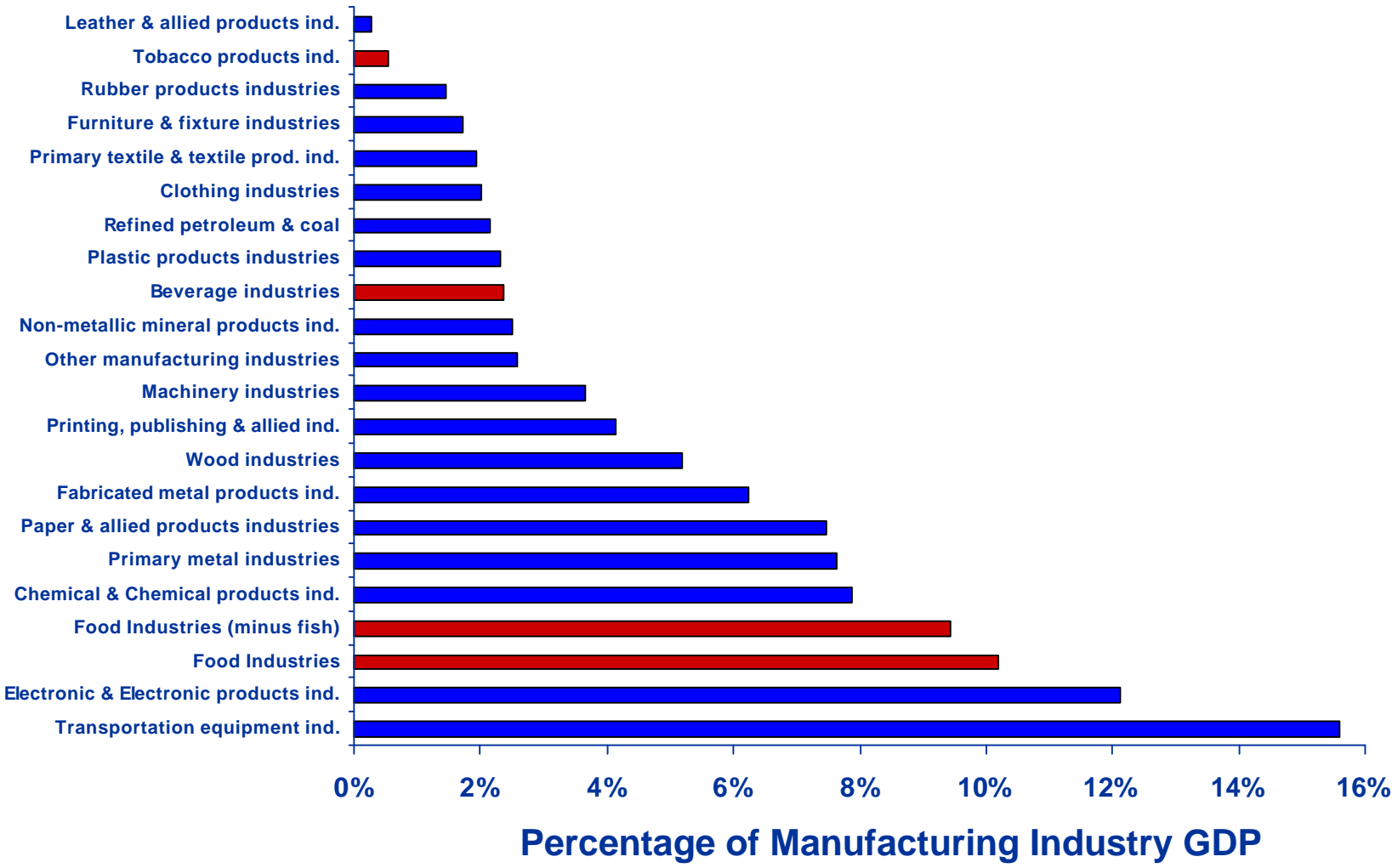
Food and Beverage Structure and Performance

Manufacturing Industries GDP Share, 1996



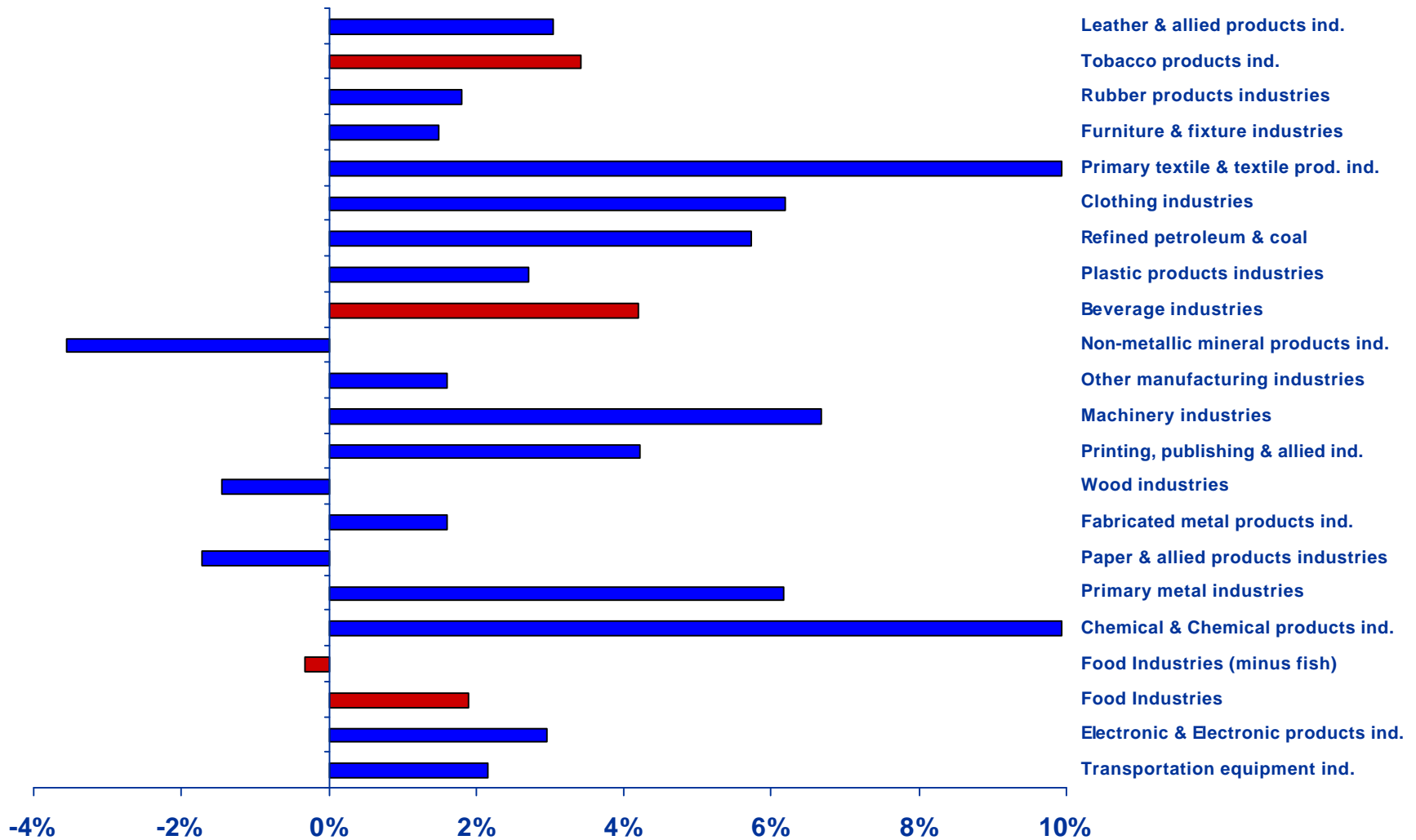
Source: Statistics Canada, Cansim.

Major Industries in Canada, 1996



Source: Statistics Canada, Cansim.

Major Industries in Canada, 1991-96



Source: Statistics Canada, Cansim.

63 Largest Agri-Food Companies in Canada, 1996

- based on total revenue in 1996 \$

Company	Major Activity	Revenue 1996 \$'000s	Head Office Location
Primary Agriculture			
Saskatchewan Wheat Pool	Grains	4,133,241	Regina, SK
Cargill Ltd.	Grain & beef	2,580,000	Winnipeg, MB
Alberta Wheat Pool	Grains	2,128,120	Calgary, AB
United Grain Growers Ltd.	Grains	1,969,899	Winnipeg, MB
XCAN Grain Pool Ltd.	Grains	1,360,441	Winnipeg, MB
Manitoba Pool Elevators	Grains	1,220,534	Winnipeg, MB
W.G. Thompson & Sons Ltd.	Grains	375,000	Blenheim, ON
N.M. Paterson & Sons Ltd.	Grains	236,830	Winnipeg, MB
		\$ 14,004,065	
Distribution/Retailing			
The Oshawa Group Ltd.	Food stores	6,383,500	Etobicoke, ON
Provigo Inc.	Food stores	5,832,500	Montreal, PQ
Canada Safeway Ltd.	Food stores	4,732,900	Calgary, AB
Métro-Richelieu Inc.	Food stores	3,266,000	Montreal, PQ
Empire Co. Ltd.	Food stores	2,915,193	Stellarton, NS
Great Atlantic & Pacific Co. of Canada, Ltd.	Food stores	2,372,317	Etobicoke, ON
Federated Co-operatives Ltd.	Wholesale dist.	2,242,343	Saskatoon, SK
McDonald's Restaurants of Canada Ltd.	Food service	1,740,301	Toronto, ON
Cara Operations Ltd.	Food service	909,305	Toronto, ON
Southland Canada Inc.	Food stores	745,681	Burnaby, BC
Silcorp Ltd.	Food stores	633,819	Scarborough, ON
Calgary Co-operative Association Ltd.	Food stores	537,555	Calgary, AB
Export Packers Co. Inc.	Wholesale dist.	404,679	Brampton, ON
Alimentation Couche-Tard	Food stores	368,624	Laval, PQ
A&W Food Services of Canada Inc.	Food service	311,000	Vancouver, BC
A.L. Van Houtte Ltée	Wholesale dist.	164,102	Montreal, PQ
Distribution/Retailing		\$ 33,559,819	

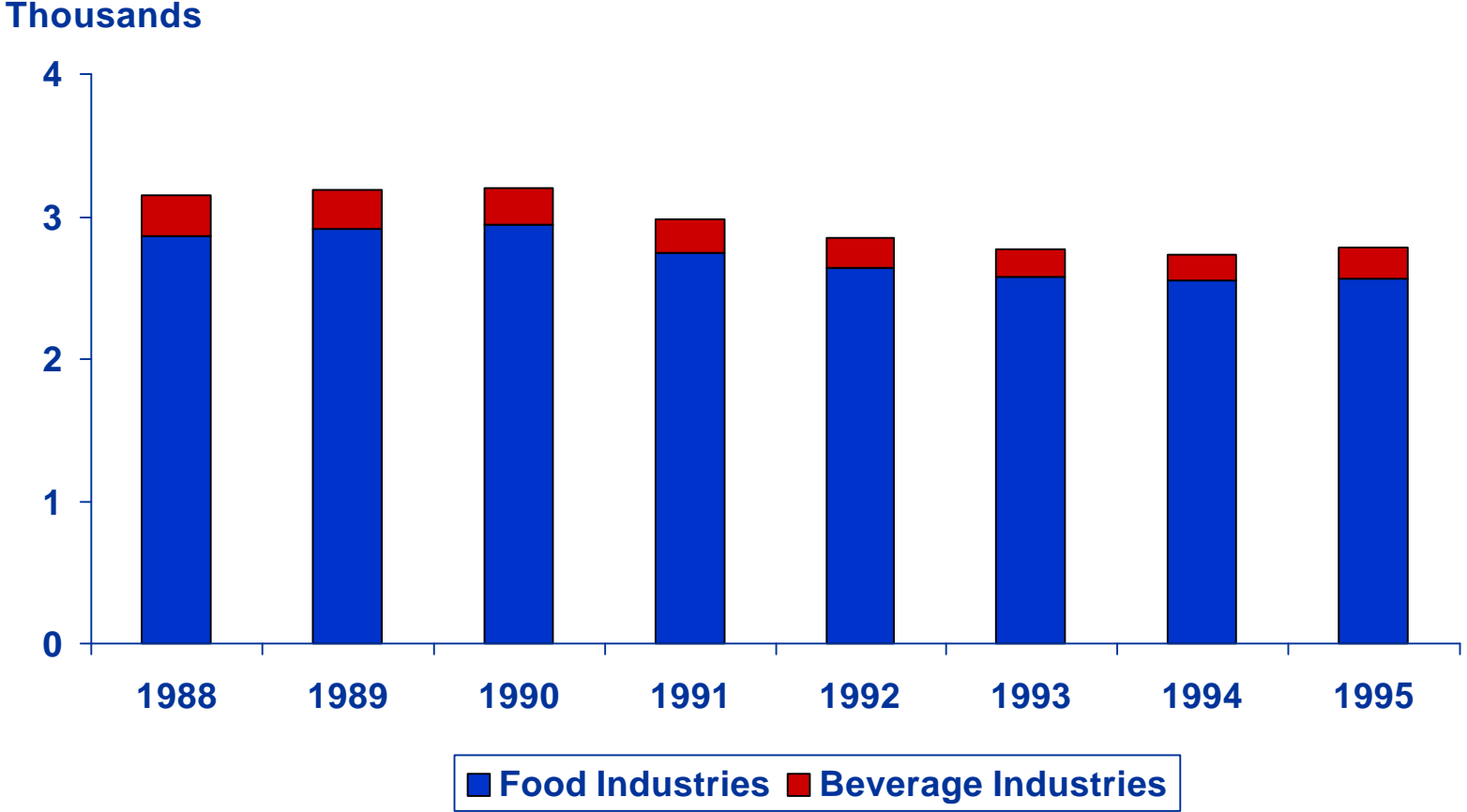
63 Largest Agri-Food Companies in Canada, 1996 - based on total revenue in 1996 \$ (cont'd)

Company	Major Activity	Revenue 1996 \$'000s	Head Office Location
Processing Sector			
The Seagram Co. Ltd.	Spirits, juices	16,396,859	Montreal, PQ
George Weston Ltd.	Baked goods, candy	12,709,000	Toronto, ON
McCain Foods Ltd.	Prepared foods, juices	4,136,664	Florenceville, NB
Maple Leaf Foods Inc.	Meat, processed foods	3,210,129	Toronto, ON
Coopérative fédérée de Québec	Dairy & meat	1,790,946	Montreal, PQ
Unilever Canada Ltd.	Prepared foods, teas	1,500,844	Toronto, ON
Cott Corp.	Beverages	1,351,567	Toronto, ON
Ault Foods Ltd.	Dairy	1,346,505	Etobicoke, ON
The Molson Cos. Ltd.	Breweries & bev.	1,182,191	Toronto, ON
Agrifoods International Cooperative Ltd.	Dairy	1,132,000	Toronto, ON
Nabisco Ltd.	Cereals, baked goods	1,126,827	Etobicoke, ON
Nestlé Canada Inc.	Coffee, prepared foods	1,118,992	North York, ON
Agropur, Coopérative Agro-alimentaire	Dairy	1,038,420	Granby, PQ
Coca-Cola Beverages Ltd.	Beverages	956,727	Toronto, ON
Beatrice Foods Inc.	Dairy, baked goods	921,354	Etobicoke, ON
BC Sugar Refinery Ltd.	Sugar	848,554	Vancouver, BC
Schneider Corp.	Meat, processed foods	826,100	Kitchener, ON
FPI Ltd.	Seafood	664,598	St. John's, NF
Canada Starch Co. Inc.	Starch	573,841	Etobicoke, ON
Campbell Soup Co. Ltd.	Canned goods	473,886	Toronto, ON
Culinar Inc.	Baked goods	445,780	Toronto, ON
Groupe Brochu-Lafleur	Meat	410,000	Lévis, PQ
Groupe Saputo Inc.	Cheese	385,000	St-Léonard, PQ
Redpath Industries Ltd.	Sugar	347,759	Toronto, ON
The Quaker Oats Co. of Canada Ltd.	Cereals	340,223	Peterborough, ON
Ralston Purina Canada Inc.	Pet foods	330,879	Mississauga, ON
Lilydale Co-operative Ltd.	Poultry	320,562	Edmonton, AB
Fletcher's Fine Foods Ltd.	Meat	300,600	Vancouver, BC
Multi-Marques Inc.	Baked goods	300,000	Laval, PQ
Groupe Lactel	Dairy	298,824	Boucherville, PQ
XL Foods Ltd.	Meat	291,387	Calgary, AB
Maple Lodge Farms Ltd.	Poultry	258,890	Norval, ON
National Sea Products Ltd.	Seafood	252,795	Lunenburg, NS
Groupe Dorchester/St-Damase	Poultry	227,000	St-Anselme, PQ
Cadbury Beverages Canada Inc.	Beverages, juices	214,792	Mississauga, ON
Gay Lea Foods Co-operative Ltd.	Dairy	200,816	Weston, ON
Scotsburn Co-operative Services Ltd.	Dairy	193,915	Scotsburn, NS
Canbra Foods Ltd.	Oils	191,463	Lethbridge, AB
Lassonde Industries Inc.	Juices, canned goods	160,002	Rougemont, PQ
Processing Sector		\$ 58,776,691	
Total		\$ 106,340,575	

Source: The Financial Post 500 Magazine.

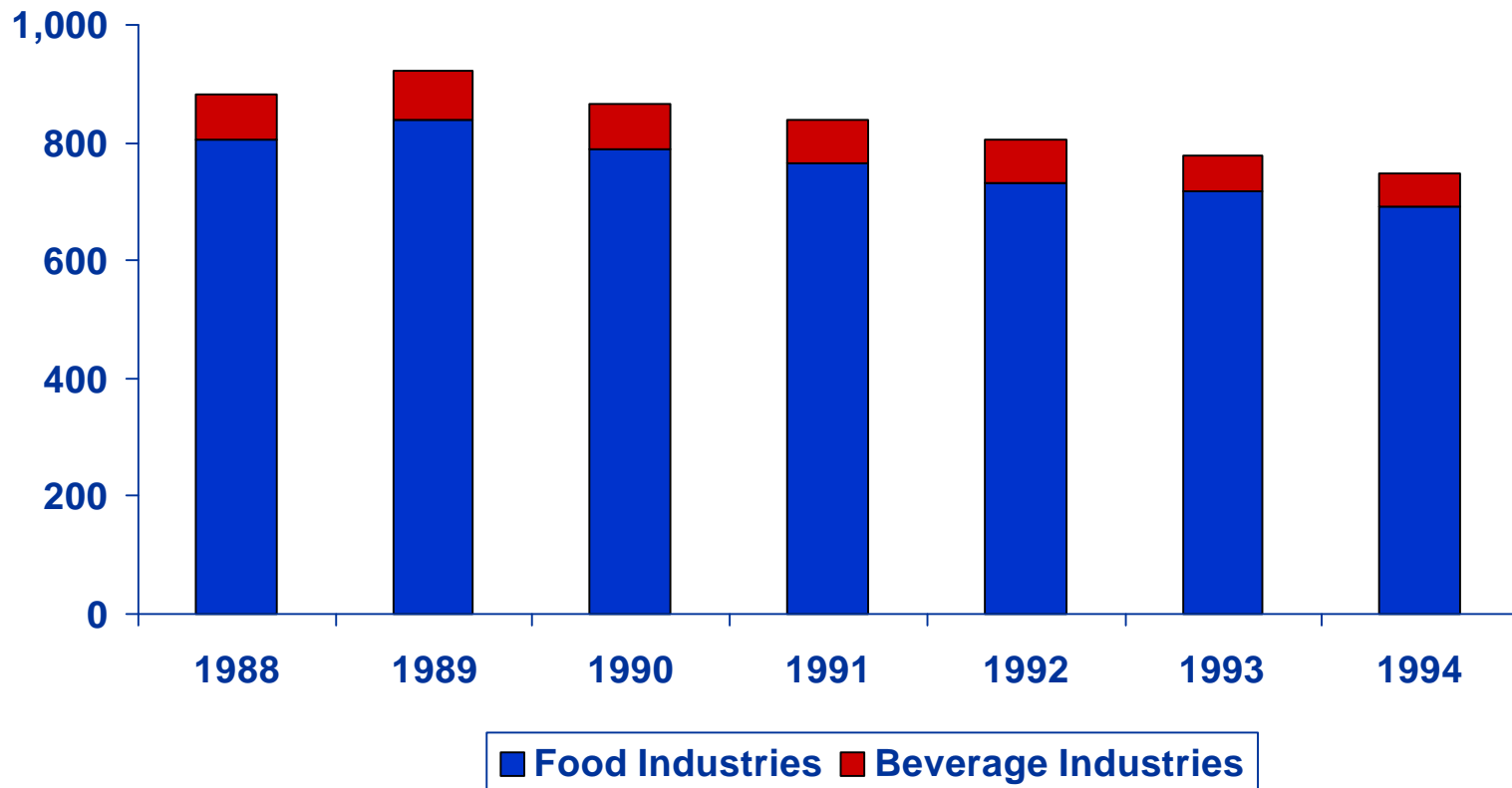
Graph 4-5

Canada Number of Processing Establishments



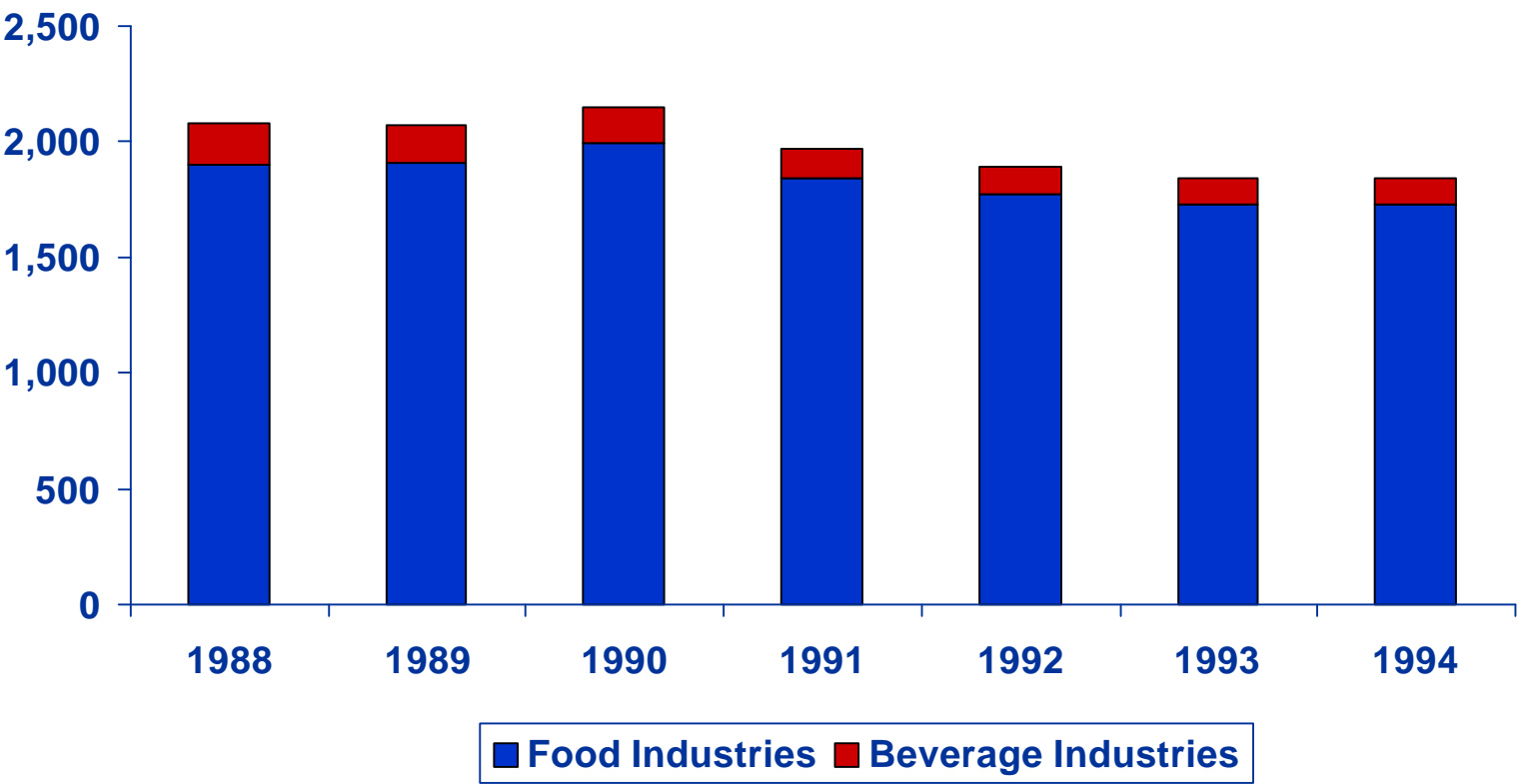
Source: Statistics Canada.

Western Canada Number of Processing Establishments



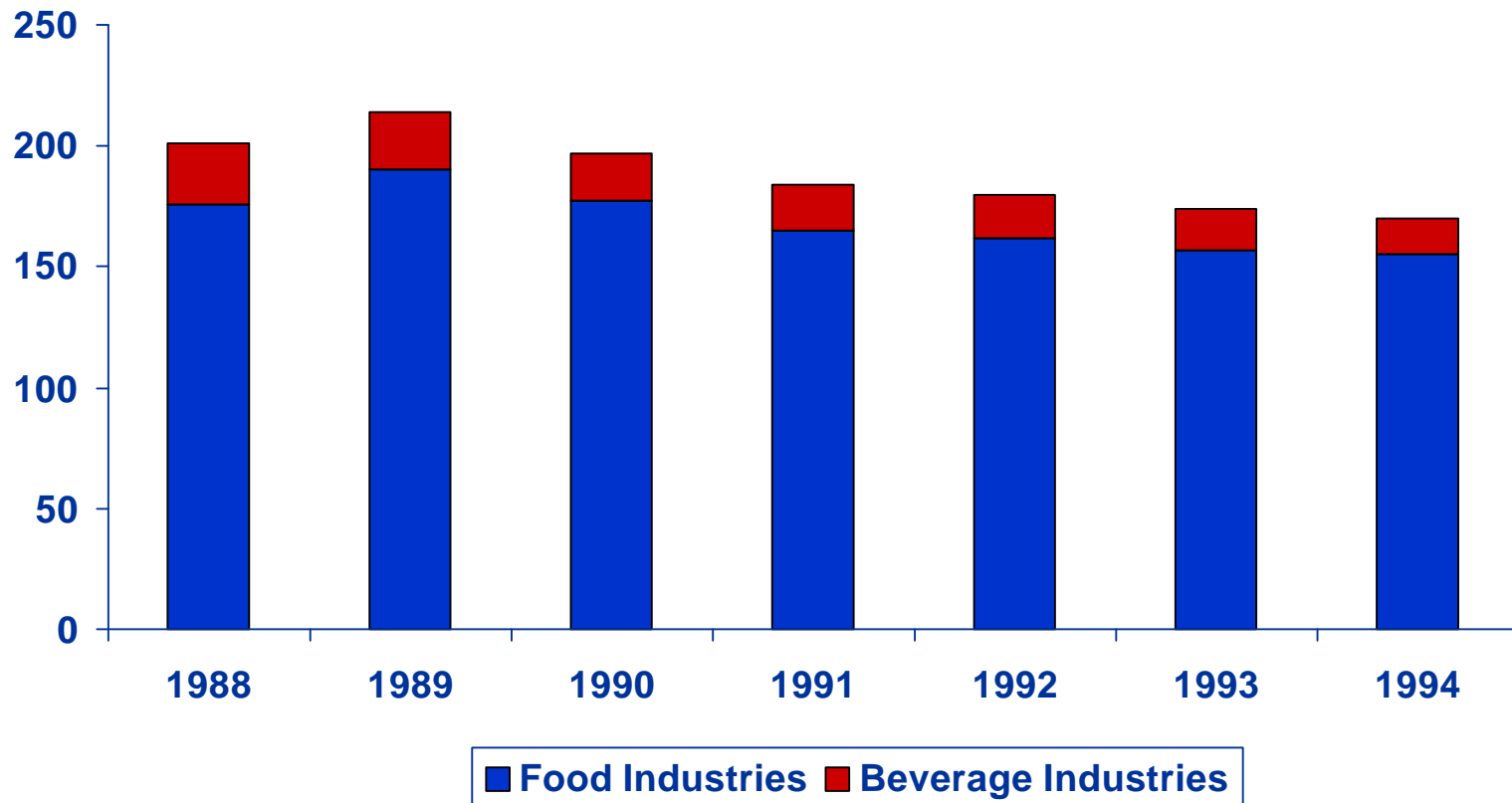
Source: FPIS database - AAFC.

Central Canada Number of Processing Establishments



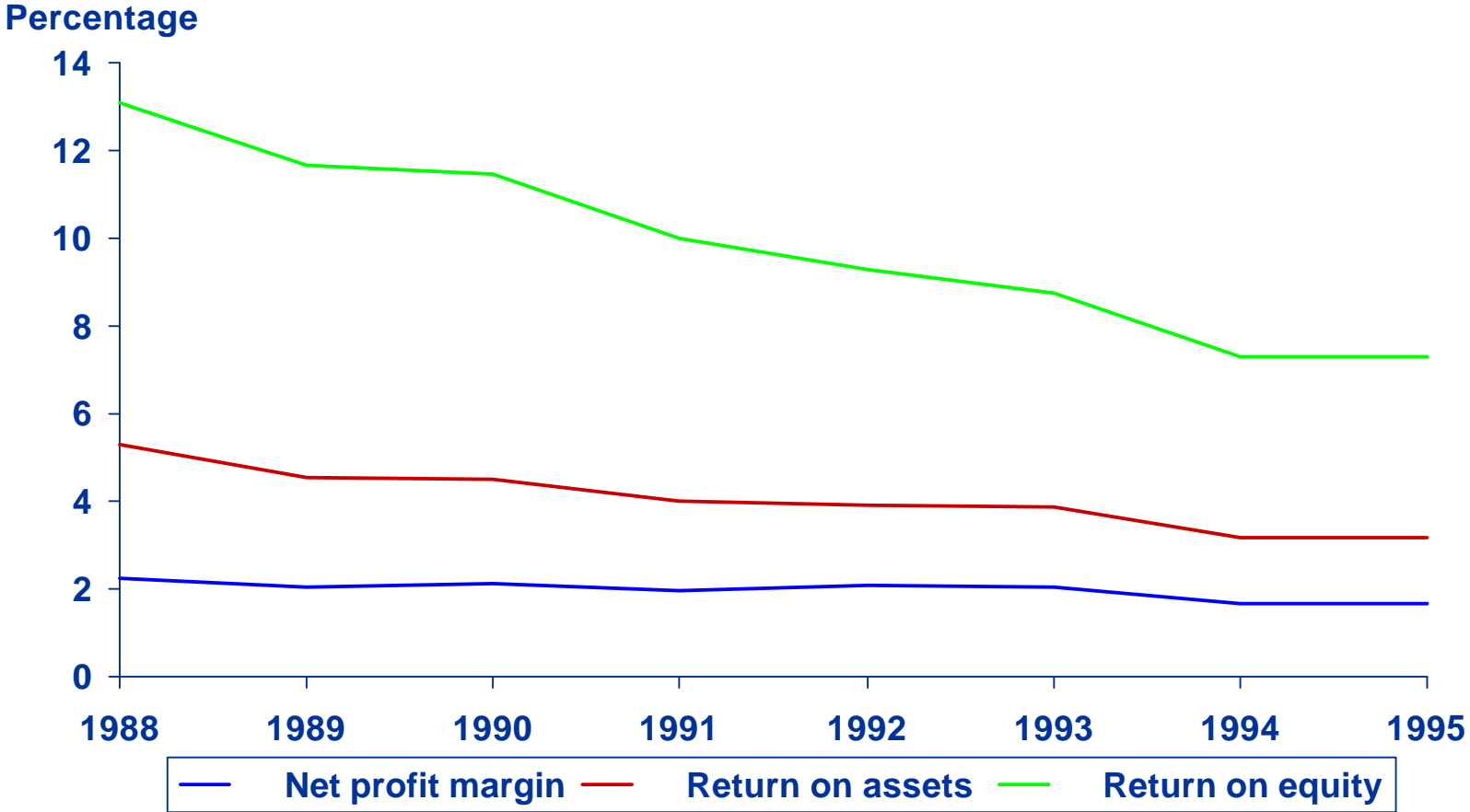
Source: FPIS database - AAFC.

Atlantic Canada Number of Processing Establishments



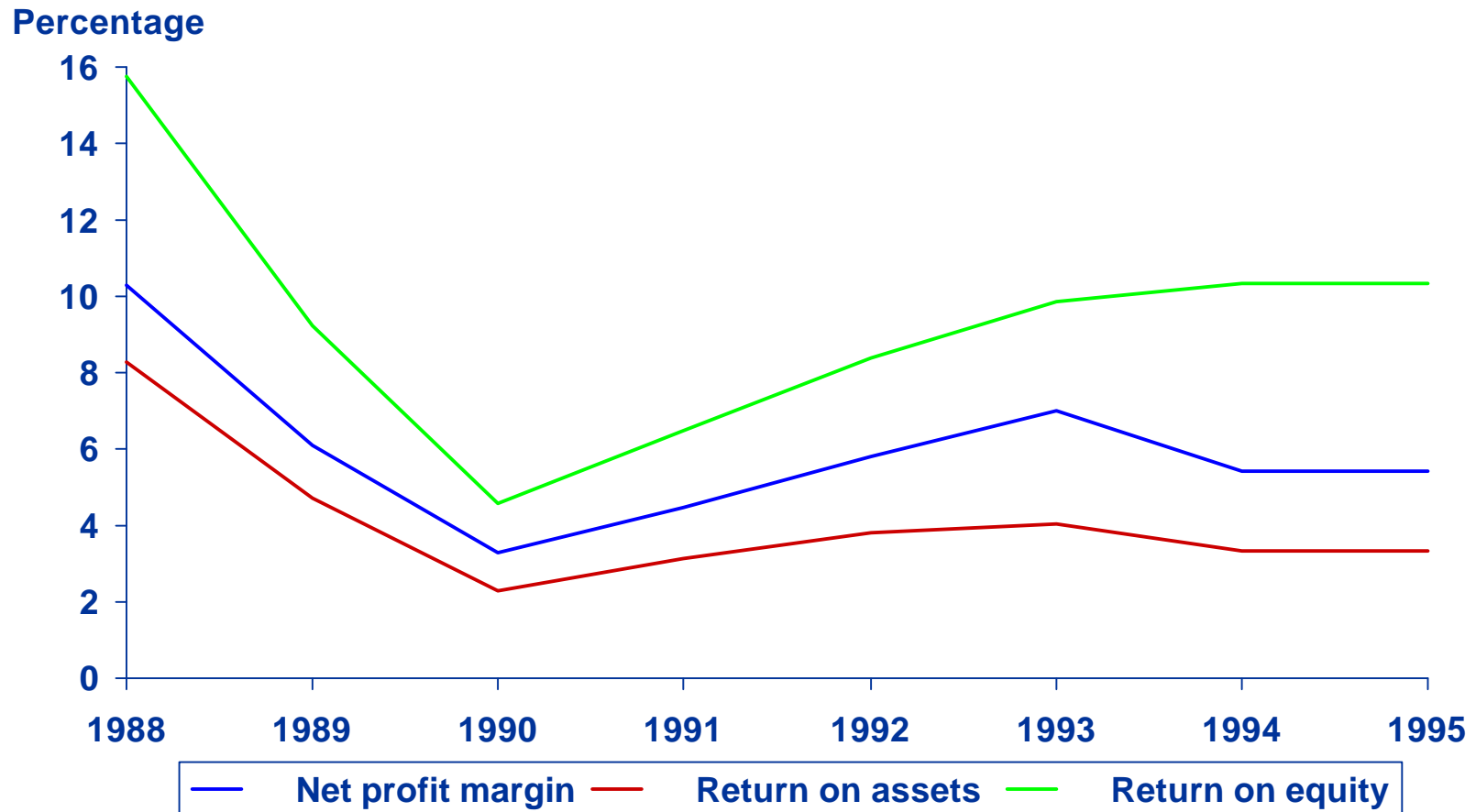
Source: FPIS database - AAFC.

Canadian Food Processing Sector Profitability Measures



Source: Special Tabulations obtained from Statistics Canada, Business Finance and Taxation.

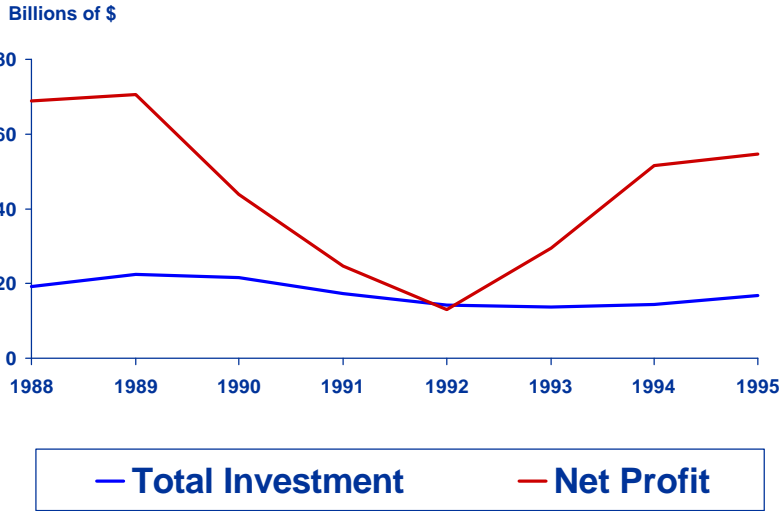
Canadian Beverage Processing Sector Profitability Measures



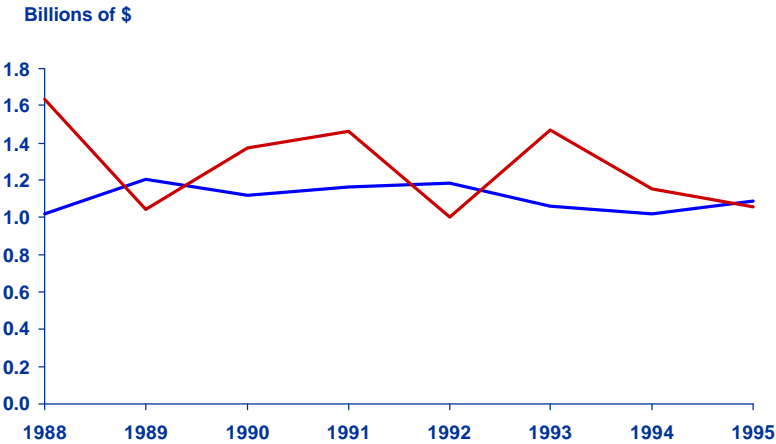
Source: Special Tabulations obtained from Statistics Canada, Business Finance and Taxation.

Investment and Net Profit

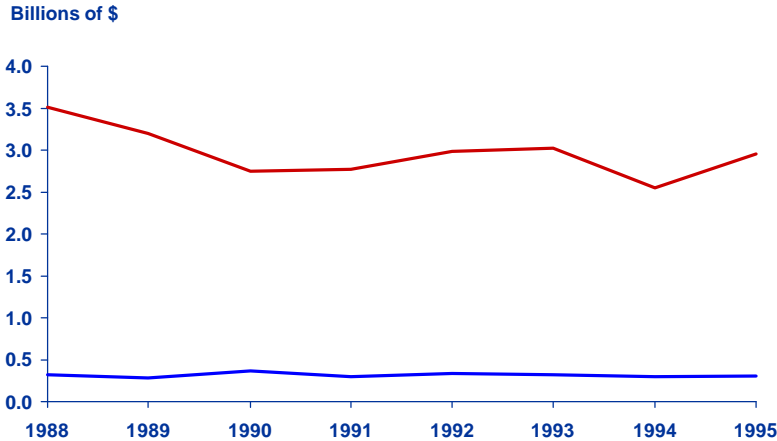
Total Manufacturing



Food Processing



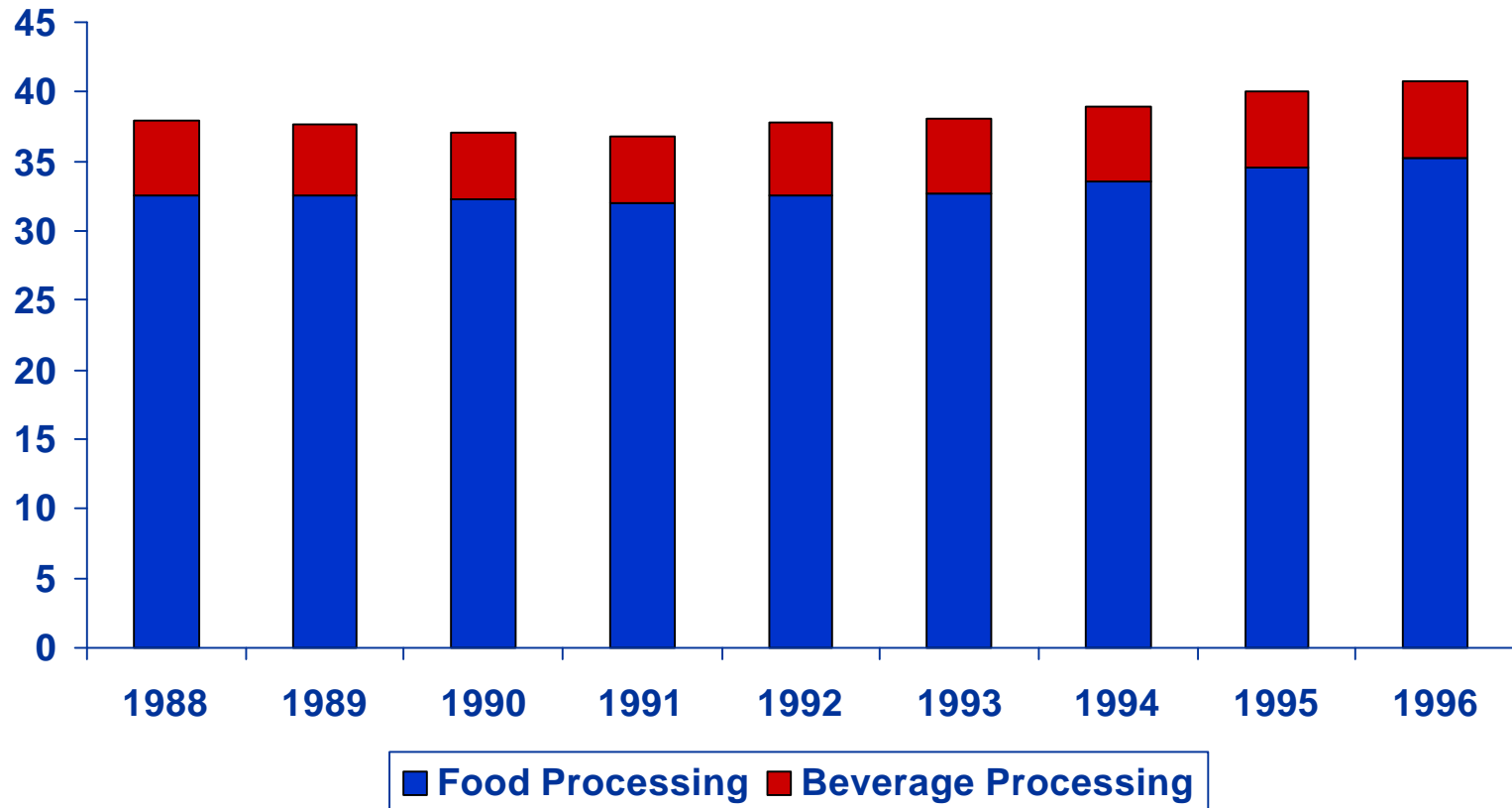
Beverage Processing



Source: Statistics Canada, Cansim.

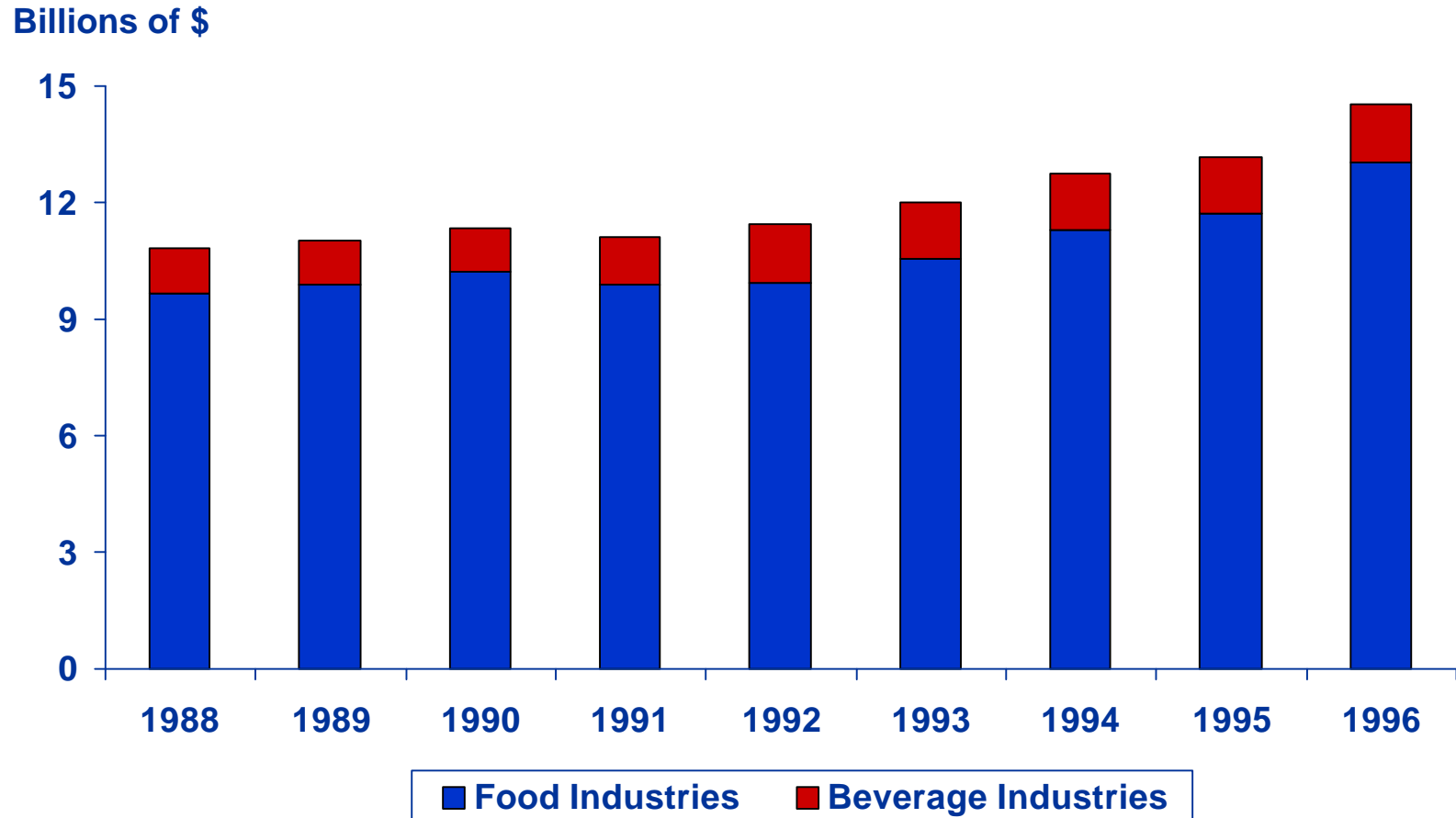
Canada Value of Shipments

Billions of 1986 \$



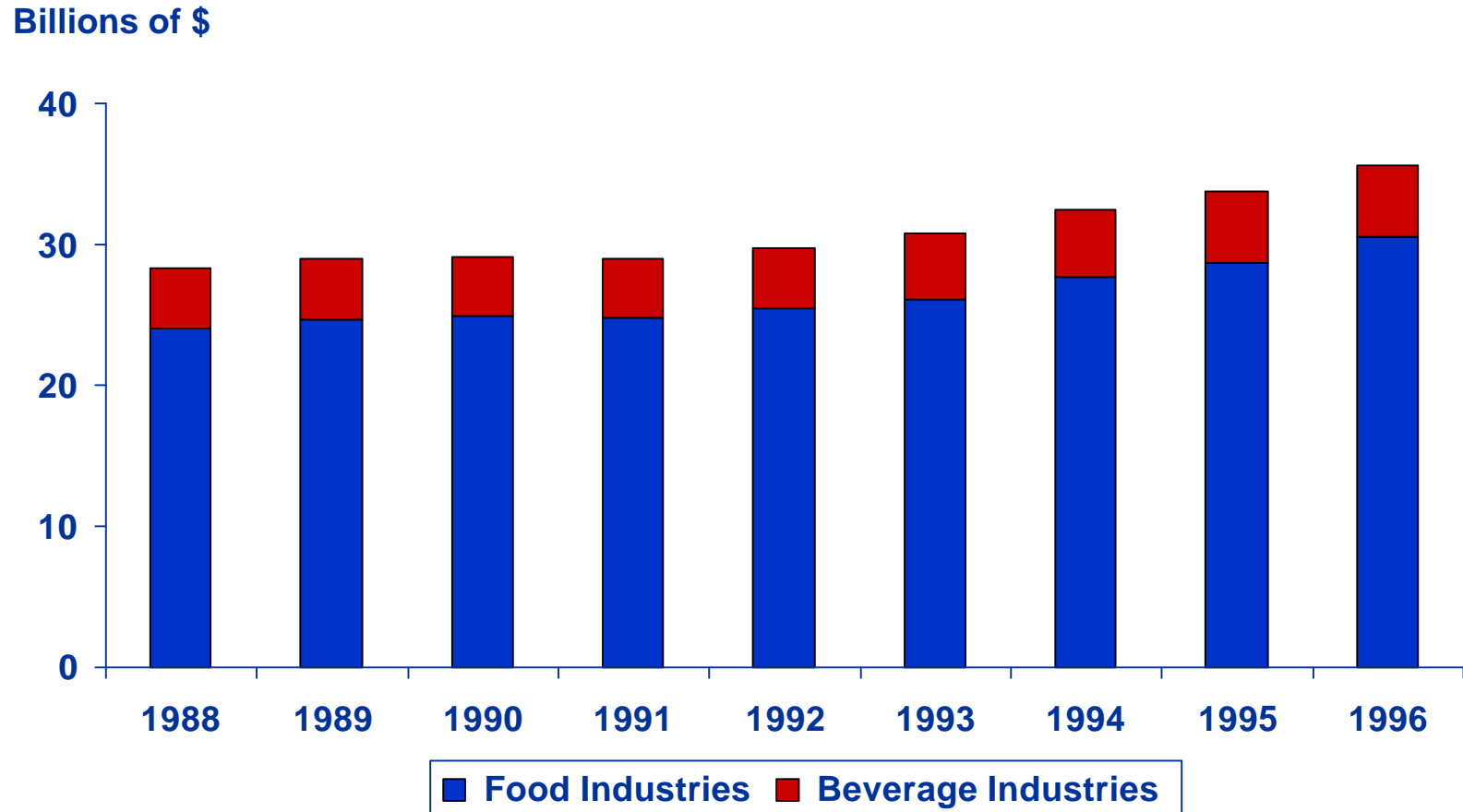
Source: Statistics Canada - BID, Cansim.

Western Canada Value of Shipments



Source: FPIS database - AAFC.

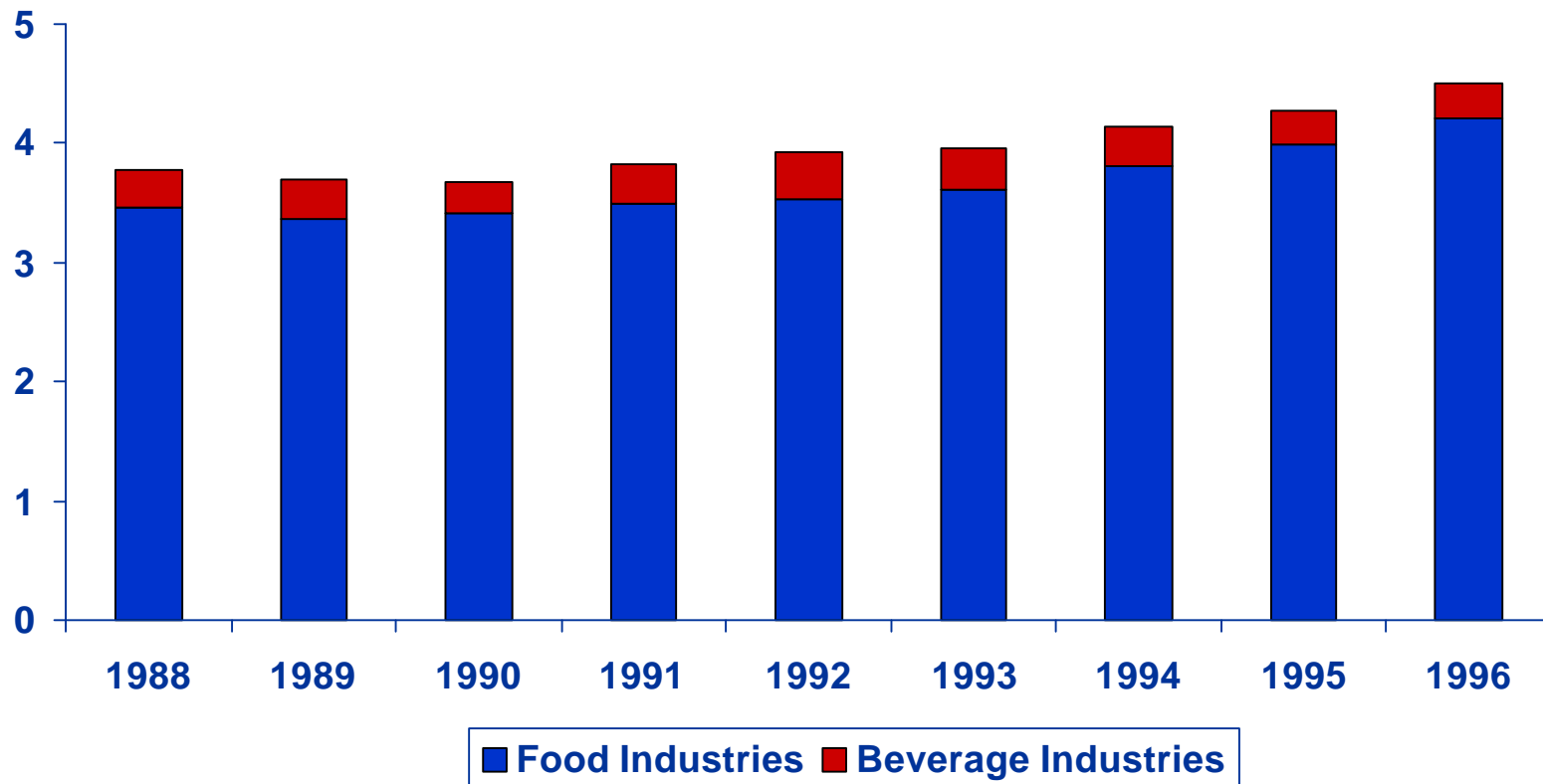
Central Canada Value of Shipments



Source: FPIS database - AAFC.

Atlantic Canada Value of Shipments

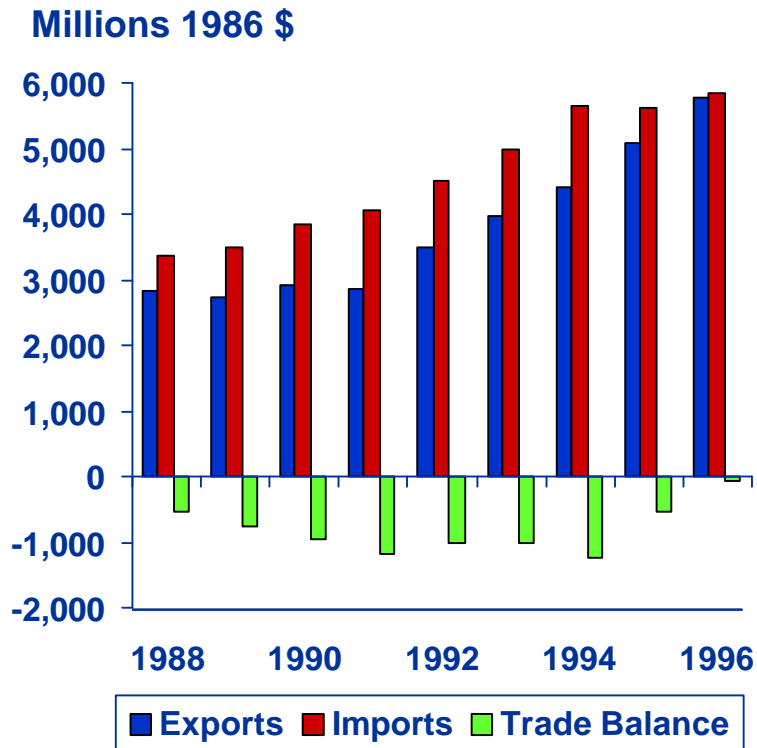
Billions of \$



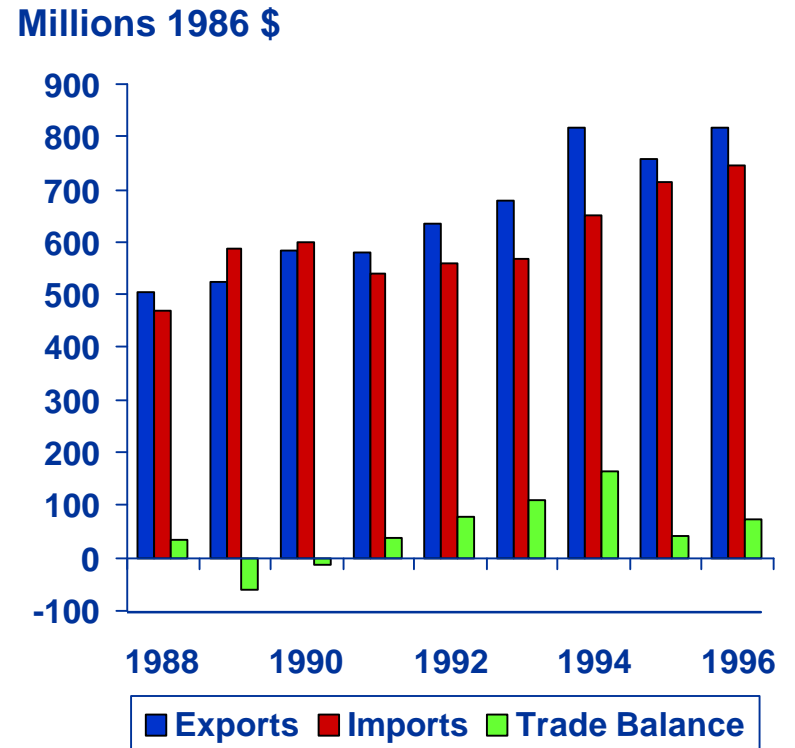
Source: FPIS database - AAFC.

Value of Trade

Food Processing Sector



Beverage Processing Sector



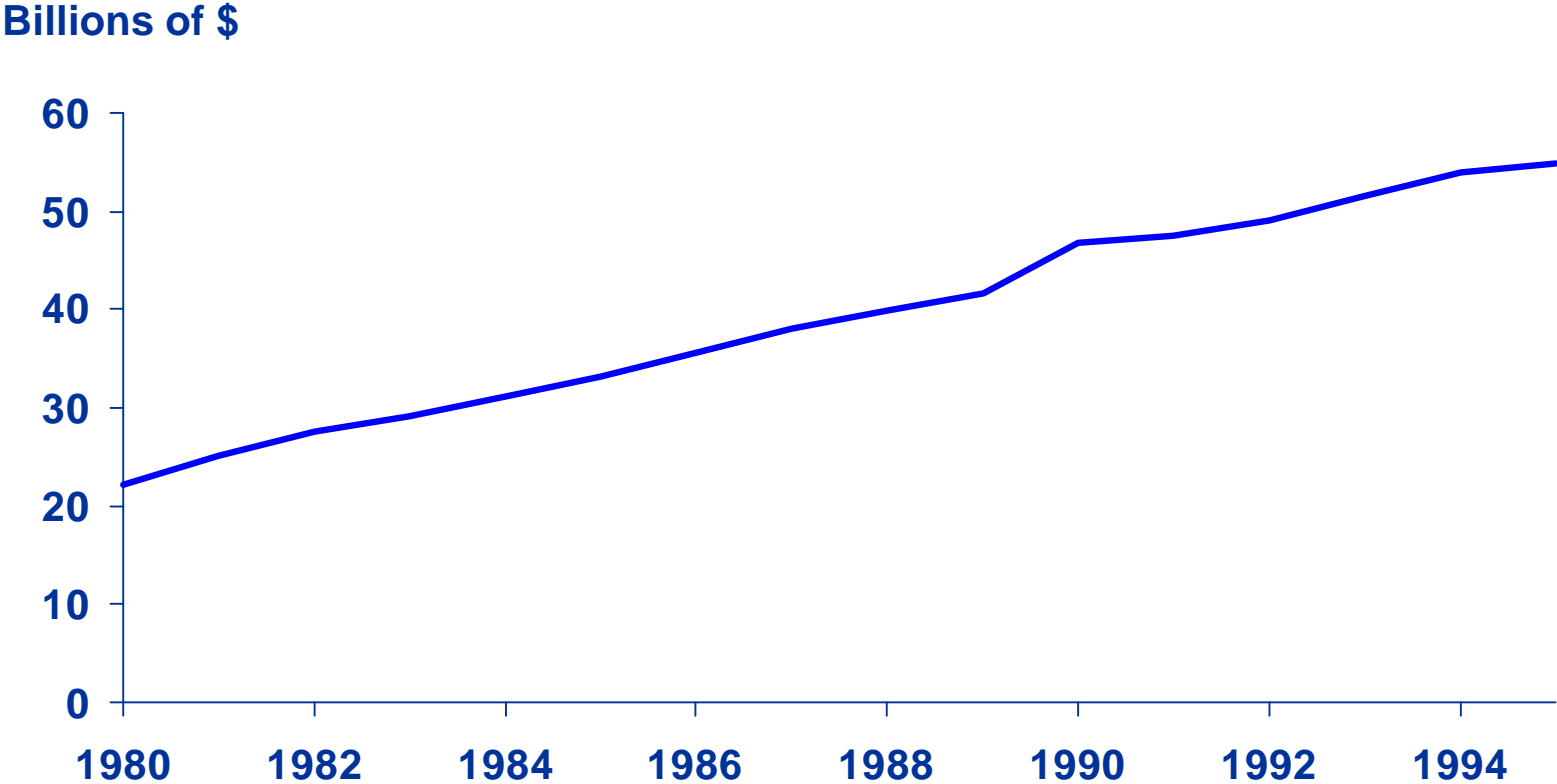
Sources: Statistics Canada, BID; Industry Canada, Canadian Industry Statistics.

Glossary of Terms

BID (Business Integrated Database) BID is a database software developed by Industry Canada and Statistics Canada that contains a collection of selected statistics from Statistics Canada. The statistics are compiled and reported by Standard Industrial Classification for Enterprise (SICE). BID data is reported at the 2, 3 and 4 digit levels and includes: industry data; services; science and technology research and development; industry measures and analysis; industrial organization and finance; investment and capital stock; international trade, input-output; prices; and census data.

Retail and Food Service Structure and Performance

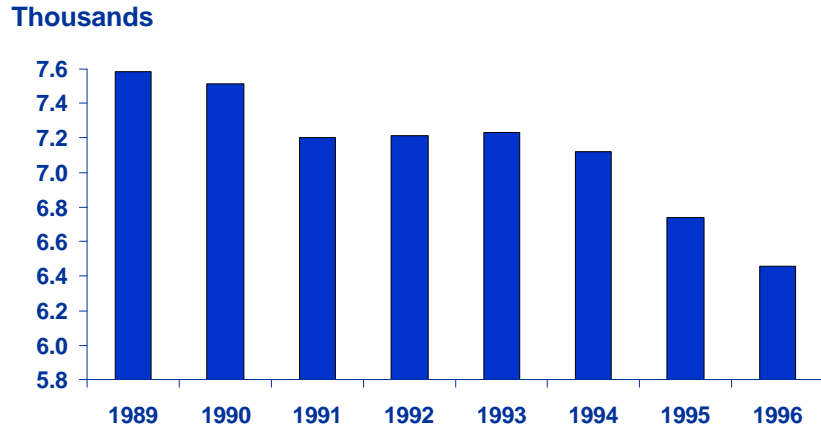
Canadian Retail Food Sales



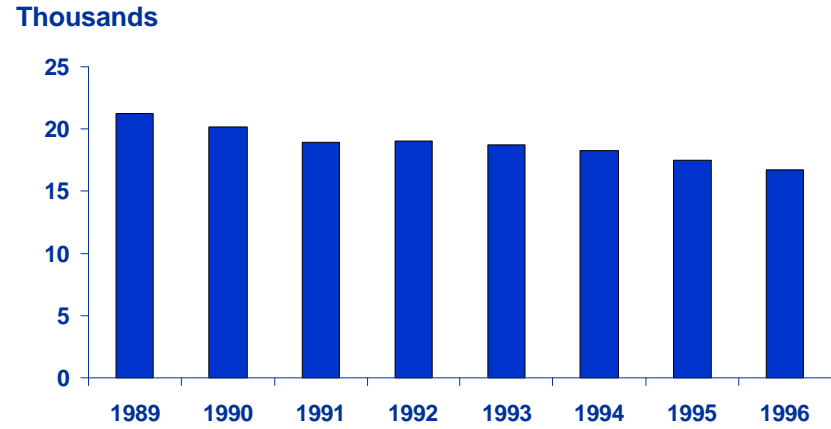
Source: Canadian Grocer, February 1991 and 1995.

Number of Retail Food Outlets

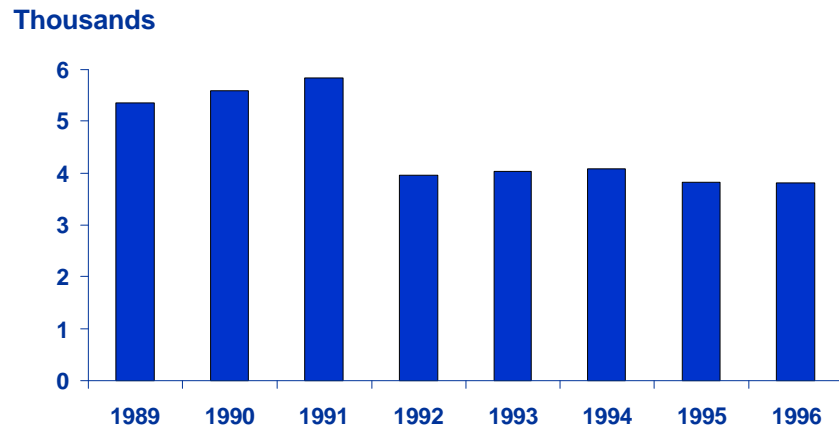
Western Canada



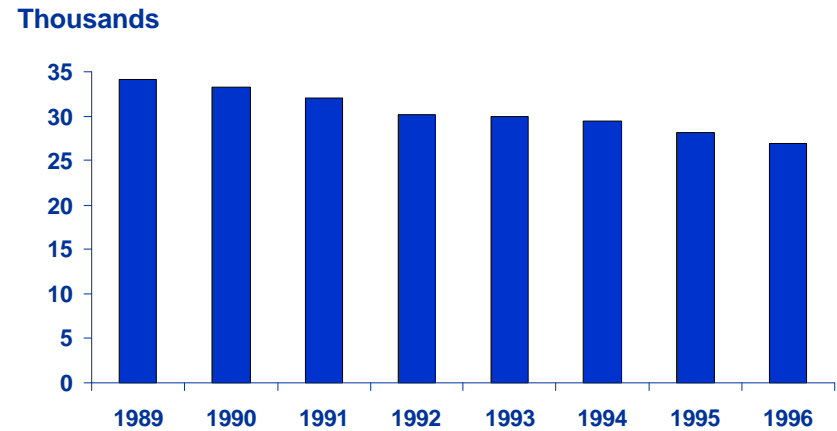
Central Canada



Atlantic Canada

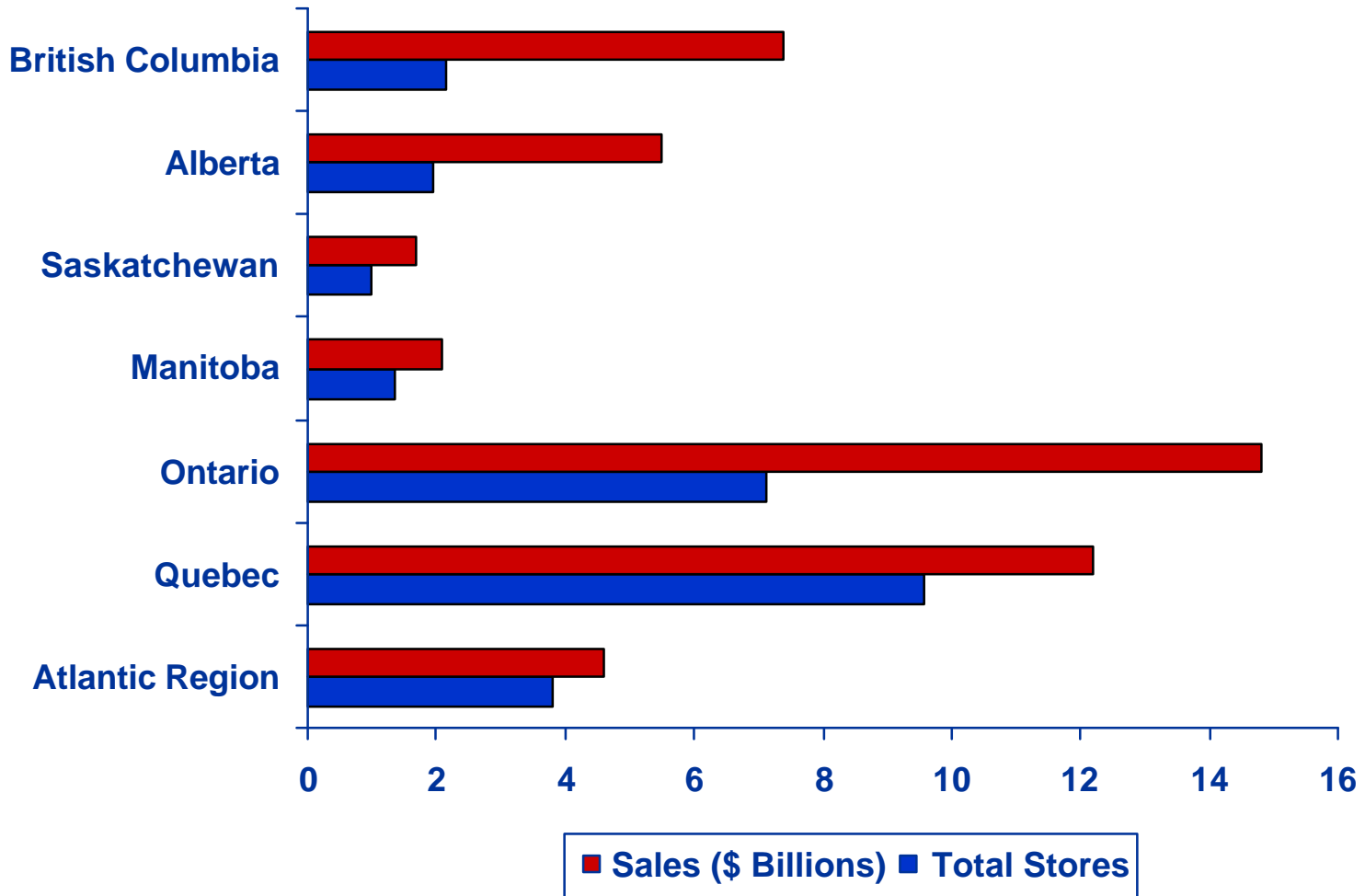


Canada



Source: Canadian Food Store Sales.

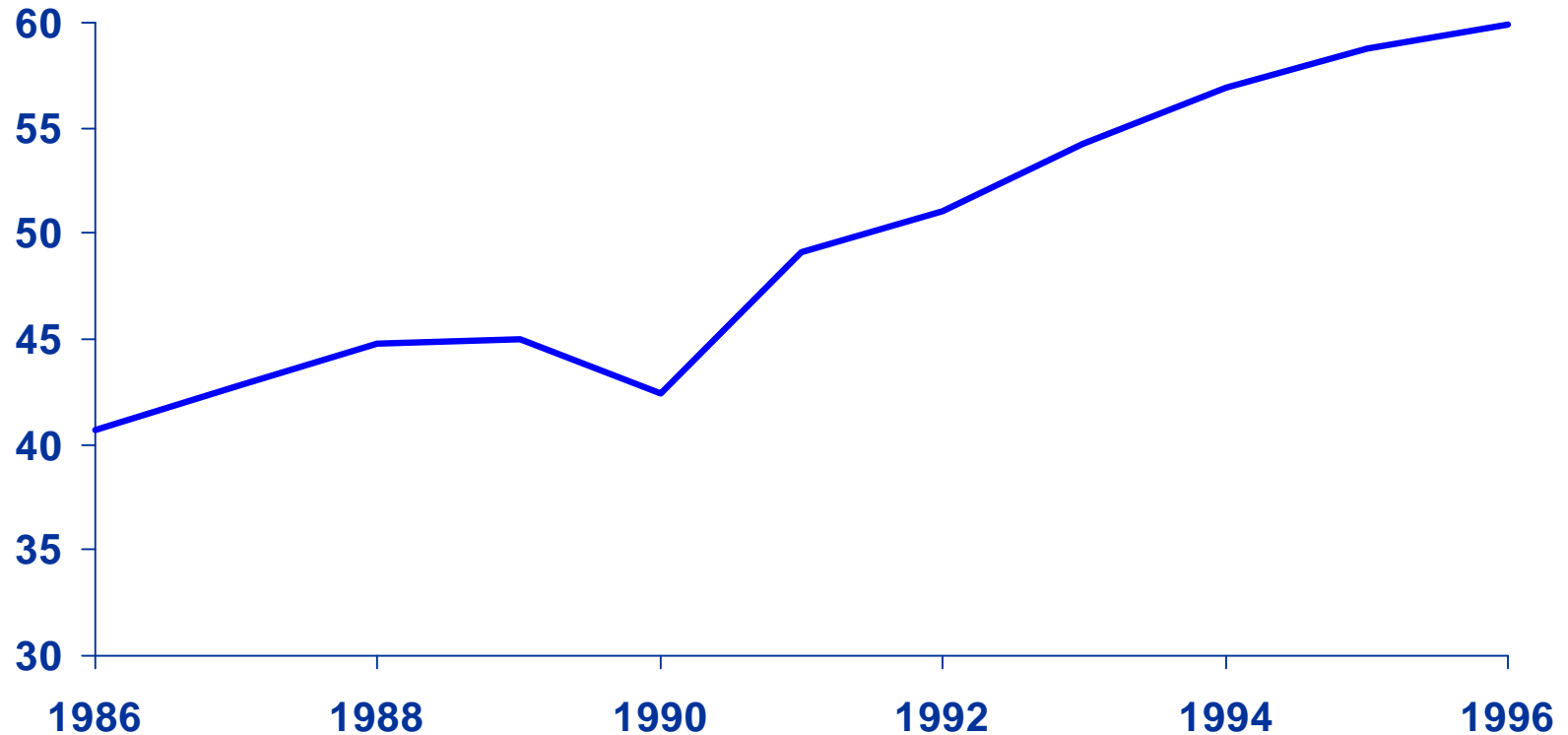
Canadian Food Store Sales, 1996



Source: Canadian Grocer, February 1996.

Number of Commercial Food Services* Establishments

Thousands



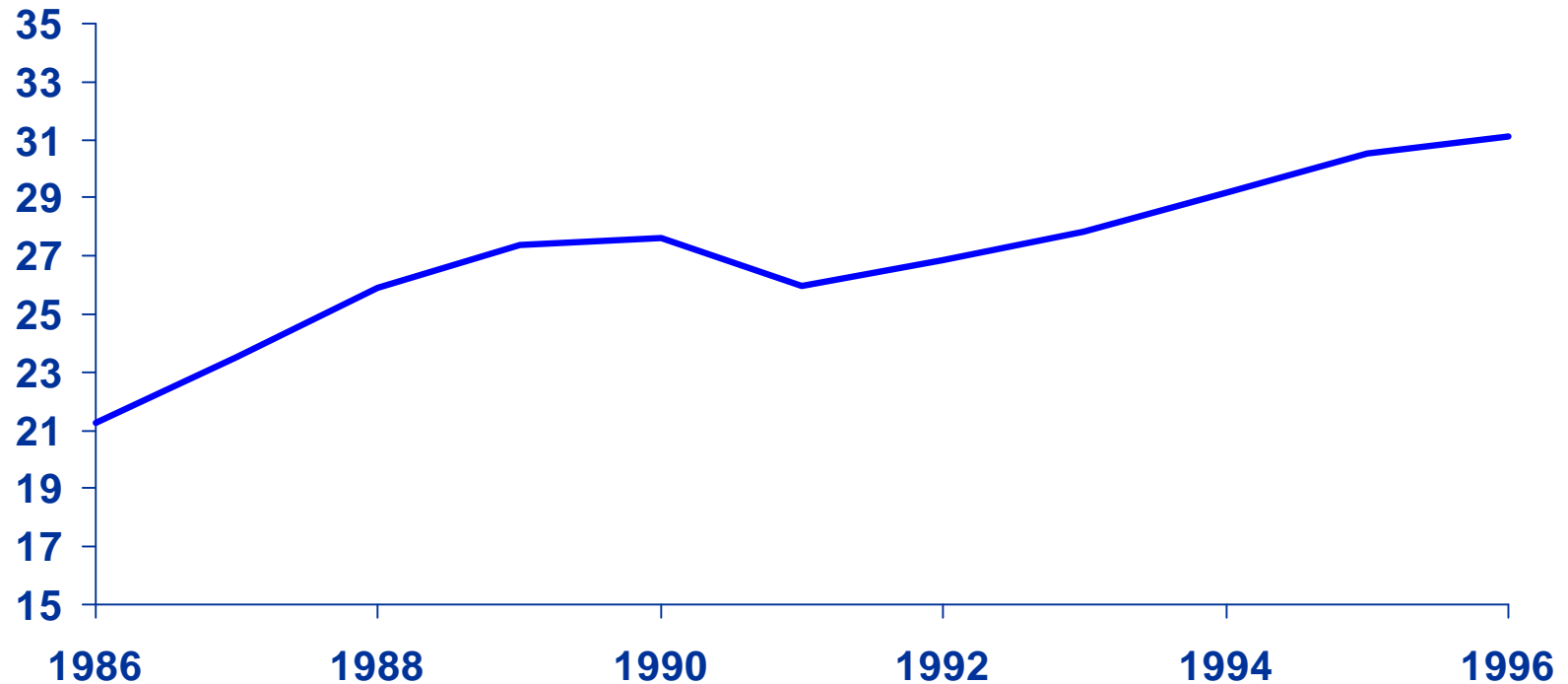
Note:

- 1) *Restaurants (licensed and unlicensed), Take-out & Delivery, Social/Contract Catering and Pubs/Taverns/Lounges
- 2) 1995 and 1996 data are estimates only.

Sources: CFRA's InfoStats and Statistics Canada.

Commercial and Institutional Food Services* Sales

Billions of \$



Notes:

- 1) *Includes Restaurants, Pubs/Taverns, Vending, Hotel/Motel, Take-out & Delivery, Leisure Industry, Department Stores (but not Drug Stores), Social/Contract Caterers, Institutions.
- 2) 1995 and 1996 data are estimates only.

Sources: CFRA's InfoStats and Statistics Canada.

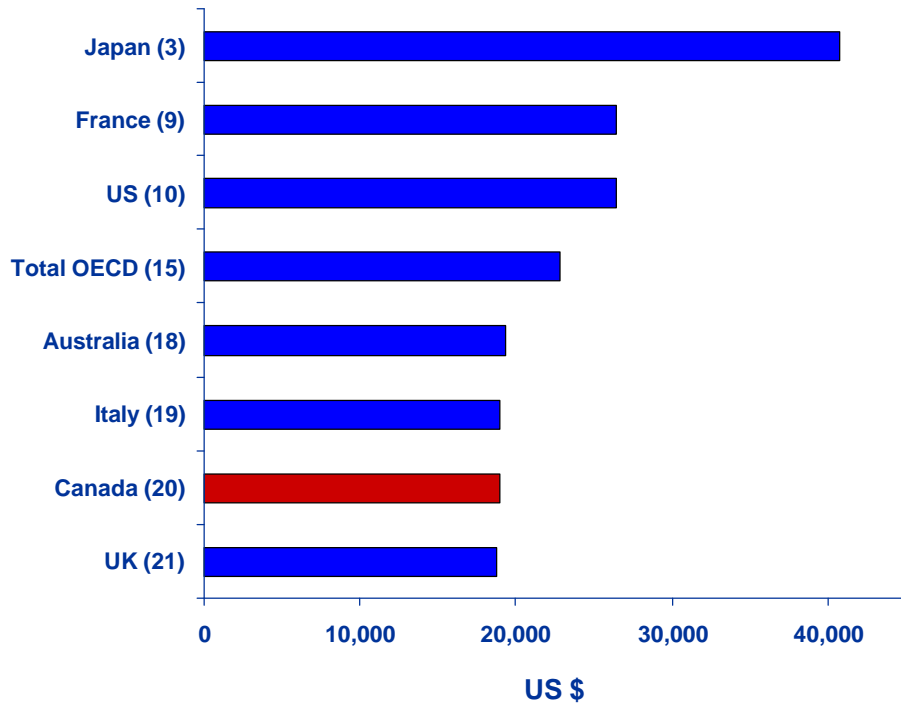
Glossary of Terms

Commercial & Institutional Food Sales	Includes sales from restaurants, pubs & taverns, vending, hotel/motel, take-out & delivery, leisure industry, department stores, social/contract caterers, institutional foodservices
Food Service Establishments	Includes restaurants (licensed and unlicensed), take-out and delivery, social/contract caterers, and pubs/taverns/lounges
Food Store Sales	Includes chain stores, independents, but does not include food sales through department stores or specialty stores (i.e., bakeries, butchers, etc.)
Retail Food Sales	Includes chains, independents, department stores, all other food stores (specialty food stores, butchers, warehouse clubs, bakeries, etc.) but does not include food sold through drug stores (estimated at 2.4% of retail food sales)
CFRA	Canadian Foodservice and Restaurant Association

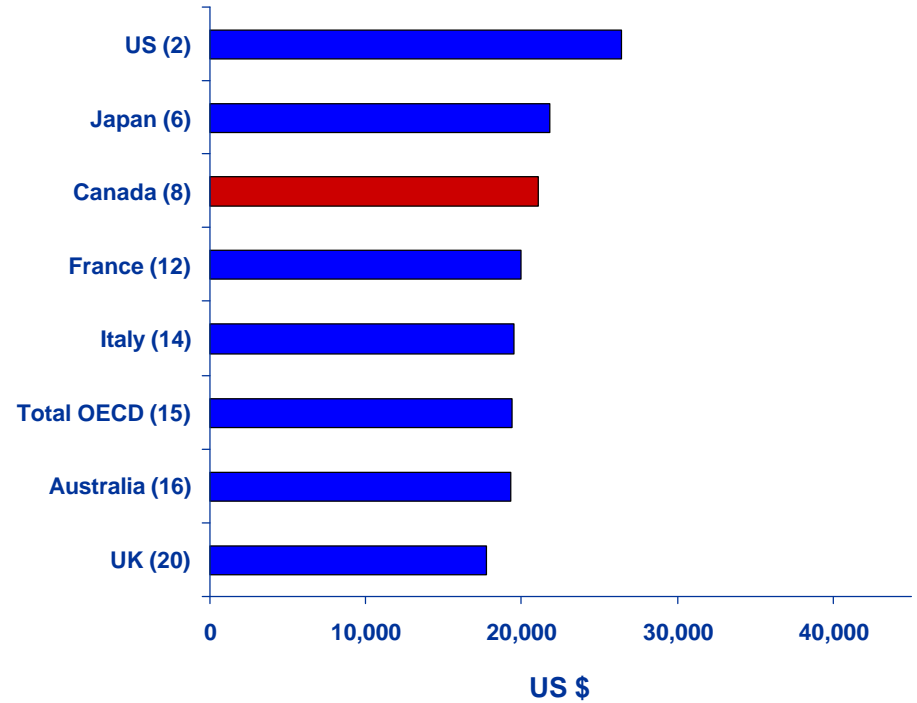
International Comparisons of Performance Indicators

GDP - 1995

GDP Per Capita Exchange Rate Basis



GDP Per Capita Purchasing Power Parities Basis



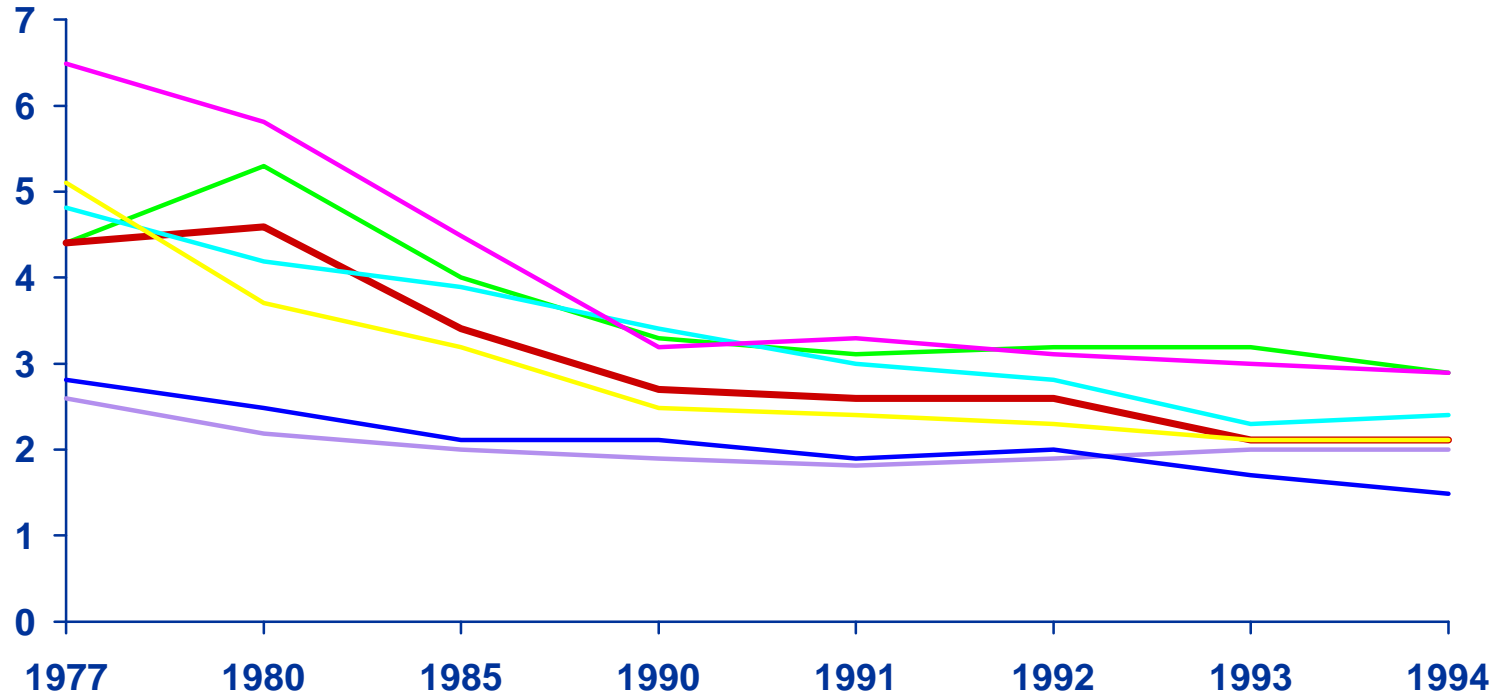
Note: Numbers in brackets represent OECD ranking.

Source: OECD National Accounts.

Graph 6-2

Agriculture's Share of GDP Developed Countries

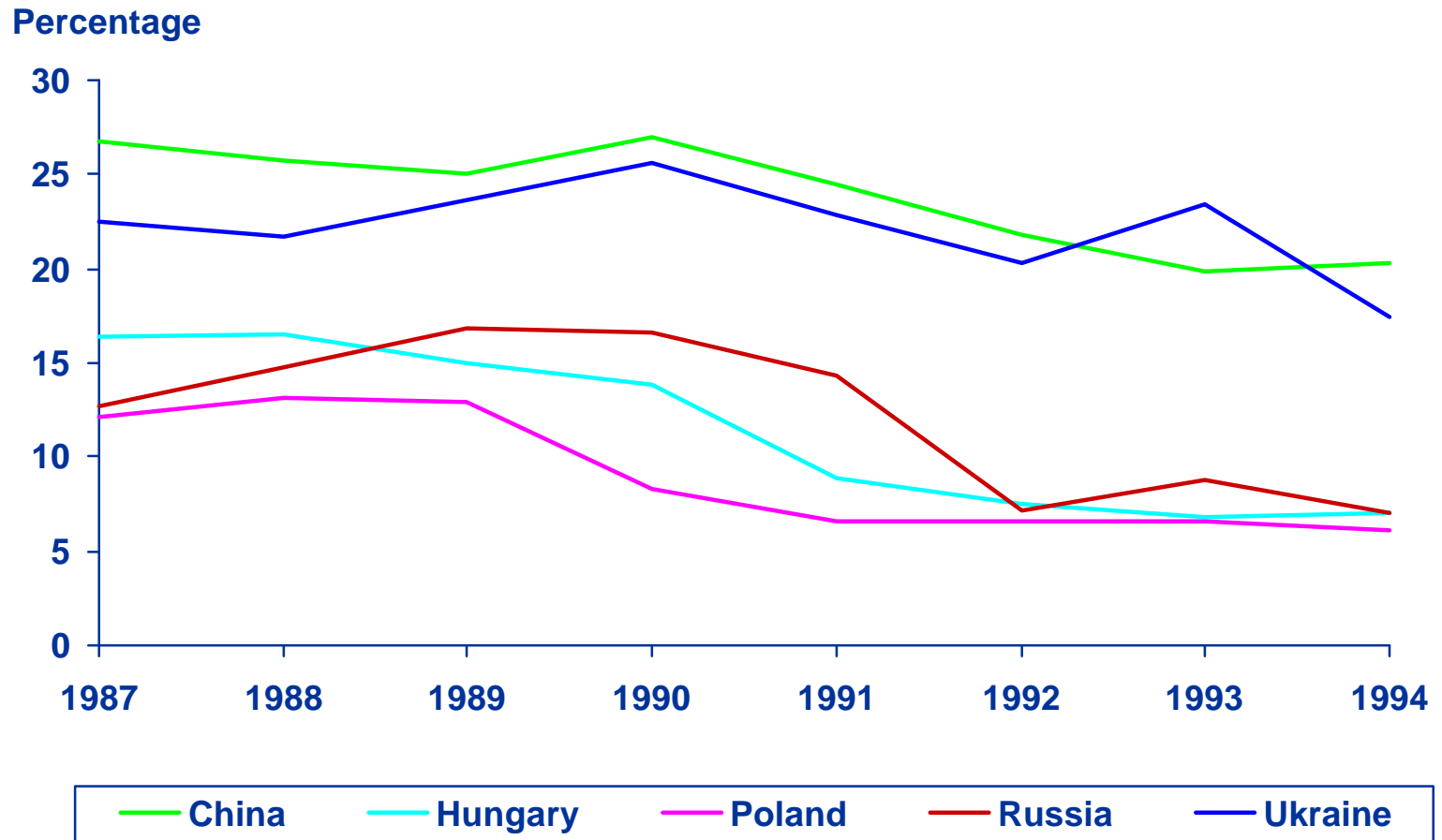
Percentage



Australia Canada France Italy Japan UK US

Source: World Bank Development Data.

Agriculture's Share of GDP Countries in Transition



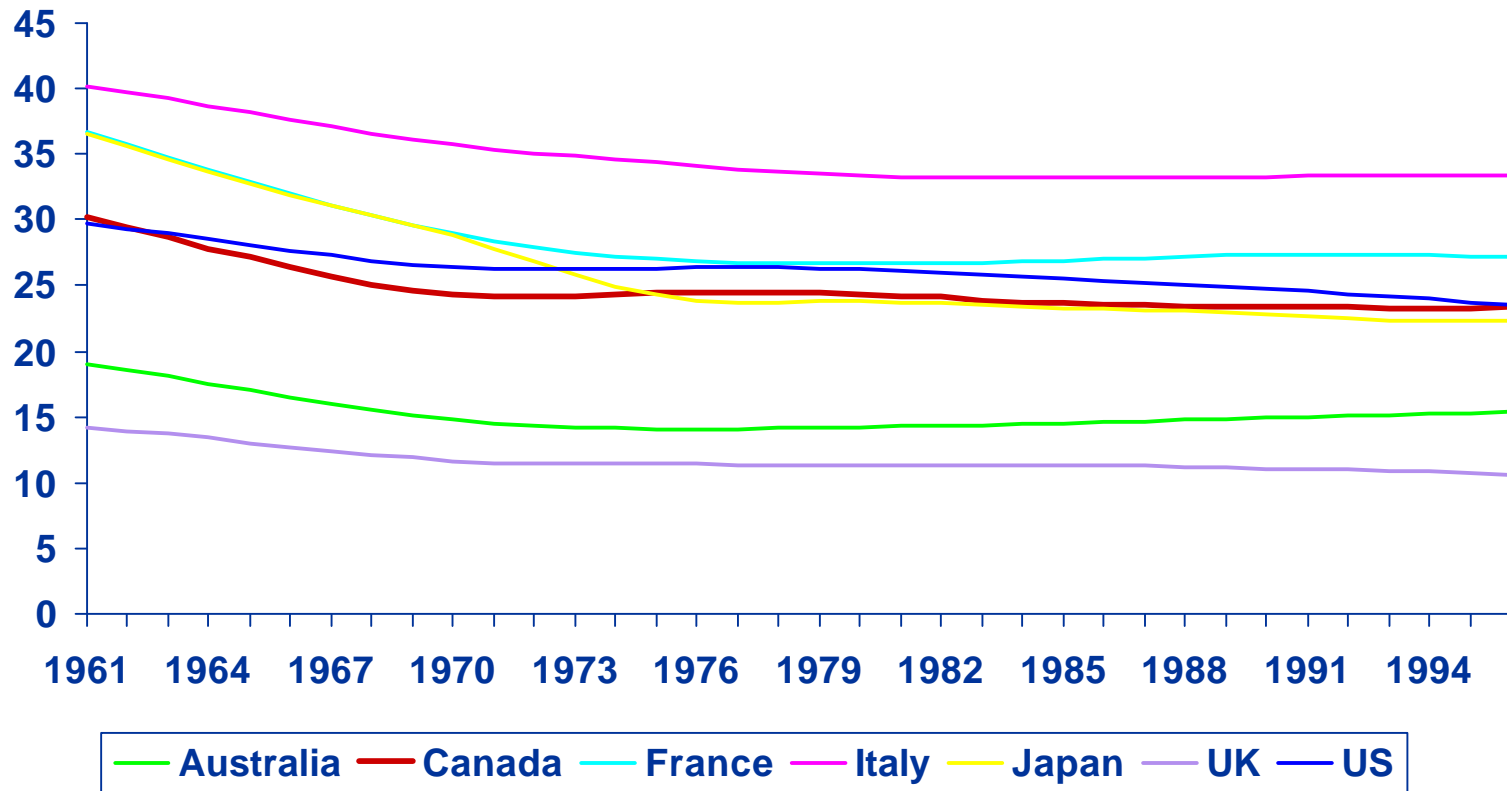
Source: World Bank Development Data.

Graph 6-3

Graph 6-4

Rural Population as a Percentage of Total Population

Percentage



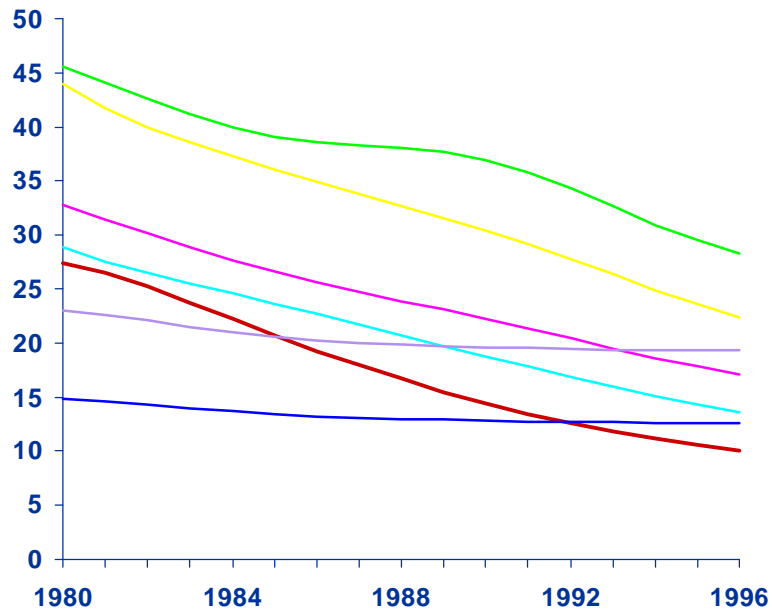
Source: FAOStat.

Agricultural Population

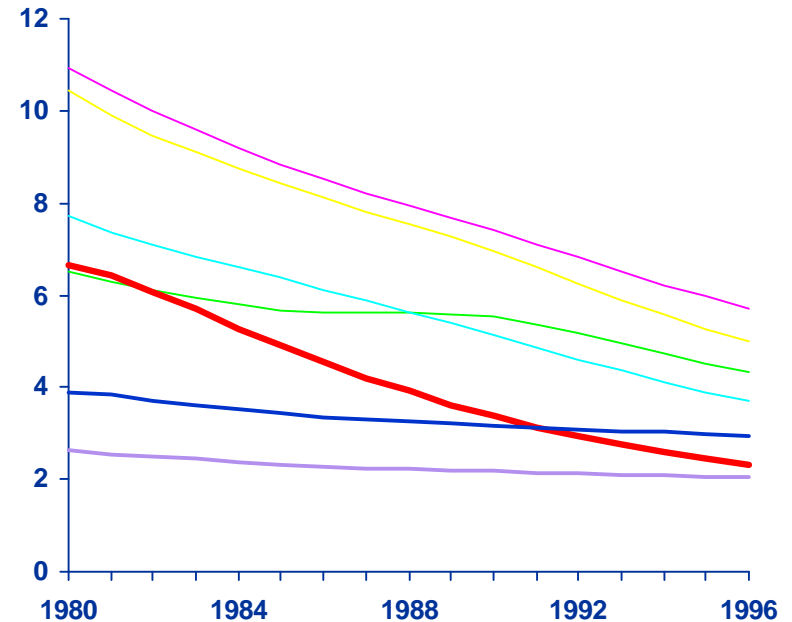
As Percentage of Rural Population

As Percentage of Total Population

Percentage



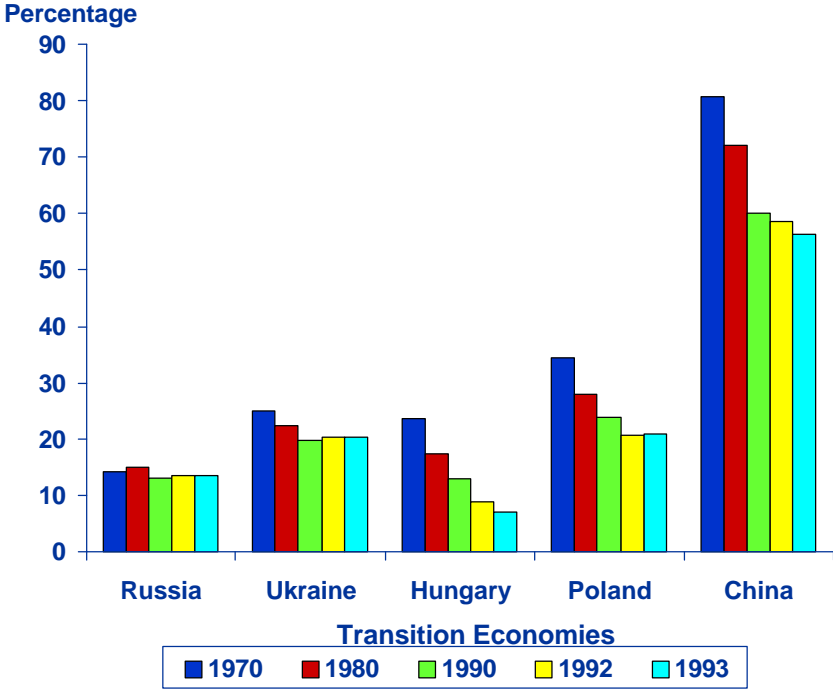
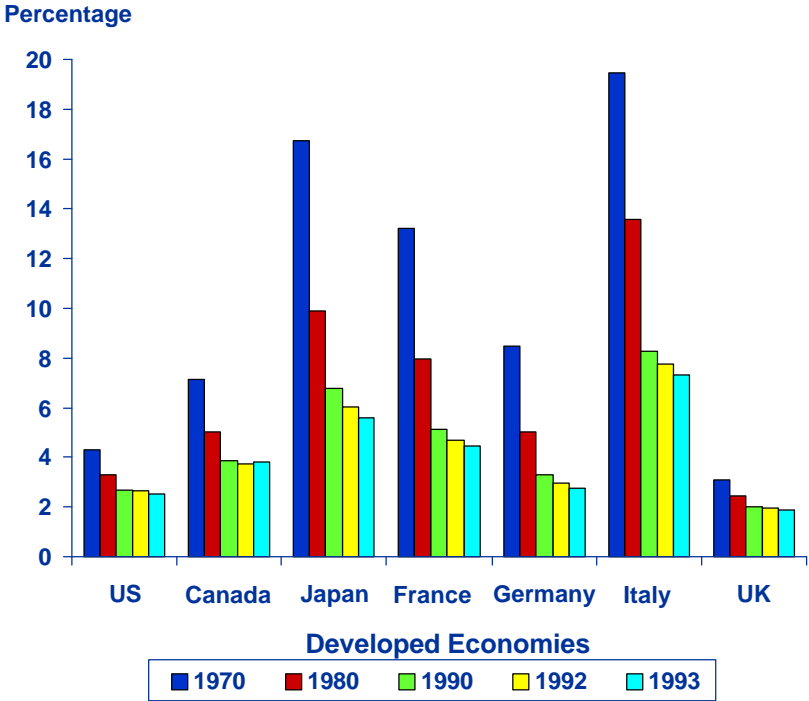
Percentage



Source: FAOStat.

Graph 6-6

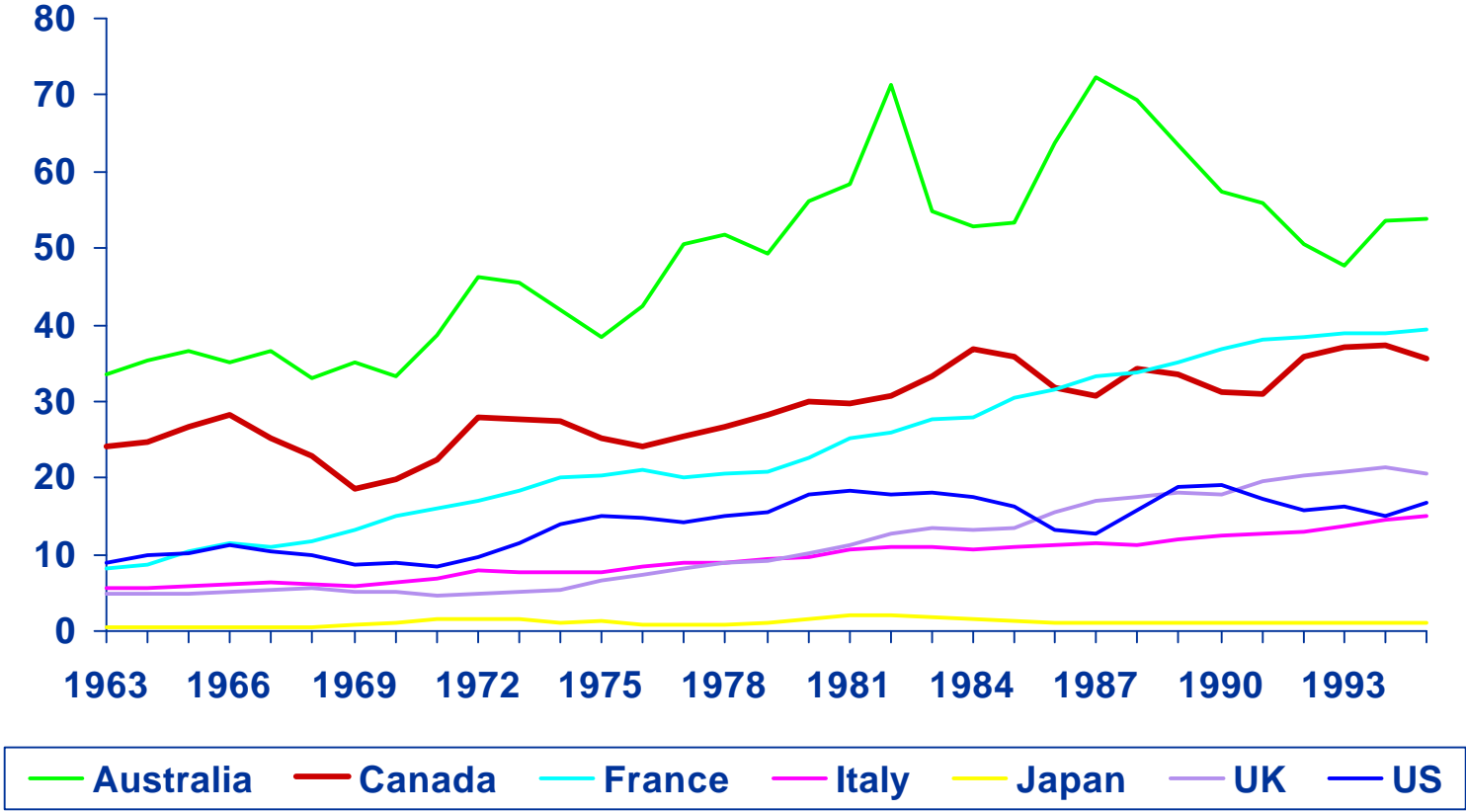
Agricultural Labour Force Share of Total Labour Force



Source: CIA Handbook.

Export Propensity* - Agri-Food Trade

Percent of Production



*Based on 3 year moving average ratio of exports to production (quantities).

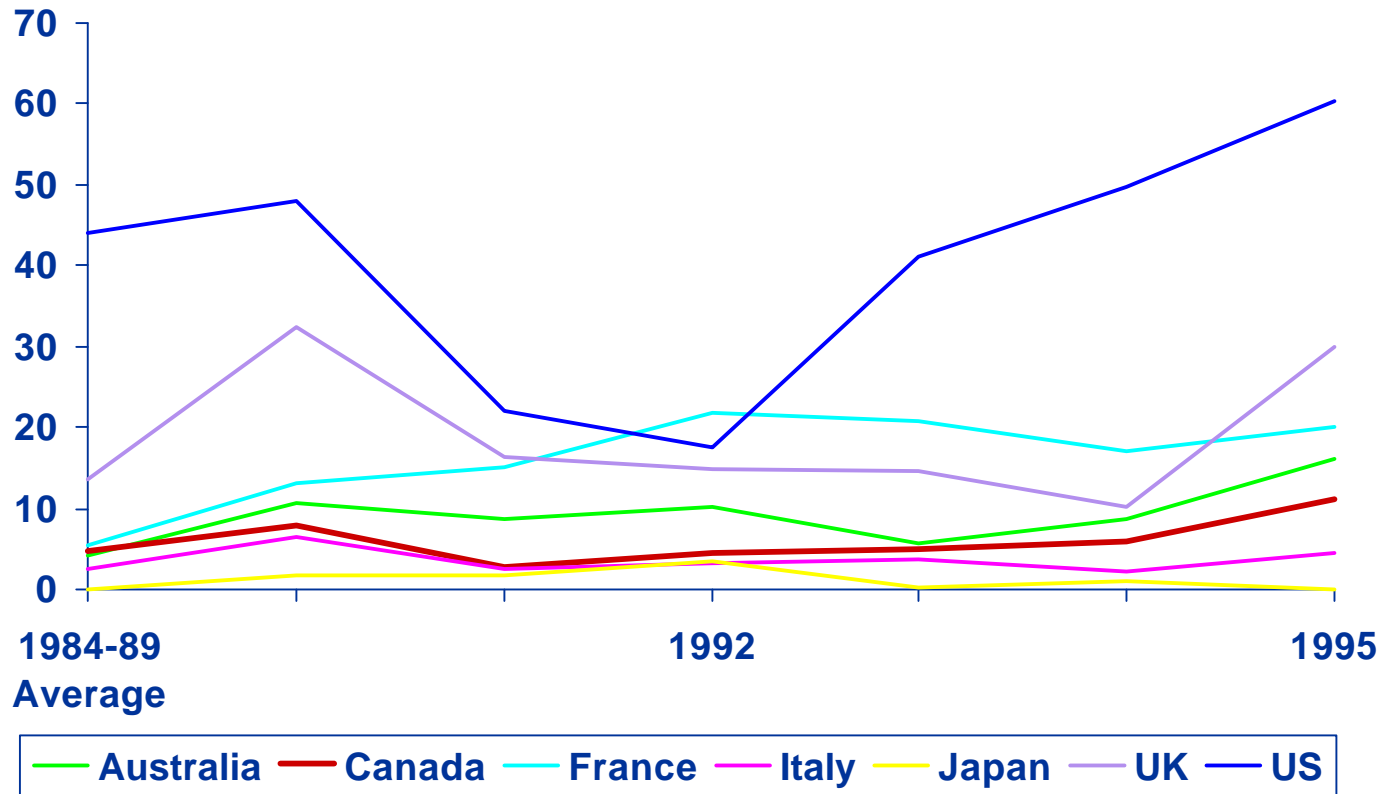
Source: FAOStat.

Graph 6-7

Graph 6-8

FDI Inflows - All Industries

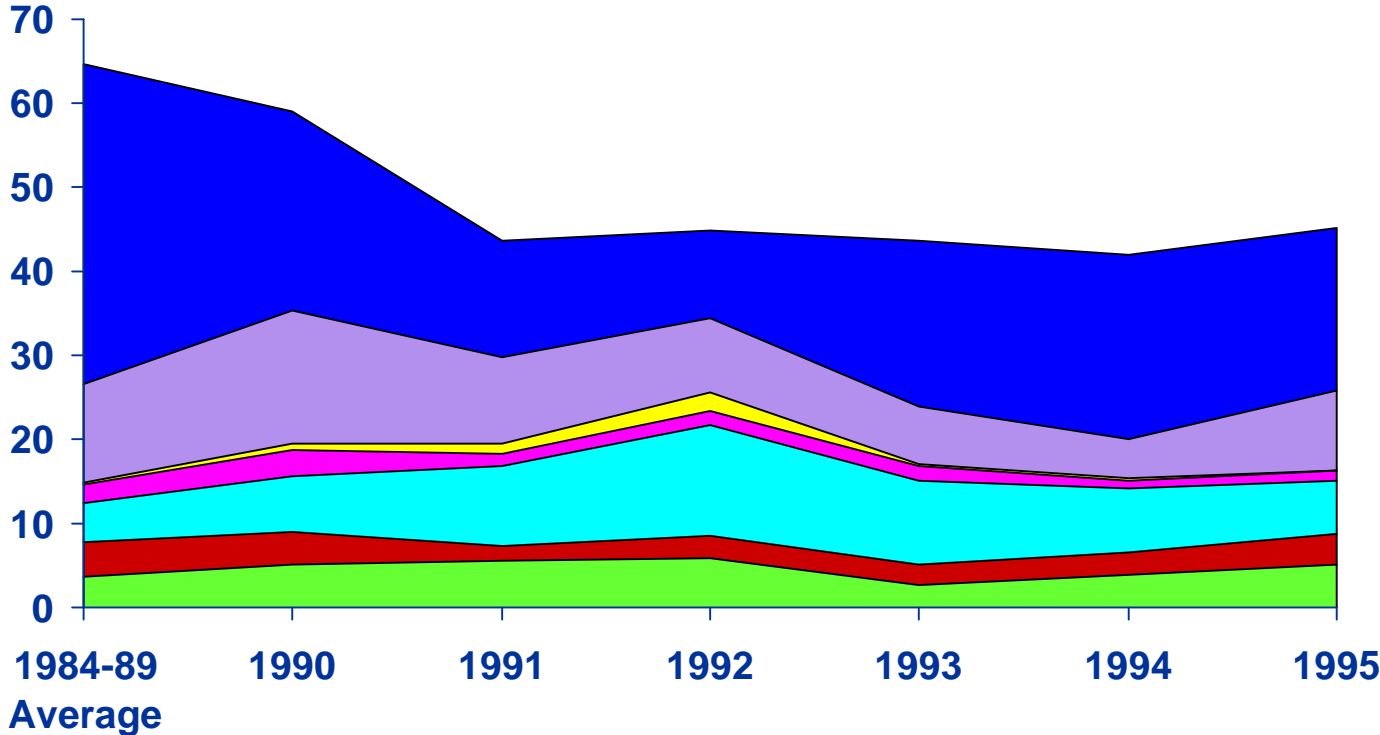
Billions of US \$



Source: WIR 96, Annex Table 1.

FDI Inflows - All Industries

Percentage



Australia
 Canada
 France
 Italy
 Japan
 UK
 US

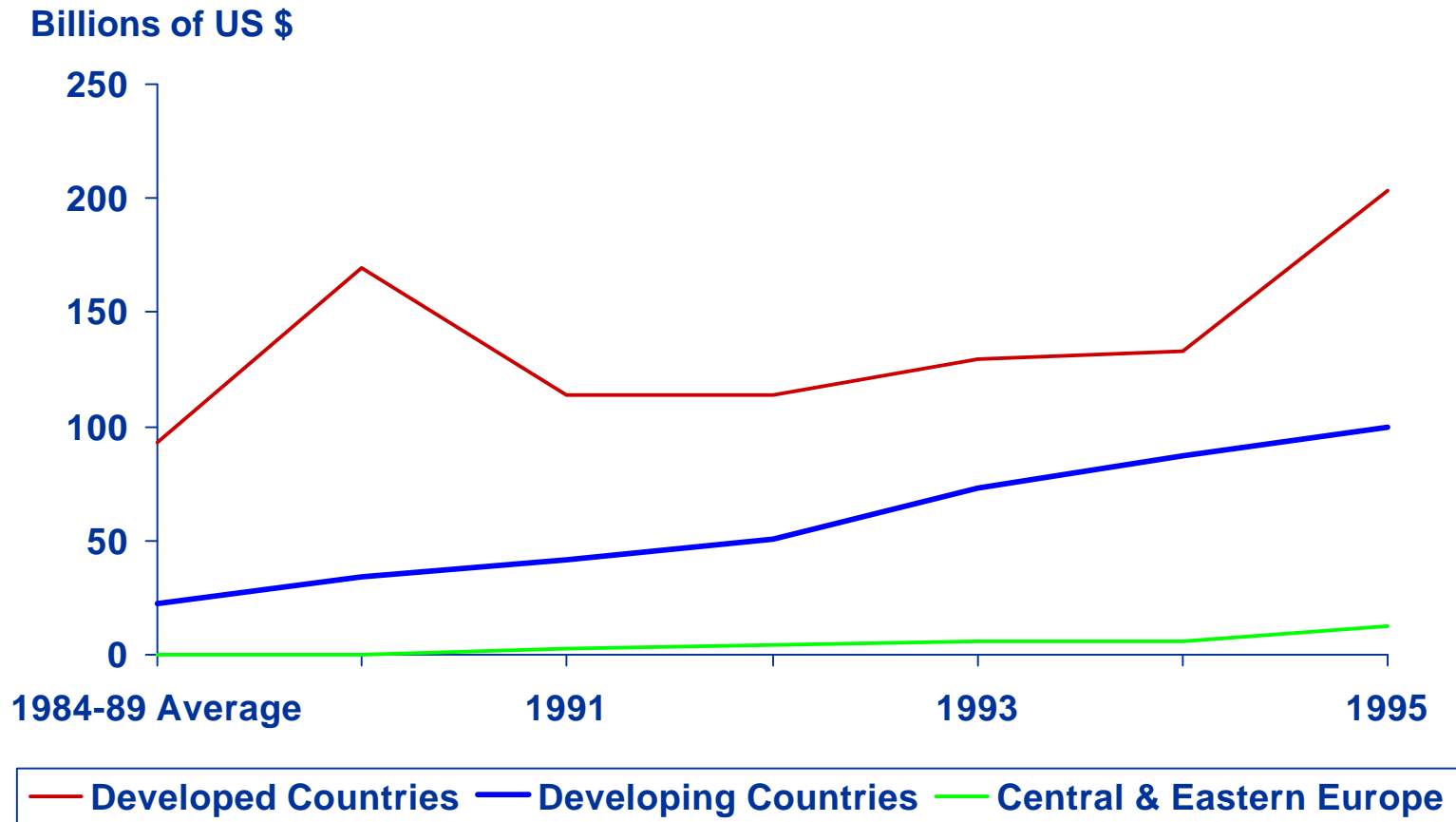
Source: WIR 96, Annex Table 1.

Graph 6-9

Graph 6-10

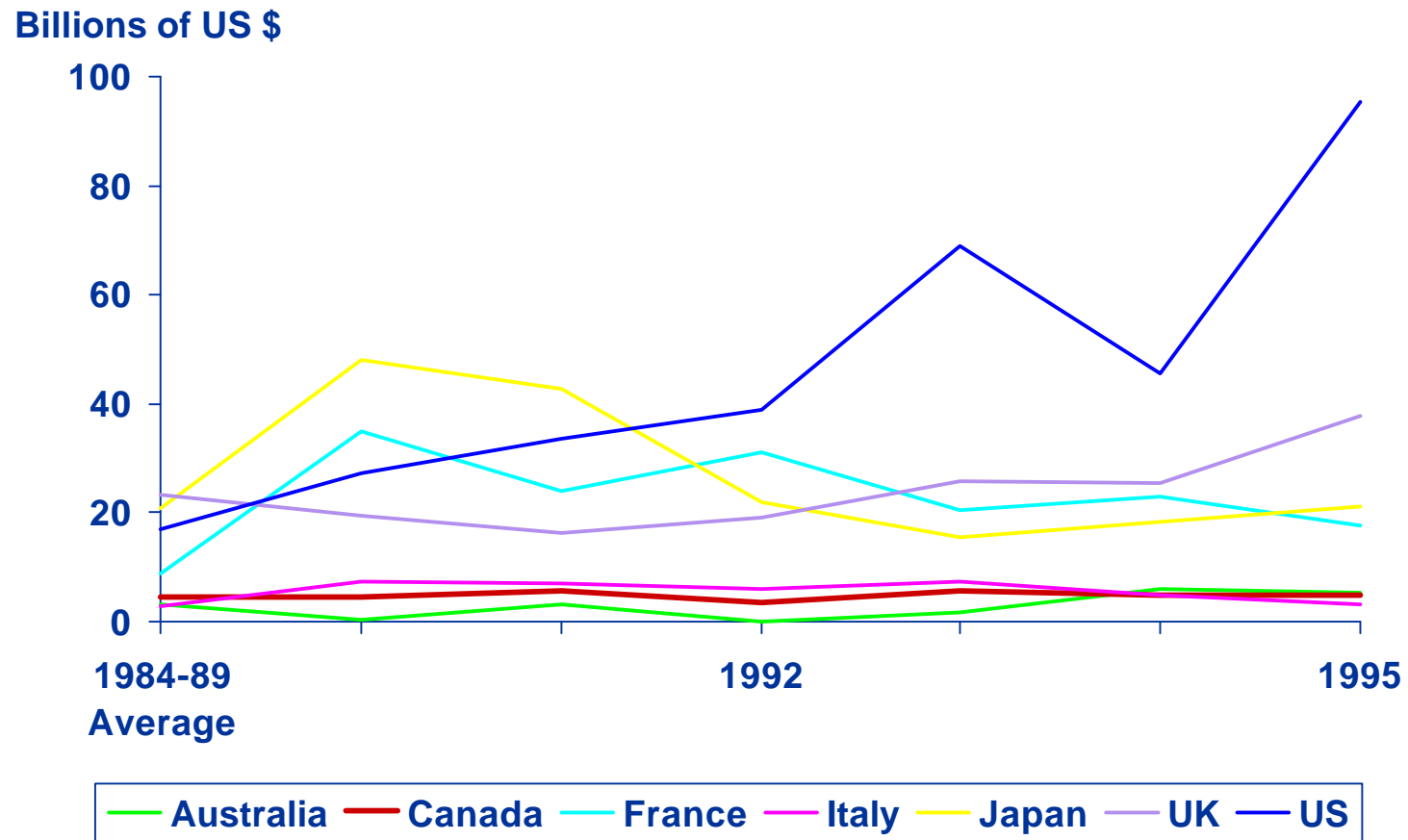
FDI Inflows

Developed, Developing and Transition Countries



Source: WIR 96, Annex Table 1.

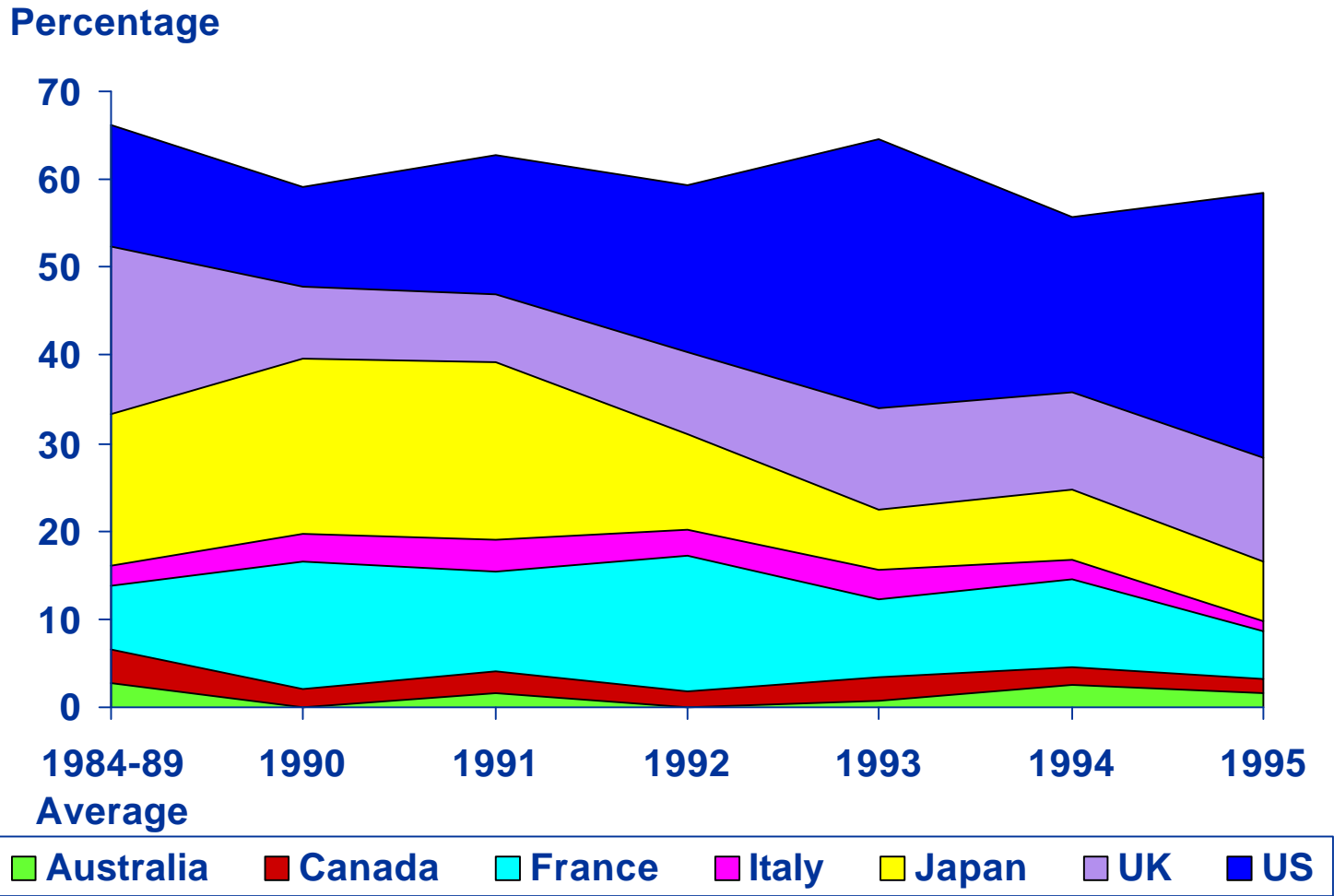
FDI Outflows - All Industries



Source: WIR 96, Annex Table 1.

Graph 6-12

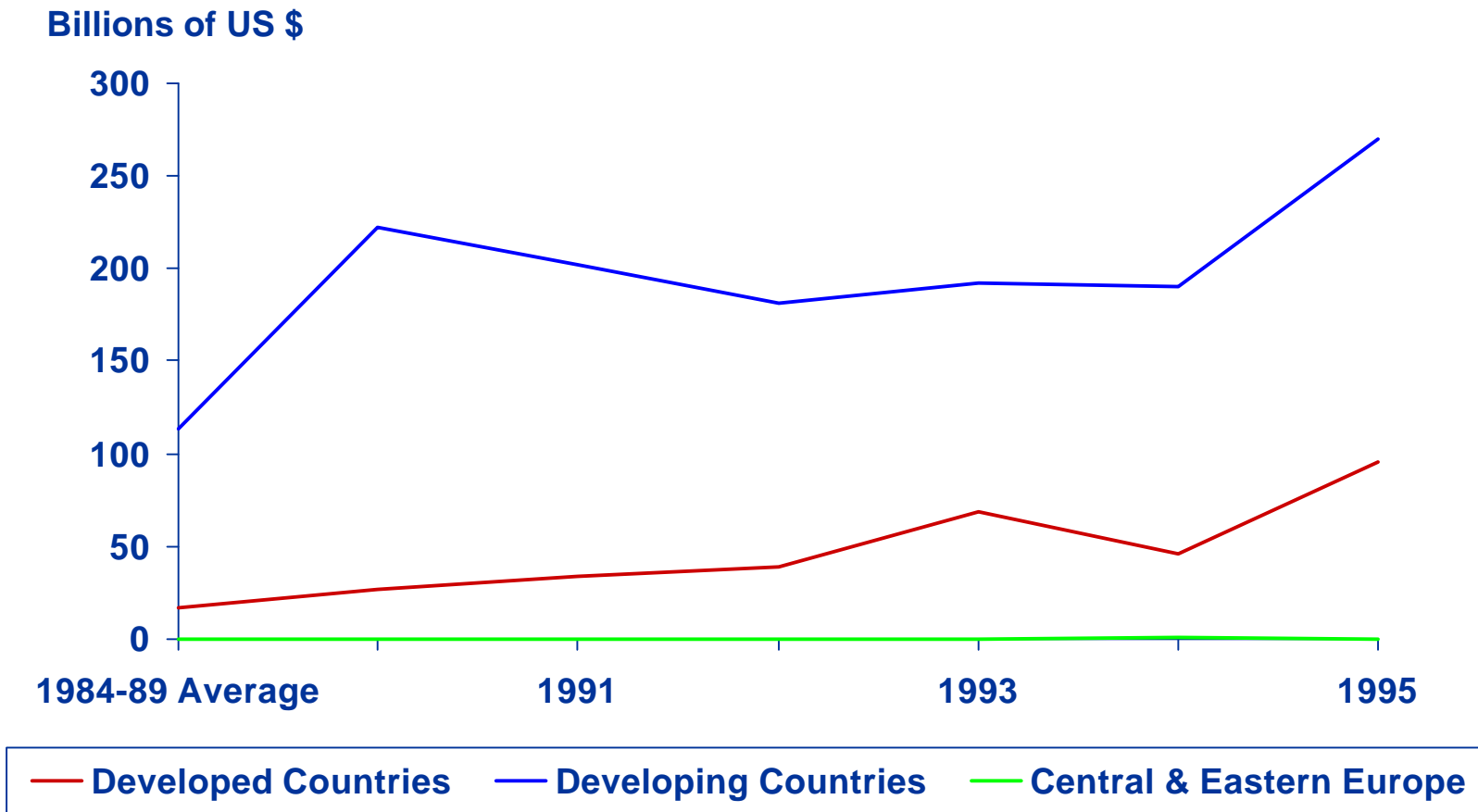
FDI Outflows - All Industries



Source: WIR 96, Annex Table 1.

FDI Outflows

Developed, Developing and Transition Economies

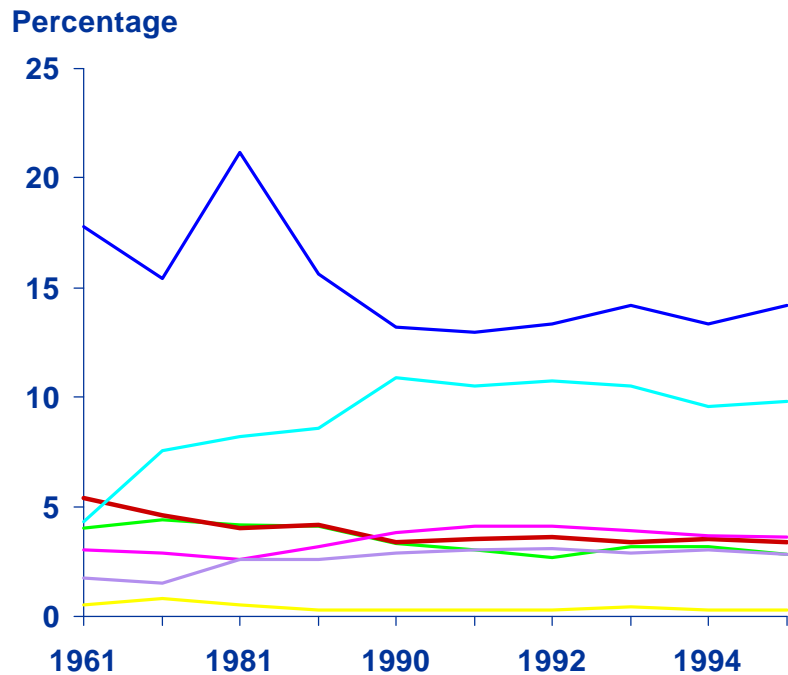


Source: WIR 96, Annex Table 1.

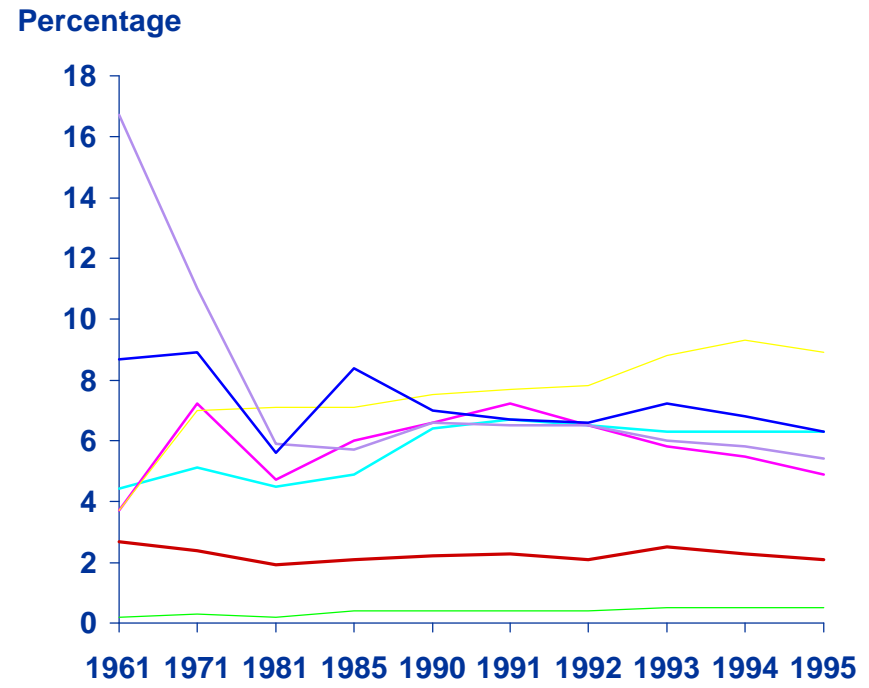
Graph 6-14

Share of World Food Exports and Imports

World Food Exports

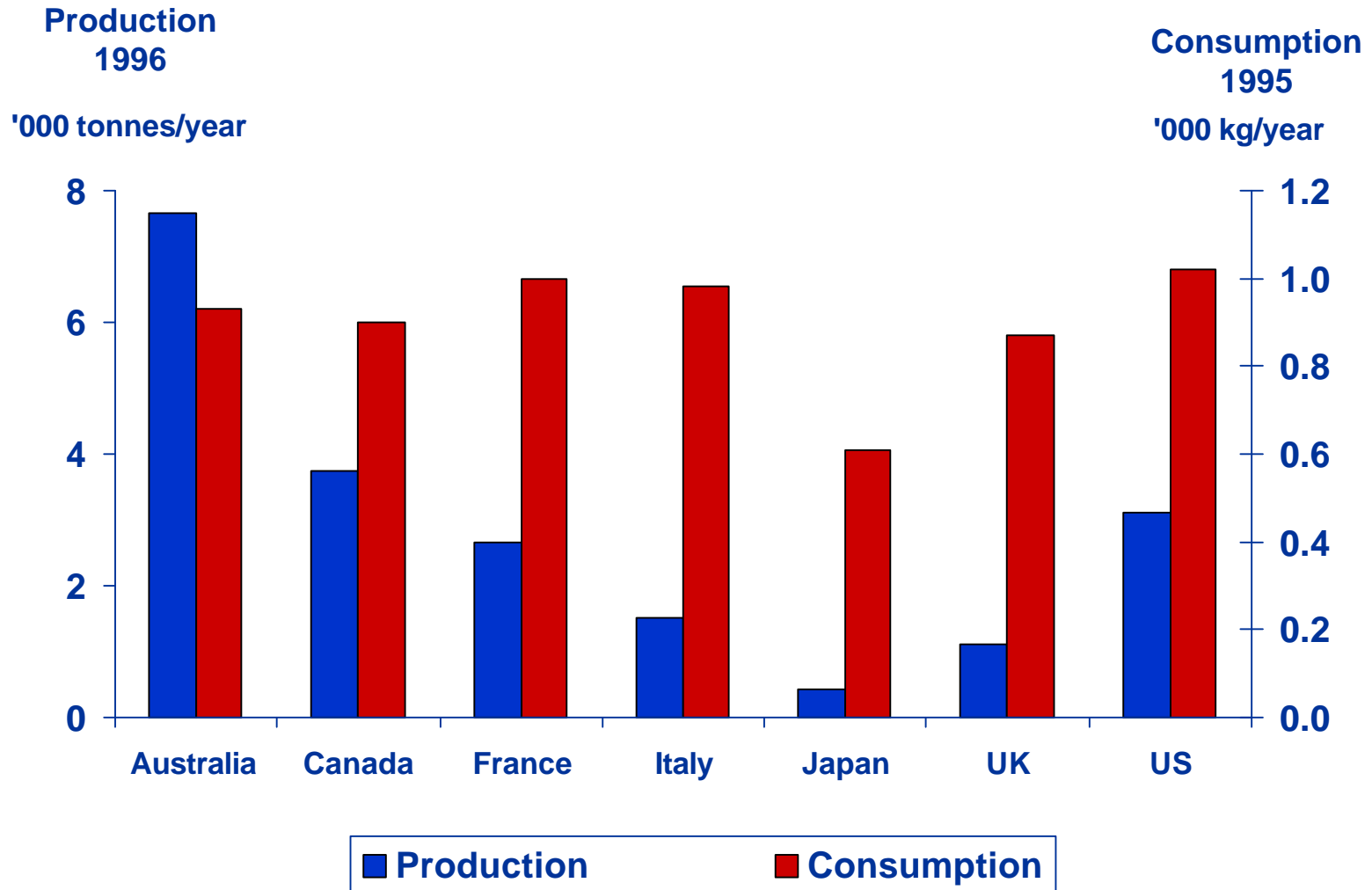


World Food Imports



Source: FAOStat.

Per Capita Food Production and Consumption

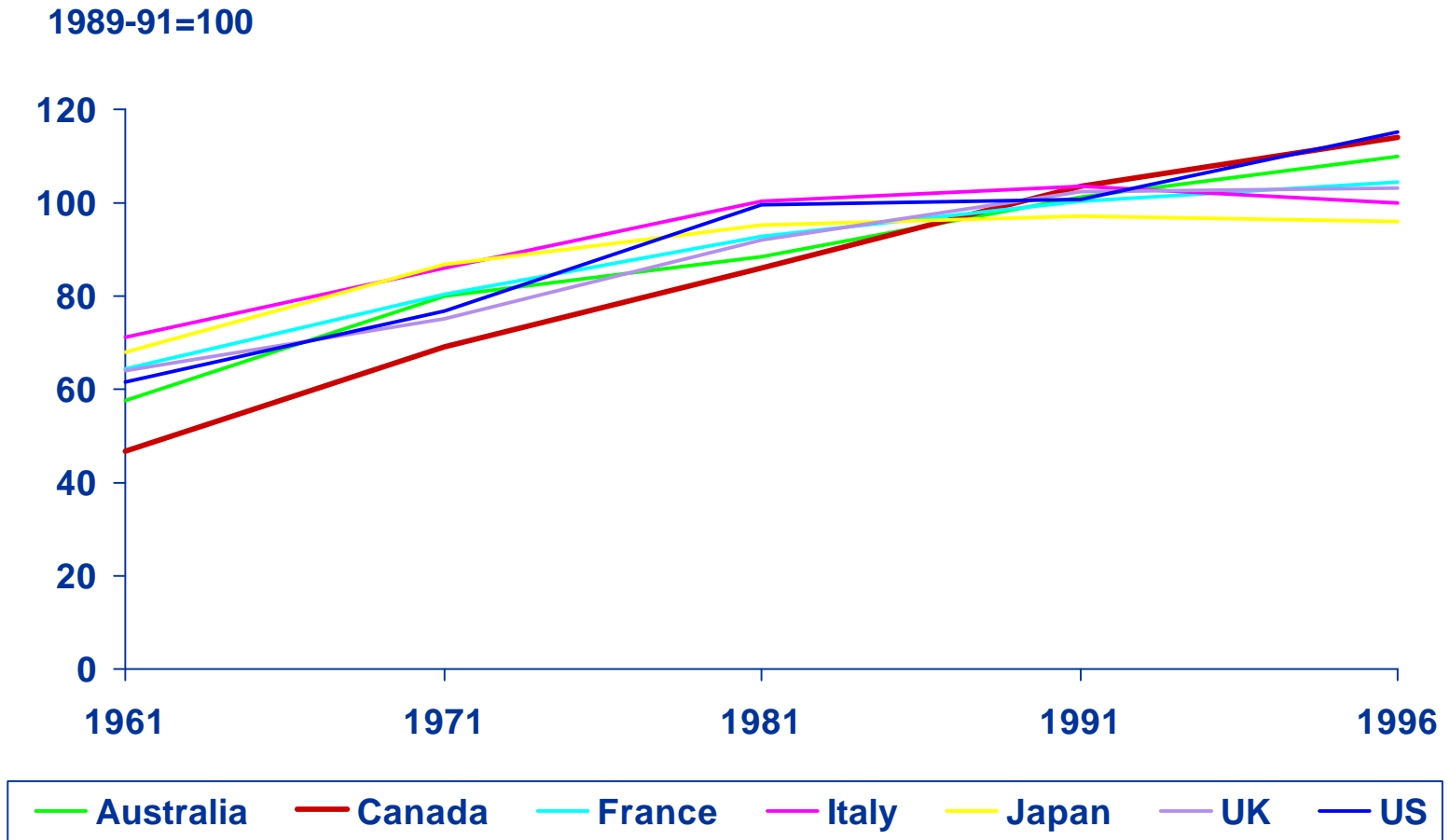


Source: FAOStat.

Graph 6-15

Graph 6-16

Production Indices - Selected Countries



Source: FAOStat.

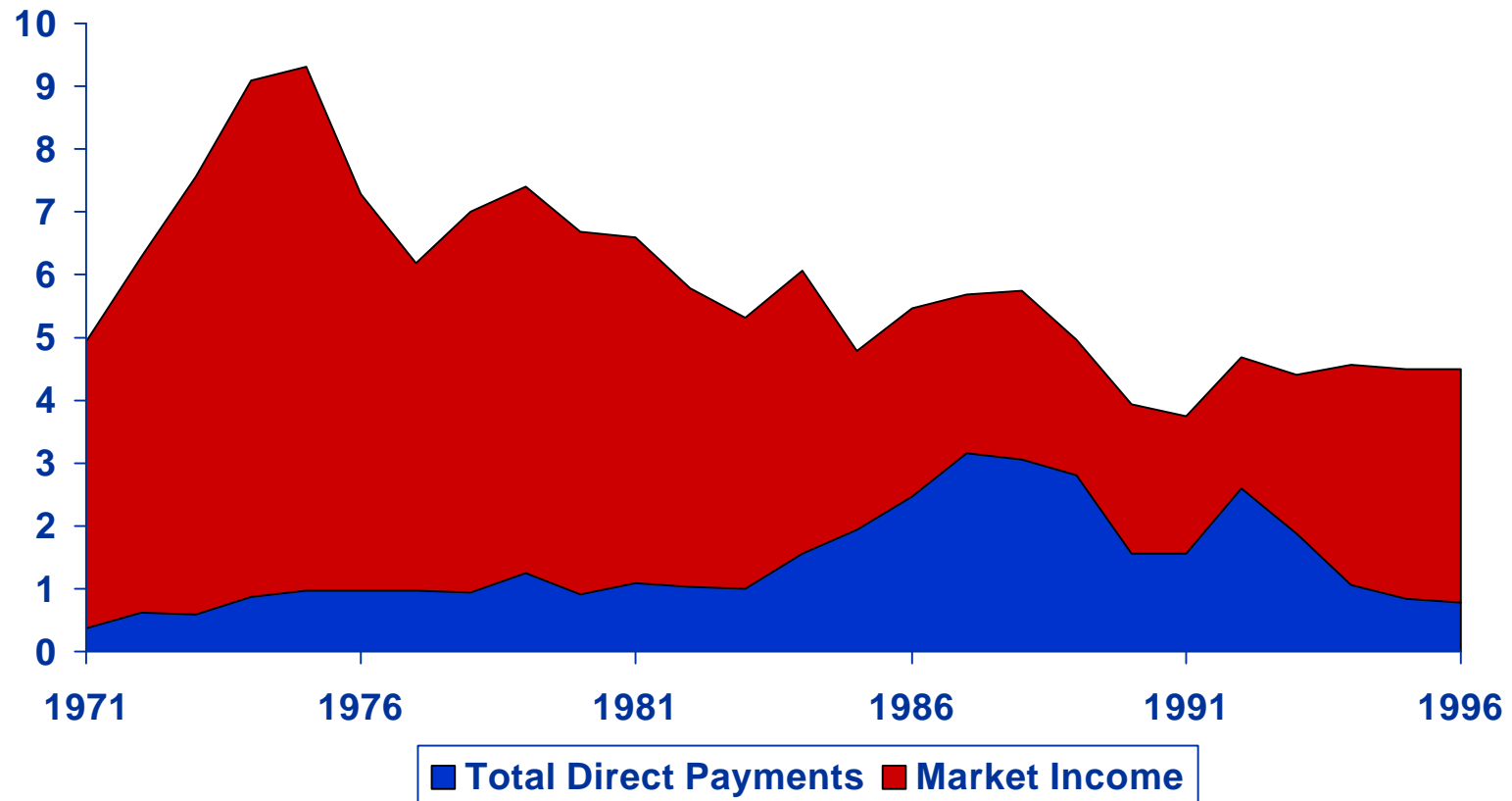
Glossary of Terms

Export Propensity	Export values as a percentage of the value of production.
Foreign Direct Investment (FDI)	Investment involving a long-term relationship and reflecting a lasting interest and control of a resident entity in one economy by an enterprise resident in another country's economy.
FDI Inflows & FDI Outflows	Comprises capital provided (directly or indirectly) by a foreign investor to a FDI enterprise. May consist of three components: equity capital, reinvested earnings, and intra-company loans.
WIR	World Investment Report 1996 - Investment, Trade and International Policy Arrangements, published by United Nations.
Production Index	Based on the sum of price-weighted quantities of all agricultural commodities produced except seed and feed (to avoid double counting). The Geary-Khamis formula is used to determine "international dollars" to assign a single price for each commodity for all countries. Processed and semi-processed goods have been excluded.

Government Support of Agri-Food System

Farm Market Income and Direct Government Payments - Canada

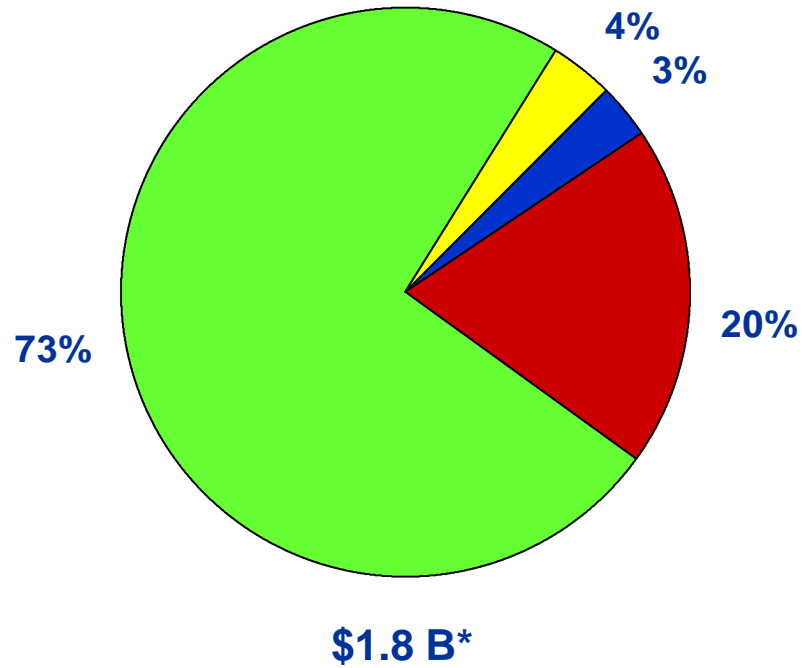
Billions 1986 \$



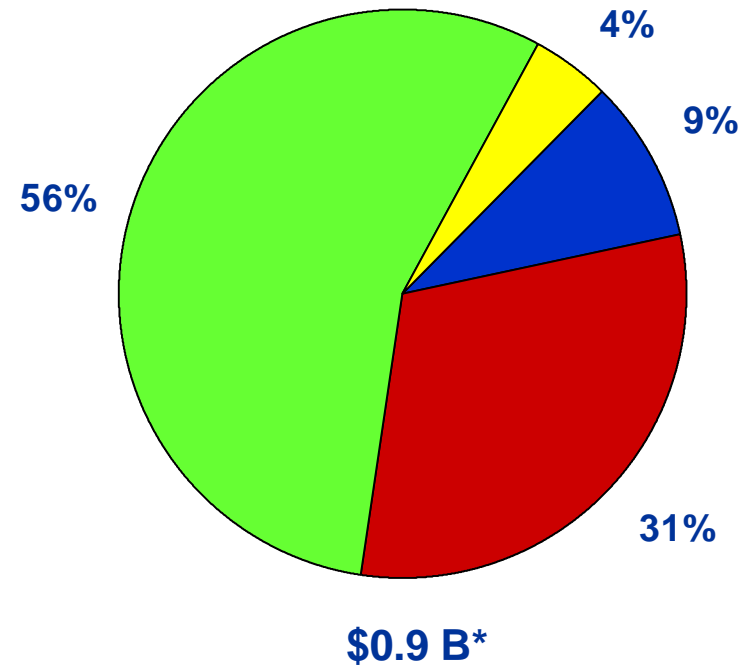
Source: Farm Income, Financial Conditions and Government Assistance Data Book, AAFC.

AAFC Expenditures by Business Lines

1996-97 Estimate



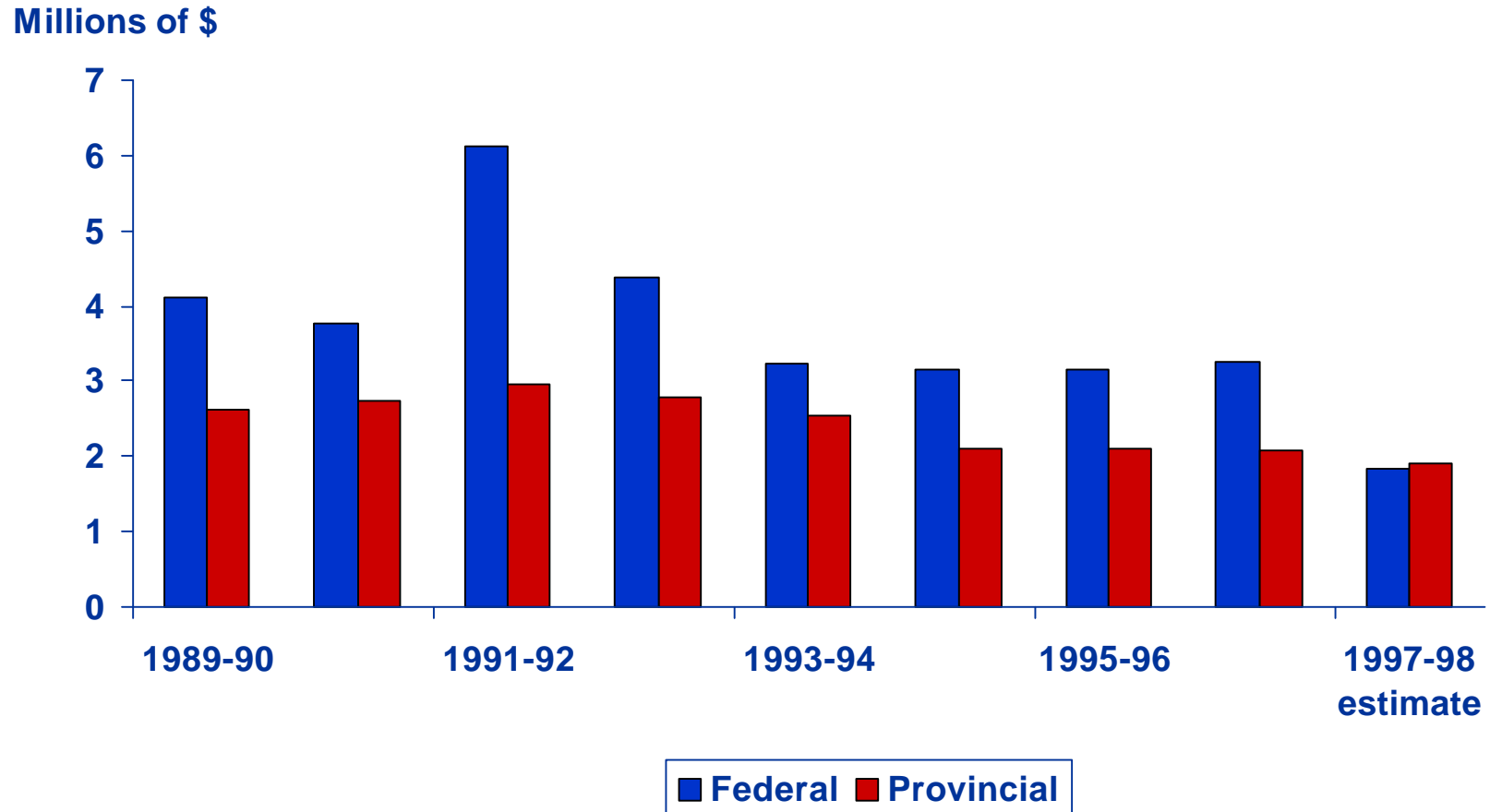
2000-01 Planned



*Does not include Canadian Food Inspection Agency.

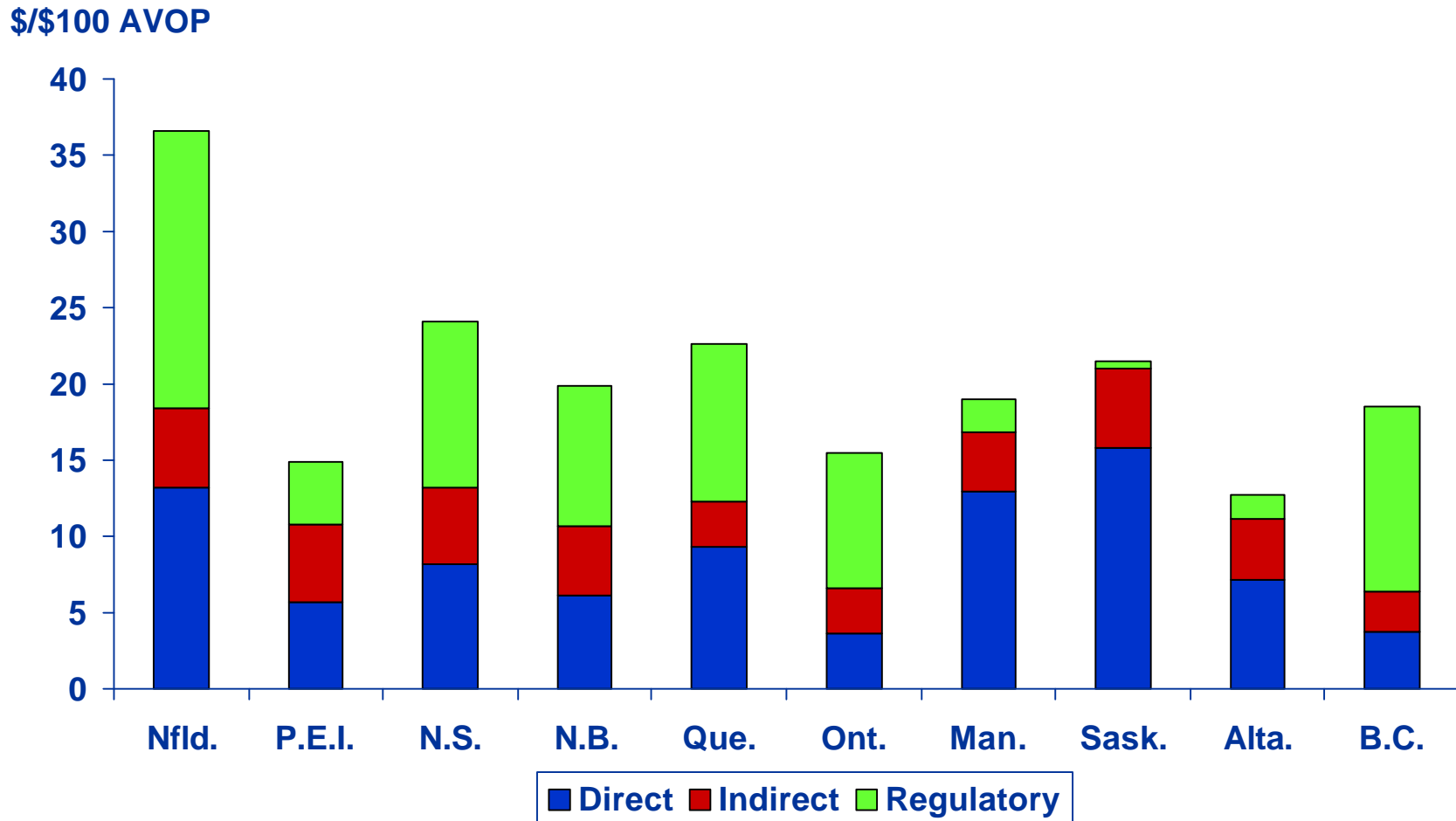
Source: AAFC - 1996-97 Performance Report

Government Expenditures in Support of Agri-Food System



Source: AAFC - Farm Income, Financial Conditions and Government Assistance Data Book, February 1997.

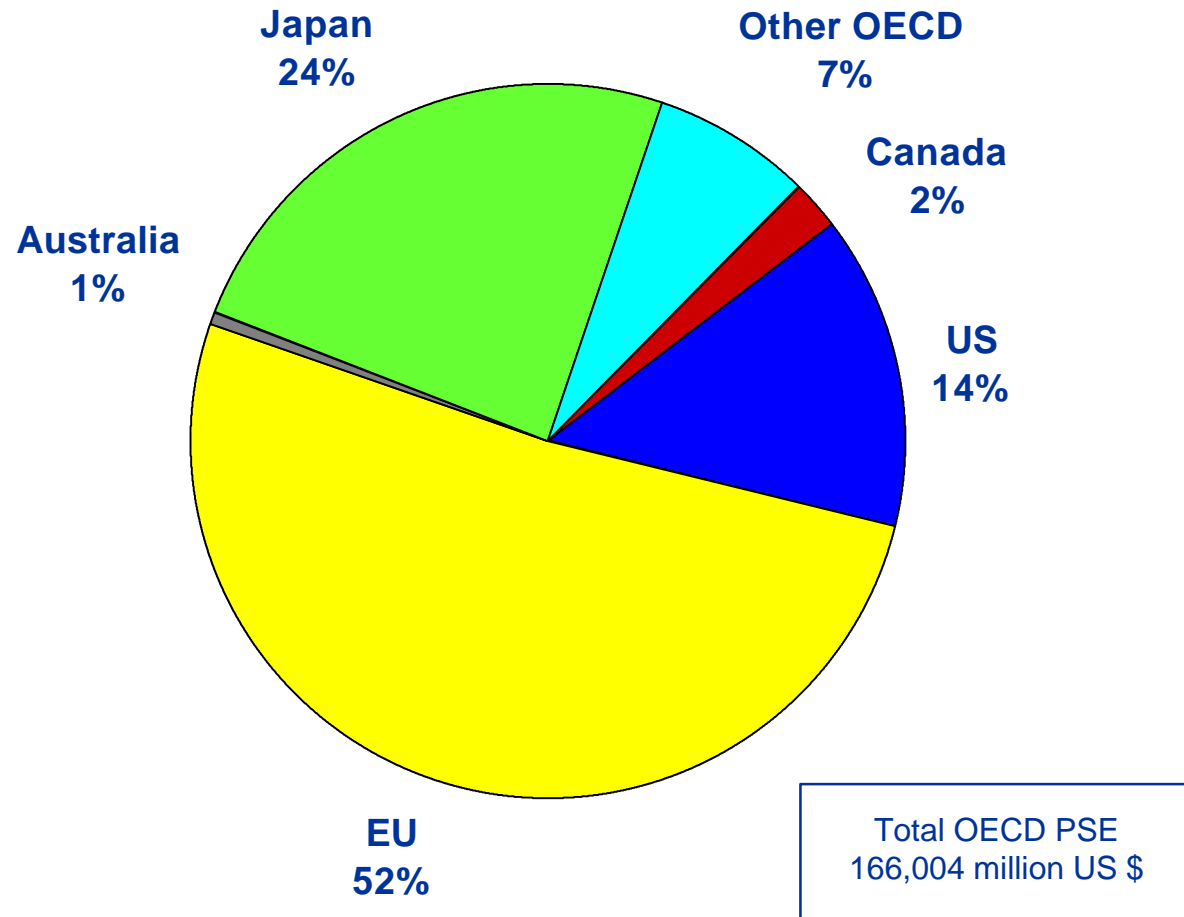
Government Transfers by Type of Transfer, 1995-96



AVOP - Adjusted Value of Production

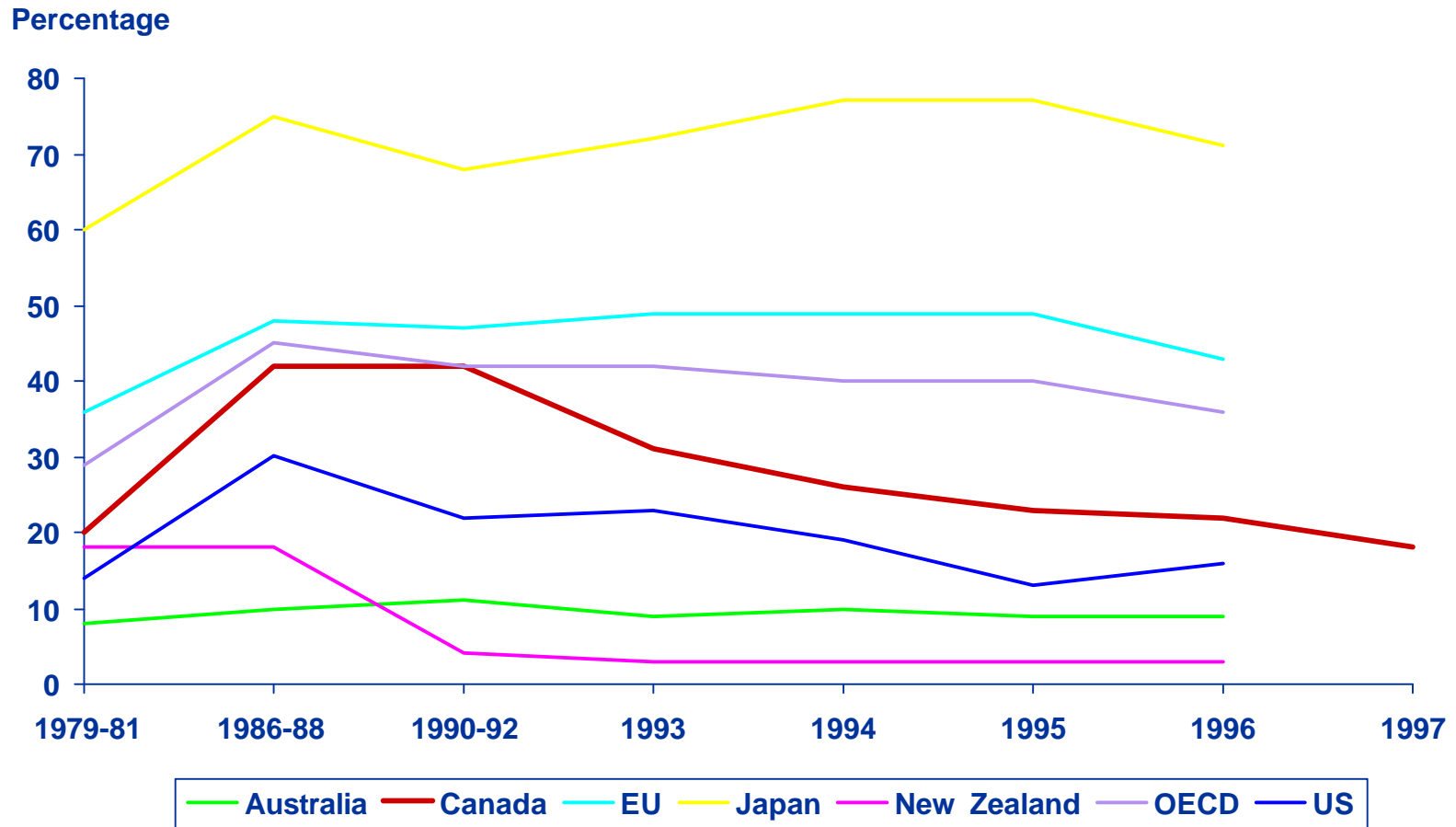
Source: AAFC - Farm Income, Financial Conditions and Government Assistance Data Book, February 1997.

Distribution of Total OECD PSE by Country 1996



Source: Agricultural Policies in OECD Countries-Measurement of Support and Background Information, 1997.

Percentage PSE, Selected Countries

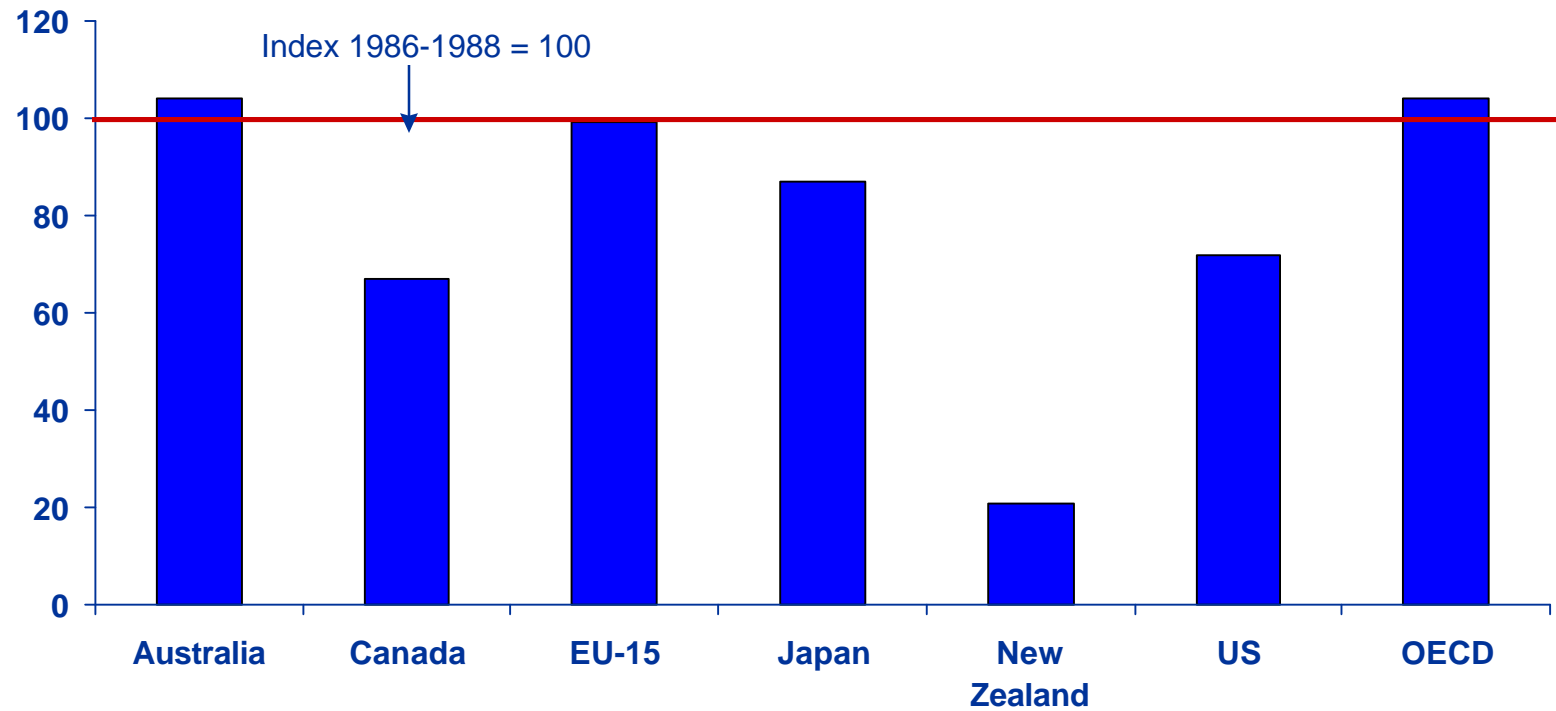


Sources: 1994-96 Agricultural Policies in OECD Countries; Measurement of Support and Background Information, 1997. OECD 1979-93 Producers Subsidy Equivalents and Consumer Subsidy Equivalents Database, 1979-1995 (Paris, 1996).

Graph 7-6

Index of Total PSE

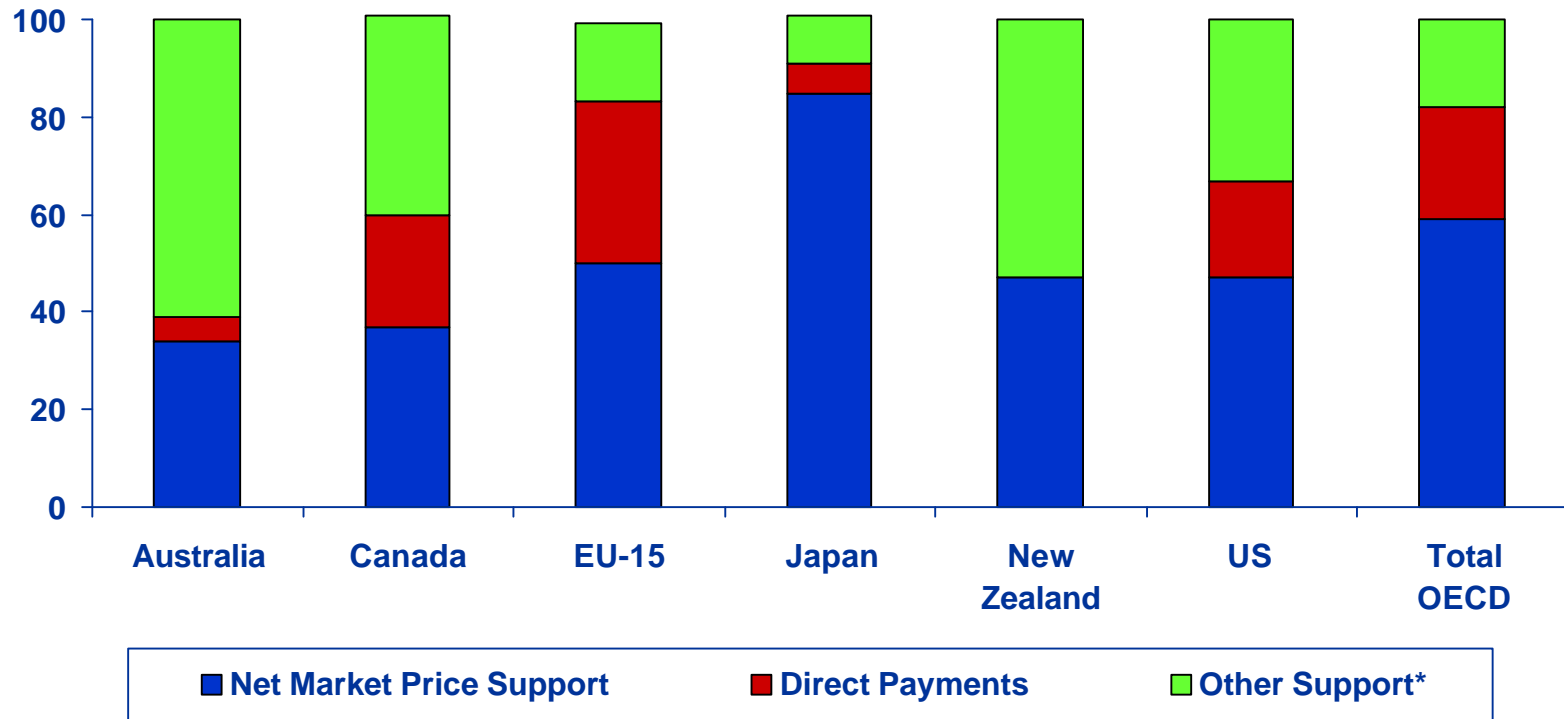
Local Currency



Source: Agricultural Policies in OECD Countries-Measurement of Support and Background Information, 1997.

Composition of Support in Selected Countries, 1996

Percentage



*Includes input cost reduction and other services provided by government to the agri-food sector.

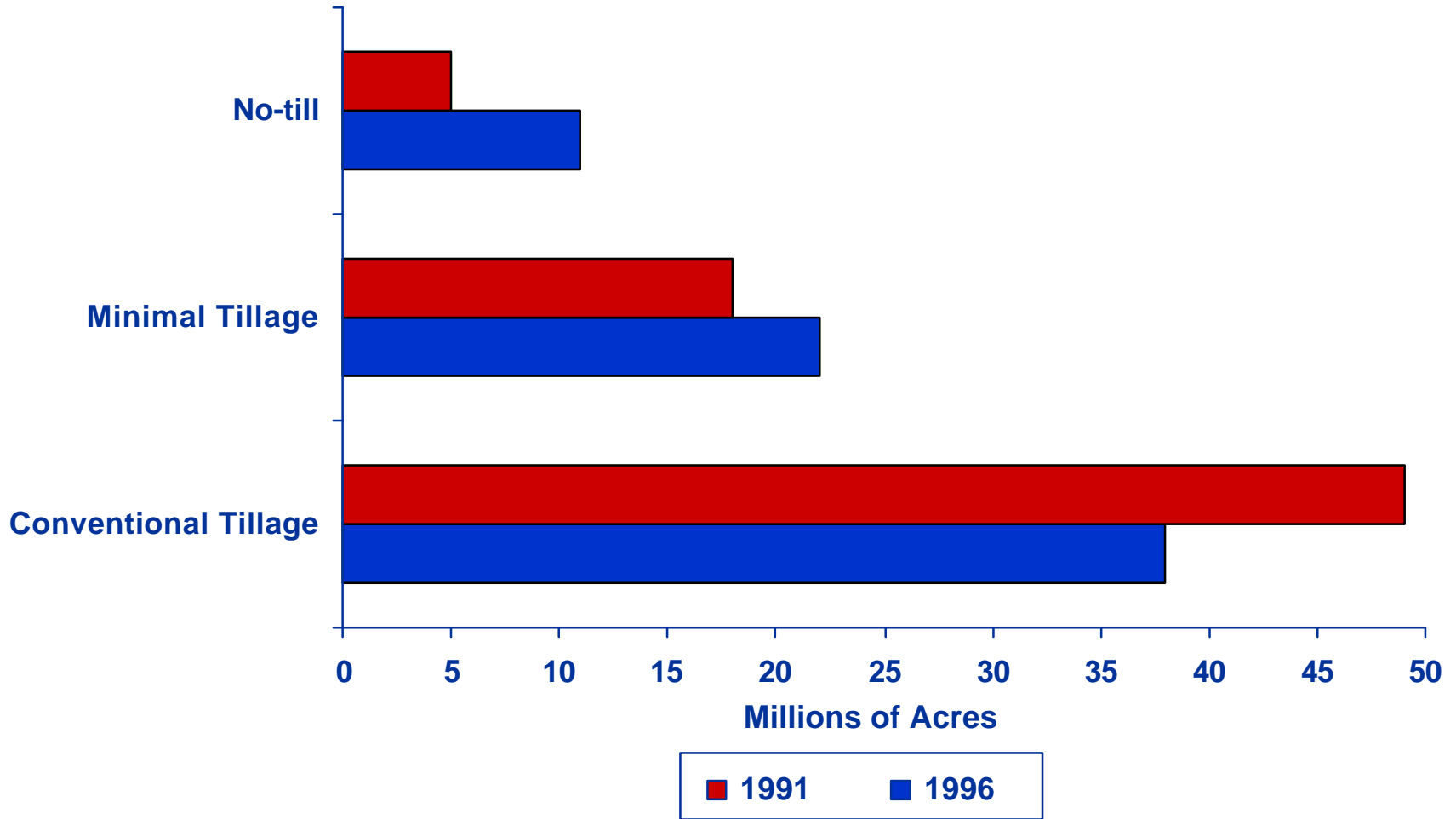
Source: Agricultural Policies in OECD Countries-Measurement of Support and Background Information,

Glossary of Terms

PSE (Producer Subsidy Equivalent)	An indicator of the value of the monetary transfers to agriculture resulting from agricultural policies in a given year (developed by the OECD, Paris).
Farm Market Income	Market receipts which do not include direct program payments, less cash operating expenses
Total direct payments	Include gross payments paid directly to producers under federal, provincial and municipal programmes
AVOP (Adjusted Value of Production)	Sum of three year moving average value of production plus current year's total direct transfers
Government Expenditures	Government spending (at all levels) on agriculture and the food and beverage processing industries in a year, both indirect and direct, to individuals, agencies or associations
Government Transfers	To agriculture only, including direct expenditures plus the effect of government regulations or policies on producers' market returns
Net Market Price Support	Transfers to agriculture resulting from measures (i.e., tariffs, administered prices) that raise prices to consumers of farm commodities, net levies and feed adjustments
Other support	Includes explicit and implicit subsidies on purchased farm inputs, farm credit, and government transfers to agriculture research and development, extension services, training and agricultural infrastructure

Environmental and Sustainability Measures

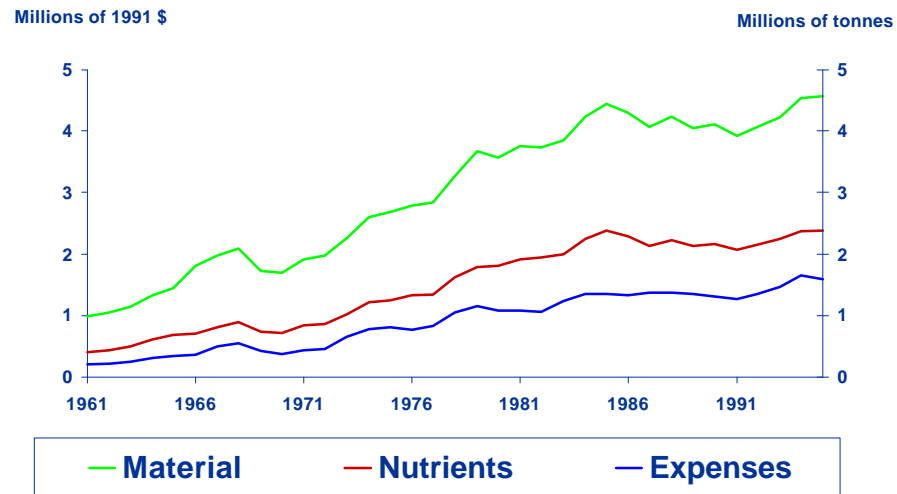
Tillage Practices



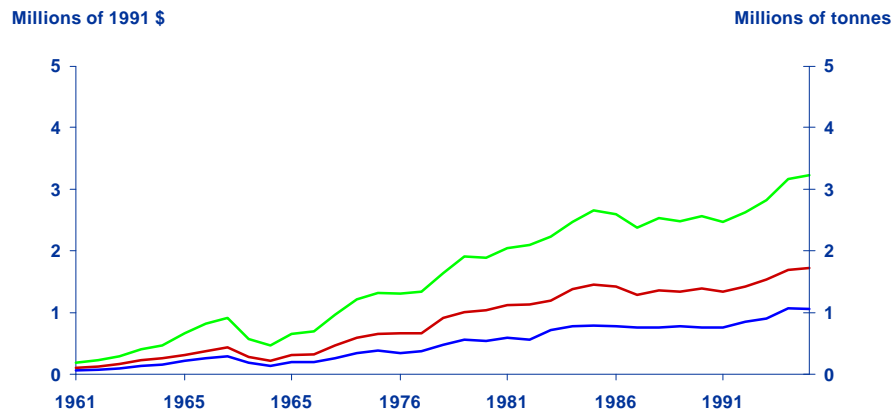
Source: Statistics Canada - 1996 Census of Agriculture National and Provincial Highlights

Farm Fertilizer and Lime Expenses, Fertilizer Material Sold, and Fertilizer Nutrient Content

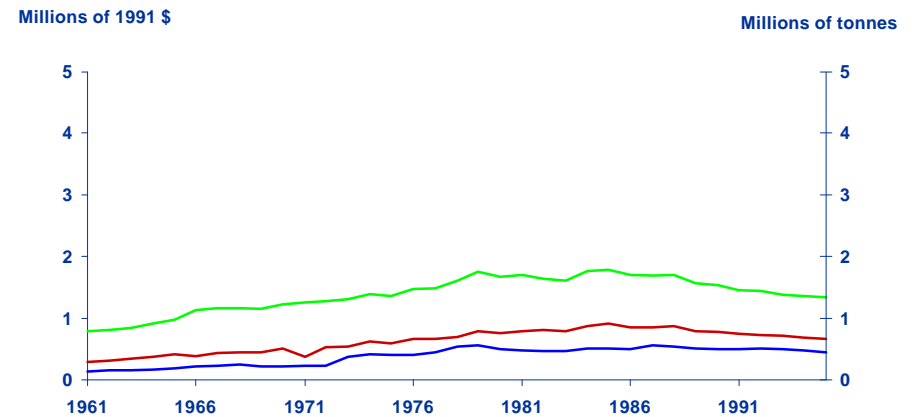
Canada



West



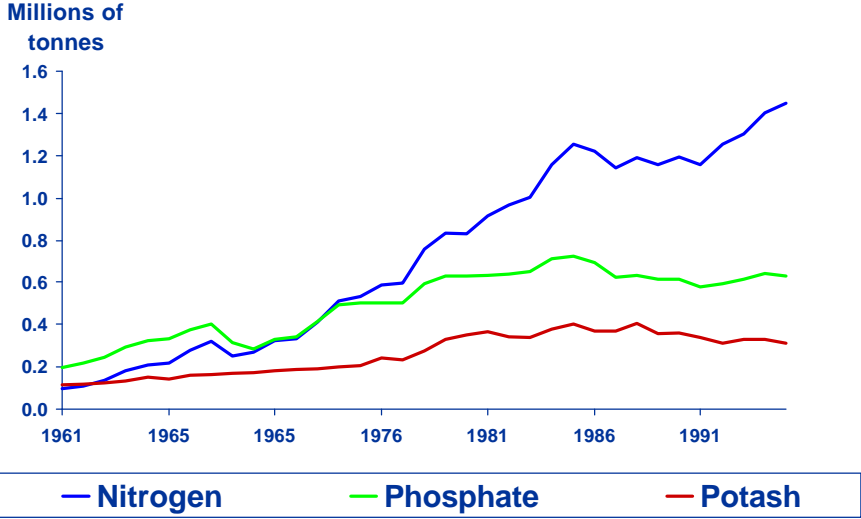
East



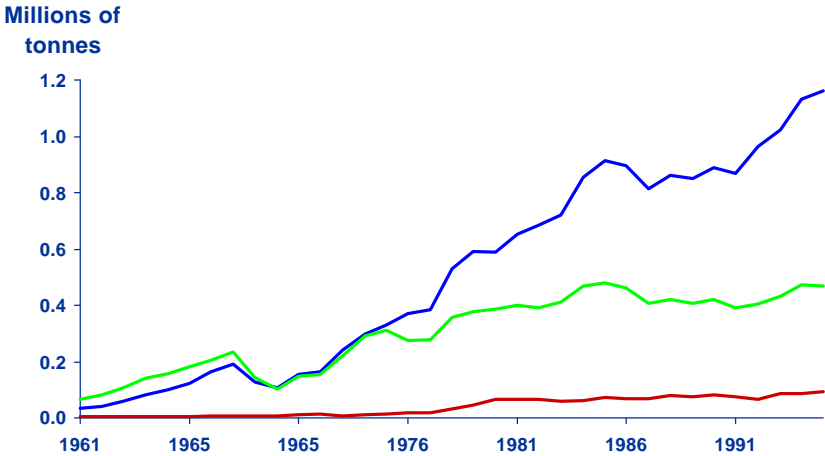
Source: Statistics Canada, Agriculture Division.

Nutrient Content of Fertilizer Material Sold

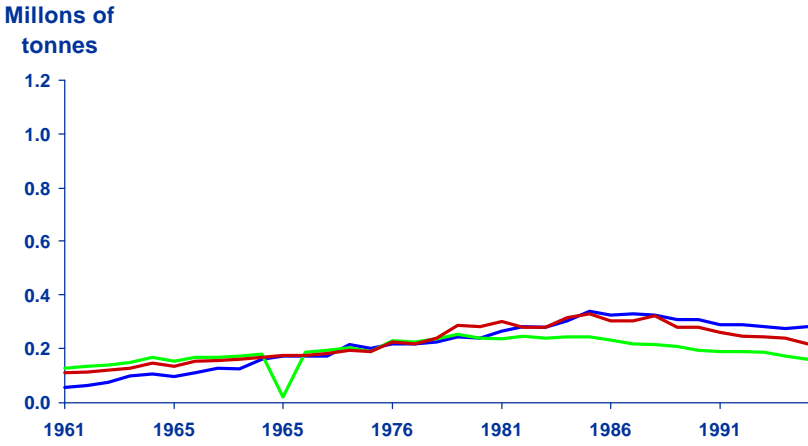
Canada



West



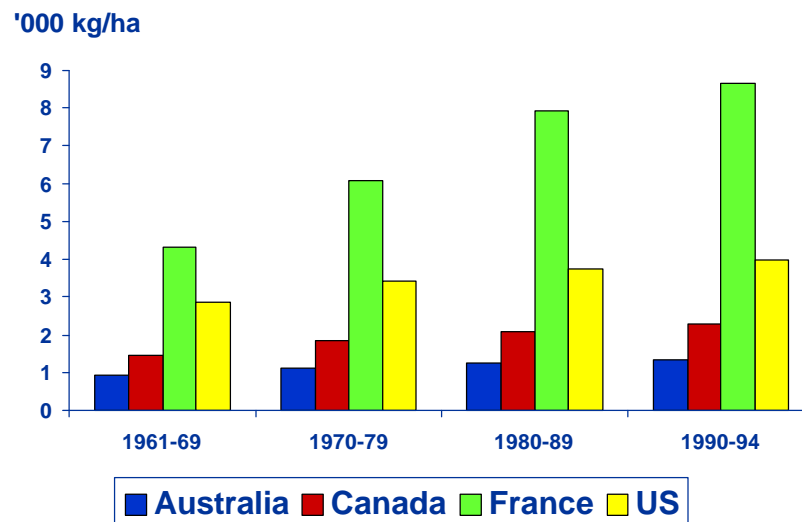
East



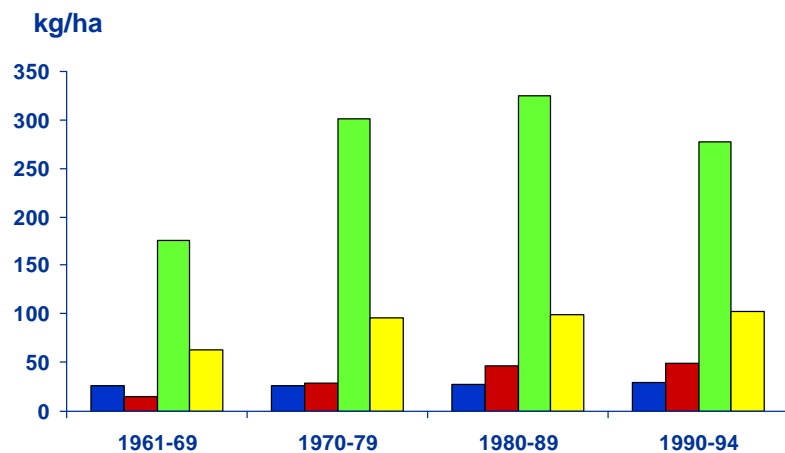
Source: Statistics Canada, Agriculture Division.

Fertilizer

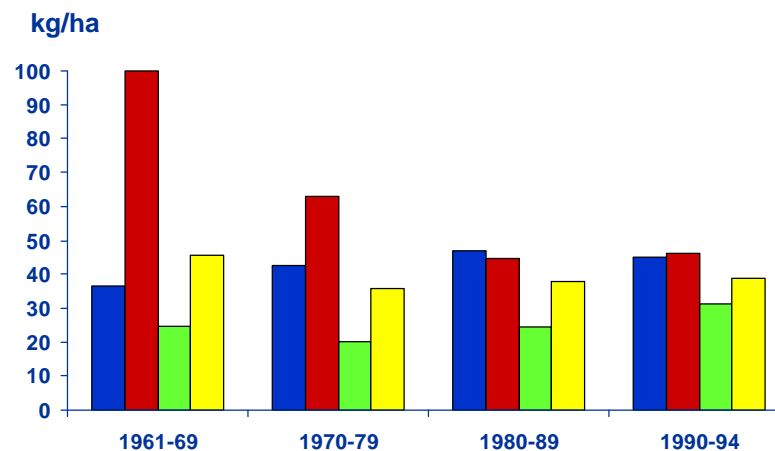
Average Primary Crop Production



Average Fertilizer Usage



Fertilizer Response - Yield to Fertilizer Use Ratio



Source: FAOStat.