



British Columbia's Agriculture Industry

Agriculture and Agri-Food Canada (AAFC) supports farmers and processors in British Columbia by investing in risk management programs, science and technology, innovation, market development and trade. By doing so, AAFC is helping set the right conditions for farmers and processors to compete and succeed, while providing the best possible service to farmers and the sector.

Canada at a Glance

Population:	35.2 million (M) (2013)
Total GDP:	\$1.6 trillion (T) (2013)*
2012 Total Agri-Food Exports:	\$43.6 billion (B)
2012 Total Agri-Food Imports:	\$33.1B
2012 Trade Balance:	\$10.5B

*Adjusted to 2007 dollars.

Top 3 Canadian Agri-Food Export Commodity Groups:

Oilseed and oilseed products (e.g. canola, canola oil and soybeans), grain and grain products (e.g. wheat), and live animals, red meats and other animal products (e.g. frozen pork).

Top 3 Canadian Agri-Food Import Commodity Groups:

Fresh and processed fruits & vegetables, beverages and juices (e.g. wine, beer and coffee) excluding fruit, and other agri-food products.

Top 5 Seafood Exports: Frozen crabs, salmon, frozen lobster, live lobster, frozen shrimps and prawns.

Sources: AAFC's Agri-Food Trade Service, 2012, Statistics Canada Table 379-0031, International Merchandise Trade Statistics 2012 and AAFC calculations.

British Columbia at a Glance

Population:	4.6M (2013)
Change from previous census:	4.1%
Share of National Population:	13.0%
Total GDP:	\$212B (2013, Forecast)
Debt to GDP ratio:	17.4% (2013-14, Forecast)
Forecasted GDP growth:	2.1% (2014, Forecast)
Unemployment rate:	6.4% (February, 2014)

Sources: 2011 Census data, Statistics Canada. RBC, Provincial Outlook, March 2014, RBC Provincial Fiscal Tables, March 28, 2014 and Statistics Canada catalogue no. 71-001-X.

Overview of Farm Operations

Farm Operators: 29,925 (10.2% of Canadian total)
 Number of Farms: 19,759 (9.6% of Canadian total)
 Average Farm Size: 327 acres (6.5M acres total)

Source: 2011 Census data, Statistics Canada.

Contribution of Agriculture, Agri-Food and Manufacturing Sectors

Farm Cash Receipts: \$2.8B (2012) (5.3% of Canadian total)
 Value of Food Processing: \$6.2B (2011)*
 Value of Total Manufacturing: \$38.4B (2011)

The British Columbia agriculture and agri-food system is diverse, with dairy, floriculture and nursery, and chicken farms comprising its main farm types, by value of farm cash receipts. British Columbia had 5% (2011) of Canada's food and beverage processing sales, with meat, other food (which includes snack food) and animal food manufacturing as its major food processing sub-industries, by value of shipments.

*Beverage manufacturing sales were not included because of confidentiality.

Sources: Statistics Canada Table 002-0001, ASML 2011 and AAFC calculations.

GDP

Canada

Real Gross Domestic Product (GDP) (2007 dollars) of the Canadian agriculture and agri-food system was \$103.4B in 2012, accounting for 6.7% of total Canadian GDP. The contribution of each component of the system accounted for the following shares of total GDP:

- Primary Agriculture (1.1%)
- Food, Beverage and Tobacco Processing (1.7%)
- Food Retail/Wholesale (1.8%)
- Input and Service Suppliers (0.6%)
- Foodservice (1.4%)

British Columbia

British Columbia's agriculture and food processing GDP in 2012 represented:

- 7.3% of Canada's agriculture and food processing GDP; and
- 1.5% of the province's total GDP.

Sources: Statistics Canada Table 379-0025: GDP at Basic Prices 2012 and special tabulations for AAFC.

British Columbia's Trade

- In 2012, British Columbia's agri-food exports totaled \$1.8B. This was up 18% over the 5-year average (2007-2011).
- The top British Columbia agri-food exports (excluding seafood) were fruit and nuts (e.g. fresh and frozen berries) at \$325M, other agri-food products (e.g. condiments and material for food preparation) at \$306M, and oilseed products at \$225M, in 2012.
- Exports of primary agricultural products were valued at \$633.8M in 2012 and accounted for 34% of British Columbia's agriculture and agri-food exports.
- Exports of processed products were valued at \$1.2B in 2012 and accounted for 66% of British Columbia's agriculture and agri-food exports.

Sources: Statistics Canada International Merchandise Trade Statistics 2012 and AAFC calculations.

Markets*

*Because of limited data, the information in this section should be used with caution.

Where does British Columbia source its food?

British Columbia sources its food from a variety of locations, including from within the province, from other Canadian provinces or territories and from other countries. In 2009, 30% of all the agriculture and food products that were sold in British Columbia were purchased from British Columbia producers and processors, 36% came from other parts of Canada, and 34% were imported from abroad.

Source of British Columbia's Agriculture and Agri-Food Products (2009)

Source	%
British Columbia	30
Rest of Canada	36
International	34
Total	100*

Sources: Statistics Canada Table 386-0002: Interprovincial and International Trade Flows at Producer Prices 2009 and AAFC calculations.

* Percentages may not add up to 100 as they are rounded to the nearest percent.

In 2012, most agri-food imports originated from:

- The United States (60.4%)
- The European Union (7.9%)
- China (5.0%)

Sources: Statistics Canada International Merchandise Trade Statistics 2012 and AAFC calculations.

Where do British Columbia's producers and food processors sell their products?

British Columbia's primary agricultural producers and food processors sell their products across Canada and around the world. In 2009, 45% of British Columbia's agriculture and agri-food production was purchased within the province, 37% was sold in other provinces and territories, and 17% was exported to international markets.

Destination of British Columbia's Agriculture and Agri-Food Production (2009)

Destination	%
British Columbia	45
Rest of Canada	37
International	17
Total	100*

Sources: Statistics Canada Table 386-0002: Interprovincial and International Trade Flows at Producer Prices 2008 and AAFC calculations.

* Percentages may not add up to 100 as they are rounded to the nearest percent.

In 2012, the leading export markets were:

- The United States (66.8%)
- South Korea (11.0%)
- Japan (3.3%)

Sources: Statistics Canada International Merchandise Trade Statistics 2012 and AAFC calculations.

Employment

The British Columbia agriculture and agri-food system employed 265,400 people in 2012, broken down as follows:

British Columbia's Agriculture and Agri-Food System Employment and Number of Establishments

Industry	Employees (2012)	Establishments (2012)
Primary Agriculture	22,700*	19,759
Food & Beverage Manufacturing	31,800	986
Food Retail/Wholesale Grocery Store	78,100	2,340
Foodservice Restaurants	131,000	12,328

Input suppliers have been omitted because of confidentiality at the provincial level, but are included in the total.

*Statistics Canada Annual LFS 2012 "total paid workers" was used and differs from the Census of Agriculture's "number of operators", but was selected for comparability between agriculture and agri-food industries.

Sources: Statistics Canada, Annual LFS 2012 and special tabulation for AAFC, Table 551-0003, Table 080-0023: Annual Retail Store Survey 2012, Census of Agriculture 2011 and CRFA's Foodservice Facts 2013.

Federal Government Expenditures in Support of British Columbia's Agri-Food Sector

- In British Columbia, the total net annual expenditures came to \$144M per year, on average, between 2009-10 and 2013-14.
- These expenditures represented administrative expenditures of the Department (operating and capital) and program expenditures (subsidies and contributions).
- The data are presented on a financial year basis and, in some cases, were broken down and weighted between the provinces following certain factors.
- Operating and capital expenditures including research and inspection represented \$97M per year, on average, between 2009-10 and 2013-14. During the same period, program expenditures came to \$57M, on average.

Federal expenditures in selected program areas averaged as follows:

- Producer income support and stabilisation - \$22.4M
- Research programs - \$2.7M
- Inspection programs - \$4.3M
- Environment programs - \$3.7M
- Advancing Canadian Agriculture and Agri-Food (ACAAF) program and Canadian Agriculture Adaptation Program (CAAP) - Adaptation Council - \$1.4M

- ACAF program and CAAP - national component allocated to British Columbia - \$0.02M
- Canadian Agriculture and Food International (CAFI) program and AgriMarketing Program (AMP) - \$0.6M

Source: AAFC Strategic Policy Branch Databook, 2010.

Key Sectors

The Agri-Food industry of British Columbia is noted for its diversity.

The **fish and seafood industry** consists of wild capture and farm cultured fish. In 2012, the landed value of wild captured fish was \$366.8M and the harvested value of farmed fish was \$301.7M for a total value of \$668.5M at the primary level. There are 153 processing establishments that contribute additional value. In 2012, \$870M worth of fish and seafood were exported from British Columbia.

The **dairy industry** consisted of 491 farms in 2012 and generated farm cash receipts of \$530M in 2012. The 687M litres of milk produced were processed by 35 processing establishments. The industry generated an estimated \$14M from dairy product exports.

The **poultry industry** (chicken and turkey) consisted of 335 farms in 2012 and generated farm cash receipts of \$420M in the same year. There are 27 poultry processing establishments that generated \$152.3M worth of manufacturing sales and an estimated \$34M in exports.

The **egg industry** (hatching and table eggs) consisted of 189 farms in 2012 and generated farm cash receipts of \$113M in the same year. There are 53 hatching egg producers and 136 table egg producers in 2012. This industry generated \$46M worth of manufacturing sales.

The **greenhouse vegetables industry** consisted of 500 acres of greenhouses in 2012 and generated \$235M of farm cash receipts. There were 135 greenhouse operations that generated \$550M worth of manufacturing sales and \$115.6M worth of greenhouse vegetables exports.

The **floriculture industry** consisted of 1,263 farms in 2012. The industry generated farm cash receipts of \$438M and an estimated \$58.2M worth of exports in 2012.

The **cattle and calves industry** consisted of 4,080 ranches, farms and feedlots in 2012 and generated farm cash receipts of \$224M in the same year. The 22 animal (except poultry) slaughtering establishments generated \$37.7M worth of manufacturing sales and an estimated \$49.1M in exports.

Source: Statistics Canada, 2012 BC Ministry of Agriculture Agrifood Industry in Review, BC Ministry of Agriculture 2013 Export Highlights BC Agrifoods

Federal Government Expenditures in Support of the Agri-Food Sector in British Columbia

(\$000)	2009-10	2010-11	2011-12	2012-13	2013-14	Average
Total Operating and Capital Expenditures	100,174	97,808	99,027	94,551	94,489	97,210
Research	17,036	16,349	16,127	19,190	19,257	17,592
Inspection	42,295	41,799	43,259	42,810	43,517	42,736
Other Operating Expenditures	38,137	37,172	37,046	31,009	30,031	34,679
Other Capital Expenditures	2,705	2,488	2,594	1,541	1,684	2,203
Total Program Expenditures	56,380	69,385	51,056	56,909	49,439	56,634
Income Support and Stabilization	19,304	35,094	15,226	27,543	14,657	22,365
Ad hoc and Cost Reduction	5,582	2,714	3,165	16	799	2,455
Crop Insurance / Production Insurance	11,409	11,596	12,638	12,356	11,678	11,935
Financial Assistance	843	212	190	457	241	388
Research	1,418	1,679	704	1,304	8,241	2,669
Food Inspection	6,680	3,278	4,462	3,043	4,195	4,332
Marketing and Trade	1,841	2,798	3,170	4,353	3,584	3,149
Rural and Regional Development	4,451	6,933	4,758	2,424	2,669	4,247
Environment	3,480	3,573	5,159	3,645	2,511	3,674
Other Programs	1,372	1,510	1,584	1,768	863	1,419
Total Gross Expenditures	156,554	167,193	150,082	151,461	143,928	153,844
Recoveries	(10,442)	(10,324)	(7,656)	(11,395)	(9,588)	(9,881)
Total Net Expenditures	146,112	156,869	142,426	140,065	134,340	143,962
Specific Programs within Program Expenditures						
ACAAF and/or CAAP (Adaptation Council)	1,966	1,216	1,154	1,327	1,290	1,390
ACAAF and/or CAAP (National)	3	79	0	0	0	16
CAFI and/or AMP	685	830	854	651	0	604

Source: Agriculture and Agri-Food Canada, 2013.

British Columbia's Agriculture Industry

© Her Majesty the Queen in Right of Canada, represented by the Minister of Agriculture and Agri-Food, (2014)
AAFC No. 12222E

Paru également en français sous le titre
Industrie agricole en Colombie-Britannique

For more information,
call the British Columbia Regional Office at 604-666-6344
or by email at atsbc@agr.gc.ca
or reach us at www.ats-sea.agr.gc.ca/reg/bc-eng.htm.

