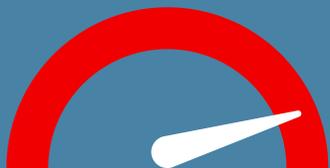


YEAR 2021

GOAL 15: FISHERIES AND AGRICULTURE

NEW BRUNSWICK'S SEAFOOD AND AGRICULTURAL
PRODUCT EXPORTS WILL BE WOTK \$2 BILLION OR
MORE BY 2024



STATUS: NOT PROGRESSING

Overview

Importance

Fisheries and agriculture are both valuable resources to New Brunswick. They improve food security, increase wealth, provide employment opportunities, and promote economic growth. In addition, sustainable use of these resources preserves the province's environment and natural resources.

Problem

Over the past ten years, the total value of New Brunswick's exports has more than doubled. However, in 2020, New Brunswick's seafood, crop production and animal production exports were valued at \$1.5 billion – a significant reduction from the previous year, which reached \$1.9 billion.

Cause

Most of the previous increase comes from the Seafood Production and Packaging sector, which makes up nearly 70% of the export value in the province, though all sectors have been growing since 2012. These upward trends had put New Brunswick on track to reach the suggested goal of achieving a total domestic export value worth at least \$2 billion by 2024. However, the decline in 2020 means this goal is no longer progressing.

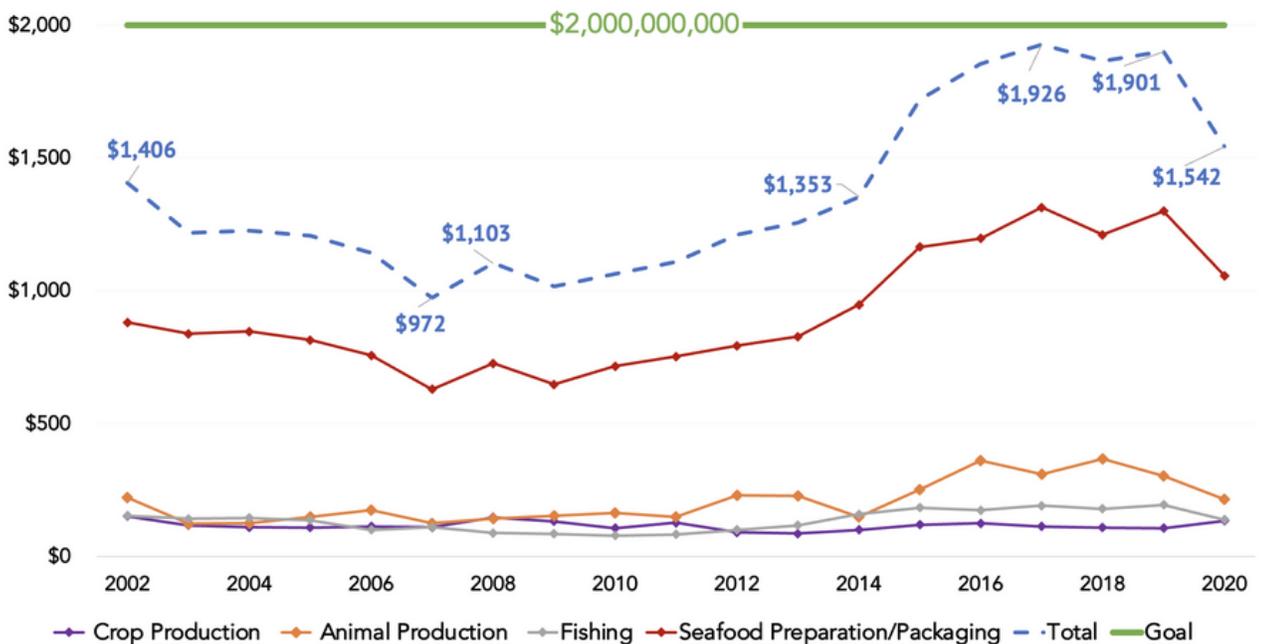
In the Numbers

Agriculture and Seafood Product Exports

Figure 1 shows that although animal production, which includes aquaculture, has fluctuated, crop production has seen minimal fluctuations since 2002. After facing a low of \$627 million in 2007, New Brunswick's domestic fishery and seafood products have seen major increases over the years, with \$1.05 billion in packaging exports in 2020. This was a decrease from 2019, when this sector reached a high of \$1.3 billion.

If New Brunswick's seafood and agriculture exports are to reach the suggested value of \$2 billion, high animal production values need to return to 2019 levels, and crop production must be accelerated. If this occurs, and seafood exports recover and continue growing, further progress is possible.

Figure 1: New Brunswick Agriculture and Seafood Product Exports (2020 Dollars)



(See full data set in Appendix A)

A Closer Look

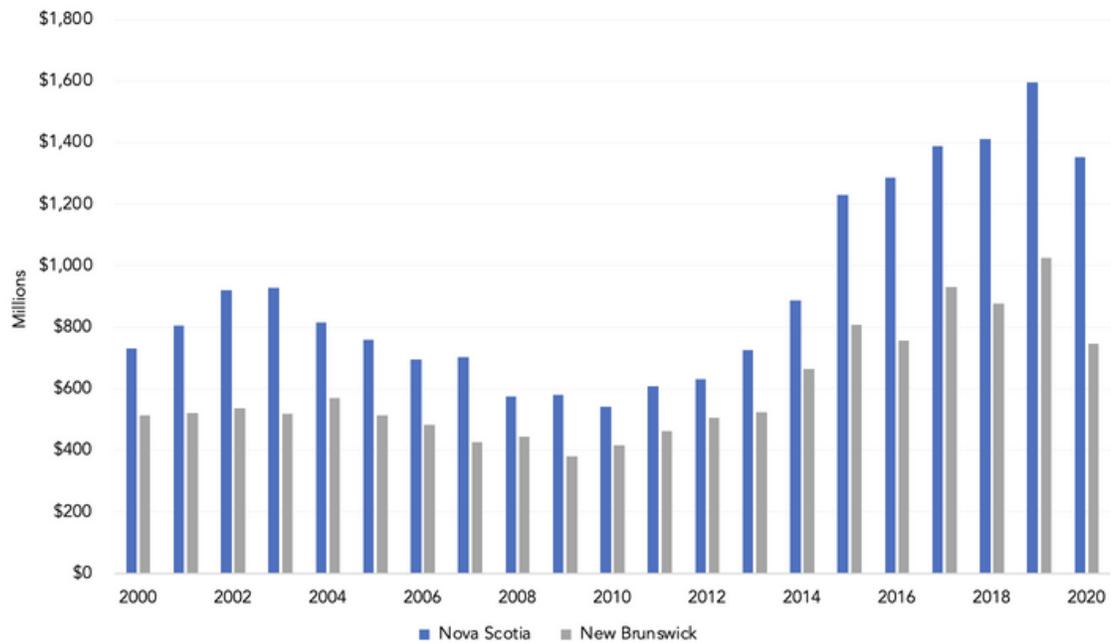
Domestic New Brunswick Exports in the Fishing and Seafood Industries Compared with Nova Scotia

Fishery exports have brought about major growth in the Atlantic provinces over the past few years, with rising lobster prices driving much of the progress within the seafood industry.

As displayed in Figure 2, New Brunswick's crustacean exports (which include lobster, crab, shrimp, and prawns) increased from \$504 million in 2012 to \$745 million in 2020. Previous years experienced even higher crustacean numbers, reaching \$1 billion in 2019. Lobster prices have nearly doubled since 2012, with a jump from \$2.87 per pound to \$5.54 between 2012 and 2018. This change is a key factor behind the accelerated growth.

This progress is also due to a weak Canadian dollar and the favourable exchange rate for the United States, which consequently imported larger amounts of Canadian lobster. High levels of growth in other seafood products, such as crab and shrimp, also boosted the upward trend in crustacean exports.

Figure 2: Domestic Exports of Lobster and Crustaceans Compared to Nova Scotia (2020 constant dollars)



(See full data set in Appendix B)

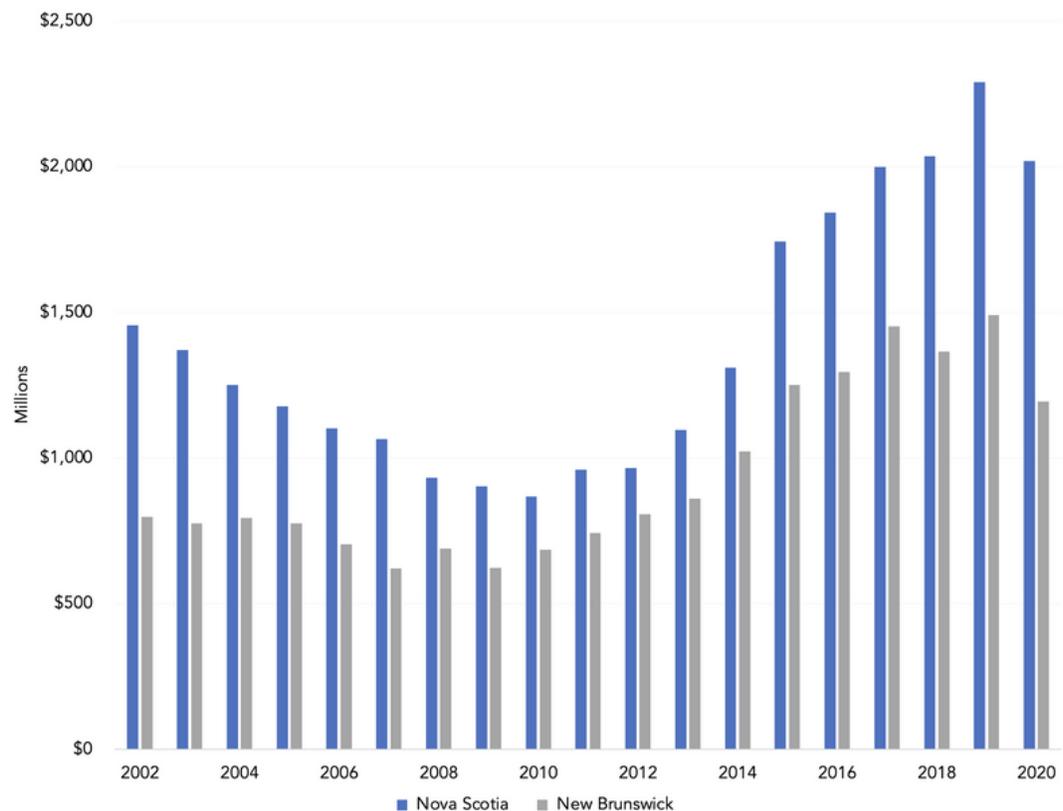
The United States is the dominant market for New Brunswick's seafood exports. In 2019, 84% of New Brunswick's seafood products (worth \$1.4 billion) were exported directly to the US. The province has seen a decline in its exports to Japan and China, both of which received the second- and third-highest percentages of New Brunswick's seafood exports in 2019, at 3.7% and 2.3% respectively [2]. According to the Government of Canada, New Brunswick is also likely to see increased exports to the European Union because the new Comprehensive Economic and Trade Agreement (CETA) between Canada and the European Union will reduce tariffs on seafood, which could have a positive impact on Atlantic Canada moving forward.[1]

After facing a low of \$622 million in 2007, New Brunswick's domestic fishery and seafood packaging exports reached a high of \$1.49 billion in 2019, which fell to \$1.2 billion in 2020. This is shown in Figure 3. Although the value of New Brunswick's exported seafood products has consistently fallen short of Nova Scotia's, this overall growth since 2007 has nonetheless been significant and progressive for the province.

[1] "Benefits for Nova Scotia." Canadian-European Union Comprehensive Economic and Trade Agreement. <http://www.international.gc.ca/trade-commerce/assets/pdfs/agreements-accords/ns-nova-scotia-eng.pdf>

[2] "New Brunswick agri-food and seafood export highlights 2019." Province of New Brunswick. <https://www2.gnb.ca/content/dam/gnb/Departments/10/pdf/Publications/Aqu/ExportHighlightsforNewBrunswickAgrifoodandSeafood2019.pdf>

Figure 3: Domestic Exports in Fishing and Seafood Preparation/Packaging Compared to Nova Scotia (2020 constant dollars)



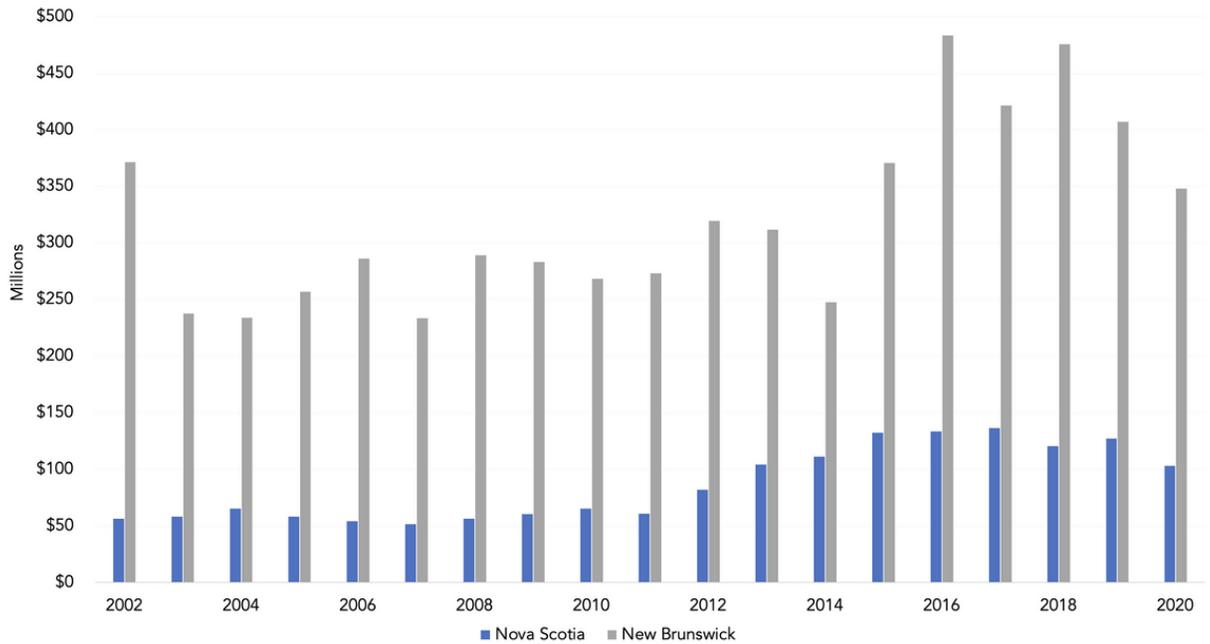
(See full data set in Appendix C)

Total Crop and Animal Production Compared to Nova Scotia

As seen in Figure 4, New Brunswick's agriculture exports increased by approximately \$114 million between 2007 and 2020, growing from \$234 million to \$349 million during that time. There has been a downward trend since 2018, during which agriculture exports reached \$475 million. Aquaculture (or, fish farming) products are currently the major animal product exported from New Brunswick, with a 2010 value of \$201 million. New Brunswick sends the bulk of its agriculture products to the United States, which received 88% of the province's agriculture exports in 2019. The next largest importer of New Brunswick agriculture is Costa Rica, which received 1.6% in the same year. [2]

[2] "New Brunswick agri-food and seafood export highlights 2019." Province of New Brunswick. <https://www2.gnb.ca/content/dam/gnb/Departments/10/pdf/Publications/Aqu/ExportHighlightsforNewBrunswickAgrifoodandSeafood2019.pdf>

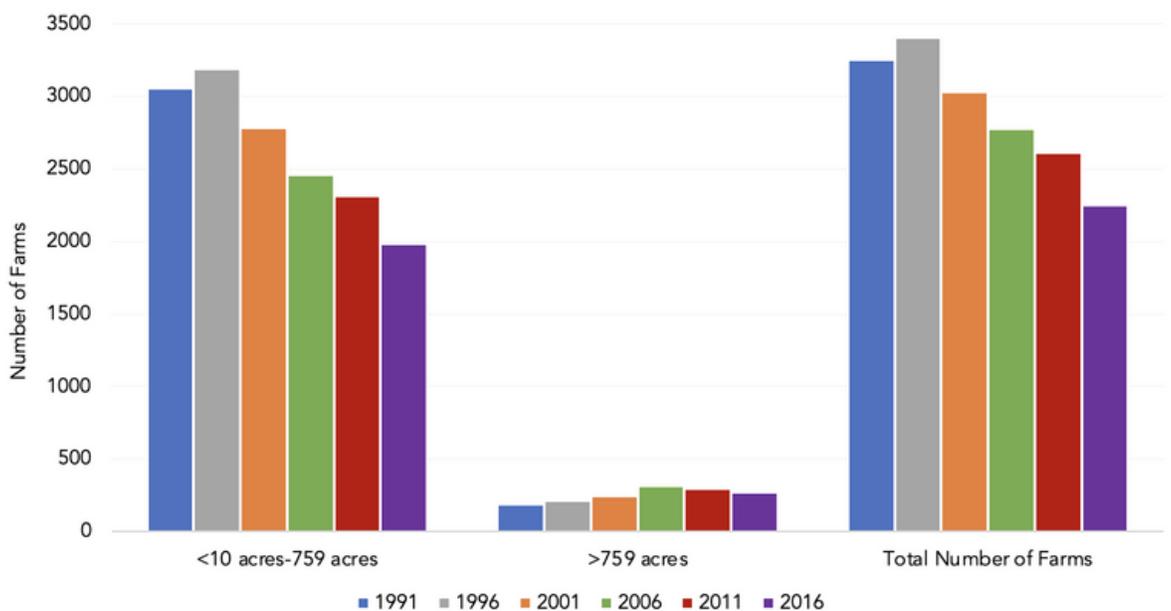
Figure 4: Total Crop and Animal Production Compared to Nova Scotia (2020 constant dollars)



(See full data set in Appendix D)

The number of farms in New Brunswick varies by size, ranging from under 10 acres to 3,520 acres and above. Farms between 10 acres and 759 acres have been decreasing, while larger farms have been increasing. This is a result of farm consolidation, which also explains the overall decrease in the total number of farms from 3,252 in 1991 to 2,255 in 2016. This is displayed in Figure 5.

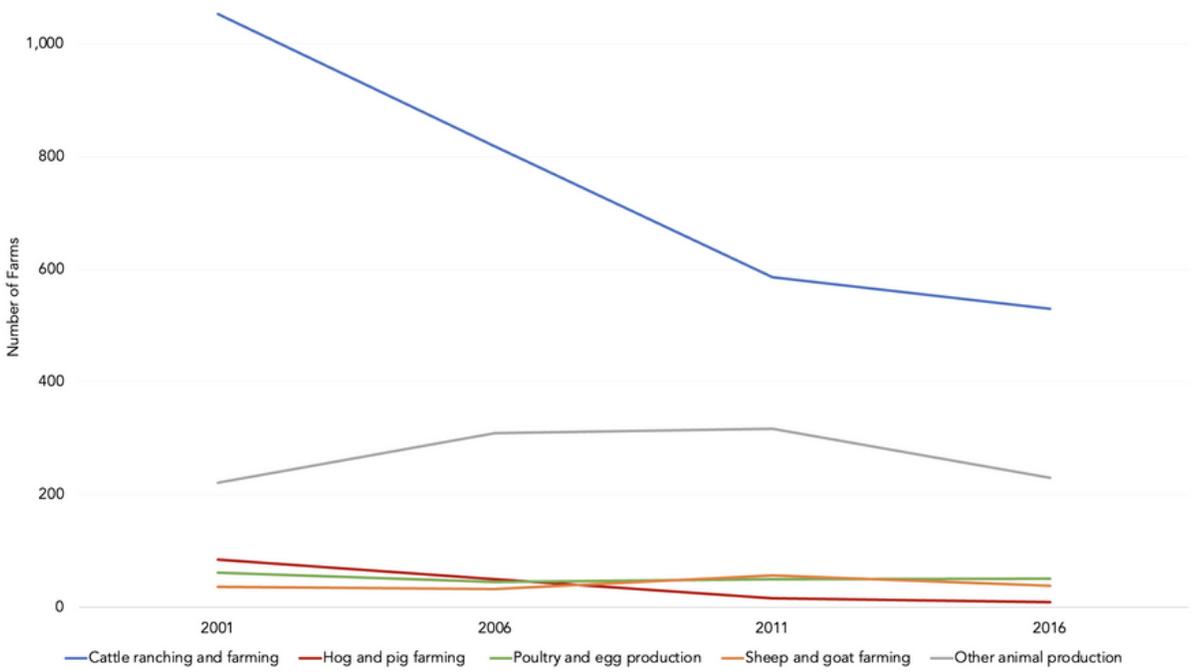
Figure 5: Number of Farms in New Brunswick by Size



(See full data set in Appendix E)

New Brunswick has numerous types of animal farming. The predominant form of farming is cattle ranching and farming, with around 530 farms in 2016. In general, the number of farms reporting in New Brunswick has decreased drastically from 2001 to 2016, falling from 3,034 farms to 2,255 farms in total. Major reductions are noted in the cattle ranching and farming and other animal production, while the other types appear to be constant. This is displayed in Figure 6.

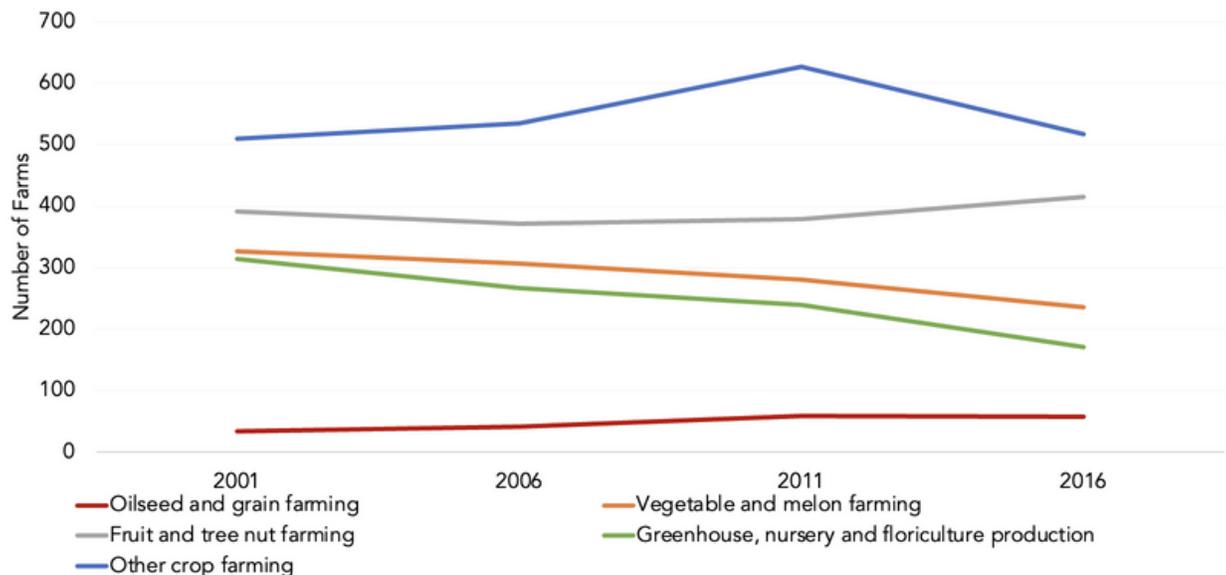
Figure 6: Animal Production in New Brunswick



(See full data set in Appendix F)

Crop production in New Brunswick showed some minor fluctuations between 2001 and 2016. Oilseed and grain farming, as well as fruit and tree nut farming, have increased, whereas other forms of crop farming have decreased linearly. This is displayed in Figure 7.

Figure 7: Crop Production in New Brunswick



(See full data set in Appendix G)

Summary

Fisheries and agriculture are valuable resources to New Brunswick, as they both improve food security, increase wealth, provide employment opportunities, and promote economic growth. The Seafood Production and Packaging sector makes up nearly 70% of the export value in the province and is a major reason behind the increase in New Brunswick's seafood and agriculture export values. This upward trend had put New Brunswick on track to reach the suggested goal of achieving a total domestic export value worth at least \$2 billion for this sector. However, this goal is no longer progressing.

Appendix A

New Brunswick Agriculture and Seafood Product Exports (2020 dollars)

Year	Crop Production	Animal Production	Fishing	Seafood Preparation/Packaging
2002	\$150,731,972.12	\$221,049,954.36	\$153,408,343.14	\$881,005,899.08
2003	\$116,043,047.50	\$121,796,907.68	\$141,374,475.17	\$838,033,257.13
2004	\$108,779,762.73	\$125,661,547.30	\$144,543,207.96	\$846,250,327.94
2005	\$108,245,384.73	\$149,050,414.63	\$136,211,066.48	\$813,577,898.70
2006	\$112,575,969.11	\$173,993,160.45	\$99,882,639.28	\$756,145,424.66
2007	\$108,939,163.98	\$125,109,129.45	\$110,094,662.52	\$628,355,523.99
2008	\$146,706,136.20	\$142,763,243.57	\$87,573,094.31	\$725,921,376.82
2009	\$131,742,572.60	\$151,739,305.79	\$84,845,059.40	\$647,486,859.57
2010	\$105,942,068.80	\$162,670,289.15	\$78,513,657.43	\$716,027,043.10
2011	\$126,346,509.17	\$147,118,610.94	\$81,822,236.62	\$752,420,245.22
2012	\$89,816,738.22	\$230,035,965.30	\$99,851,882.56	\$792,447,669.78
2013	\$85,313,066.89	\$226,852,620.62	\$116,918,903.00	\$826,975,462.68
2014	\$99,900,985.99	\$148,015,352.24	\$157,966,831.90	\$947,436,043.91
2015	\$119,000,242.49	\$251,947,641.28	\$182,822,658.98	\$1,164,947,268.19
2016	\$123,691,048.54	\$359,900,559.15	\$173,491,970.10	\$1,196,797,091.96
2017	\$112,640,014.34	\$309,378,820.27	\$190,486,414.66	\$1,313,666,928.29
2018	\$108,527,576.62	\$367,380,502.06	\$178,487,405.26	\$1,210,403,464.11
2019	\$105,708,393.06	\$301,555,101.28	\$194,051,765.18	\$1,299,694,590.51
2020	\$134,121,083.00	\$214,397,436.00	\$137,957,602.00	\$1,055,806,595.00

Data Source: Statistics Canada (Trade Data Online)

Appendix B

Domestic Exports of Lobster and Crustaceans Compared to Nova Scotia (2020 constant dollars)

Year	Nova Scotia	New Brunswick
2000	\$731,090,820.88	\$514,811,400.82
2001	\$806,636,774.77	\$521,864,924.03
2002	\$920,052,975.98	\$536,221,461.36
2003	\$927,667,410.08	\$519,724,495.71
2004	\$816,607,636.94	\$569,904,953.42
2005	\$760,256,505.29	\$514,761,394.82
2006	\$695,822,816.18	\$484,171,648.59
2007	\$702,713,589.03	\$427,428,324.50
2008	\$575,809,275.44	\$445,198,224.73
2009	\$581,298,360.92	\$379,782,887.76
2010	\$543,084,322.67	\$416,645,852.20
2011	\$608,880,761.52	\$462,694,796.12
2012	\$631,261,744.61	\$505,032,922.63
2013	\$725,583,591.52	\$523,235,991.70
2014	\$886,430,278.06	\$664,103,351.44
2015	\$1,231,066,016.32	\$807,516,149.41
2016	\$1,285,447,014.49	\$755,633,135.27
2017	\$1,389,260,798.42	\$930,681,494.75
2018	\$1,411,324,363.38	\$876,753,554.17
2019	\$1,594,518,441.14	\$1,025,221,705.00
2020	\$1,351,503,544.00	\$745,661,776.00

Source: Statistics Canada (Trade Data Online)

Appendix C

Domestic Exports in Fishing and Seafood Preparation/Packaging Compared to Nova Scotia (2020 constant dollars)

Year	Nova Scotia	New Brunswick
2002	\$1,455,439,976.68	\$798,361,417.14
2003	\$1,370,832,516.87	\$775,727,614.17
2004	\$1,252,501,368.63	\$794,408,942.96
2005	\$1,178,006,535.34	\$775,876,266.48
2006	\$1,101,741,328.16	\$704,356,141.28
2007	\$1,064,918,142.91	\$622,071,015.52
2008	\$932,955,017.72	\$689,141,907.31
2009	\$902,804,782.75	\$622,837,435.40
2010	\$868,975,960.83	\$686,035,870.43
2011	\$960,750,041.51	\$742,806,346.62
2012	\$966,373,811.29	\$807,601,631.56
2013	\$1,097,491,732.89	\$861,560,059.00
2014	\$1,310,757,294.39	\$1,023,559,937.90
2015	\$1,744,360,812.78	\$1,252,254,484.98
2016	\$1,843,210,586.82	\$1,296,693,926.10
2017	\$2,000,162,552.48	\$1,452,222,146.66
2018	\$2,037,206,858.68	\$1,365,852,443.26
2019	\$2,290,139,767.41	\$1,490,891,975.18
2020	\$2,019,484,970.00	\$1,193,764,197.00

Lobster Price: US Department of Commerce exchanged to Canadian using annual rate (source: Canadian Forex Limited)

Appendix D

Total Crop and Animal Production Compared to Nova Scotia (2020 constant dollars)

Year	Nova Scotia	New Brunswick
2002	\$56,717,654.97	\$371,781,926.49
2003	\$58,535,207.86	\$237,839,955.19
2004	\$65,529,632.12	\$234,441,310.03
2005	\$58,780,904.79	\$257,295,799.36
2006	\$54,753,552.24	\$286,569,129.56
2007	\$52,061,266.87	\$234,048,293.43
2008	\$56,648,043.32	\$289,469,379.78
2009	\$61,017,924.06	\$283,481,878.39
2010	\$65,658,584.83	\$268,612,357.95
2011	\$61,318,733.13	\$273,465,120.11
2012	\$82,304,242.61	\$319,852,703.53
2013	\$104,490,664.19	\$312,165,687.52
2014	\$111,639,682.66	\$247,916,338.23
2015	\$132,762,181.95	\$370,947,883.78
2016	\$133,726,493.90	\$483,591,607.69
2017	\$136,760,227.34	\$422,018,834.60
2018	\$120,976,452.33	\$475,908,078.68
2019	\$127,721,820.64	\$407,263,494.34
2020	\$103,349,263.00	\$348,518,519.00

Source: Statistics Canada (Trade Data Online)

Appendix E

Number of Farms in New Brunswick by Size

Farm Size	1991	1996	2001	2006	2011	2016
Under 10 acres	271	319	202	193	187	200
10 to 69 acres	387	524	473	387	420	402
70 to 129 acres	479	478	421	378	389	280
130 to 179 acres	304	312	267	240	198	184
180 to 239 acres	391	396	328	260	249	202
240 to 399 acres	646	576	546	503	408	362
400 to 559 acres	378	375	326	307	290	211
560 to 759 acres	204	208	225	192	174	143
760 to 1,119 acres	124	125	140	188	154	136
1,120 to 1,599 acres	39	58	61	65	70	60
1,600 to 2,239 acres	18	24	21	39	41	39
2,240 to 2,879 acres	4	5	11	8	11	14
2,880 to 3,519 acres	6	2	7	6	3	3
3,520 acres and above	1	3	6	10	17	19
Total number of farms	3,252	3,405	3,034	2,776	2,611	2,255

Source: Statistics Canada Table: 32-10-0156-01 (formerly CANSIM 004-0005)

Appendix F

Animal Production in New Brunswick

Year	Total, farms reporting	Cattle ranching and farming	Hog and pig farming	Poultry and egg production	Sheep and goat farming	Other animal production
2001	3,034	1,054	85	62	36	221
2006	2,776	818	50	45	33	309
2011	2,611	586	16	50	57	317
2016	2,255	530	9	51	38	230

Source: Statistics Canada Table: 32-10-0166-01 (formerly CANSIM 004-0014)

Appendix G

Crop Production in New Brunswick

Year	2001	2006	2011	2016
Oilseed and grain farming	34	41	59	58
Vegetable and melon farming	327	307	280	236
Fruit and tree nut farming	391	372	379	415
Greenhouse, nursery and floriculture production	314	267	240	171
Other crop farming	510	534	627	517

Source: Statistics Canada Table: 32-10-0166-01 (formerly CANSIM 004-0014)