

2013 Statistical Overview



THE CANADIAN FRUIT AND VEGETABLE INDUSTRY

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For additional information, or to request a copy, please contact the Canadian Horticultural Council

Since • Depuis 1922

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Horticulture is one of Canada's Largest Agri-food Industries

The Canadian horticultural sector is one of Canada's largest agri-food industries and an overall objective for the sector is to ensure the growth of a near five billion dollar sector which has already doubled since 2000. Today, farm gate sales, with additional processing, supply chain, and induced impacts create an economic footprint of \$11.4 billion in real GDP*.

The statistical overview provides the reader with a synopsis of the scope, breadth and diversity of an extremely dynamic sector which is a key component of Canadian agriculture overall. Historical facts and trends are also of interest and useful.

Horticulture is a sector which has matured and experienced tremendous growth. While there are many challenges, there are also exciting opportunities that await investment by individual operations, the industry collectively and through strategic collaboration with allied stakeholders and government.

An excellent example of this is the Canadian Agri-Science Cluster for Horticulture, a joint initiative conducted through industry and Agriculture and Agri-Food Canada. The cluster has resulted in a combined industry-government investment of nearly \$14 million to the Cluster 1 (2010–13) and Cluster 2 (2013–18) and brings together expertise from all levels of industry, academia, and government.

Canadian Agri-Science Cluster for Horticulture Investment (2010–2018)

	Industry	Government	Total
Cluster 1	\$1.1 million	\$3.1 million	\$4.2 million
Cluster 2	\$2.8 million	\$6.8 million	\$9.6 million
Total	\$3.9 million	\$9.9 million	\$13.8 million

The science cluster is underpinned by sectorial long term research and innovation strategies such as those for potatoes and apples. Continued strategic collaboration in innovation and research will contribute to the sector's growth and sustainability.

Horticulture is a key contributor to the health and wellness of Canadians. It is well recognized and documented that the consumption of fruits and vegetables contributes to the health and wellness of Canadians through reduced incidences of chronic diseases. The benefits extend beyond the impact to positive health outcomes to the wide reaching contributions to our communities and to Canada's overall economic well-being.

* More than a Healthy Habit: Assessing the Economic Contribution of Canada's Produce Industry
The Conference Board of Canada for the Canadian Produce Marketing Association (May 2014)

As a sector:

- Horticulture is one of Canada's **largest agri-food industries**
- Horticulture contributes to a **stronger Canadian economy**
- Horticulture is an **entrepreneurial advantage** for rural Canada
- Horticulture delivers on **consumer demands**
- Horticulture contributes to the **health and well-being** of Canadians
- Horticulture presents tremendous **opportunity for Canadian growth**
- Horticulture contributes to Canada's **environmental protection agenda**
- Horticulture **delivers on consumer demands** for safe, healthy and local food choices

About us

The Canadian Horticultural Council (CHC) is a voluntary, not-for-profit, national association that represents producers from across Canada primarily involved in the production and packing of over 120 fruit and vegetable crops.

Members include provincial and national horticultural commodity organizations as well as allied and service organizations, provincial governments and individual producers.

The CHC has been actively advancing the interests of its members since 1922 and is committed to ensuring a more innovative, profitable and sustainable horticultural industry for future generations.

1.0 The Economics of Horticulture within Canada

1.1 Introduction

Horticulture plays a significant role within Canada's economy in terms of the provision of quality safe food of many sorts as well as important contributions to Gross Domestic Product (GDP), availability of direct and indirect employment opportunities and associated household incomes, and contributions to local, provincial and federal tax revenues. With a multitude of domestically produced commodities, Canada's horticulture sector is certainly one of Canada's most diverse. As with any economy, a multitude of factors can affect the industry at any given time.

Consumer consumption behaviors for fruits and vegetables can serve as an indication of healthy eating patterns and demand for horticulture products. Generally, horticulture receipts are particularly affected by the price of goods being offered as compared to prices of other food items and inflation generally. A review of the various components of the Consumer Price Index (CPI) over time is provided below.

The business side of horticulture is of course affected by the price of inputs to production. An analysis of the trends for the Canadian Farm Input Price Index (FIPI) for agricultural operations in general as well as a particular review of the trends for the crop production FIPI provides an understanding of the changing costs of doing business in horticulture as compared to other agricultural contributors.

The horticultural economy, like many others in Canada, is sensitive to the fluctuations that exist in the exchange rate with the US dollar. Because of the dependence in horticulture on bilateral trade with the United States in terms of production output and ensuing receipts, but also from an input cost standpoint other than labor, a review of the changes over time in the CDN-US exchange rate has been provided.

1.2 Economic Impact of Horticulture

The size and significance of the horticultural sector is not always understood in the farm community and by policy makers. Part of this misunderstanding can be reflected in the diverse nature of the horticultural sector. With over 120 different horticultural crops produced across the country, from blueberries, cranberries, and peaches in the fruit sector, to asparagus, zucchinis, and greenhouse tomatoes in the vegetable sector, to potatoes and the huge array of other horticulture products, the Canadian fruit and vegetable industry is diverse.

Major Horticultural Commodities

With over 27,500 horticulture farms in Canada covering close to 1,000,000 total acres of land and producing over \$4 billion in annual direct farm cash receipts, there is no doubt that horticulture farming is a valuable sector within Canadian agriculture having a direct positive impact on rural economies across the country and further positive impacts across industries as a whole.

Vegetables	Fruit	Greenhouse
Tomatoes	Apples	Tomatoes
Peppers	Grapes	Cucumbers
Cucumbers	Tender Fruit	Peppers
Onions	Apricots	Lettuce
Carrots	Peaches	
Cabbage	Nectarines	
Lettuce	Plums and Prunes	
Cauliflower	Cherries (Sweet and Sour)	
Celery	Pears	
Potatoes	Berries	
	Blueberries (Low and High bush)	
	Raspberries	
	Strawberries	
	Cranberries	
	Saskatoon Berries	

Source: Statistical Overview of Canadian Horticulture 2010-2011, AAFC October 2012

The Canadian horticultural sector is of far more value to Canada's economy than what is represented in Farm Cash Receipts. The sector's backward and forward linkages are immense, and fruit and vegetable farming remains a significant driver of rural Canada's economy. When considering the economic impact of the horticulture industry it is important to take into account the huge investments in seed, fertilizer, labour, crop protection products and machinery operating expenses, with forward impacts in sales to processors, packing sheds, fresh and seed markets and economic spin offs in the form of research, packaging development, transportation and other necessary portions of the value chain.

For example a study by Canmac Economics Limited / BDO Chartered Accountants and Advisors commissioned by the PEI Potato Board found that the potato sector alone was responsible for over 4% of GDP in PEI. This one horticultural sector in PEI in 2010 was responsible for:

- \$267.6 million in direct crop value,
- \$1.06 billion in total economic output,
- generating \$245 million in household income,
- employing over 8000 people,
- and generating \$72 million in provincial and federal tax revenue.

While the potato sector in PEI is certainly a dominant sector and cannot necessarily be indicative of the Canadian horticulture sector at large, we can assert that collectively the contributions by the Canadian horticultural sector are extremely valuable and a significant driver of the Canadian economy.

1.3 Canadian Fruit and Vegetable Consumption, 5 Times or More Per Day

Canadians as a whole continue to consume less fruits and vegetables on a daily basis. After peaking at 45.6% of the population in 2009, over the last 3 years we have seen a decline back to levels seen previously in 2003.

Fruit and Vegetable Consumption, 5 Times or More Per Day						
Canada	2003	2008	2009	2010	2011	2012
Total Population ¹	24,999,809	26,505,954	27,093,037	27,354,485	27,693,837	27,737,259
Number of persons	10,349,921	11,583,102	12,354,425	11,844,492	11,188,310	11,261,327
Percent (%)	41.4	43.7	45.6	43.3	40.4	40.6

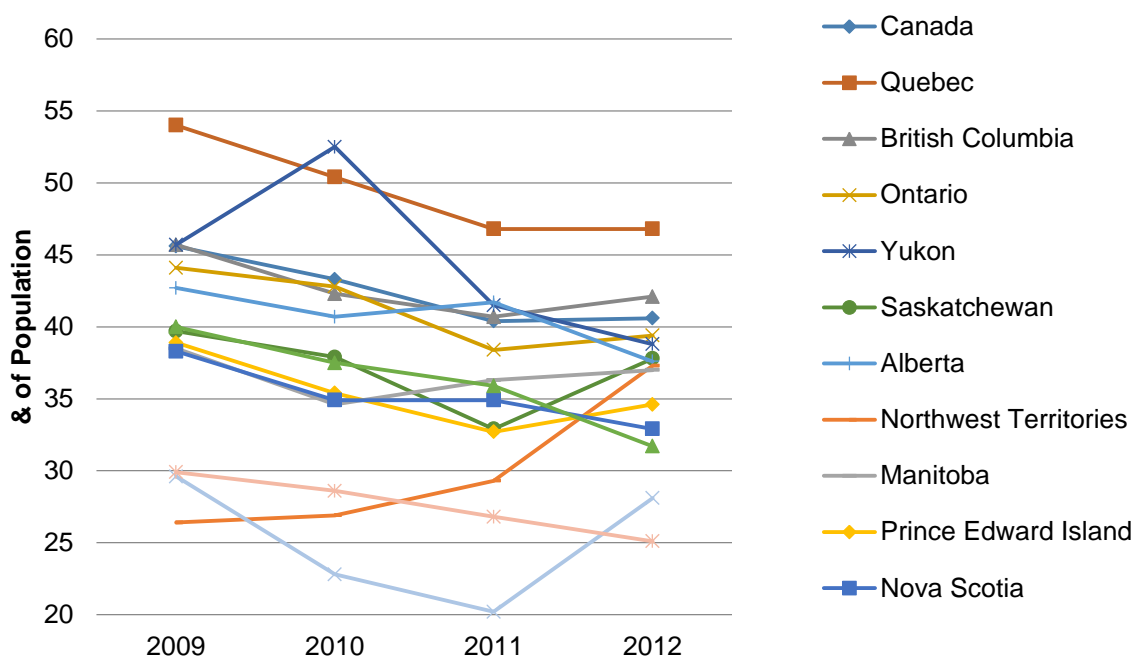
Source: Statistics Canada Table 105-0501 (Statistics Canada, Canadian Community Health Survey (CCHS))

1. Population, persons 12 years or older

The most obvious of trends is the general decline in consumption across the Atlantic region despite the fact that these provinces were already on the lower end of the Canadian spectrum of daily consumption ratios to begin.

On a provincial basis, consumption is highest in Ontario, Quebec, and BC while the Atlantic Provinces remain at the lower end. Notable is the fact that these three provinces, representing a majority of the Canadian population, have seen their consumption levels decline by between 8% and 13% over the period of 2009 to 2012. Over the last 4 years the most notable improvement has been in the Northwest Territories with increased consumption of some 41% over 2009 figures based on successive periods of improvement.

Fruit and Vegetable Consumption (5 Times or More Per Day)



Fruit and Vegetable Consumption, 5 Times or More Per Day, by Province and Territory (Listed According to 2012 Rankings)

	(Percentage %)	Change 2009 to 2012 (3 yrs)			
	2009	2010	2011	2012	
Canada	45.6	43.3	40.4	40.6	-11%
Quebec	54.0	50.4	46.8	46.8	-13%
British Columbia	45.7	42.3	40.7	42.1	-8%
Ontario	44.1	42.8	38.4	39.4	-11%
Yukon	45.7	52.5	41.5	38.8	-15%
Saskatchewan	39.7	37.9	32.9	37.8	-5%
Alberta	42.7	40.7	41.7	37.6	-12%
Northwest Territories	26.4	26.9	29.3	37.3	41%
Manitoba	38.5	34.6	36.3	37.0	-4%
Prince Edward Island	38.9	35.4	32.7	34.6	-11%
Nova Scotia	38.3	34.9	34.9	32.9	-14%
New Brunswick	40.0	37.5	35.9	31.7	-21%
Nunavut	29.6	22.8	20.2	28.1	-5%
Newfoundland and Labrador	29.9	28.6	26.8	25.1	-16%

Notes: Population aged 12 and older. / Source: Statistics Canada, CANSIM table 105-0501 and Catalogue no. 82-221-X. / Last modified: 2013-06-17.

1.4 Consumer Price Index, Food Prices, and Prices of Fruits and Vegetables

The Consumer Price Index (CPI) is an indicator of the changes in consumer prices experienced by a target population. The CPI measures price change by comparing, over time, the cost of a fixed basket of goods and services. It also compares, in percentage terms, prices in any given time period to prices in the official base period which, at present, is 2002=100. The Consumer Price Index (CPI) is not a cost-of-living index. The objective behind a cost-of-living index is to measure changes in expenditures necessary for consumers to maintain a constant standard of living. The idea is that consumers would normally switch between products as the price relationship of goods changes.

The Consumer Price Index (CPI) maintains fixed quantitative proportions (weights) between goods and services during the life of a given basket. The baskets are updated periodically to take into account changes in consumer expenditure patterns. The index reflects only pure price movements. Since the CPI is a measure of price change from one time period to another, it cannot be used to indicate differences in price levels between provinces or urban centres.

Consumer Price Index (CPI)

2011 Basket	2002 Base Yr.	2008	2009	2010	2011	2012	Change 2002 to 2008	Change 2008 to 2012	Change 2002 to 2012
All-items CPI ¹⁶	100	114.1	114.4	116.5	119.9	121.7	14.1%	6.7%	21.7%
Core Consumer Price Index (CPI) (Bank of Canada definition) ²³	100	111.7	113.6	115.6	117.5	119.5	11.7%	7.0%	19.5%
Food	100	115.7	121.4	123.1	127.7	130.8	15.7%	13.1%	30.8%
Fresh fruit	100	101.2	107.6	104.3	108.8	111.9	1.2%	10.6%	11.9%
Fresh vegetables	100	96.5	105.8	103.1	112.8	107.2	-3.5%	11.1%	7.2%
Fresh fruit and vegetables	100	98.5	106.5	103.6	111.1	109.6	-1.5%	11.3%	9.6%

Source: Statistics Canada. Table 326-0020 - Consumer Price Index (CPI), 2011 basket, annual (2002=100 unless otherwise noted), CANSIM (database). (accessed: 2014-01-09) Table 326-0020

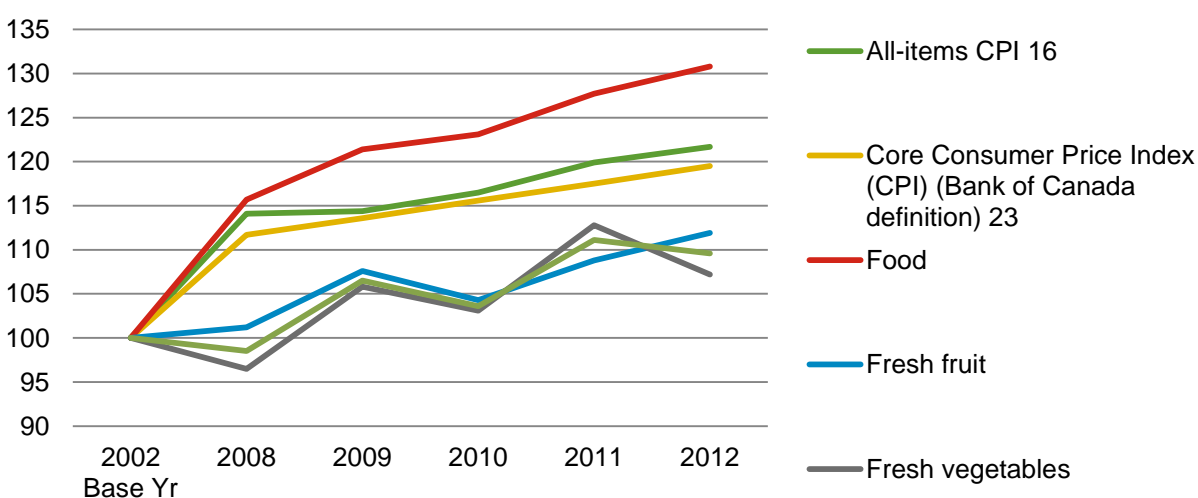
16. The eight major components of the Consumer Price Index (CPI) basket are: "food", "shelter", "household operations, furnishings and equipment", "clothing and footwear", "transportation", "health and personal care", "recreation, education and reading", and "alcoholic beverages and tobacco products".

23. The Bank of Canada's core index excludes eight of the Consumer Price Index's most volatile components (fruit, fruit preparations and nuts; vegetables and vegetable preparations; mortgage interest cost; natural gas; fuel oil and other fuels; gasoline; inter-city transportation; and tobacco products and smokers' supplies) as well as the effects of changes in indirect taxes on the remaining components.

Over the last ten years (2002 to 2012) fresh fruit and vegetable prices have increased by 9.6% in total. This is characterized by a decrease in prices of 1.5% during the initial period of 2002 to 2008 followed by an increase more recently of 11.3% from 2008 to 2012. Prices for fresh fruit and vegetables have not increased as dramatically as those for food in general which today are close to 31% higher than they were 10 years ago or 13% higher than in 2008.

When comparing fresh fruit and vegetable prices to CPI figures over the last 10 years we can conclude generally that prices for horticultural products have only increase half as fast as those measured by the CPI and a third as fast as all food items combined. Additionally, prices over time for fresh fruit and fresh vegetables appear to follow a similar trend line from year to year, and the difference between fresh fruit and vegetable prices and the CPI demonstrates a widening gap between the two.

Consumer Price Index (CPI) 2011 Basket



1.5 Farm Input Price Indexes

The Farm Input Price Index (FIPI) estimates the change in price that farmers pay for inputs into their farming operation through time. A range of administrative price sources are used to calculate this estimate. Generally, categories included within the FIPI are buildings, machinery and motor vehicles, general business costs, and crop production costs.

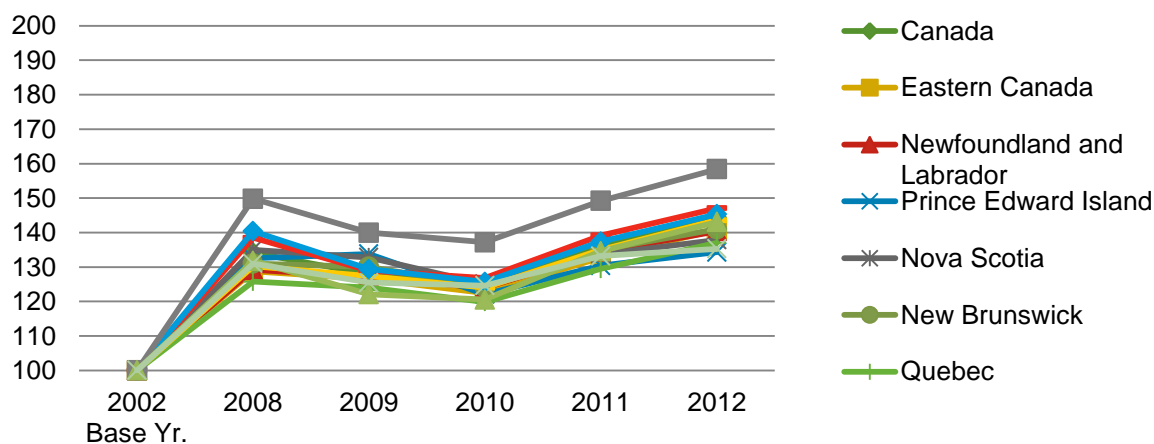
Farm Input Price Index, Annual Average Index

Price Index — Farm Input Total ALL FARM TYPES	2002 Base Yr.	2008	2009	2010	2011	2012	Change 2002 to 2008	Change 2008 to 2012	Change 2002 to 2012
Canada	100.0	134.2	127.9	124.9	136.4	144.3	34.2%	7.5%	44.3%
Eastern Canada	100.0	128.8	126.5	122.5	132.8	140.8	28.8%	9.3%	40.8%
Newfoundland and Labrador	100.0	129.2	127.1	123.9	134.4	140.4	29.2%	8.7%	40.4%
Prince Edward Island	100.0	132.6	133.8	122.1	130.4	134.3	32.6%	1.3%	34.3%
Nova Scotia	100.0	135.0	132.8	125.1	133.7	137.9	35.0%	2.1%	37.9%
New Brunswick	100.0	131.0	130.1	124.2	135.0	141.0	31.0%	7.6%	41.0%
Quebec	100.0	125.8	124.0	119.9	129.5	137.0	25.8%	8.9%	37.0%
Ontario	100.0	130.3	127.4	124.0	135.0	143.6	30.3%	10.2%	43.6%
Western Canada	100.0	138.5	129.0	126.8	139.2	147.1	38.5%	6.2%	47.1%
Manitoba	100.0	140.4	129.4	125.7	137.4	145.3	40.4%	3.5%	45.3%
Saskatchewan	100.0	149.8	140.0	137.2	149.2	158.4	49.8%	5.7%	58.4%
Alberta	100.0	131.8	122.1	120.6	134.6	143.1	31.8%	8.6%	43.1%
British Columbia	100.0	131.0	125.5	124.6	133.2	135.3	31.0%	3.3%	35.3%

Source: Statistics Canada. Table328-0015 — Farm input price index, annual (index, 2002=100), CANSIM (database). (accessed: 2014-01-03)

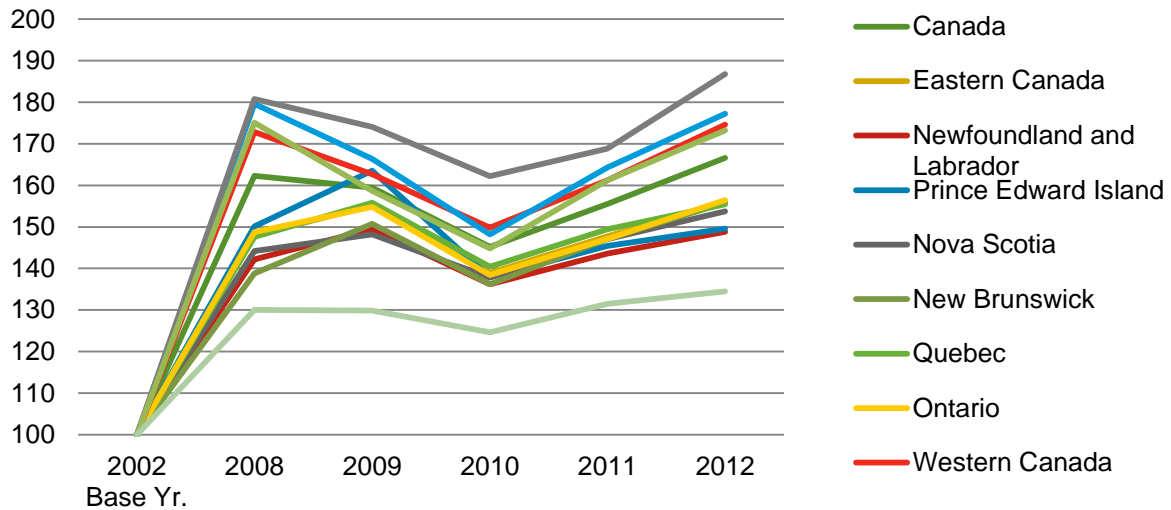
The “All Farms” FIPI includes an evaluation of farm prices for all of agriculture. Across Canada input prices rose by 44% between 2002 and 2012 with the major portion of the increase (34%) occurring between 2002 and 2008 and a further increase of 7.5% since 2008 up to 2012. Other than Saskatchewan, prices increases have been similar from region to region as well as amongst provinces. In Saskatchewan’s case an initial increase of almost 50% in prices from 2002 to 2008 has caused the province to register overall pricing continuously above the other provinces within the country.

Farm Input Price Index, Annual Average Index Price Index — All Farm Types



The Farm Input Price Index (FIPI) specific to crop production operations across Canada presents a similar general pattern to that of the “All Farms” FIPI. There is a similar pattern of significant increase in the first five years (2002 to 2008) followed by more moderate increases in the next five years.

**Farm Input Price Index, Annual Average Index
Price Index — Crop Production**



Overall, over the ten year period, prices specific to crop production operations increased by one third more than prices for all farms combined. Crop production operations in the Prairies in particular have driven the overall Canadian index to its current level. Cost increases in this region have generally been over 50% higher than those in either the Atlantic region or within Quebec or Ontario.

Farm Input Price Index, Annual Average Index

Price Index — Crop Production ¹	2002 Base Yr.	2008	2009	2010	2011	2012	Change 2002 to 2008	Change 2008 to 2012	Change 2002 to 2012
Canada	100.0	162.3	159.4	145.2	155.5	166.6	62.3%	2.6%	66.6%
Eastern Canada	100.0	148.0	155.1	138.9	147.7	155.8	48.0%	5.3%	55.8%
Newfoundland and Labrador	100.0	142.2	149.5	136.2	143.6	148.8	42.2%	4.6%	48.8%
Prince Edward Island	100.0	150.1	163.5	137.9	145.4	149.6	50.1%	-0.3%	49.6%
Nova Scotia	100.0	144.2	148.2	137.8	147.0	153.7	44.2%	6.6%	53.7%
New Brunswick	100.0	138.8	150.7	136.2	147.1	155.8	38.8%	12.2%	55.8%
Quebec	100.0	147.6	155.8	140.4	149.4	155.4	47.6%	5.3%	55.4%
Ontario	100.0	148.7	154.8	138.4	147.1	156.4	48.7%	5.2%	56.4%
Western Canada	100.0	172.8	162.7	149.8	161.2	174.6	72.8%	1.0%	74.6%
Manitoba	100.0	179.6	166.4	148.2	164.3	177.2	79.6%	-1.3%	77.2%
Saskatchewan	100.0	180.8	174.1	162.2	168.8	186.8	80.8%	3.3%	86.8%
Alberta	100.0	175.1	158.7	144.8	161.2	173.2	75.1%	-1.1%	73.2%
British Columbia	100.0	130.0	129.9	124.6	131.5	134.5	30.0%	3.5%	34.5%

Source: Statistics Canada. Table328-0015 — Farm input price index, annual (index, 2002=100), CANSIM (database). (accessed: 2014-01-03)

Crop Production includes:

- Commercial seed and plant, Fertilizer, Pesticides,
- Twine, wire and containers
- Production insurance
- Cash wages in crop production, Crop-related custom work

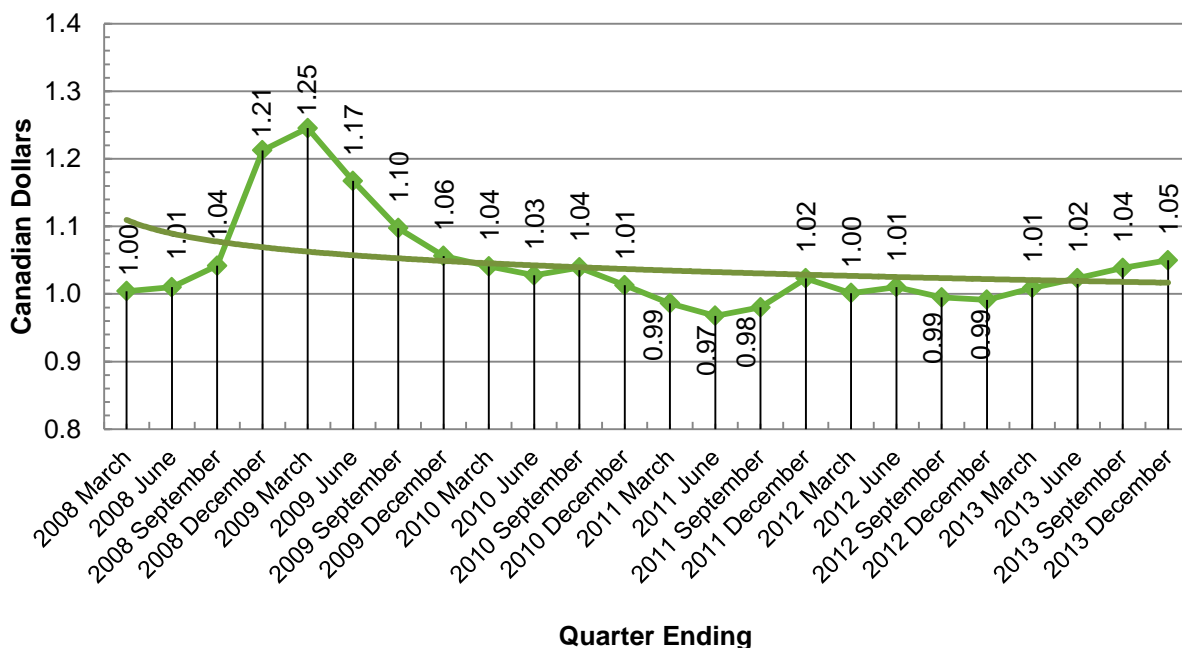
1. The Crop Production index reflects costs for all crops including fruits and vegetables, grains and oilseeds, floriculture, nursery and sod

1.6 Foreign Exchange (CDN-US)

Because of the prevalence within the horticultural sector of cross border trade between Canada and the United States of America, both in terms of inputs to farming operations as well as output of production (fresh fruit and vegetable crop sales for example) an understanding of the exchange rate fluctuation between 2008 and 2013 is important. While daily, weekly and monthly fluctuations occur regularly a presentation of quarterly spot rate averages (below) can provide a good understanding of the potential influence the Canada-US exchange might have on horticulture.

In the period ending March 2008 the US dollar was on par with the Canadian dollar. Subsequently the cost escalated during 2008 and early 2009 to reach a high of roughly \$1.25 dollars Canadian per US dollar in the quarter ending March 2009. Over the following two years the Canadian dollar slowly gained ground to finish in June 2011 at \$0.97 dollars Canadian for every US dollar. The Canadian and US dollars hovered around par until June 2013 when the US dollar slowly began to gain ground and as of the end of December 2013 the US dollar was trading at an average of \$1.05 Canadian.

Canadian Dollar Per United States Dollar (Spot Rate) Quarterly Average



Source: This is non-Statistics Canada information. *Table 176-0049 — Foreign exchange rates, United States and United Kingdom, monthly (cents unless otherwise noted), CANSIM (database).* (Accessed: 2014-04-29)

The volatility seen during the first three years of this six year period is not demonstrating itself to the same degree in the most recent three years. In fact, despite the fact that of recent the US dollar has been edging upwards from the Canadian dollar, a multi-year trend line demonstrates that relative exchange rate stability at plus or minus five cents from par has existed for the last four years.

2. Fruit and Vegetable Farms in Canada Number, Total Acreage and Average Size

The Census of Agriculture conducted every five years by Statistics Canada provides a basis for obtaining a portrait of the number, total acreage and average size of horticultural farms by commodity type across Canada. The table (Statistics Canada, CANSIM Table 004-0003) provides specific numbers however they contain a certain element of risk so where these figures are most interesting is in the demonstration of the trends over time. For our purposes we have focused on the last 20 years up until the most recent census of 2011. The census tables have not considered greenhouse vegetable operations within their reported figures thus at the end of this section a separate discussion on greenhouse vegetable operations is provided.

Definition of a Census farm

As far as horticulture is concerned, since 1991, a census farm has been defined as an agricultural operation that produces at least one of the following crop products intended for sale: field crops, tree fruits or nuts, berries or grapes, vegetables, seed. Previous to this, a census farm was defined as a farm, ranch or other agricultural holding with sales of agricultural products of \$250 or more during the previous 12 months.

Definition of a Farm type

Farm types are derived from the 2007 North American Industrial Classification System (NAICS). Farm typing is a procedure that classifies each census farm according to the predominant type of production. This is done by estimating the potential receipts from the inventories of crops reported on the census questionnaire and determining the product or group of products that make up the majority of the estimated receipts.

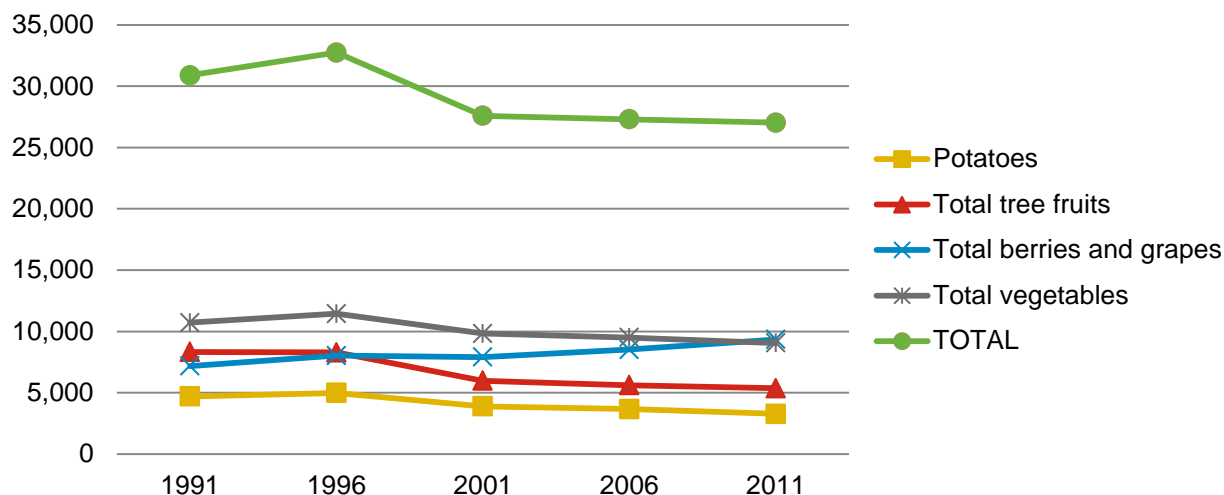
2.1 Canada

Over the last 20 years the total number of farms in Canada has experienced a continuous decline across all commodities except for those farms producing berries and grapes. The total number of Canadian farms now stands at slightly over 27,000. Between 2006 and 2011 the numbers of tree fruit and vegetable farms have decreased by roughly 4.5% each while potato farms have decrease by just over 10%. What has allowed the total number of Canadian farms to only incur a 12.5% decrease over the last 20 years is the 30% increase in the total number of berries and grapes farms.

Number of Farms (by Commodity) — Canada

Census of Agriculture Year	1991	1996	2001	2006	2011
Potatoes	4,692	4,989	3,887	3,667	3,272
Total tree fruits	8,328	8,282	5,974	5,612	5,362
Total berries and grapes	7,175	8,029	7,903	8,524	9,342
Total vegetables	10,708	11,440	9,829	9,499	9,057
TOTAL	30,903	32,740	27,593	27,302	27,033

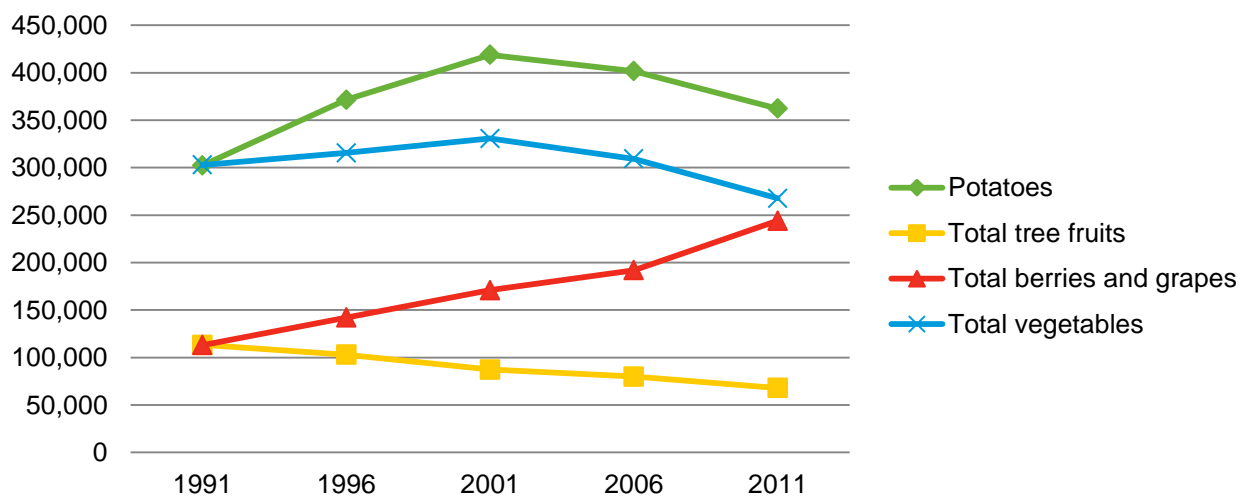
Number of Farms (by Commodity) — Canada



Total Canadian horticulture acreage now stands at 942,000 acres after having peaked at slightly above one million acres in 2001. Total horticultural farm acreage today is 13% higher than it was 20 years ago largely due to continuous and significant period over period increases in acreage for berries and grapes farms; the acreage for this type of farm is now more than twice that reported in 1991. Potatoes and vegetable acreage experienced some increases during the 1990s however they have been steadily declining since then. Tree fruit acreage in Canada began a decline 20 years ago and it has continued in this manner since then, representing today approximately 60% of what existed 20 years ago.

The distribution of total acreage amongst the commodities over the last 20 years demonstrates that total acreage for potatoes has remained at its same ratio to the whole (38%) while tree fruit farm acres has diminished from 14% to 7% of total acres and vegetables have gone from 36% to 28% of the total. The trend indicates a movement towards berries and grapes farm acreage with the ratio now standing at over one quarter of the total acreage when 20 years ago it was only 14%.

Farm Size: Total Acreage (by Commodity) — Canada

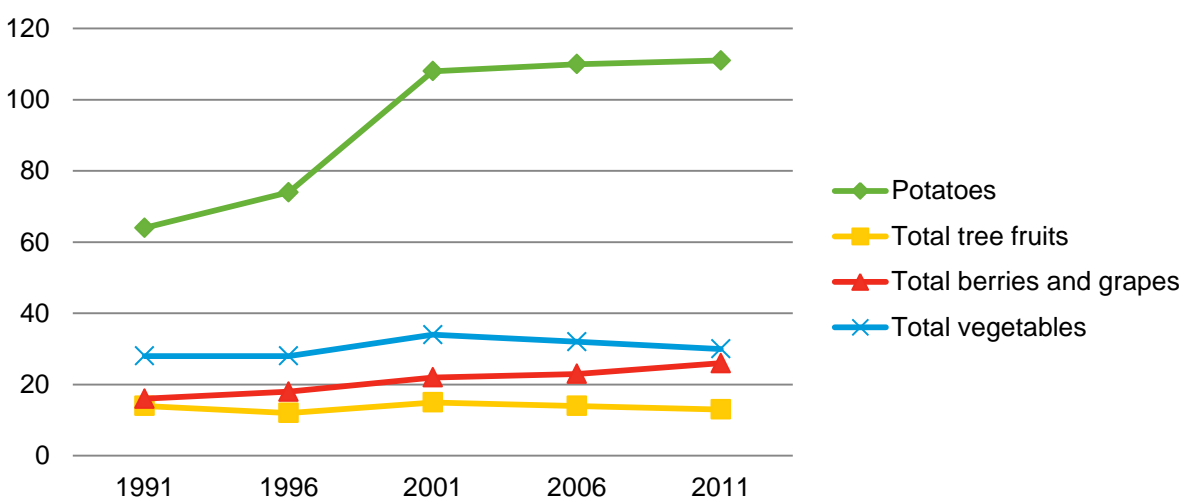


On a Canada wide basis the average size of census farms for potatoes has experienced the largest increase; today they are 73% larger than they were 20 years ago and are on average 111 acres. Berries and grapes farms have also experienced a significant increase in size coming in today at an average of 26 acres while they were 16 acres in 1991 (a 63% increase). Only small changes in average sizes for Canadian tree fruit and vegetable farms have occurred over the last 20 years; in 2011 they are sized respectively at 13 and 30 acres each.

Farm Size — Total Acreage (by Commodity)

Census of Agriculture Year	1991	1996	2001	2006	2011
Potatoes	302,435	371,421	418,783	401,583	362,265
Total tree fruits	113,345	102,964	87,325	79,968	67,902
Total berries and grapes	113,072	142,143	170,911	192,019	244,139
Total vegetables	302,936	315,547	330,752	309,330	267,665

Average Farm Size in Acres (By Commodity) — Canada



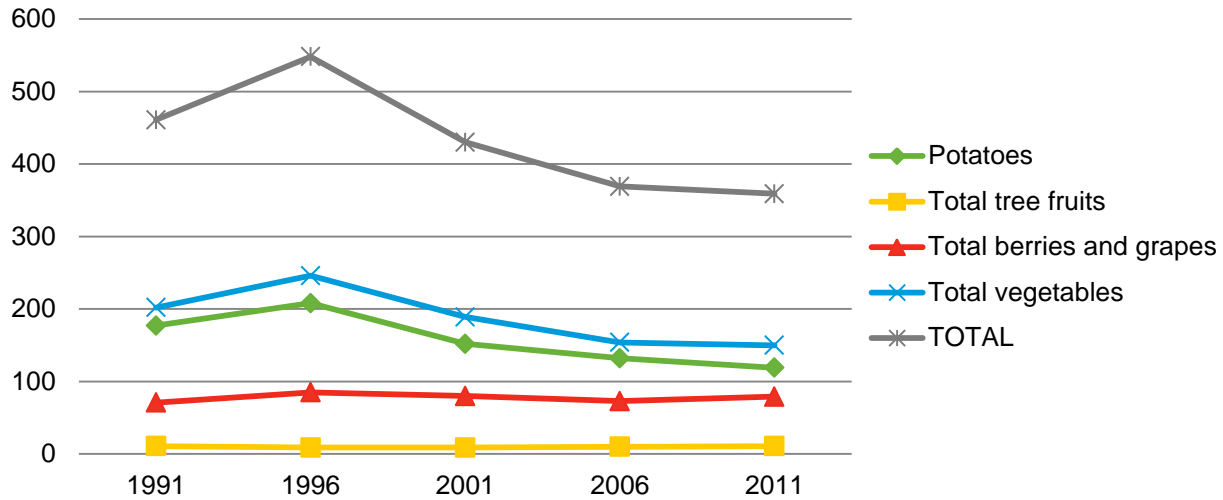
Average Farm Size in Acres (by Commodity)

Census of Agriculture Year	1991	1996	2001	2006	2011
Potatoes	64	74	108	110	111
Total tree fruits	14	12	15	14	13
Total berries and grapes	16	18	22	23	26
Total vegetables	28	28	34	32	30

2.2 Newfoundland and Labrador

The total number of farms in Newfoundland and Labrador represent only a small fraction of the total Canadian number (1.2%). Nonetheless, the trends in numbers of farms by commodity have followed the same general directions of those from Canada as a whole since 2001 except that increases in berries and grapes farms were not present to the same degree. Overall, the distribution of farm types to total number of farms as remained relatively static.

Number of Farms (by Commodity) — Newfoundland and Labrador



Number of Farms (by Commodity) — Newfoundland and Labrador

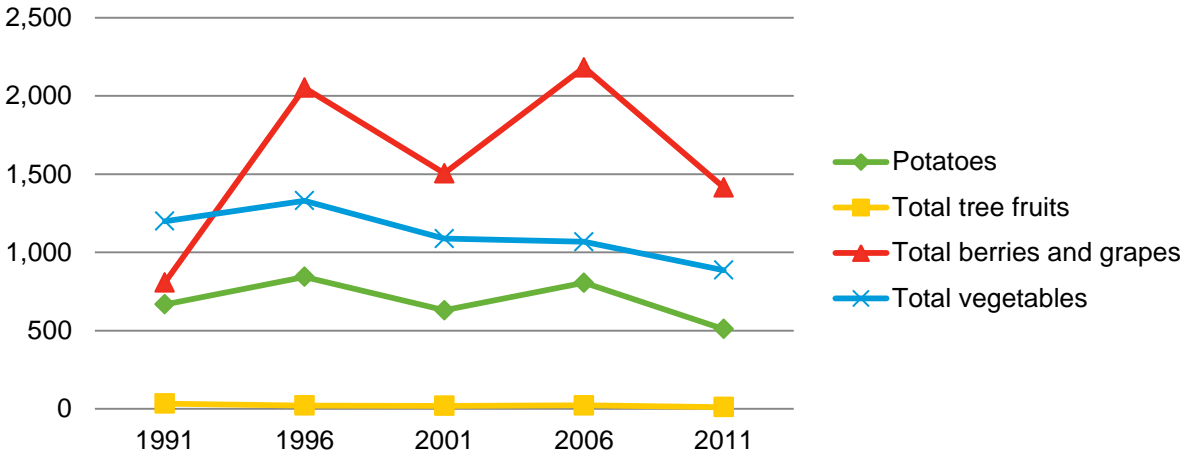
Census of Agriculture Year	1991	1996	2001	2006	2011
Potatoes	177	208	152	132	119
Total tree fruits	11	9	9	10	11
Total berries and grapes	71	85	80	73	79
Total vegetables	202	246	189	154	150
TOTAL	461	548	430	369	359

At a total of 2,822 acres, total horticulture farming acreage in Newfoundland and Labrador represents less than one half of one percent of the current total Canadian acreage across all commodities. What is most notable for this province is the movement away from potato and vegetable acreage towards berries and grapes acreage which now stands at over 50% of total provincial acreage.

Farm Size — Total Acreage (by Commodity)

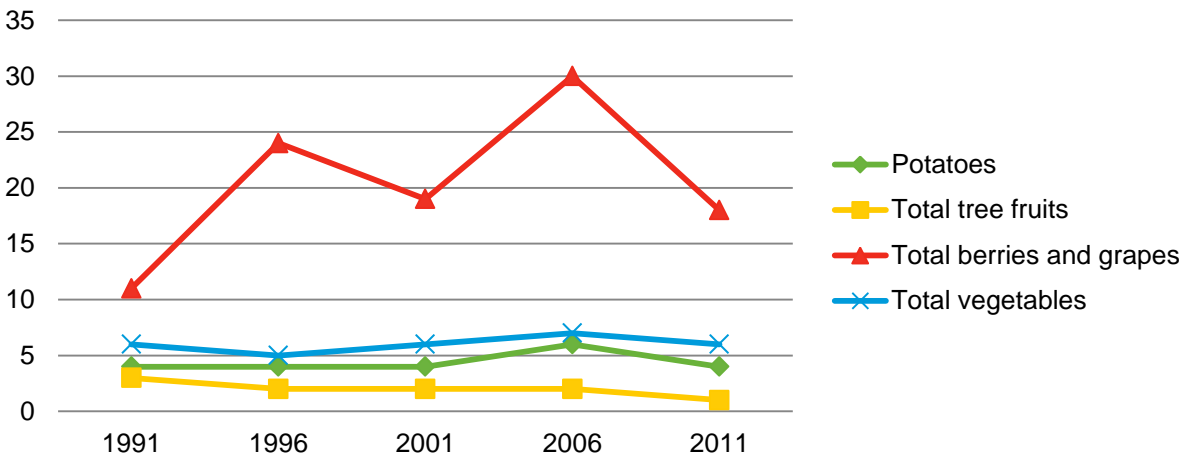
Census of Agriculture Year	1991	1996	2001	2006	2011
Potatoes	667	843	629	805	510
Total tree fruits	33	21	19	22	11
Total berries and grapes	807	2,052	1,505	2,182	1,415
Total vegetables	1,199	1,330	1,088	1,067	886

**Farm Size: Total Acreage (by Commodity)
Newfoundland and Labrador**



Except for berries and grapes farms, the average size of farms across all commodities is dramatically smaller in Newfoundland and Labrador than the rest of Canada; potatoes farms are an average of 4 acres compared to the national average of 111 and vegetable farms are an average of 6 acres in size compared to 30 for Canada as a whole. Berries and grapes farms are an average of 18 acres however this still only represents 70% of the average Canadian farm of this type.

Average Farm Size in Acres (by Commodity) — Newfoundland and Labrador



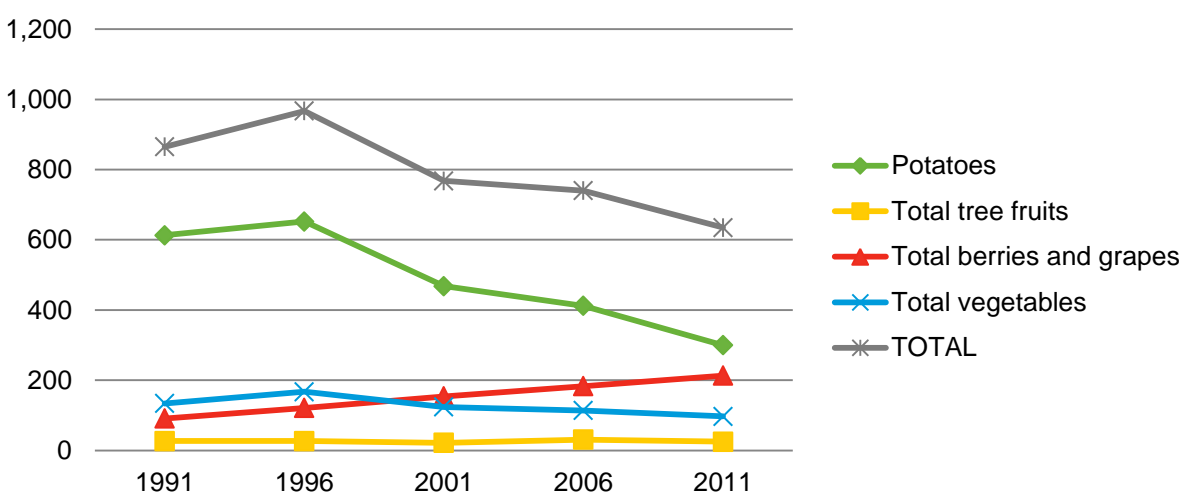
Average Farm Size in Acres (by Commodity)

Census of Agriculture Year	1991	1996	2001	2006	2011
Potatoes	4	4	4	6	4
Total tree fruits	3	2	2	2	1
Total berries and grapes	11	24	19	30	18
Total vegetables	6	5	6	7	6

2.3 Prince Edward Island

The total number of farms in PEI represents only a small fraction of the total Canadian number (2.2%). The number of farms in PEI has reduced by 27% over the last 20 years with potato farms representing today less than half of the provincial number that existed in 1996. What is notable for PEI is the trend that has taken place away from a primarily potato farming province in terms of farm numbers (71% of total farms in 1991 to just 47% in 2011) and the rising interest in berries and grapes farming (11% of total farms in 1991 to roughly 35% today). While there has been a reduction in the total number of vegetable farms, this decrease has followed overall reducing farm numbers and remained at a relative 15% of the total provincial number of farms over the years.

Number of Farms (by Commodity) — Prince Edward Island

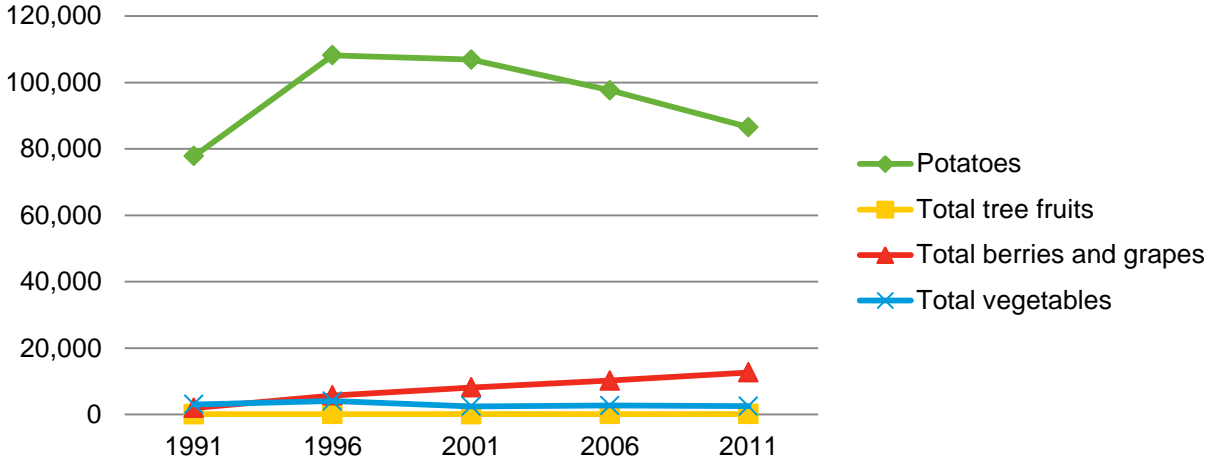


Number of Farms (by Commodity) — Prince Edward Island

Census of Agriculture Year	1991	1996	2001	2006	2011
Potatoes	613	652	468	412	300
Total tree fruits	27	27	22	31	25
Total berries and grapes	91	121	154	183	213
Total vegetables	134	167	124	114	97
TOTAL	865	967	768	740	635

It is no surprise that PEI is a lead player in the potato industry and that this drives many of the statistics for this province; today PEI has close to 25% of the total Canadian potato acreage. The relative weight of PEI to the total Canadian acreage has remained around 10% since 1991 which is high considering the small size of the province and its population. While potatoes accounted for 95% of total acreage within the province in 1991 this commodity now comes in at 84% due largely to the emergence of a significant provincial presence of berries and grapes acreage; berries and grapes represented only 1,982 acres in 1991 and today account for 12,702 acres, an overall 544% increase over time. Potato acreage reported a 39% increase at the beginning of the 1990s and remained relatively flat for the subsequent census period however over the last 10 years acreage for this commodity has seen period over period declines and today at 86,560 acres, stands at only 11% higher than total acreage of 20 years ago.

Farm Size: Total Acreage (by Commodity) — Prince Edward Island

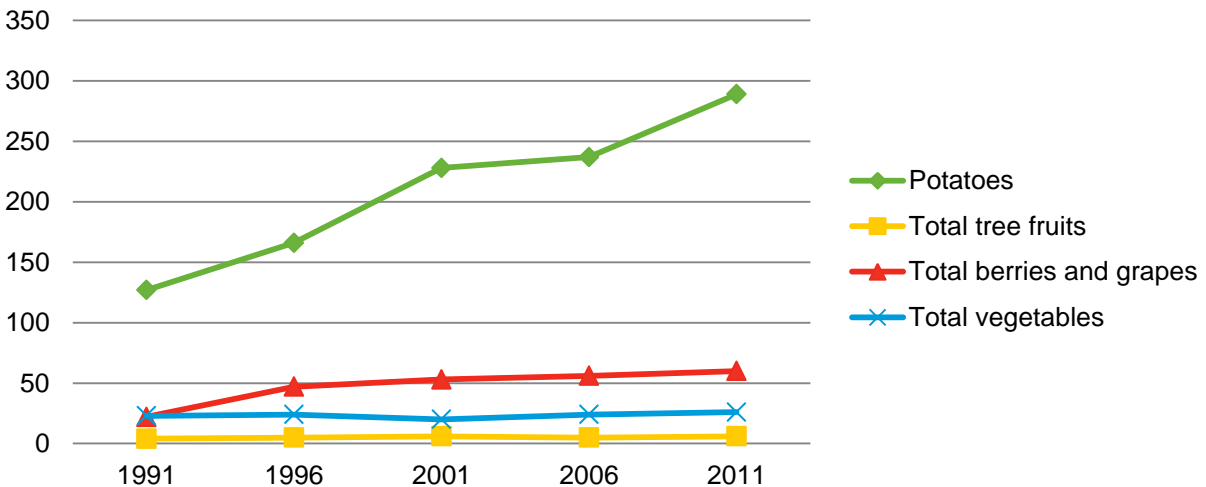


Farm Size — Total Acreage (by Commodity)

Census of Agriculture Year	1991	1996	2001	2006	2011
Potatoes	77,809	108,158	106,889	97,637	86,560
Total tree fruits	102	136	128	146	143
Total berries and grapes	1,982	5,743	8,170	10,219	12,702
Total vegetables	3,059	4,062	2,491	2,725	2,506

At 289 acres, the average potato farm in PEI is more than 2.6 times the Canadian average. While there was a slight levelling in average size for potato farms between 2001 and 2006, the increase in average size has returned to trends experienced in the 1990s with the latest period change being an increase of 22% in size. These same general trends are seen for berries and grapes farm sizes which, at an average of 60 acres today and having increased in average size by over 170% since 1991, are 2.3 times bigger than those in the rest of Canada.

Average Farm Size in Acres (by Commodity) — Prince Edward Island



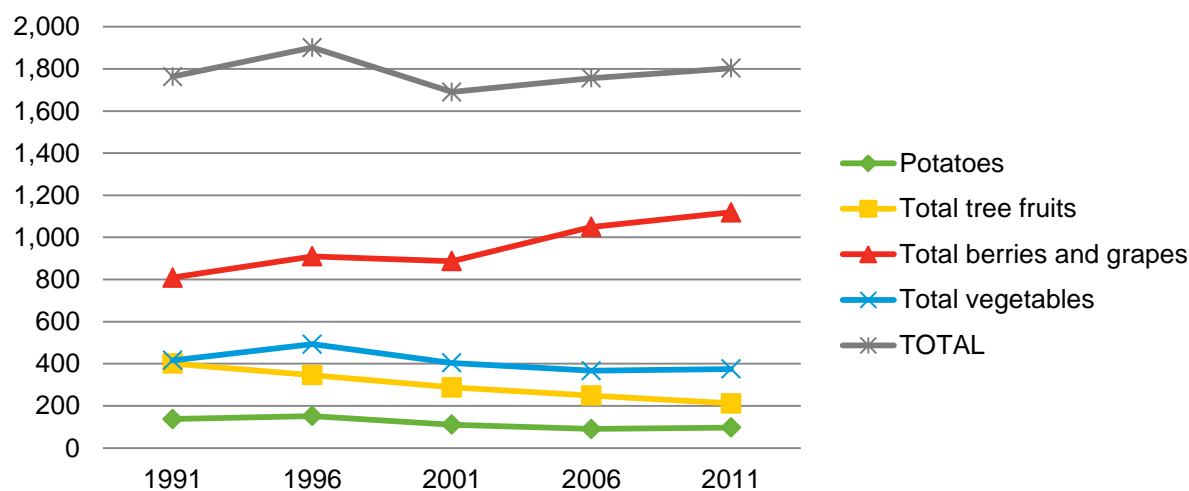
Average Farm Size in Acres (by Commodity)

Census of Agriculture Year	1991	1996	2001	2006	2011
Potatoes	127	166	228	237	289
Total tree fruits	4	5	6	5	6
Total berries and grapes	22	47	53	56	60
Total vegetables	23	24	20	24	26

2.4 Nova Scotia

The total number of farms in Nova Scotia represents just over 6.2% of the total Canadian number. From a total number of farms perspective, Nova Scotia is one of two provinces that has experienced an increase over the last 20 years; the increase being driven by berries and grapes farm installations exclusively. On a relative basis, while berries and grapes farm operations represented 46% of the total in 1991, they now represent over 62% of the total in Nova Scotia.

Number of Farms (by Commodity) — Nova Scotia



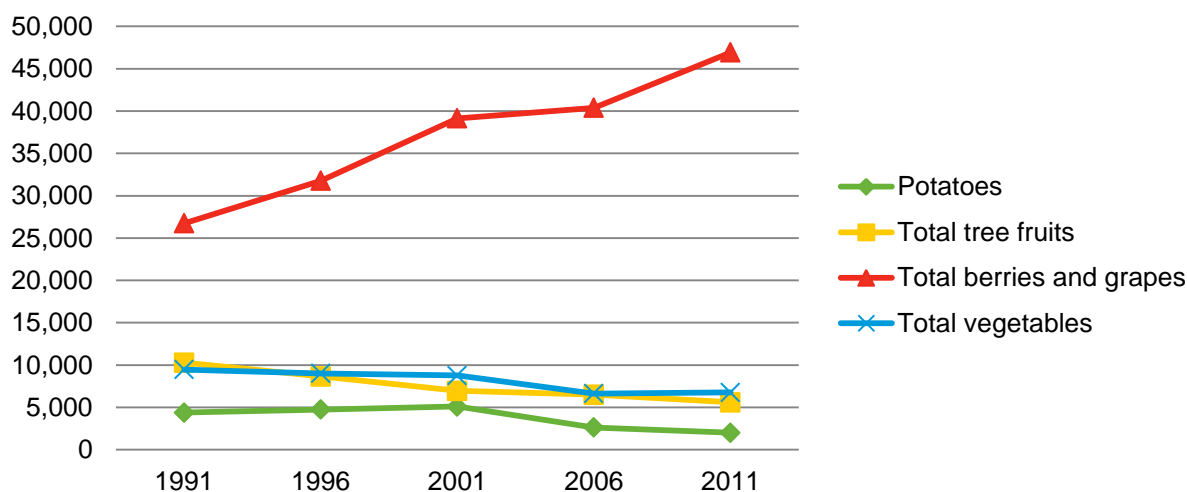
Number of Farms (by Commodity) — Nova Scotia

Census of Agriculture Year	1991	1996	2001	2006	2011
Potatoes	137	152	111	90	97
Total tree fruits	401	346	288	249	212
Total berries and grapes	809	910	887	1,050	1,119
Total vegetables	416	493	404	367	375
TOTAL	1,763	1,901	1,690	1,756	1,803

Berries and grapes farming acreage have allowed Nova Scotia to increase its overall horticulture acreage by 20% since 1991. All other commodities experienced reduced total acreage over time with the biggest decline being seen for tree fruits which today represent roughly half of the total acreage that existed in 1991. Berries and grapes define Nova Scotia horticulture today on an acreage basis with 77% of total provincial horticulture acreage being occupied by this commodity compared to just over 50% in 1991.

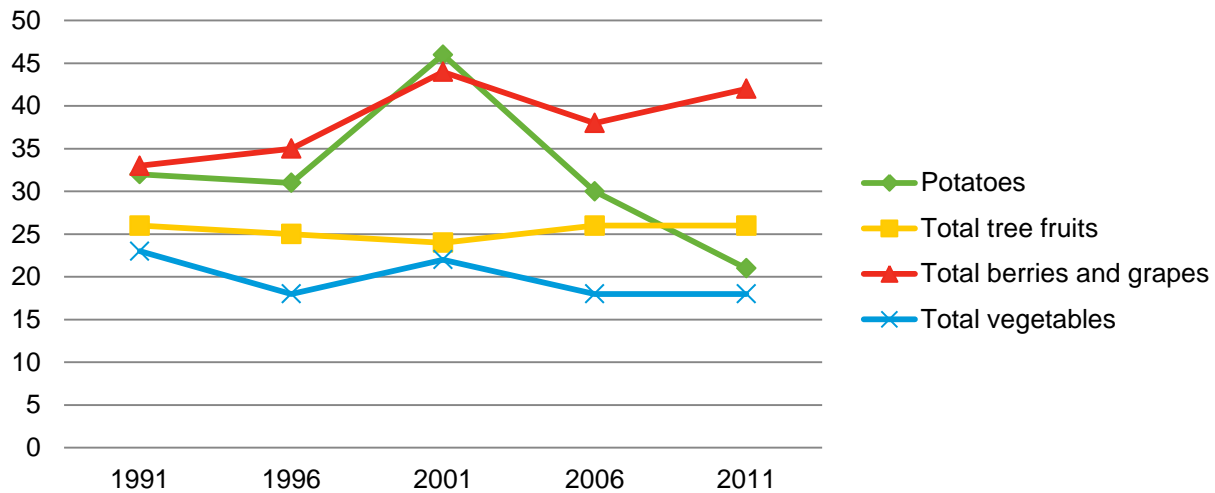
Farm Size — Total Acreage (by Commodity)					
Census of Agriculture Year	1991	1996	2001	2006	2011
Potatoes	4,386	4,749	5,114	2,623	2,008
Total tree fruits	10,278	8,656	6,948	6,507	5,592
Total berries and grapes	26,745	31,766	39,136	40,379	46,919
Total vegetables	9,462	9,012	8,763	6,633	6,768

Farm Size: Total Acreage (By Commodity) — Nova Scotia



Nova Scotia's average tree fruit farm has remained at 26 acres over time, twice the size of the national average of 13 acres. While there has been a great decline in the average size of potato farms in Nova Scotia this is based on a very small sample. Berries and grapes farms are today roughly one third larger than they were 20 years ago and at 42 acres are over one and one half the size of the average Canadian farm of this commodity type.

Average Farm Size in Acres (by Commodity) — Nova Scotia



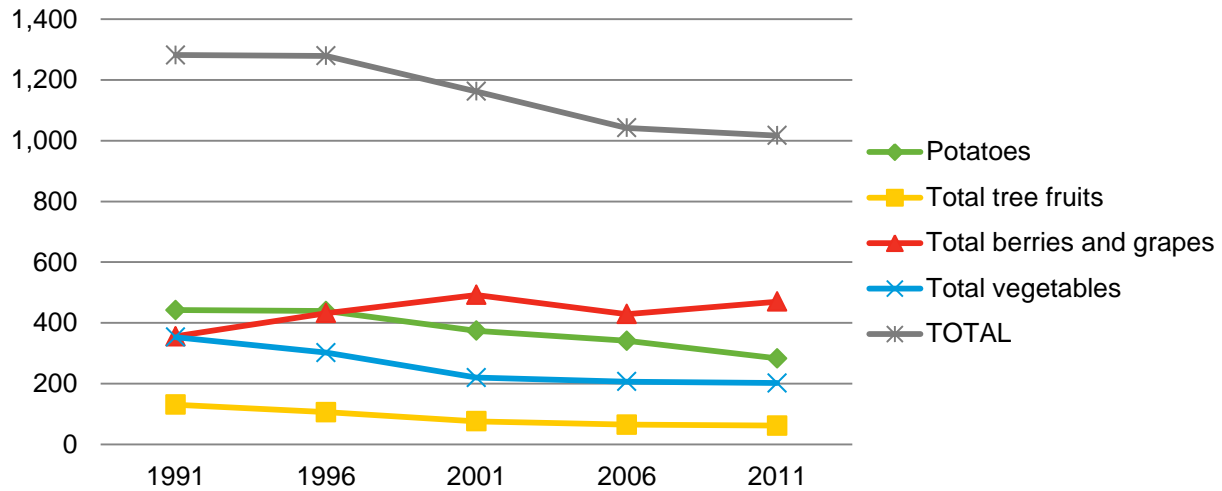
Average Farm Size in Acres (by Commodity)

Census of Agriculture Year	1991	1996	2001	2006	2011
Potatoes	32	31	46	30	21
Total tree fruits	26	25	24	26	26
Total berries and grapes	33	35	44	38	42
Total vegetables	23	18	22	18	18

2.5 New Brunswick

The total number of farms in New Brunswick represents 3.5% of the total Canadian number. On the whole over the last 20 years the total number of farms has diminished by 20%. However this modest reduction is due solely to an increase in berries and grapes farms (+32%) that has balanced the reductions in the number of all other farms; while berries and grapes represented just over a quarter of the total number in 1991 they now account for close to 50%.

Number of Farms (by Commodity) — New Brunswick

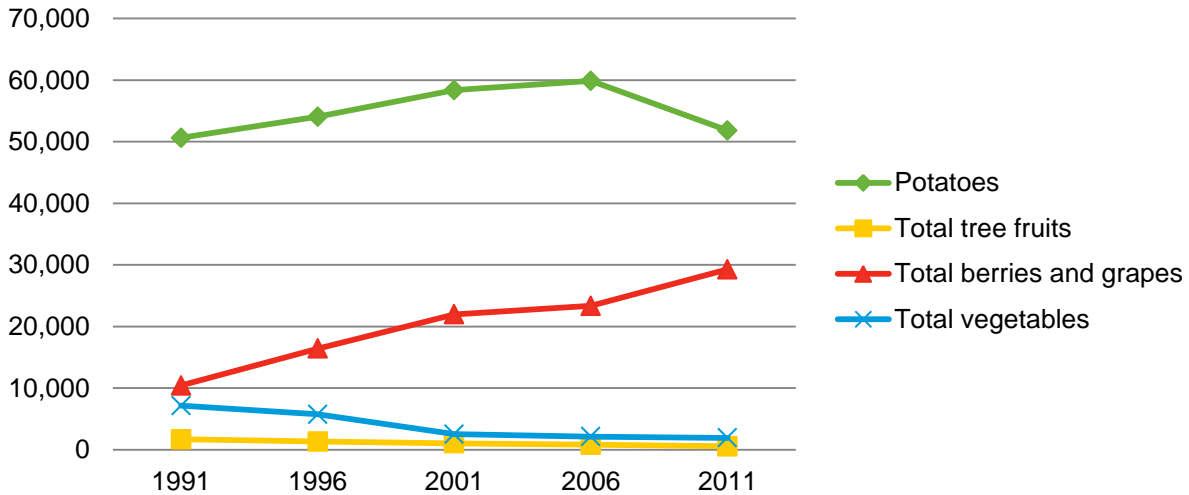


Number of Farms (by commodity) — New Brunswick

Census of Agriculture Year	1991	1996	2001	2006	2011
Potatoes	442	439	374	341	283
Total tree fruits	131	106	76	65	62
Total berries and grapes	356	432	492	429	470
Total vegetables	353	302	220	207	202
TOTAL	1,282	1,279	1,162	1,042	1,017

Total horticulture acreage has increased 20% over the last 20 years with most of the increase having taken place in the 1990s. Only a slight increase for both potatoes and berries and grapes was reported at the 2006 census and most recently with the 2011 census we have seen a decline in potato acreage, returning to their 1991 levels. On a total acreage basis New Brunswick continues to be defined by potatoes (62% of total provincial acres) though this position is seeing continuous erosion as a result of dramatically increased berries and grapes farm acreage. Berries and grapes acreage has essentially tripled since 1991 and today represents 35% of the total provincial horticulture acreage.

Farm Size: Total Acreage (by Commodity) — New Brunswick

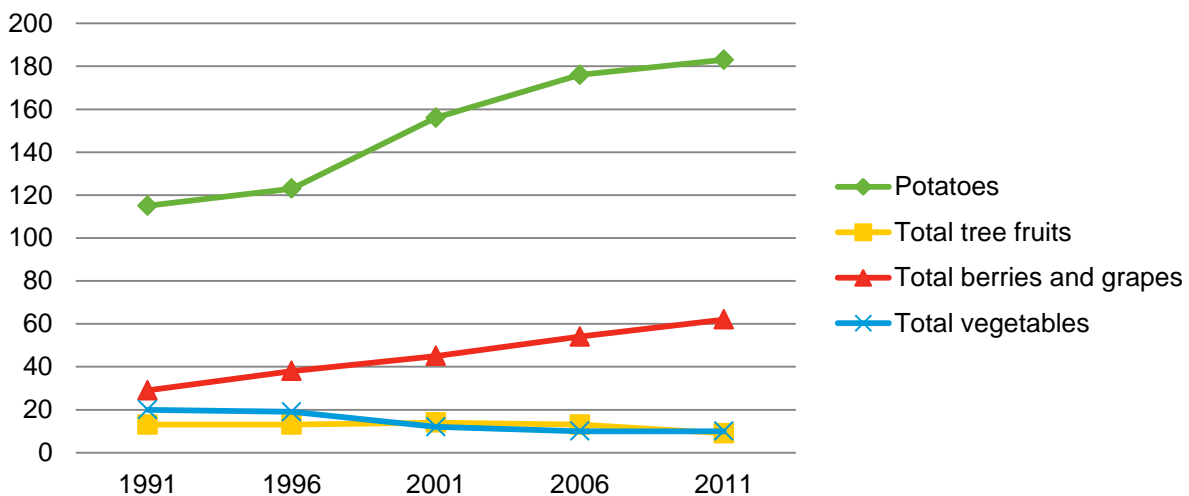


Farm Size — Total Acreage (by Commodity)

Census of Agriculture Year	1991	1996	2001	2006	2011
Potatoes	50,621	54,064	58,366	59,870	51,814
Total tree fruits	1,685	1,330	1,045	817	566
Total berries and grapes	10,432	16,421	21,983	23,357	29,284
Total vegetables	7,145	5,737	2,540	2,136	1,923

At 183 acres, New Brunswick's potato farms are 1.6 times the average Canadian size for this commodity. Berries and grapes farms are close to 2.5 times the average Canadian size for this type of operation reflecting the fact that they have more than doubled in average size over the last 20 years. Twenty years ago tree fruit and vegetable farms were close to the national average in size however today, due to continuous period over period declines the sizes are comparatively small in New Brunswick over the rest of Canada.

Average Farm Size in Acres (by Commodity) — New Brunswick



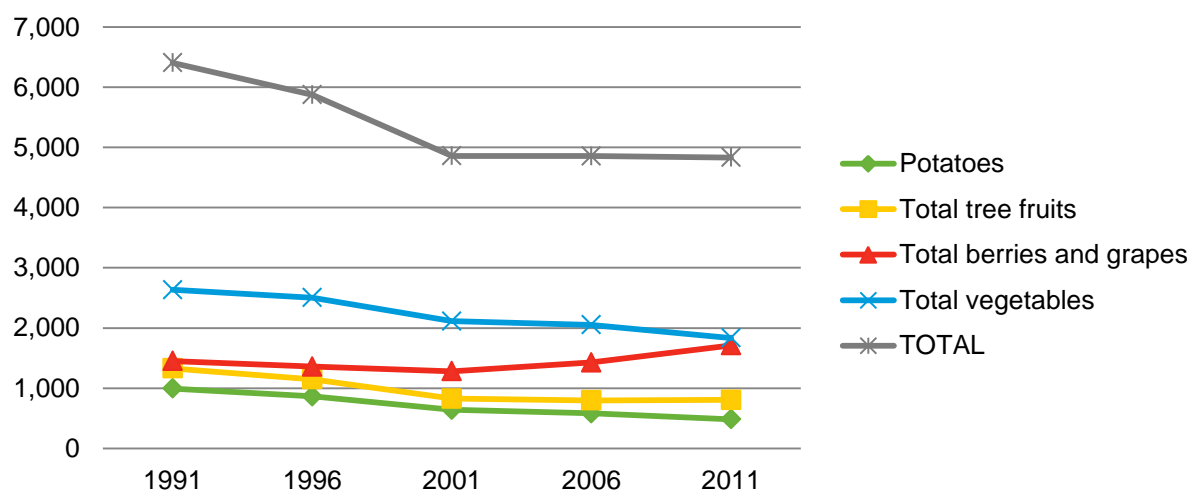
Average Farm Size in Acres (by Commodity)

Census of Agriculture Year	1991	1996	2001	2006	2011
Potatoes	115	123	156	176	183
Total tree fruits	13	13	14	13	9
Total berries and grapes	29	38	45	54	62
Total vegetables	20	19	12	10	10

2.6 Quebec

Quebec provides for roughly 17% of the total number of farms in Canada. Over the last 20 years the total number has reduced by 25%, with the only significant increase occurring within berries and grapes over the last five years (2006 to 2011). This recent increase has, however, been counteracted by the decrease in numbers for potatoes and vegetables: 17% and 11% respectively. The result is a relatively stable total number of farms in Quebec over the last 10 years. While berries and grapes farms now represent 35% of total farms in Quebec compared to 23% 20 years ago, vegetables continue to dominate the landscape at roughly 40% of the overall numbers over time.

Number of Farms (by Commodity) — Quebec



Number of Farms (by Commodity) — Quebec

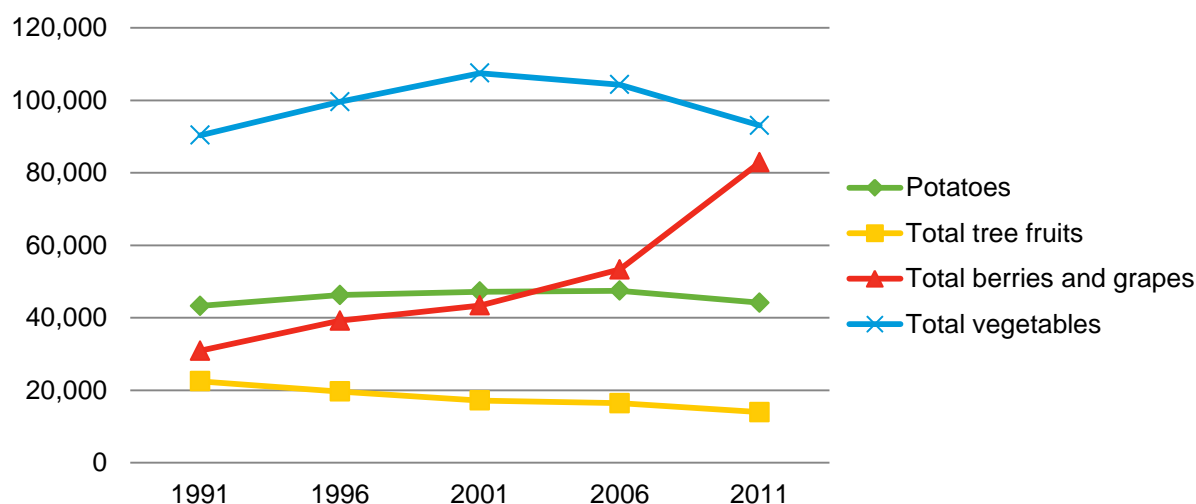
Census of Agriculture Year	1991	1996	2001	2006	2011
Potatoes	994	864	640	583	484
Total tree fruits	1,330	1,148	826	797	806
Total berries and grapes	1,450	1,359	1,280	1,426	1,711
Total vegetables	2,634	2,505	2,114	2,052	1,833
TOTAL	6,408	5,876	4,860	4,858	4,834

Quebec today represents one quarter of total Canadian horticulture farming acreage with just over 234,000 acres in production. Except for tree fruits, which have experienced a decline of roughly 40%, total acreage for all other commodities has increased resulting in an overall increase of total acreage by about 25% over the last 20 years. This increase in acreage is directly attributable to berries and grapes production which has experienced an increase of 168% since 1991 and now stands at 35% of Quebec's provincial total versus 17% in 1991. While acreage for potatoes saw a 10% increase in total acreage during the 1990s this increase has since all been eliminated.

Farm Size — Total Acreage (by Commodity)

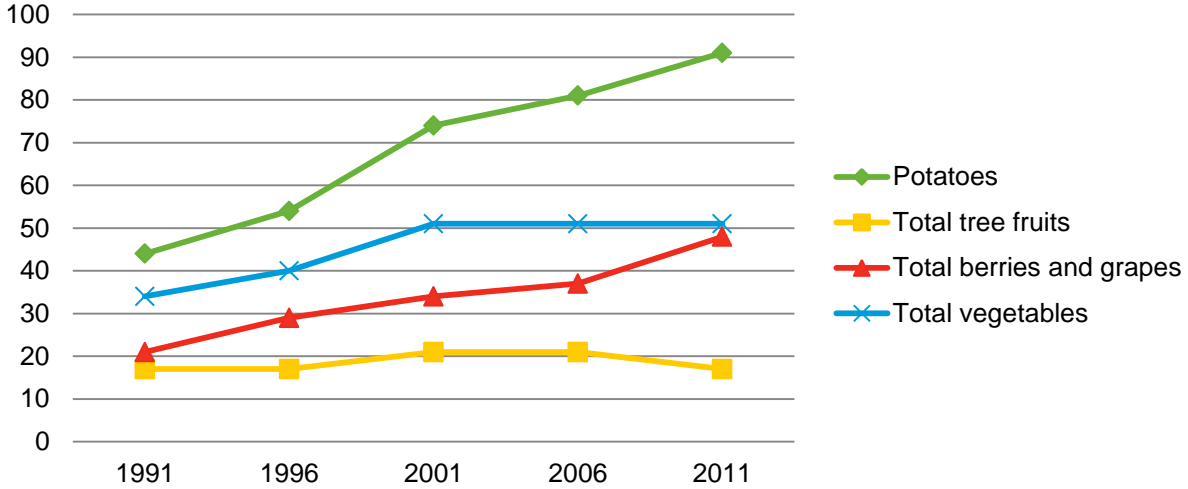
Census of Agriculture Year	1991	1996	2001	2006	2011
Potatoes	43,280	46,263	47,190	47,466	44,164
Total tree fruits	22,492	19,664	17,168	16,432	13,960
Total berries and grapes	30,938	39,215	43,411	53,359	82,851
Total vegetables	90,378	99,615	107,494	104,337	93,052

Farm Size — Total Acreage (By Commodity) — Quebec



Potato farms in Quebec have steadily increased in average size since 1991 and almost doubled over time though, at 91 acres, they are still 20% smaller than the national average. While tree fruit farms increased in average size in 2001 they have returned to their average recorded 20 years ago; at 17 acres, they nonetheless remain 30% larger than the average Canadian tree fruit farm. Vegetable farms increased in average size by 20% in each of the 1996 and 2001 census however have stabilized at 51 acres since then, roughly 70% larger than the average Canadian farm for this commodity. Berries and grapes farms have more than doubled in average in size in Quebec since 1991 and today, at 48 acres, are 80% larger than the Canadian average.

Average Farm Size in Acres (by Commodity) — Quebec



Average Farm Size in Acres (by Commodity)

Census of Agriculture Year	1991	1996	2001	2006	2011
Potatoes	44	54	74	81	91
Total tree fruits	17	17	21	21	17
Total berries and grapes	21	29	34	37	48
Total vegetables	34	40	51	51	51

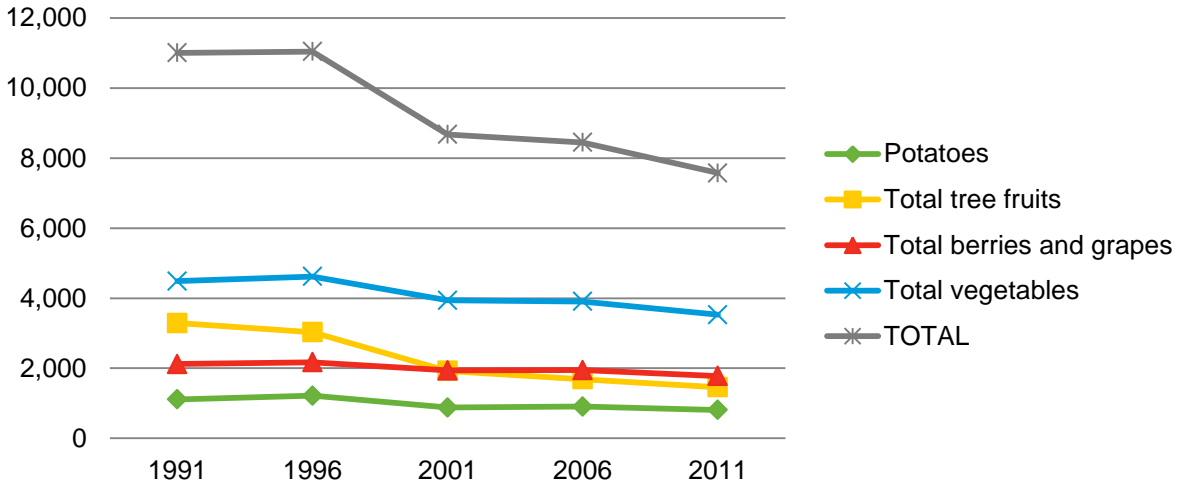
2.7 Ontario

From a number of farms perspective Ontario today accounts for over one quarter of all Canadian farms in contrast to 1991 where the province represented over 33% of the total number of farms. Their numbers have diminished by over 30% over the last 20 years. Contrary to the trend across Canada, Ontario has even seen a reduction in berries and grapes farms over time to go along with reductions in all other commodities. The most significant reduction in numbers has been in tree fruits (55%). On the whole, the distribution of the number of farms by commodity has remained similar to the landscape 20 years ago except for the minor increase in relative weight of vegetable farms to the whole due mostly to the reduction in tree fruit numbers.

Number of Farms (by Commodity) —Ontario

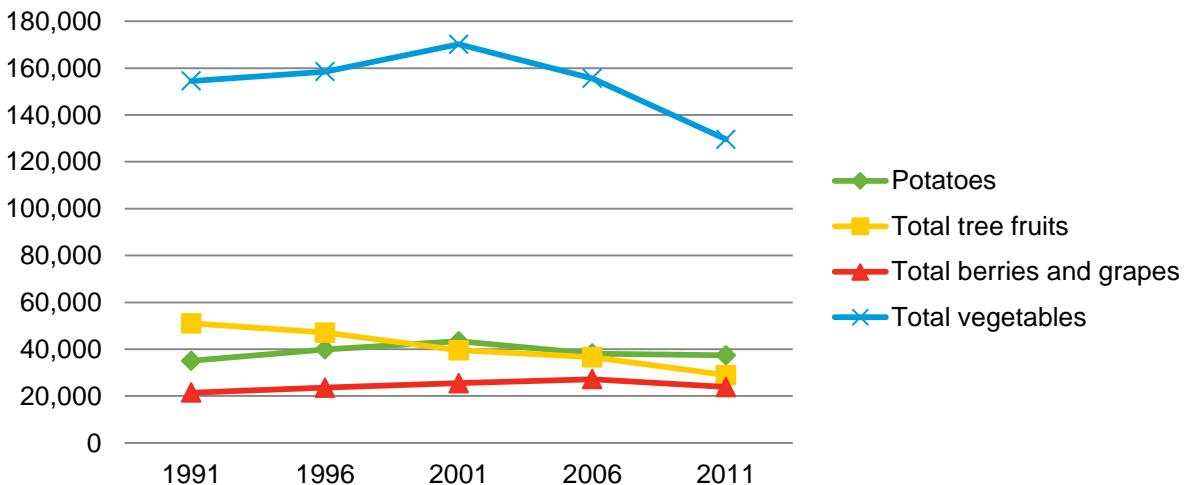
Census of Agriculture Year	1991	1996	2001	2006	2011
Potatoes	1113	1218	876	904	811
Total tree fruits	3,289	3,031	1,925	1,687	1,460
Total berries and grapes	2,121	2,172	1,938	1,949	1,779
Total vegetables	4,486	4,622	3,938	3,909	3,527
TOTAL	11,009	11,043	8,677	8,449	7,577

Number of Farms (by Commodity) — Ontario



On a total acreage basis, Ontario represented close to one third of the Canadian landscape 20 years ago; today the province accounts for just over 23% of total Canadian horticulture acreage. Along with British Columbia, Ontario is one of the only two provinces that have experienced an overall decline in total acreage since 1991 and at 219,719 acres today is 16% smaller than 20 years ago. Ontario provides for 43% of Canadian tree fruit farming acreage and, at 129,595 acres, close to half of all of Canada's vegetable farm acreage. Tree fruit farm acreage has been in steady decline over time and is now 43% lower than in 1991. While vegetable farming acres saw modest increases in the 1990s these have been eliminated with sharp declines in each of 2006 and 2011 and total vegetable farm acreage now stands 16% lower than 20 years ago. Ontario's total berries and grapes acreage accounts for only 10% of the total Canadian acreage for this commodity.

Farm Size — Total Acreage (by Commodity) — Ontario

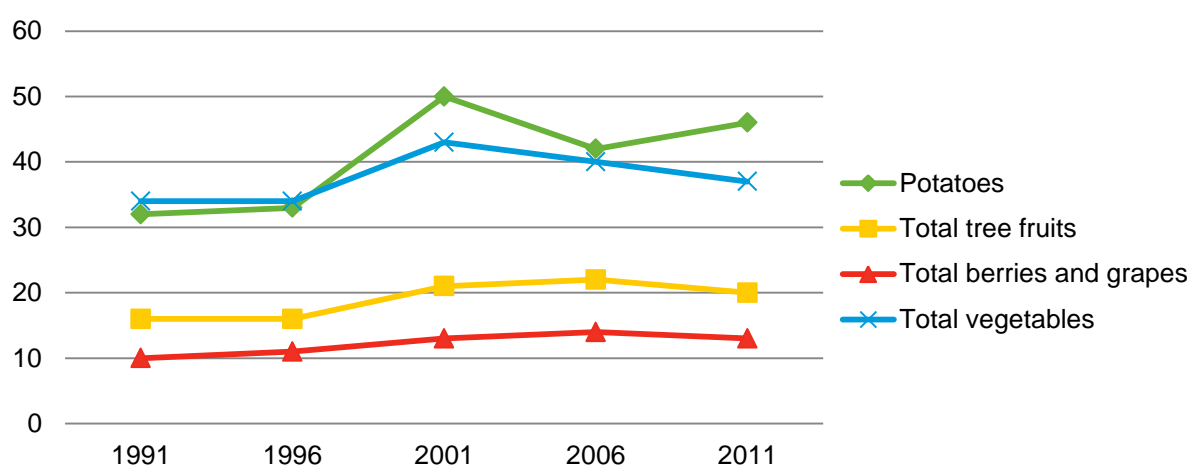


Farm Size — Total Acreage (by Commodity)

Census of Agriculture Year	1991	1996	2001	2006	2011
Potatoes	35,070	39,905	43,396	38,155	37,384
Total tree fruits	51,007	47,064	39,567	36,535	28,887
Total berries and grapes	21,472	23,600	25,509	27,169	23,853
Total vegetables	154,493	158,471	170,147	155,594	129,595

Over the last 20 years the average farm size in Ontario has increased for each of the commodities, with potatoes seeing the most significant (44%) relative average size increase. Despite this trend, potato farms in Ontario are still less than half the size of the average Canadian farm of this type. This same general pattern is shown for berries and grapes farms; despite having increased by 30% in size over time, they remain only half the size of the average Canadian berries and grapes farms.

Average Farm Size in Acres (by Commodity) — Ontario



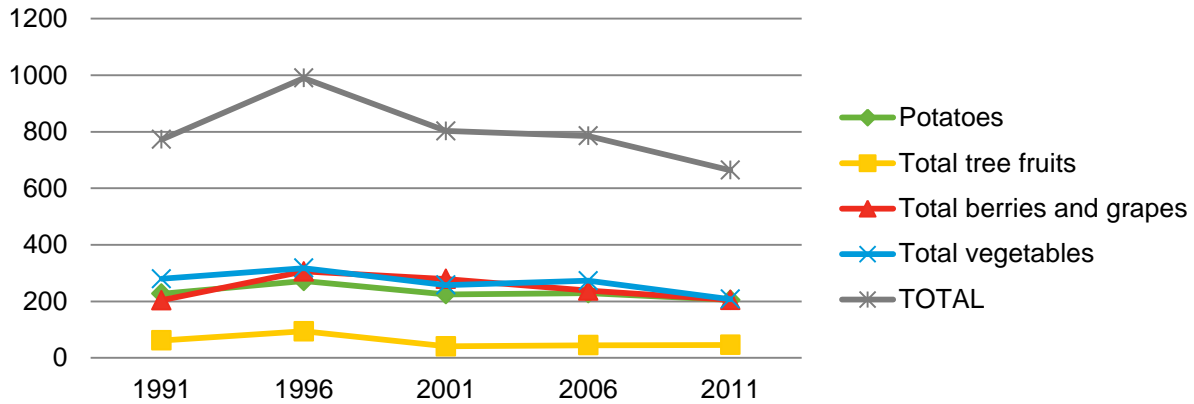
Average Farm Size in Acres (by Commodity)

Census of Agriculture Year	1991	1996	2001	2006	2011
Potatoes	32	33	50	42	46
Total tree fruits	16	16	21	22	20
Total berries and grapes	10	11	13	14	13
Total vegetables	34	34	43	40	37

2.8 Manitoba

Compared to other provinces Manitoba has seen less of a reduction in total number of farms overall. From a number of farms perspective Manitoba represents just over 2% of the Canadian landscape today, not much different than 20 years ago. While berries and grapes farms surged during the 1990s, they have since progressively returned to the same level of 20 years ago. The most notable reduction in number of farms has been for vegetables having decreased by 25% over the years.

Number of Farms (by Commodity) — Manitoba

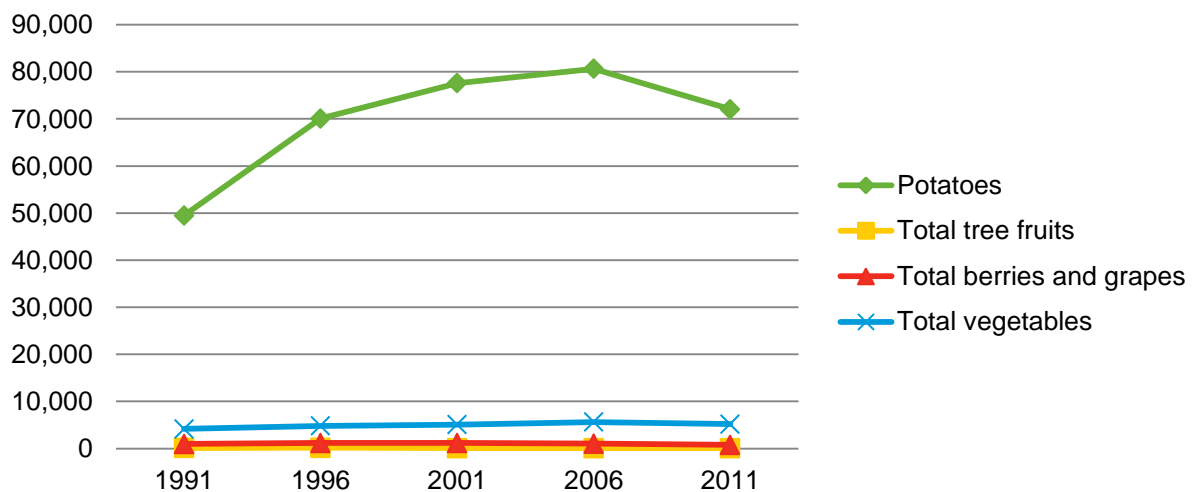


Number of Farms (by Commodity) — Manitoba

Census of Agriculture Year	1991	1996	2001	2006	2011
Potatoes	227	272	225	229	205
Total tree fruits	62	94	41	45	46
Total berries and grapes	204	306	279	238	205
Total vegetables	280	318	258	273	208
TOTAL	773	990	803	785	664

In 2011, Manitoba provided for 20% of the total Canadian acreage for potatoes; this closely follows PEI at 24% for this commodity. Total potato acres increased sharply during the 1990s and peaked in 2006 at over 80,000 acres however in 2011 potatoes reported a decline of 10% in total acres within the province and now stand at just over 72,000 in total, 46% higher than 20 years ago. Potato acreage within the province represents 92% of total provincial acreage so, on a total acreage basis across all commodities, the province has followed the trend for potatoes.

Farm Size: Total Acreage (by Commodity) — Manitoba

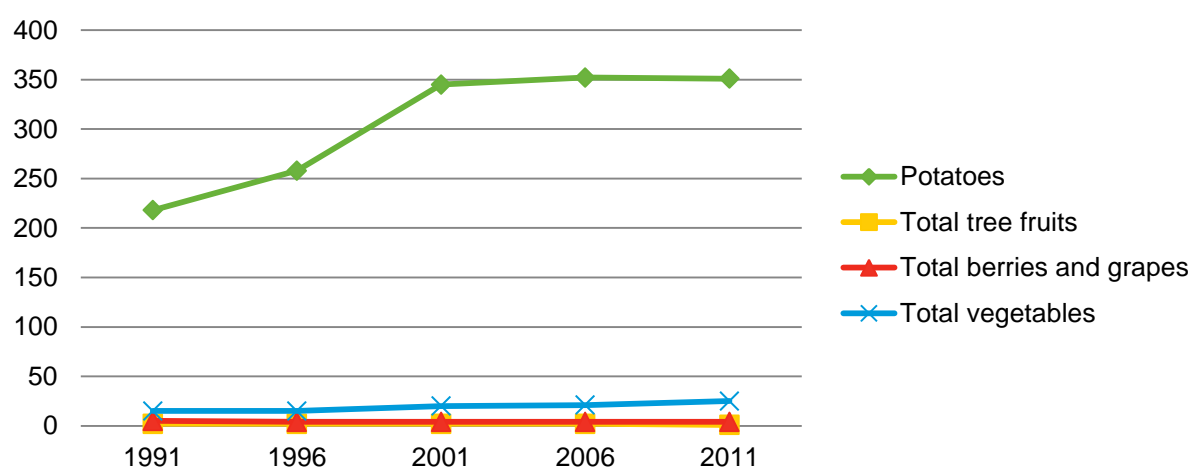


Farm Size — Total Acreage (by Commodity)

Census of Agriculture Year	1991	1996	2001	2006	2011
Potatoes	49,478	70,063	77,586	80,631	72,043
Total tree fruits	127	151	83	66	50
Total berries and grapes	983	1,186	1,184	1,027	757
Total vegetables ¹	4,174	4,815	5,074	5,641	5,169

Large potato farms have been a distinguishable trait for Manitoba for some time. At an average of 351 acres per farm, the farms are more than three times the national average. The average size rose sharply in the 1990s and since the 2001 census they have remained stable.

Average Farm Size in Acres (by Commodity) — Manitoba



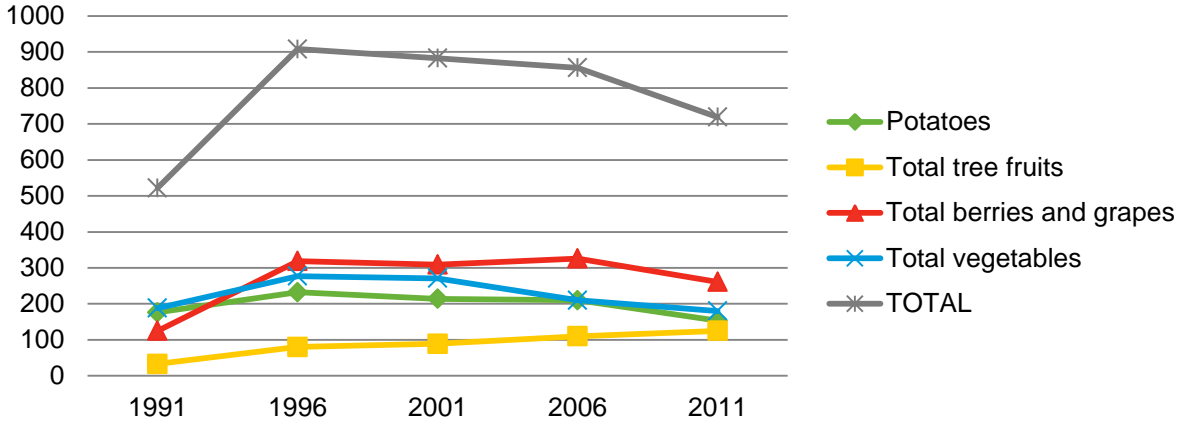
Average Farm Size in Acres (by Commodity)

Census of Agriculture Year	1991	1996	2001	2006	2011
Potatoes	218	258	345	352	351
Total tree fruits	2	2	2	2	1
Total berries and grapes	5	4	4	4	4
Total vegetables	15	15	20	21	25

2.9 Saskatchewan

A large increase in the number of farms in Saskatchewan during the 1990s has contributed to an overall 38% higher number of horticultural farms in 2011 compared to 1991. Despite this increase Saskatchewan is a relatively small province in terms of Canadian horticulture and today represents only 2.5% of overall farms (compared to 2% in 1991). The number of tree fruit farms has continuously increased over each of the last 5 census periods (20 years) and now stands at close to 280% of the number reported in 1991. The number of berries and grapes farms is twice that of 20 years ago and while potatoes farms reported a significant increase in 1996, farms in this commodity have since steadily decreased to now stand at 13% lower than the number in 1991.

Number of Farms (by Commodity) — Saskatchewan

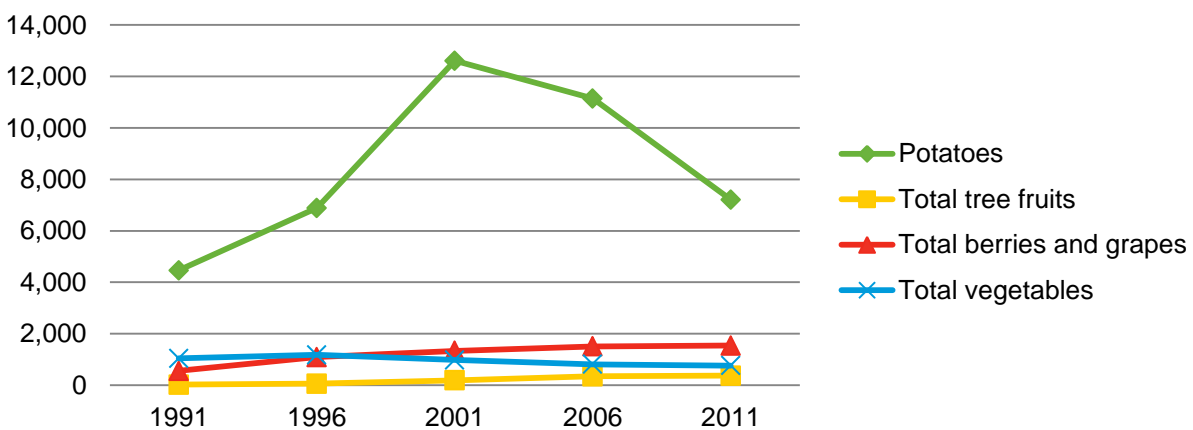


Number of Farms (by Commodity) — Saskatchewan

Census of Agriculture Year	1991	1996	2001	2006	2011
Potatoes	176	232	214	210	153
Total tree fruits	33	80	89	110	125
Total berries and grapes	125	319	309	326	261
Total vegetables	188	277	271	210	180
TOTAL	522	908	883	856	719

At 9,888 acres in total, Saskatchewan accounts for just over 1% of total Canadian horticulture acreage. In 1991 the distribution of total provincial acreage was 73% for potatoes and 17% for vegetables and while this distribution has remained the same in 2011 for potatoes there has been a shift in Saskatchewan towards berries and grapes acreage that now is at 16% of total acreage and stands second to potatoes. On the whole there are 62% more horticulture acres in Saskatchewan than there were 20 years ago (9,888 versus 6,086 acres in 1991) with almost all of the increase occurring within potatoes during the 1990s. While potato acreage almost tripled during the 1990s, since the 2011 census this acreage has subsequently declined by 43% and now stands at just 62% higher than it was 20 years ago.

Farm Size: Total Acreage (by Commodity) — Saskatchewan

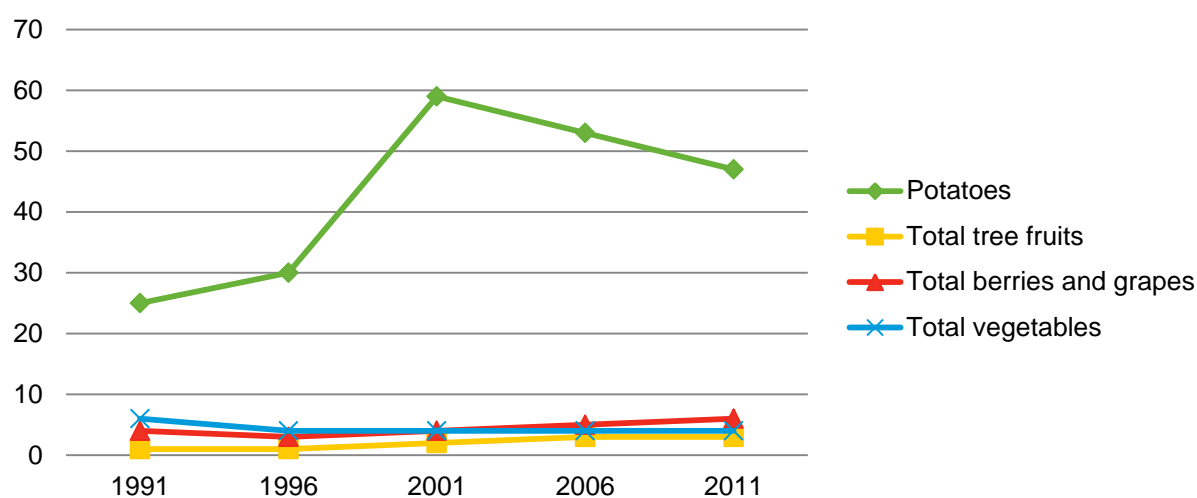


Farm Size — Total Acreage (by Commodity)

Census of Agriculture Year	1991	1996	2001	2006	2011
Potatoes	4,461	6,888	12,607	11,138	7,209
Total tree fruits	24	62	194	346	373
Total berries and grapes	557	1,094	1,339	1,509	1,541
Total vegetables	1,044	1,178	980	813	765

Compared to the rest of Canada the average size of horticulture farms is very small across all commodities in Saskatchewan; at a provincial average of 47 acres, potato farms are less than half the national average despite having almost doubled in size since 1991 and tree fruit as well as berries and grapes farms are less than a quarter the national average size. For their part, Saskatchewan's vegetable farms are about one tenth the average size of their Canadian counterparts.

Average Farm Size in Acres (by Commodity) — Saskatchewan



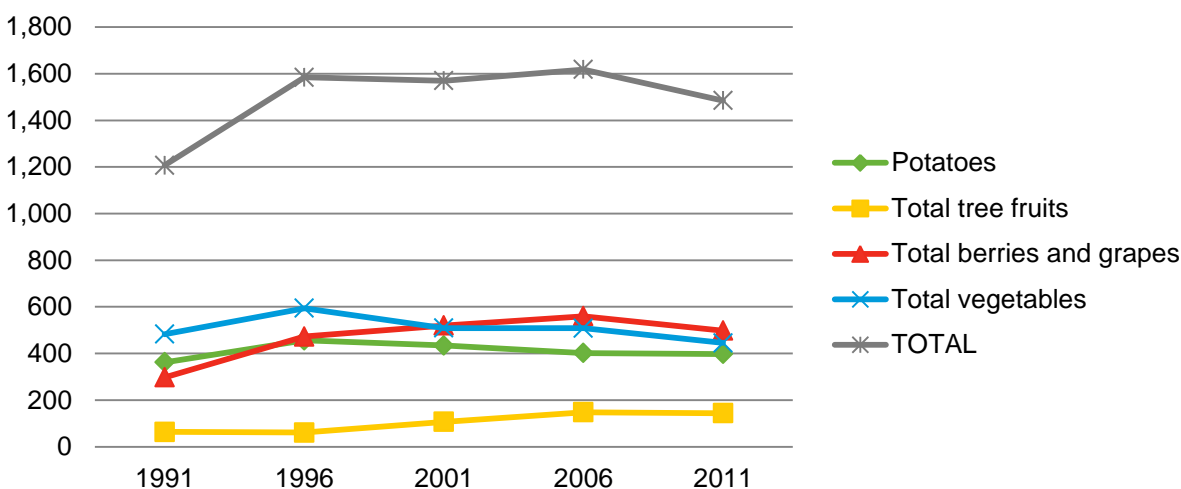
Average Farm Size in Acres (by Commodity)

Census of Agriculture Year	1991	1996	2001	2006	2011
Potatoes	25	30	59	53	47
Total tree fruits	1	1	2	3	3
Total berries and grapes	4	3	4	5	6
Total vegetables	6	4	4	4	4

2.10 Alberta

The total number of horticulture farms in Alberta is 23% higher today than it was in 1991. The most significant increase has been in the number of berries and grapes farms that are now 67% higher than in 1991. Potato and vegetable farms reported significant increases in 1996 however since that time there appears to be a steady decline in their numbers returning to similar numbers as those reported in 1991.

Number of Farms (by Commodity) — Alberta

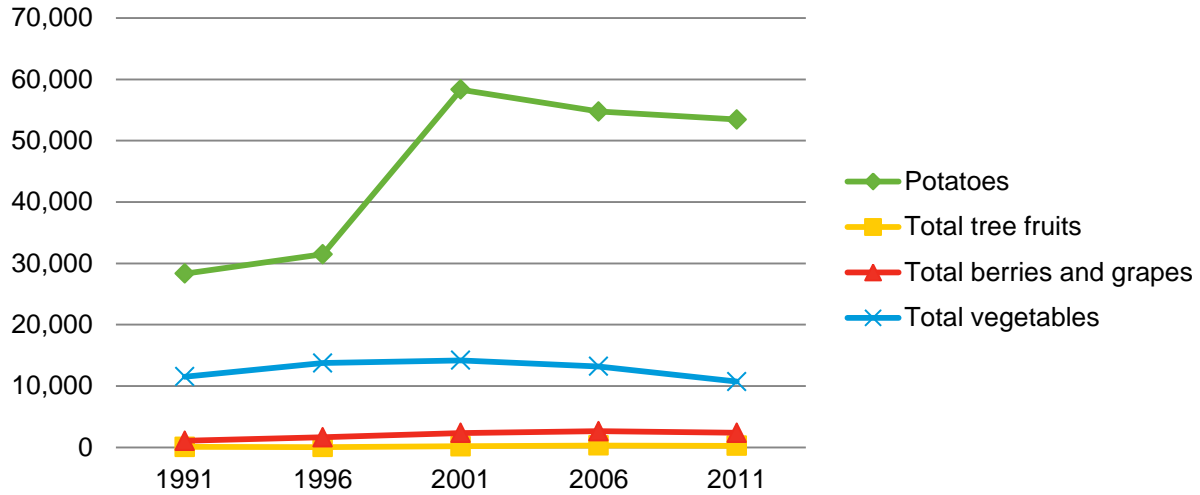


Number of Farms (by Commodity) — Alberta

Census of Agriculture Year	1991	1996	2001	2006	2011
Potatoes	362	456	434	402	398
Total tree fruits	64	61	107	148	144
Total berries and grapes	298	473	520	560	498
Total vegetables	483	594	509	508	445
TOTAL	1,207	1,584	1,570	1,618	1,485

On the Canadian landscape, Alberta accounts for just over 7% of total horticulture acres. The province reported a large increase in total horticultural acreage in 2001 due mainly to an increase in potato farming acres that essentially doubled during the 1990s. The figure for potatoes has since declined by roughly 10% over 2001 numbers and now stands at a total provincial acreage of 53,440. This commodity accounts for 80% of Alberta's total horticulture acreage and the remainder is occupied largely by vegetables (16% of total acres) a commodity that has experienced a decrease of 7% in total acres since 1991.

Farm Size: Total Acreage (by Commodity) — Alberta

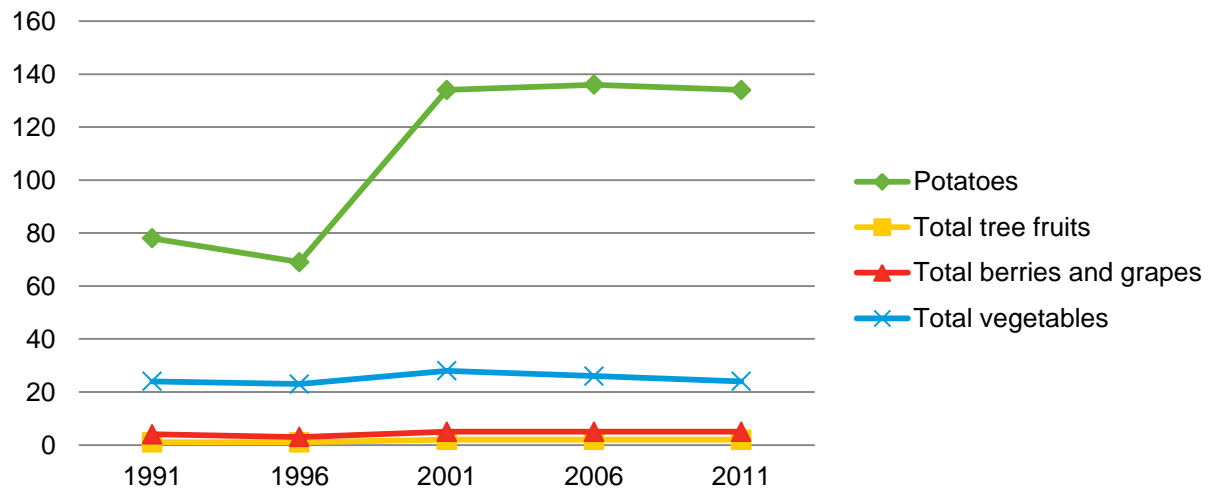


Farm Size — Total Acreage (by Commodity)

Census of Agriculture Year	1991	1996	2001	2006	2011
Potatoes	28,339	31,488	58,341	54,759	53,440
Total tree fruits	74	50	166	298	250
Total berries and grapes	1,077	1,634	2,352	2,635	2,360
Total vegetables	11,536	13,743	14,194	13,193	10,716

There have been no significant changes in average farm sizes in Alberta over all commodities except potatoes. The average potato farm in Alberta reported a 72% increase in size in 2001 and has remained at this level of 134 acres since; this is roughly 20% larger than the average Canadian potato farm which stands at 111 acres.

Average Farm Size in Acres (by Commodity) — Alberta



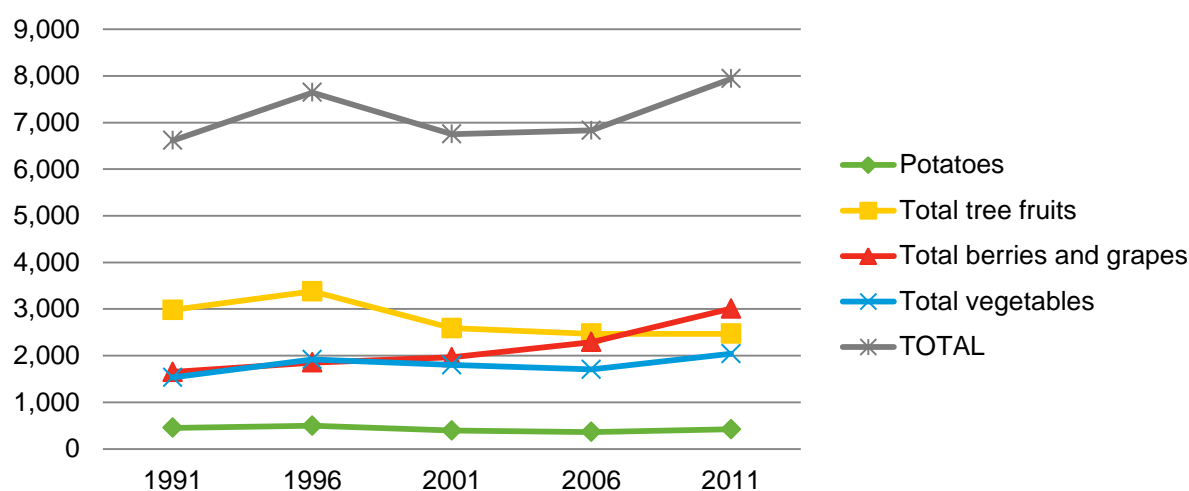
Average Farm Size in Acres (by Commodity)

Census of Agriculture Year	1991	1996	2001	2006	2011
Potatoes	78	69	134	136	134
Total tree fruits	1	1	2	2	2
Total berries and grapes	4	3	5	5	5
Total vegetables ¹	24	23	28	26	24

2.11 British Columbia

The number of farms in British Columbia now represent close to 30% of total Canadian farms, up from 20% 20 years ago. The number of tree fruit farms has remained relatively stable over the last 10 years and while there was a surge in numbers reported in 1996 they stand today at roughly 17% less than in 1991.

Number of Farms (by Commodity) — British Columbia



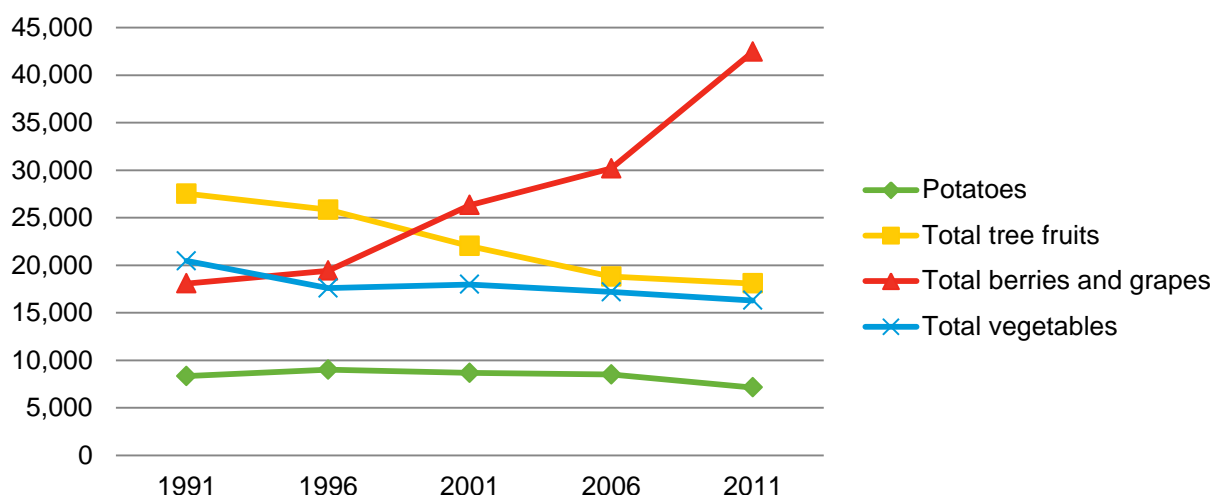
This decrease however is largely outweighed by the significant increases in both berries and grapes farms as well as vegetable farms which now stand respectively 82% and 33% higher than 20 years ago; both these commodities have reported increases in 2011 but most notable is the continuously registered increases in numbers of berries and grapes farms over each of the last five census periods.

Number of Farms (by Commodity) — British Columbia

Census of Agriculture Year	1991	1996	2001	2006	2011
Potatoes	451	496	393	364	422
Total tree fruits	2,980	3,380	2,591	2,470	2,471
Total berries and grapes	1,650	1,852	1,964	2,290	3,007
Total vegetables	1,532	1,916	1,802	1,705	2,040
TOTAL	6,613	7,644	6,750	6,829	7,940

On the whole, total British Columbia fruit and vegetable farming acreage has increased by 13% in the 20 year period of 1991 to 2011 with almost all of this increase having taken place within the period between the 2006 and 2011 census and a significant amount of this increase, if not to say all, originates from increased berries and grapes acreage.

Farm Size: Total Acreage (by Commodity) — British Columbia



In fact, berries and grapes total acreage in British Columbia has more than doubled in the twenty year period (135%) while each of tree fruits, vegetables and potatoes acreage has reduced by 34%, 20%, and 14% respectively.

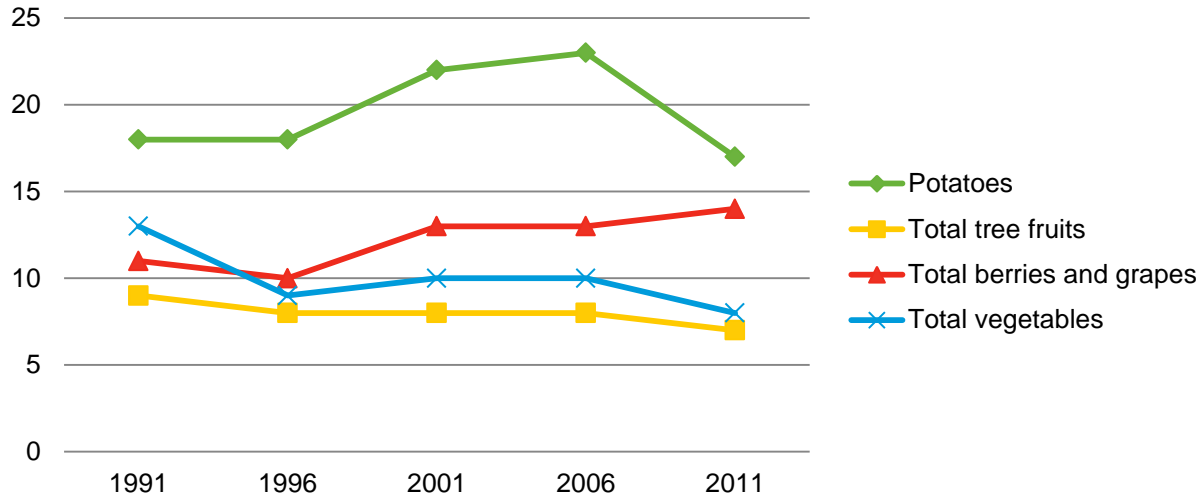
Farm Size — Total Acreage (by Commodity)

Census of Agriculture Year	1991	1996	2001	2006	2011
Potatoes	8,324	9,000	8,665	8,499	7,133
Total tree fruits	27,523	25,830	22,008	18,798	18,069
Total berries and grapes	18,079	19,431	26,322	30,182	42,456
Total vegetables	20,447	17,586	17,982	17,192	16,287

Much like the patterns for total acreage, the average farm sizes for horticultural commodities in British Columbia decreased for all types except for berries and grapes. Contrary to vegetables and tree fruits farms, which saw their average size diminish progressively over the period, potatoes experienced an initial surge from 1996 to 2006 (increasing in size by roughly 27%) to then significantly drop to 17 acres, or a little below the average size shown for 1991.

The average size of berries and grapes farms in British Columbia is significantly higher today than it was in 1996. A 30% increase in average size between 1996 and 2001 saw the average berries and grapes farm move from 10 acres to 13 acres, remain at this level for the next census in 2006, and then increase once again by roughly 10% to 14 acres today.

Average Farm Size in Acres (by Commodity) — British Columbia



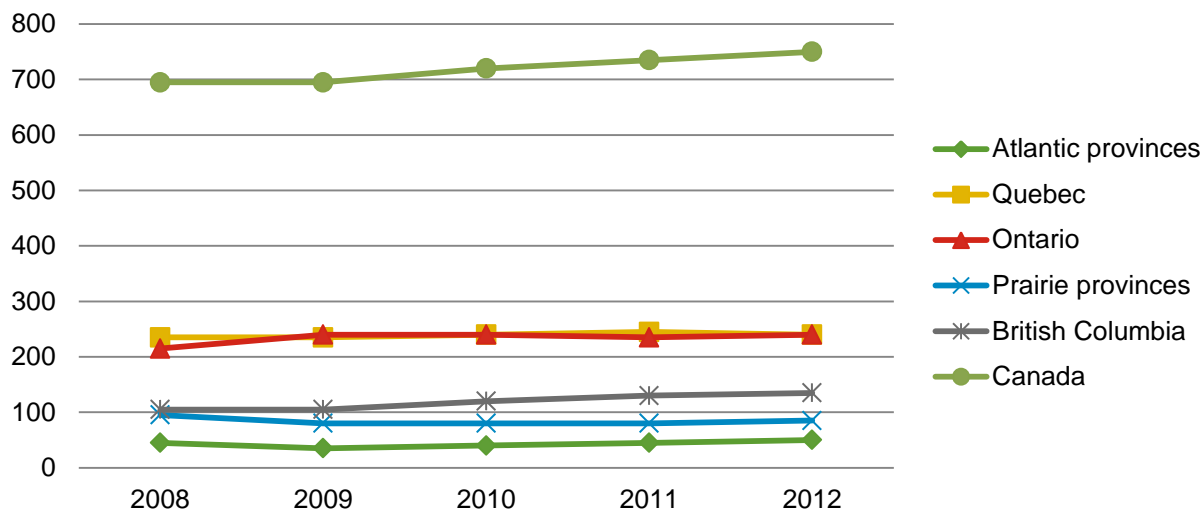
Average Farm Size in Acres (by Commodity)

Census of Agriculture Year	1991	1996	2001	2006	2011
Potatoes	18	18	22	23	17
Total tree fruits	9	8	8	8	7
Total berries and grapes	11	10	13	13	14
Total vegetables	13	9	10	10	8

2.12 Canadian Greenhouse Farms

The Census of Agriculture has not taken into account the number of specialized greenhouse farms within their surveys thus we have referred to other Statistics Canada tables to derive these numbers. The trends in total numbers are provided since 2008. Relatively speaking, the overall landscape for greenhouse farms has change very little over the last five years with the total number of farms today being about 8% higher than in 2008. Ontario and Quebec continue to represent each about one third of the total number of farms. British Columbia has increased its numbers by close to 30% while the Prairie Provinces have decreased by 11%.

Number of Farms — Specialized Greenhouse Fruits and Vegetables



Number of Farms — Specialized Greenhouse Fruits and Vegetables¹

	2008	2009	2010	2011	2012
Atlantic provinces	45	35	40	45	50
Quebec	235	235	240	245	240
Ontario	215	240	240	235	240
Prairie provinces	95	80	80	80	85
British Columbia	105	105	120	130	135
Canada	695	695	720	735	750

Source: Statistics Canada. Table 001-0047 — Estimates of specialized greenhouse operations, greenhouse area, and months of operation, annual, CANSIM (database). (accessed: 2014-04-02)

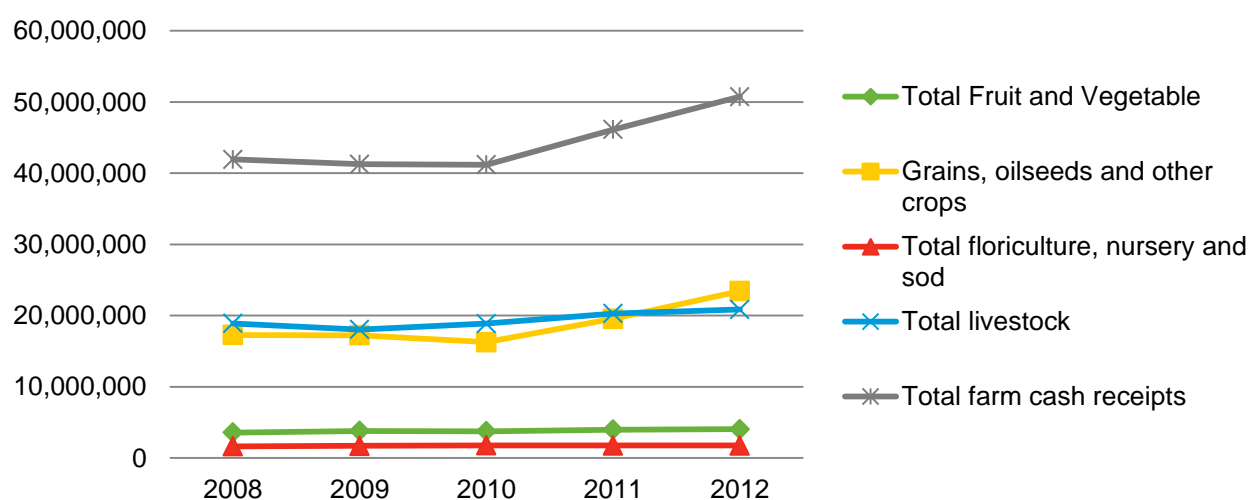
1. Includes all other types of enclosed protection used for growing plants, such as rigid insulation, mine shafts, barns and shelters.

3. Horticulture Farm Cash Receipts and Production

3.1 Horticulture Share of Canadian Agricultural Farm Cash Receipts

Canadian agricultural farm cash receipts as a whole increased year over year by 12% and 10% respectively for 2011 and 2012 after having been generally stagnant from 2008 to 2010. As a whole, Canadian agricultural farm cash receipts increased by close to 18% over the 2008-2012 period with a reported amount of \$54.2 billion dollars in 2012. This progress for agriculture cash receipts as a whole was driven primarily by 20% increases in grains and oilseeds crops reported for each of 2011 and 2012.

Canadian Agricultural Farm Cash Receipts (\$ Thousands)



Canadian Agricultural Farm Cash Receipts (\$ Thousands)

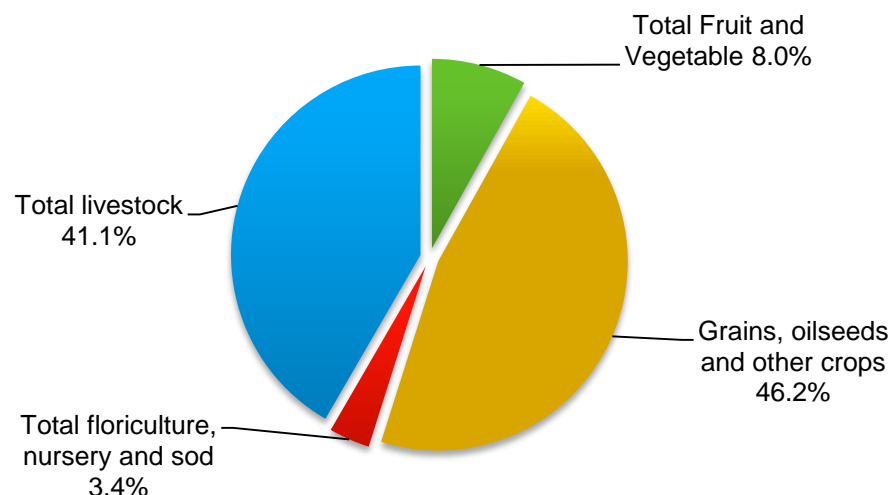
	2012 Distribution	2008	2009	2010	2011	2012
Fruit and Vegetable	8.0%	3,569,603	3,809,748	3,753,227	3,973,380	4,060,713
Grains, oilseeds, other crops	46.2%	17,277,634	17,231,021	16,279,157	19,556,774	23,446,825
Floriculture, nursery and sod	3.4%	1,647,695	1,714,966	1,775,576	1,749,478	1,750,407
Total livestock	41.1%	18,910,571	18,055,155	18,887,871	20,297,134	20,868,521
Total farm cash receipts¹		41,926,725	41,269,197	41,189,778	46,134,878	50,746,907

Source: Statistics Canada, CANSIM, table 002-0001 and Catalogue no. 21-011-X

1. Exclusive of program payments

Fruit and vegetable cash receipts, for their part, stand today at \$4.1 billion dollars, having increased by 14% between 2008 and 2012, or an average of 3.3% per year for the last 5 years. In 2012, horticulture farm cash receipts represent 8% of the Canadian agricultural farm cash receipts landscape. While the sector's relative weight was 8.5% of the whole in 2008 and progressed to over 9% in 2010, the surge in grains and oilseeds cash receipts during 2011 and 2012 has recently diminished horticulture's position to the whole.

2012 Canadian Agricultural Farm Cash Receipts Distribution



3.2 Fruit and Vegetable Share of Canadian Crop Farm Cash Receipts

On the basis of total Canadian crop farm cash receipts, at \$4.1 billion dollars, horticulture stands at 13.6% of the 2012 total of just under \$30 billion dollars.

3.3 Canadian Fruit and Vegetable Farm Cash Receipts by Commodity

From 2008 to 2012, combined fruit and vegetable farm cash receipts progressed by close to 14% to \$4.06 billion dollars, so as a whole, slightly less progress than agriculture in general.

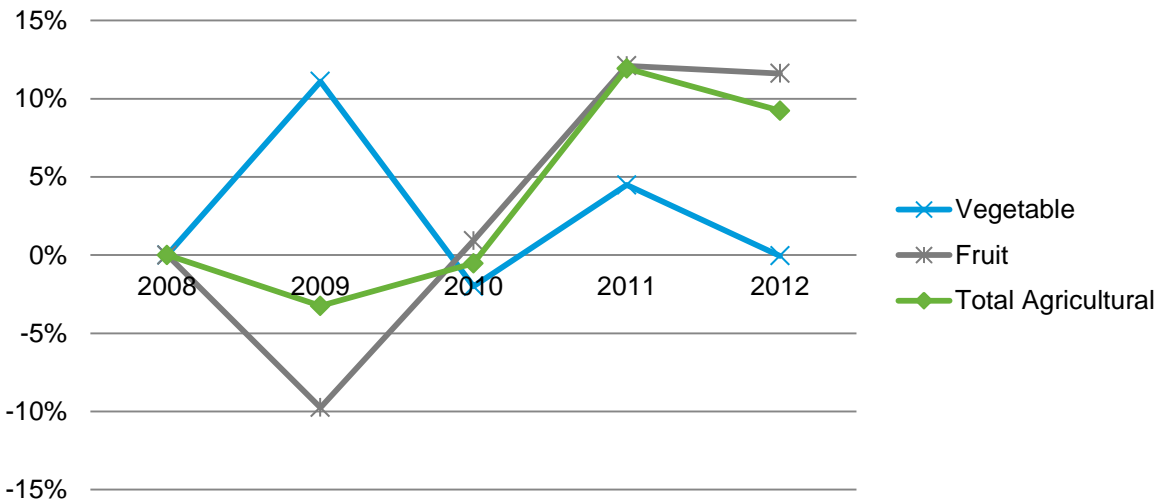
Canadian Agricultural Farm Cash Receipts (\$/1,000)							Change 2008 to 2012
		2008	2009	2010	2011	2012	
Total¹	Cash Receipts	46,059,835	44,559,519	44,325,063	49,611,776	54,189,310	17.65%
	Yearly Change	-	-3.26%	-0.53%	11.93%	9.23%	
Fruit and Vegetable	Cash Receipts	3,569,603	3,809,748	3,753,227	3,973,380	4,060,713	13.76%
	Yearly Change	-	6.73%	-1.48%	5.87%	2.20%	
Vegetable	Cash Receipts	2,820,996	3,134,090	3,071,345	3,208,975	3,207,514	13.70%
	Yearly Change	-	11.10%	-2.00%	4.48%	-0.05%	
Fruit	Cash Receipts	748,607	675,658	681,882	764,405	853,199	13.97%
	Yearly Change	-	-9.74%	0.92%	12.10%	11.62%	

Source: Statistics Canada, CANSIM, table 002-0001 and Catalogue no. 21-011-X

1. Includes program payments

A review of the yearly percentage changes from 2008 to 2012 within agriculture as well as fruit and vegetable farm cash receipts, demonstrates that these sectors are subject to different market forces; on a farm cash receipt basis there seems to be little correlation in the year to year variances.

Yearly Change (%) Canadian Agricultural Farm Cash Receipts



At a little more than \$1.1 billion dollars in 2012, field vegetables represent 28% of the total Canadian fruit and vegetable farm cash receipts; greenhouse vegetables and potatoes both come in at 25% and slightly above \$1 billion dollars as well. At a total of \$607 million dollars, fruit farm cash receipts, led by small fruit farms and particularly blueberries, account for 15% of the Canadian marketplace with the remaining 6% occupied by tree fruits.

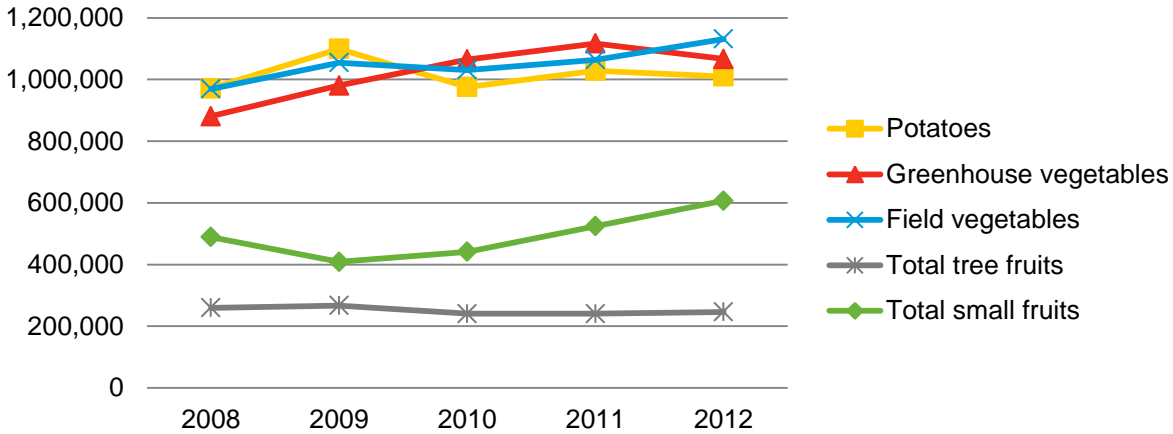
Fruit and Vegetable Farm Cash Receipts (\$ Thousands)

	2008	2009	2010	2011	2012
Total	3,569,603	3,809,748	3,753,227	3,973,380	4,060,713
Potatoes	971,206	1,099,276	975,850	1,028,714	1,009,648
Greenhouse vegetables	880,584	980,262	1,064,731	1,116,691	1,066,480
Field vegetables	969,206	1,054,552	1,030,764	1,063,570	1,131,386
Total tree fruits	259,610	267,183	240,549	240,351	246,393
Apples	177,220	179,063	162,072	155,180	157,722
Total small fruits	488,997	408,475	441,333	524,054	606,806
Blueberries	163,338	111,748	147,654	203,345	247,272
Strawberries	61,250	69,178	68,065	71,626	70,826
Grapes	119,414	98,318	116,156	127,961	144,621

Source: Statistics Canada, CANSIM, table 002-0001 and Catalogue no. 21-011-X.

From 2008 to 2012 the greatest volatility in year over year farm cash receipts has been with potatoes however at the end of the five year period the net result remained an overall increase of 4% over 2008. Tree fruits for their part have remained relatively stable over the years however the end result was a decrease of 5%.

**Fruit and Vegetable Farm Cash Receipts (\$/1,000)
by Commodity Group**

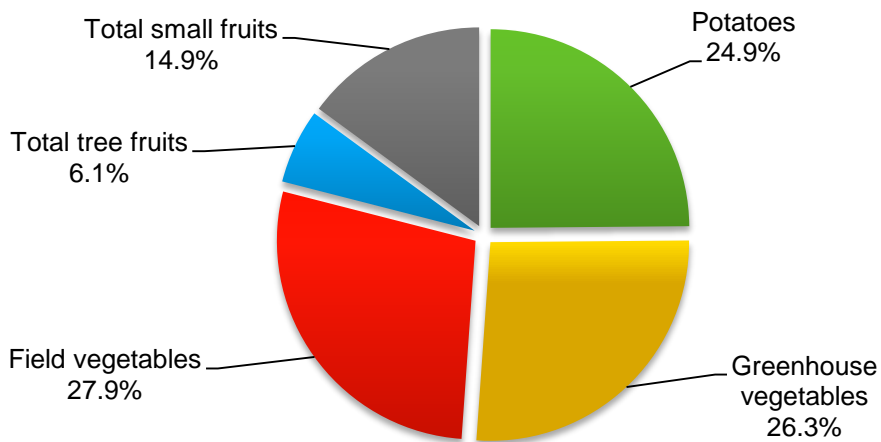


Field vegetable cash receipts increased during 2008 and then again during 2012 after having remained stable between these individual periods; the net result after 5 years was a total increase of 17%. After a significant decline registered in 2009, small fruit cash receipts rebounded and have experienced year over year increases to end the five year period with a balance that is 24% higher than 2008. The most significant increase in this category was seen for blueberries that have more than doubled in farm cash receipts since the 2009 period.

After having experienced successive significant year over year increases for the preceding four years, there has been a tapering off of greenhouse farm cash receipts reported during 2012. For the five year period greenhouse vegetable farm cash receipts have increased by 21%, positively impact the fruit and vegetable sector as a whole.

As of 2012 field vegetables represent the largest portion of the Canadian horticultural farm cash receipts landscape with 27.9% of the total, followed closely by greenhouse vegetables (26.3%) and potatoes (24.9%). While small fruits represented just over 10% of marketplace in 2009 they have rebounded to 15% in 2012. Tree fruits continue to account for somewhere between 6% and 7% of the horticultural marketplace.

Total 2012 Fruit and Vegetable Farm Cash Receipts by Commodity

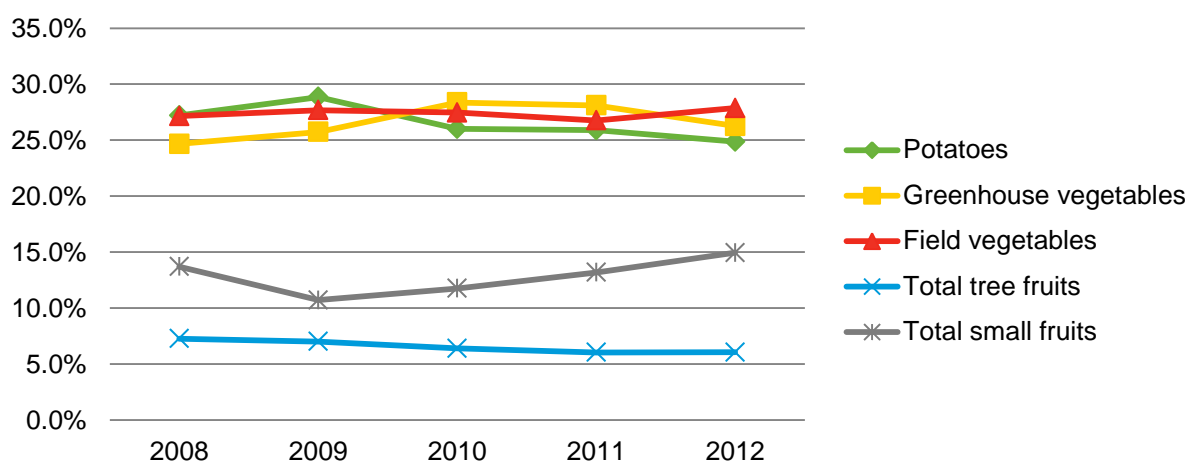


Total Fruit and Vegetable farm cash receipts by commodity (\$/1,000)											
Type of cash receipts	2012 Market Share	2008		2009		2010		2011		2012	
		Market Share	Market Share	Market Share	Market Share	Market Share	Market Share	Market Share	Market Share		
Potatoes	24.9%	971,206	27.2%	1,099,276	28.9%	975,850	26.0%	1,028,714	25.9%	1,009,648	24.9%
Greenhouse vegetables	26.3%	880,584	24.7%	980,262	25.7%	1,064,731	28.4%	1,116,691	28.1%	1,066,480	26.3%
Field vegetables	27.9%	969,206	27.2%	1,054,552	27.7%	1,030,764	27.5%	1,063,570	26.8%	1,131,386	27.9%
Total tree fruits	6.1%	259,610	7.3%	267,183	7.0%	240,549	6.4%	240,351	6.0%	246,393	6.1%
Total small fruits	14.9%	488,997	13.7%	408,475	10.7%	441,333	11.8%	524,054	13.2%	606,806	14.9%

Source: Statistics Canada. Table002-0001 - Farm cash receipts, annual (dollars), CANSIM (database). (accessed: 2014-01-02)

Over the five year period from 2008 to 2012, while there has been some small movement among the commodities, no significant change in the Canadian landscape, on a share basis, can be truly identified.

Commodity Share of Total Canadian Fruit and Vegetable Farm Cash Receipts

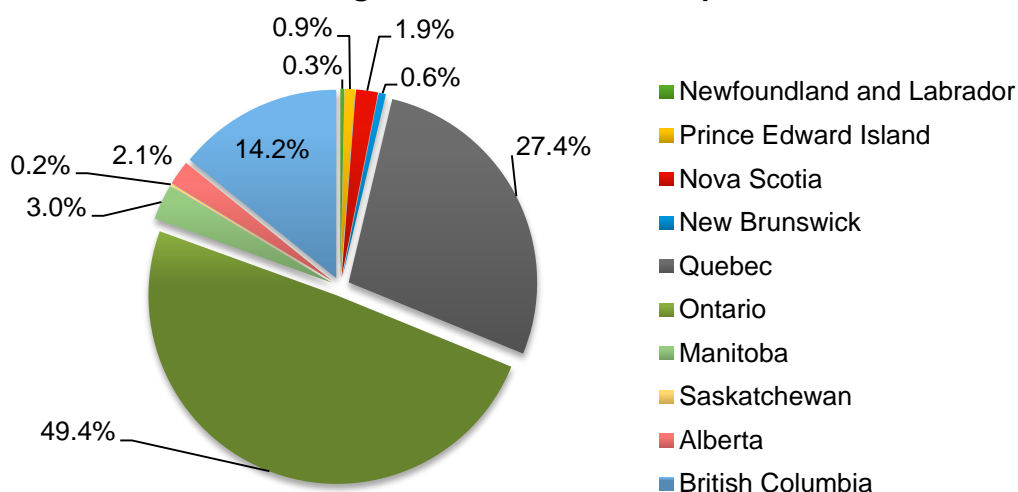


3.3.1 Field Vegetables

On a total Canadian basis field vegetable cash receipts have progressed by 17% from 2008 to 2012 and while there was a slight reduction in receipts during 2010 the marketplace returned to healthy year over year improvements of 3.2% in 2011 and 6.4% in 2012.

There has been little change in the provincial distribution of the field vegetable cash receipts landscape during the period. For the five year period, Ontario consistently produced half of the Canadian field vegetable cash receipts while Quebec and British Columbia have produced respectively 27% and 14%.

2012 Field Vegetable Farm Cash Receipts Distribution



Field Vegetables-Farm Cash Receipts, Annual (Dollars x 1,000)

	2012 Provincial Share	2008	2009	2010	2011	2012
Canada		969,206	1,054,552	1,030,764	1,063,570	1,131,386
Newfoundland and Labrador	0.3%	3,448	4,494	3,799	3,522	3,766
Prince Edward Island	0.9%	7,058	8,166	10,143	11,166	10,056
Nova Scotia	1.9%	16,230	16,852	17,673	21,911	21,331
New Brunswick	0.6%	6,095	6,240	7,341	7,230	6,959
Quebec	27.4%	260,463	280,424	280,825	277,313	310,552
Ontario	49.4%	478,685	527,599	510,603	530,459	558,468
Manitoba	3.0%	33,356	35,615	31,989	32,697	34,073
Saskatchewan	0.2%	1,644	1,981	1,775	2,349	1,900
Alberta	2.1%	25,376	28,750	20,303	25,635	23,775
British Columbia	14.2%	136,851	144,431	146,311	151,288	160,507

Source: Statistics Canada. Table 002-0001 — Farm cash receipts, annual (dollars), CANSIM (database). (accessed: 2014-01-03)

Note: Includes mushroom receipts.

3.3.1.1 Farm Gate Value of Vegetables by Commodity

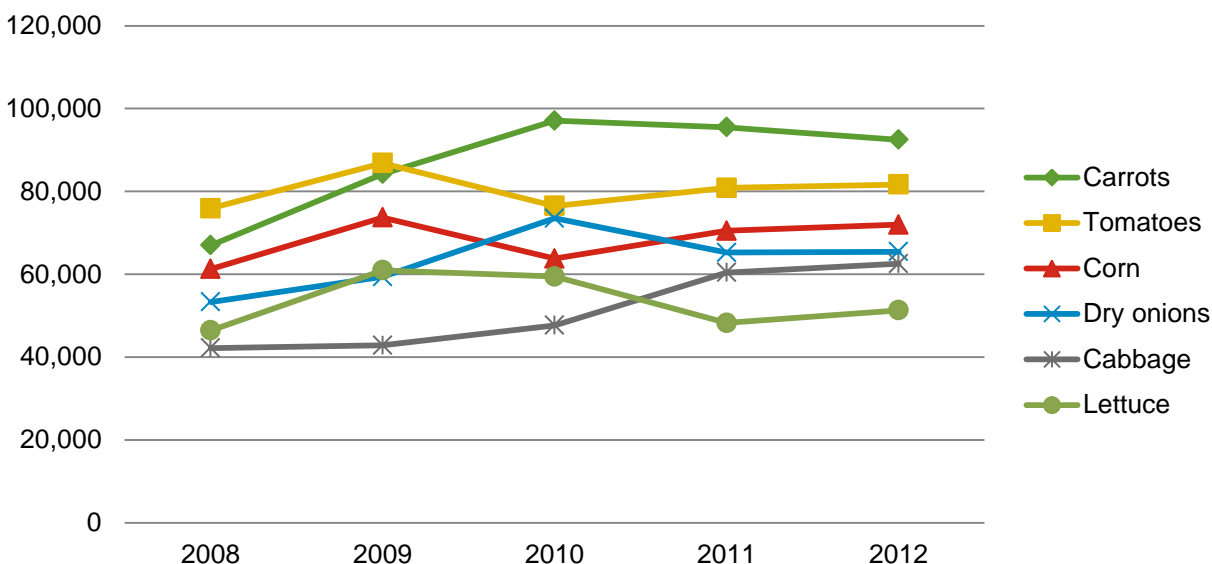
There are twenty nine types of vegetables listed within Statistics Canada tables that provide for an overview of the Canadian vegetable sector by commodity on the basis of Farm Gate Value (FGV). Of these twenty nine, the first six vegetable types account for more than 52.5% of total Canadian FGV in 2012. The top ten listed vegetables account for 70% of total FGV and the first half of the list account for over 85% of FGV.

During the 2008 to 2012 period vegetable FGV in Canada has progressed by 26% overall. Only two commodities from the list (peas and shallots) suffered contraction over the five year period and these reductions had little influence over the whole as they accounted for only 2.5% and 2.0% respectively of total FGV. Rhubarb, parsnips, watermelons, and beets, each doubled in FGV over the five years, and garlic almost tripled in size. Despite these impressive individual commodity percentage increases their combined influence on the whole (4.5% of total FGV) however was not great.

Since 2010 carrots have been the leading vegetable in terms of Canadian FGV, having overtaken tomatoes that suffered a decline in FGV during that year. While tomatoes appear to have since progressively returned to moderate yearly FGV increases, carrots have experienced moderate declines year over year since 2010. Over the five year period carrots have registered an above average progression in FGV of 38% while tomatoes have only increased by roughly 8% when comparing 2012 to 2008.

Like most of the listed commodities lettuce posted impressive gains in 2009. These gains however then were followed by stagnation and declines with the end result being an increase of 10.5% in FGV over the five year period, modest when compared to the national average of 26%. Cabbage is one of the standout commodities from the top six listing in terms of progression in FGV. With an overall five year increase of close to 50% and a contribution to the whole of over 7% this vegetables influence on the marketplace is significant.

**Canadian Farm Gate Value (FGV) (\$/1,000)
Top Six Vegetables by Commodity**



Canadian Farm Gate Value (FGV) of Vegetables by Commodity (\$/1,000)

Commodity	2008	2009	2010	2011	2012	Change 1 Yr.	Change 5 Yrs.	% of 2012 Total
Carrots ²	66,975	84,195	97,071	95,491	92,483	-3.2%	38.1%	11.4%
Tomatoes	75,915	86,856	76,500	80,831	81,651	1.0%	7.6%	10.1%
Corn	61,258	73,690	63,765	70,493	71,979	2.1%	17.5%	8.9%
Dry onions	53,305	59,369	73,515	65,242	65,452	0.3%	22.8%	8.1%
Cabbag ¹	42,178	42,849	47,653	60,415	62,533	3.5%	48.3%	7.7%
Lettuce ³	46,425	60,961	59,431	48,248	51,287	6.3%	10.5%	6.3%
Broccoli	33,735	39,717	35,594	33,492	40,241	20.2%	19.3%	5.0%
Peppers	25,425	28,268	32,866	33,782	39,170	15.9%	54.1%	4.8%
Beans	27,442	26,886	31,300	30,295	31,968	5.5%	16.5%	3.9%
Cucumbers	19,001	32,862	26,020	23,130	29,598	28.0%	55.8%	3.7%
Squash and zucchinis	15,935	20,483	20,998	26,955	26,025	-3.5%	63.3%	3.2%
Cauliflower	22,295	23,172	24,183	22,333	23,857	6.8%	7.0%	2.9%
Asparagus	14,085	24,136	21,465	22,392	22,887	2.2%	62.5%	2.8%
Rutabagas and turnips	14,770	21,719	18,532	22,024	21,495	-2.4%	45.5%	2.7%
Peas	23,608	24,056	16,346	17,327	20,111	16.1%	-14.8%	2.5%
Pumpkins	12,345	15,277	15,339	16,956	17,586	3.7%	42.5%	2.2%
Shallots	20,225	24,225	14,301	15,907	15,938	0.2%	-21.2%	2.0%
Celery	13,852	13,382	15,562	12,369	14,587	17.9%	5.3%	1.8%
Beets	6,653	9,430	9,517	13,922	12,189	-12.4%	83.2%	1.5%
Radishes	9,865	11,578	11,481	10,739	10,839	0.9%	9.9%	1.3%
Spinach	5,280	7,512	8,015	6,681	8,712	30.4%	65.0%	1.1%
Leeks	5,135	7,786	7,217	7,953	7,541	-5.2%	46.9%	0.9%
Brussels sprouts	7,385	6,950	n/a	7,331	7,475	2.0%	1.2%	0.9%
Other melons	6,360	7,013	7,114	6,250	7,469	19.5%	17.4%	0.9%
Watermelon	3,545	5,361	7,242	7,409	6,901	-6.9%	94.7%	0.9%
Garlic	2,255	2,989	2,617	6,190	6,593	6.5%	192.4%	0.8%
Parsnips	3,270	3,929	4,752	5,966	6,574	10.2%	101.0%	0.8%
Parsley	2,125	3,218	3,155	2,820	3,430	21.6%	61.4%	0.4%
Rhubarb	1,310	1,670	1,797	2,194	2,760	25.8%	110.7%	0.3%
Total	641,957	769,539	753,348	775,137	809,331	4.4%	26.1%	

Source: Statistics Canada. Table001-0013 — Area, production and farm gate value of vegetables, annual, CANSIM (database). (accessed: 2014-01-07)

1. Includes Chinese cabbage and regular cabbage.
2. Includes baby carrots and regular carrots.
3. Includes leaf lettuce and head lettuce.

3.3.1.2 Canadian Field Vegetable Production

While tomato production volumes have moderately increased in the last year (2012) this has followed four previous periods of declining production with the net result that as of 2012 overall tomato production is 13% less than it was five years prior. Despite this decline, on a volume basis tomatoes do account for close to one quarter of Canadian tonnage of vegetables produced. The contrary situation is observed for carrots whereby, after four periods of volume increases, 2012 registered a moderate decline of 5%. With an overall five year progression of 44% carrots now stand at one fifth of the Canadian marketplace in terms of volumes produced.

Canadian Farm Production — Vegetables by Commodity (Tons)								
Commodity	2008	2009	2010	2011	2012	Change 1 Yr.	Change 5 Yrs.	% of 2012 Tons
Tomatoes	620,748	553,678	543,054	519,876	539,871	3.8%	-13.0%	23.4%
Carrots ²	305,420	397,050	456,778	464,245	439,902	-5.2%	44.0%	19.1%
Corn	251,909	255,383	239,797	235,379	227,851	-3.2%	-9.6%	9.9%
Dry onions	206,233	238,564	218,113	212,855	220,398	3.5%	6.9%	9.6%
Cabbage ¹	157,930	162,691	167,805	179,733	182,289	1.4%	15.4%	7.9%
Lettuce ³	77,623	87,571	76,575	69,510	71,023	2.2%	-8.5%	3.1%
Pumpkins	52,628	57,217	52,534	63,972	70,591	10.3%	34.1%	3.1%
Beans	61,086	53,860	52,991	48,392	56,677	17.1%	-7.2%	2.5%
Peppers	46,275	46,953	51,467	51,163	55,934	9.3%	20.9%	2.4%
Rutabagas and turnips	44,793	54,614	52,308	61,987	55,177	-11.0%	23.2%	2.4%
Cucumbers	46,954	74,797	59,492	49,323	54,146	9.8%	15.3%	2.3%
Peas	79,486	66,241	49,587	47,425	46,548	-1.8%	-41.4%	2.0%
Beets	25,113	29,123	28,108	34,689	42,305	22.0%	68.5%	1.8%
Broccoli	35,740	46,944	42,910	37,222	38,407	3.2%	7.5%	1.7%
Squash and zucchinis	23,770	31,855	33,445	35,321	36,539	3.4%	53.7%	1.6%
Cauliflower	34,280	35,912	35,710	31,977	33,730	5.5%	-1.6%	1.5%
Celery	36,433	37,107	36,161	32,567	31,039	-4.7%	-14.8%	1.3%
Watermelon	11,060	16,037	20,626	19,902	25,295	27.1%	128.7%	1.1%
Other melons	13,045	14,415	13,219	12,497	15,785	26.3%	21.0%	0.7%
Radishes	10,470	14,008	14,218	12,737	13,777	8.2%	31.6%	0.6%
Shallots	17,135	19,850	11,437	12,085	11,699	-3.2%	-31.7%	0.5%
Parsnips	4,738	5,428	5,583	6,316	8,263	30.8%	74.4%	0.4%
Brussels sprouts	6,890	9,341	5,487	7,148	7,014	-1.9%	1.8%	0.3%
Asparagus	5,253	8,660	6,860	7,275	6,877	-5.5%	30.9%	0.3%
Spinach	4,348	5,851	6,276	4,429	5,695	28.6%	31.0%	0.2%
Leeks	4,558	7,413	5,814	5,633	4,881	-13.3%	7.1%	0.2%
Parsley	1,435	2,194	2,089	1,443	2,423	67.9%	68.9%	0.1%
Rhubarb	1,688	2,242	2,296	1,778	2,057	15.7%	21.9%	0.1%
Garlic	568	743	520	843	883	4.7%	55.5%	0.0%
Total	2,187,609	2,335,742	2,291,260	2,267,722	2,307,076	1.7%	5.5%	

Source: Statistics Canada. Table001-0013 — Area, production and farm gate value of vegetables, annual, CANSIM (database). (accessed: 2014-01-07)

1. Includes Chinese cabbage and regular cabbage
2. Includes baby and regular carrots
3. Includes leaf lettuce and head lettuce.

It is interesting to observe that the top six commodities on a production volume basis are the same as those listing on a Farm Gate Value basis. On a production volume basis these top six vegetables account for 73% of total volumes produced in 2012 and 52% of Farm Gate Values.

Canadian Vegetables by Commodity

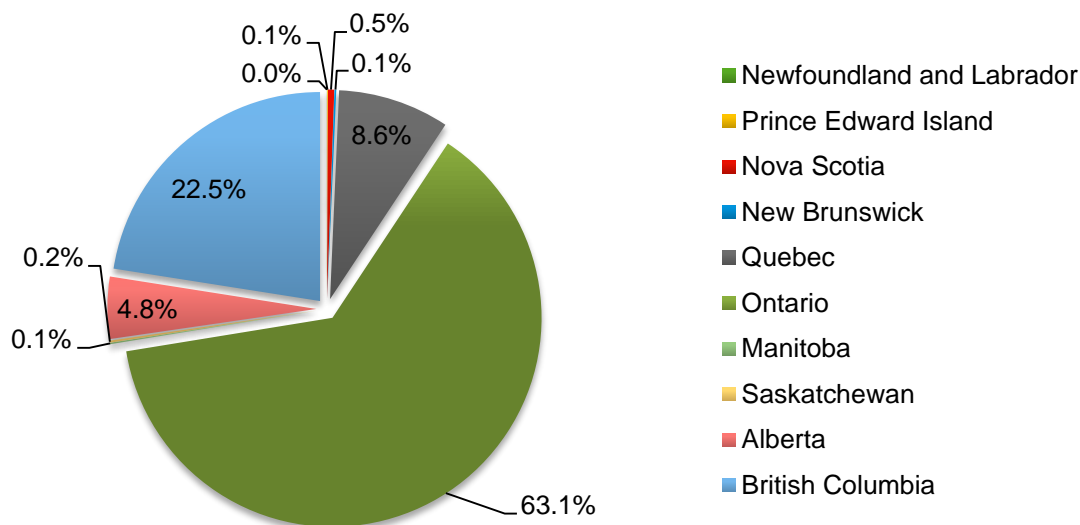
Commodity	Change 2008 to 2012	
	Volume (Tons)	Farm Gate Value
Tomatoes	-13.0%	38.1%
Carrots	44.0%	7.6%
Corn	-9.6%	17.5%
Dry onions	6.9%	22.8%
Cabbage	15.4%	48.3%
Lettuce	-8.5%	10.5%

Among the top six commodities in terms of FGV and tonnage a number of different patterns are distinguishable over the 2008 to 2012 period. While the increased FVG for tomatoes during the period was among the highest within the group the volume of tomatoes also decreased the most. This same general trend was noted with corn and lettuce but to successively lesser degrees. Presenting an opposite scenario, carrots increased in tonnage the most but, at only 7.6% over five years, the least in FGV. From 2008 to 2012 cabbage fared very well over both fronts of FGV registering a 48% increase, the highest of all, as well as volume at 15%, close to three times the national average volume increase.

3.3.2 Greenhouse Vegetables

Over the five year period of 2008 to 2012, Ontario has consistently accounted for over 60% of greenhouse vegetable marketplace followed by British Columbia at 22.5% and Quebec at around 9%. There has been a slow but gradual gain in Ontario's share of the Canadian greenhouse vegetable farm cash receipts marketplace (60% in 2008 to 63% in 2012). The opposite has been true for British Columbia where in 2012 they account for 22.5% of the marketplace while in 2008 they stood at 25.4%.

2012 Greenhouse Vegetable Farm Cash Receipts Distribution



Greenhouse Vegetables - Farm Cash Receipts, Annual (Dollars x 1,000)

	2012 Provincial Share	2008	2009	2010	2011	2012
Canada		880,584	980,262	1,064,731	1,116,691	1,066,480
Newfoundland and Labrador	0.0%	190	209	214	144	83
Prince Edward Island	0.1%	256	455	356	413	673
Nova Scotia	0.5%	6,717	7,156	4,983	6,126	5,138
New Brunswick	0.1%	364	432	1,210	1,364	1,472
Quebec	8.6%	84,625	82,808	95,095	96,313	91,858
Ontario	63.1%	529,964	608,037	666,749	700,014	673,272
Manitoba	0.1%	406	558	972	1,082	1,182
Saskatchewan	0.2%	822	850	1,131	1,267	1,616
Alberta	4.8%	33,699	33,818	41,554	43,733	51,068
British Columbia	22.5%	223,542	245,938	252,466	266,235	240,119

Source: Statistics Canada. Table002-0001 — Farm cash receipts, annual (dollars), CANSIM (database). (accessed: 2014-01-03)

Ontario's Greenhouse Sector

Ontario has experienced an overall 52% increase in greenhouse FGV over the period of 2008 to 2013 and this increase has taken place relatively evenly across the three primary commodity types. The distribution among commodities over this time has thus remained generally the same at 40% for tomatoes, 31% for peppers and 29% for cucumbers. While 2012 saw FGV recede slightly for each of the commodities except peppers, 2013 has come in at double digit increases across the board.

Farm Gate Value (FGV) of Greenhouse Vegetables — Canada and Provinces

	Commodity	2008	2009	2010	2011	2012	2013
Ontario	Tomatoes	216,579,000	260,262,240	275,859,120	281,397,825	262,554,240	315,076,265
	Cucumbers	150,658,000	188,377,390	198,863,070	216,783,980	206,683,805	224,969,989
	Lettuce	x	4,738,925	F	F	F	F
	Peppers	149,563,000	143,797,020	176,483,165	189,114,155	209,145,250	242,907,302
	Total	516,800,000	597,175,575	651,205,355	687,295,960	678,383,295	782,953,556

Source: Statistics Canada. Table 001-0006 - Production and value of greenhouse vegetables, annual, CANSIM (database). (accessed: 2014-04-25)

British Columbia's Greenhouse Sector

While all commodities experienced growth during the period of 2008 to 2013, peppers led the trend with a 71% increase, followed respectively by tomatoes and cucumbers at 17% and 13%. These combined figures provided for an overall increase of BC's greenhouse FGV of 36% over the time period. From a distribution standpoint, peppers today account for 46% of BC's greenhouse FGV and tomatoes account for 39%; the opposite was the case in 2008 when tomatoes accounted for 45% and peppers for 36%. Lettuce's relative volume to the whole of provincial greenhouse FGV has remained generally stable at 15% of the total.

Farm Gate Value (FGV) of Greenhouse Vegetables — Canada and Provinces

	Commodity	2008	2009	2010	2011	2012	2013
British Columbia	Tomatoes	100,442,300	121,301,910	113,811,015	115,711,830	94,141,000	117,068,000
	Cucumbers	40,446,240	37,792,315	38,139,220	40,533,810	39,447,665	45,728,771
	Lettuce	F	F	F	x	x	x
	Peppers	80,128,250	84,200,000	95,426,900	102,993,140	97,460,000	136,995,000
	Total	221,016,790	243,294,225	247,377,135	259,238,780	231,048,665	299,791,771

Source: Statistics Canada. Table 001-0006 - Production and value of greenhouse vegetables, annual, CANSIM (database). (accessed: 2014-04-25)

Quebec's Greenhouse Sector

Tomatoes dominate Quebec's greenhouse sector with 76% of this Province's greenhouse FGV in 2013. Tomato FGV has however remained stagnant over the period; while there was an increase of 14% in 2010, subsequent periods all but eliminated these increases and the FGV for this commodity in 2013 is at the same provincial level as it was in 2008. Overall it would appear that Quebec has increased greenhouse FGVs by approximately 33% during the period however this is mostly due to the new reporting of lettuce values which was not present prior to 2012. Quebec provides an important portion of overall Canadian greenhouse FGVs for lettuce (72% of total Canadian) and as this province's second greenhouse commodity of importance, an increase of 13% in FGV for 2013 over 2012 could be considered a good sign.

Farm Gate Value (FGV) of Greenhouse Vegetables — Canada and Provinces

	Commodity	2008	2009	2010	2011	2012	2013
Quebec	Tomatoes	60,465,800	60,778,180	69,355,835	68,697,620	61,682,730	60,425,727
	Cucumbers	3,135,600	2,839,740	3,535,015	3,283,520	3,322,700	3,895,729
	Lettuce	F	14,791,620	F	F	15,302,675	17,225,385
	Peppers	F	x	F	F	605,230	3,164,050
	Total	63,601,400	78,409,540	72,890,850	71,981,140	80,913,335	84,710,891

Source: Statistics Canada. Table 001-0006 — Production and value of greenhouse vegetables, annual, CANSIM (database). (accessed: 2014-04-25)

Alberta's Greenhouse Sector

Overall, Alberta's greenhouse FGV has experienced an increase of 63% from 2008 to 2013. The most influential commodity to this increase is cucumbers, having recorded an increase over the same period of 65%, though a veritable doubling of tomato FGVs has also contributed significantly. Alberta's greenhouse sector is dominated by cucumbers at 58% of the provincial figures followed by tomatoes at 30%.

Farm Gate Value (FGV) of Greenhouse Vegetables — Canada and Provinces

	Commodity	2008	2009	2010	2011	2012	2013
Alberta	Tomatoes	8,188,700	10,232,050	12,500,420	12,927,120	13,400,110	15,905,195
	Cucumbers	18,621,700	15,500,000	22,496,400	22,486,280	30,692,200	30,657,559
	Lettuce	F	F	F	F	475,065	435,382
	Peppers	5,744,450	6,500,000	5,735,900	6,965,115	5,977,750	5,976,437
	Total	32,554,850	32,232,050	40,732,720	42,378,515	50,545,125	52,974,573

Source: Statistics Canada. Table 001-0006 - Production and value of greenhouse vegetables, annual, CANSIM (database). (accessed: 2014-04-25)

3.3.2.1 Greenhouse Farm Gate Value by Commodity Type

On a Canada wide basis, all greenhouse vegetable commodities recorded increases in FGV during all periods except for 2012 when all except peppers recorded a nominal decrease. Over the whole period this has produced a significant increase of 65% in pepper FGVs as well as 44% for cucumbers and 31% for tomatoes contributing as a whole to a 43% increase in overall greenhouse FGVs in Canada.

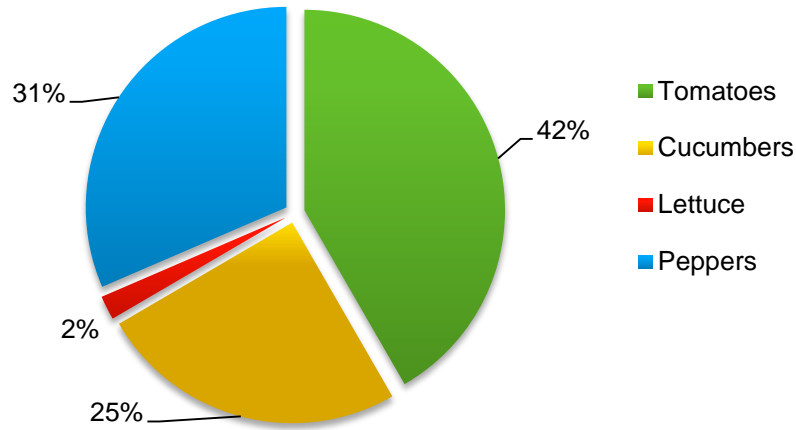
In 2013, greenhouse tomatoes account for 42% of total Canadian greenhouse FGV of \$1.24 billion dollars. This is slightly less than the 45% portion that tomatoes occupied in 2008 and the shift appears to have been in favor of greenhouse peppers that now account for 31% of total greenhouse FGV in 2013 while they registered at 27% in 2008. Both cucumbers (25%) and lettuce (2%) have remained at their same relative weight to the whole in 2013 as they were in 2008.

Farm Gate Value (FGV) of Greenhouse Vegetables — Canada and Provinces

	Commodity	2008	2009	2010	2011	2012	2013
Canada	Tomatoes	392,265,700	458,681,260	476,765,120	484,933,952	437,649,175	515,508,778
	Cucumbers	214,232,530	246,484,705	264,584,355	284,521,840	281,791,069	308,146,975
	Lettuce	20,052,775	21,905,045	23,265,220	26,555,268	23,183,570	24,004,168
	Peppers	235,807,000	235,161,600	278,123,295	299,612,440	313,357,260	389,333,022
	Total	862,358,005	962,232,610	1,042,737,990	1,095,623,500	1,055,981,074	1,236,992,943

Source: Statistics Canada. Table 001-0006 - Production and value of greenhouse vegetables, annual, CANSIM (database). (accessed: 2014-04-25)

2013 Farm Gate Value (FGV) of Greenhouse Vegetables Canada - By Commodity



Canadian Greenhouse Tomatoes

Between 2008 and 2011 greenhouse tomatoes FGV progressed by 24% and then in 2012 declined by 10%. 2013 saw an 18% resurgence of greenhouse tomatoes FGV to \$515.5 million dollars, standing at 31% higher than what was recorded in 2008.

Ontario clearly is the largest greenhouse tomato producer garnering 61% of FGVs for 2013. Based on a gain of 45% in FGV from 2008 to 2013, Ontario has seen its greenhouse tomato producer's move from 55% of the total in 2008 to today's 61%. British Columbia is the second largest producer of greenhouse tomatoes with just about a quarter of the FGV for 2013 after having registered a 19% decline the year prior.

Farm Gate Value (FGV) of Greenhouse Vegetables — by Commodity

TOMATOES	2008	2009	2010	2011	2012	2013
Canada	392,265,700	458,681,260	476,765,120	484,933,952 ^r	437,649,175	515,508,778
Newfoundland and Labrador	F	16,590 ^E	24,000	9,815	22,140 ^E	26,717
Prince Edward Island	x	x	x	x	F	F
Nova Scotia	F	x	3,747,145 ^E	F	3,568,420	4,695,795
New Brunswick	x	145,000 ^E	x	x	F	114,957
Quebec	60,465,800 ^E	60,778,180	69,355,835 ^E	68,697,620 ^E	61,682,730	60,425,727
Ontario	216,579,000	260,262,240	275,859,120	281,397,825 ^r	262,554,240 ^r	315,076,265
Manitoba	F	330,350	547,690 ^E	723,652 ^E	650,835	703,203
Saskatchewan	373,700	338,950	467,960	398,330	F	645,942
Alberta	8,188,700	10,232,050	12,500,420	12,927,120	13,400,110	15,905,195
British Columbia	100,442,300	121,301,910	113,811,015 ^E	115,711,830	94,141,000 ^r	117,068,000

Source: Statistics Canada. Table 001-0006 — Production and value of greenhouse vegetables, annual, CANSIM (database). (accessed: 2014-04-25)

Symbol legend:

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(T)=Series is Terminated

Canadian Greenhouse Peppers

Peppers have gained significantly in presence within the marketplace over the last years. Based on successive year over year increases, and most recently a 24% increase registered in 2013 alone, overall, peppers have progressed by 65% from 2008 to 2013.

Apart from small production figures in Alberta and Quebec, almost two thirds of Canada's greenhouse peppers are produced in Ontario (62%) and one third in British Columbia (35%). Both these provinces have experienced significant growth numbers during the 2008 to 2013 period with BC gaining some ground with a rise of 71% over time while Ontario increased by 62%.

Farm Gate Value (FGV) of Greenhouse Vegetables — by Commodity						
PEPPERS	2008	2009	2010	2011	2012	2013
Canada	235,807,000	235,161,600	278,123,295	299,612,440 ^r	313,357,260	389,333,022
Newfoundland and Labrador	o	F	7,475 ^E	4,720	F	F
Prince Edward Island	x	x	x	2,250 ^E	x	x
Nova Scotia	19,900 ^E	F	F	F	x	181,480
New Brunswick	F	F	F	x	F	F
Quebec	F	x	F	F	605,230	3,164,050
Ontario	149,563,000	143,797,020	176,483,165	189,114,155	209,145,250 ^r	242,907,302
Manitoba	F	7,960 ^E	F	x	x	x
Saskatchewan	x	83,130	x	135,290 ^{Er}	F	80,502
Alberta	5,744,450	6,500,000	5,735,900	6,965,115	5,977,750	5,976,437
British Columbia	80,128,250	84,200,000	95,426,900	102,993,140	97,460,000 ^r	136,995,000

Source: Statistics Canada. Table 001-0006 — Production and value of greenhouse vegetables, annual, CANSIM (database). (accessed: 2014-04-25)

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Canadian Greenhouse Cucumbers

Ontario produced close to three quarters of the country's greenhouse cucumbers in 2013 with the remainder originating essentially from British Columbia (15%) and then Alberta (10%). While BC used to produce about 20% of greenhouse cucumber FGV, a modest increase of only 13% over the 2008 to 2013 period now places them at about 15% of the market. Ontario has seen its cucumber FGV increase by 49% over the time period while Alberta, albeit from a smaller base figure, has recorded a 65% increase.

On the whole, at \$308.2 million dollars, greenhouse cucumber FGV is today 44% higher than it was in 2008. This progress is also characterized by a moderate but steady trend in increases over time generally as opposed to the peaks and valleys of other commodities movements.

Farm Gate Value (FGV) of Greenhouse Vegetables — by Commodity						
CUCUMBERS	2008	2009	2010	2011	2012	2013
Canada	214,232,530	246,484,705	264,584,355	284,521,840 ^r	281,791,069	308,146,975
Newfoundland and Labrador	x	2,240 ^E	2,385	4,525	F	10,919
Prince Edward Island	x	x	0	F	x	x
Nova Scotia	F	F	1,140,540	1,039,050	1,130,340	2,400,334
New Brunswick	F	x	F	F	F	x
Quebec	3,135,600	2,839,740	3,535,015 ^E	3,283,520 ^E	3,322,700	3,895,729
Ontario	150,658,000	188,377,390	198,863,070	216,783,980	206,683,805 ^r	224,969,989
Manitoba	F	36,140 ^E	F	F	x	x
Saskatchewan	F	217,270	325,345	280,860 ^E	398,095	397,488
Alberta	18,621,700	15,500,000	22,496,400	22,486,280 ^r	30,692,200	30,657,559
British Columbia	40,446,240	37,792,315	38,139,220	40,533,810 ^r	39,447,665	45,728,771

Source: Statistics Canada. Table 001-0006 — Production and value of greenhouse vegetables, annual, CANSIM (database). (accessed: 2014-04-25)

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Canadian Greenhouse Lettuce

The smallest of greenhouse vegetable crops in terms of FGV, greenhouse lettuce has generally followed a trend of modest but steady increases each year over the time period of 2008 to 2013 and today FGV is 20% higher than in 2008.

Quebec is the primary producer of greenhouse lettuce within the country with just over 70% of total Canadian FGV and while it is difficult to know with certainty how the province fared over time because of the lack of available data, it appears that Quebec has followed the same generally trend of a 20% increase over the time period.

Farm Gate Value (FGV) of Greenhouse Vegetables — by Commodity						
LETTUCE	2008	2009	2010	2011	2012	2013
Canada	20,052,775	21,905,045	23,265,220E	26,555,268Er	23,183,570	24,004,168
Newfoundland and Labrador	x	x	x	F	F	35,931
Prince Edward Island	x	x	F	4,200r	F	14,525
Nova Scotia	13,400	F	F	F	F	24,519
New Brunswick	F	x	F	x	F	x
Quebec	F	14,791,620	F	F	15,302,675	17,225,385
Ontario	x	4,738,925E	F	F	F	F
Manitoba		F	F	x	x	x
Saskatchewan	F	x	x	32,180Er	x	69,572
Alberta	F	F	F	F	475,065	435,382
British Columbia	F	F	F	x	x	x

Source: Statistics Canada. Table 001-0006 — Production and value of greenhouse vegetables, annual, CANSIM (database). (accessed: 2014-04-25)

Symbol legend:

r=Revised

E=Use with caution

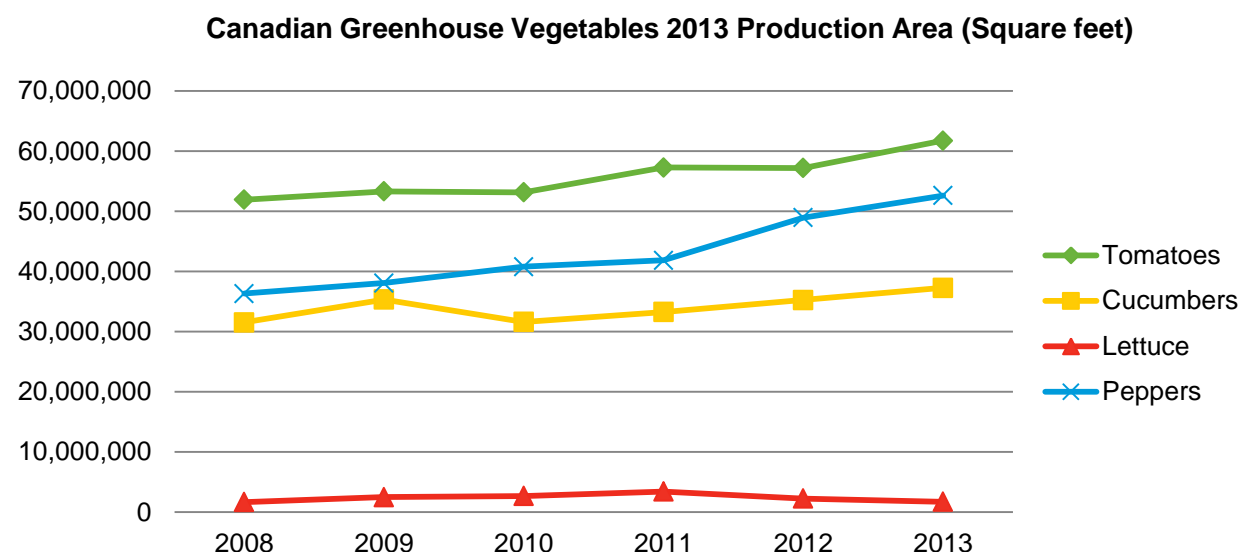
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3.3.2.2 Greenhouse Production Area and Volumes

Greenhouse Production Area



On a Canada wide basis pepper production areas have increased the most with a 2008 to 2013 period increase of 45%. This increase was achieved successively over each year including an 8% increase in the last period of 2012 to 2013. Tomato square footage increased by 19% over the period followed by cucumbers at 18% in total after having suffered an 11% decrease in 2010 to then rebound back upwards..

Production Area — Canadian Greenhouse Vegetables (Square Feet)

	2008	2009	2010	2011	2012	2013
Tomatoes	51,931,400	53,306,260	53,143,280	57,277,815r	57,195,485r	61,745,884
Cucumbers	31,515,910	35,320,880	31,594,260	33,258,395	35,240,870r	37,272,091
Lettuce	1,673,096E	2,485,530	2,675,665E	3,417,100r	2,248,722r	1,723,139
Peppers	36,309,090	38,081,310	40,769,060	41,847,270r	48,935,520r	52,607,714

Production Area — Canadian Greenhouse Vegetables (Square Metres)

	2008	2009	2010	2011	2012	2013
Tomatoes	4,824,583	4,952,311	4,937,170	5,321,281r	5,313,632r	5,736,378
Cucumbers	2,927,923	3,281,416	2,935,202	3,089,805	3,273,983r	3,462,689
Lettuce	155,436E	230,913	248,577E	317,459r	208,913r	160,085
Peppers	3,373,223	3,537,868	3,787,568	3,887,737r	4,546,257r	4,887,414

Source: Statistics Canada. Table 001-0006 — Production and value of greenhouse vegetables, annual, CANSIM (database). (accessed: 2014-05-06)

Symbol legend:

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Greenhouse tomato production area incurred an overall 18% rise in total square footage between 2008 and 2013 with Ontario accounting for a majority of this increase; Ontario increased by 21% in total however accounts for 64% of total square footage thus the increase was more significant to the whole. Quebec's production area for tomatoes increased by 48% over the period, though their weight to the whole is much

lower than Ontario's so this had less of an influence on a Canada wide basis. Tomato production area in British Columbia has suffered continuous declines since 2010 and registered the 2008 to 2013 period with an overall reduction of 6% in total square footage.

Production Area — Greenhouse Tomatoes (Square Metres)

	2008	2009	2010	2011	2012	2013
Canada	4,824,583	4,952,311	4,937,170	5,321,281 ^r	5,313,632 ^r	5,736,378
Newfoundland and Labrador	1,723 ^E	1,572	2,285	889	1,712 ^E	1,645
Prince Edward Island	x	x	x	x	F	F
Nova Scotia	F	x	41,887	40,093	37,599	46,203
New Brunswick	x	3,047	x	x	F	F
Quebec	542,981	514,694	546,260	576,489	574,533	802,360
Ontario	3,019,440	3,165,409	3,080,587	3,471,940	3,484,956 ^r	3,666,893
Manitoba	5,528	4,198	7,056 ^E	7,055	6,778	6,595
Saskatchewan	5,035 ^E	3,753 ^E	5,639	3,929	F	9,128
Alberta	85,471	92,903	128,779	131,134	152,439 ^r	156,390
British Columbia	1,100,873	1,110,255	1,116,709 ^E	1,081,391 ^r	1,032,000 ^r	1,037,000

Source: Statistics Canada. Table 001-0006 — Production and value of greenhouse vegetables, annual, CANSIM (database). (accessed: 2014-05-06)

Symbol legend:

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Ontario's cucumber production area has increase by 18% between 2008 and 2013 mostly based on an increase of 20% from Ontario and the fact that Ontario accounts for 75% of total Canadian production square footage. As with greenhouse tomatoes, British Columbia has experienced a declining trend in greenhouse cucumber area recording a 7% decline between 2008 and 2013.

Production Area — Greenhouse Cucumbers (Square Metres)

	2008	2009	2010	2011	2012	2013
Canada	2,927,923	3,281,416	2,935,202	3,089,805	3,273,983 ^r	3,462,689
Newfoundland and Labrador	x	133 ^E	152	34 ¹	353 ^r	364
Prince Edward Island	x	x	0	F	x	x
Nova Scotia	F	F	11,254	12,757	13,955	18,407
New Brunswick	F	x	F	F	F	x
Quebec	104,023	94,649 ^E	94,293	74,207 ^E	97,067	106,345
Ontario	2,172,722	2,609,642	2,143,373	2,319,377	2,448,065 ^r	2,610,971
Manitoba	F	671	668 ^E	731	x	x
Saskatchewan	F	2,393	4,014	3,819 ^E	4,301 ^E	4,221
Alberta	188,811	157,935	279,929	282,474	292,035	308,245
British Columbia	445,470	393,984	400,831	395,126	416,258	413,000

Source: Statistics Canada. Table 001-0006 — Production and value of greenhouse vegetables, annual, CANSIM (database). (accessed: 2014-05-06)

Symbol legend:

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After surging in total production area in each year through to 2011, greenhouse lettuce areas then diminished dramatically over the subsequent periods of 2012 (-34%) and 2013 (-23%) and today stand at a little over 3% rise for the whole of 2008 to 2013. While there have been certain nominal increases in production area for lettuce over the period, Quebec's decline of 8% has affected the Canadian landscape.

Production Area — Greenhouse Lettuce (Square Metres)						
	2008	2009	2010	2011	2012	2013
Canada	155,436E	230,913	248,577E	317,459r	208,913r	160,085
Newfoundland and Labrador	x	x	F	F	143	212
Prince Edward Island	x	F	F	122	F	1,236E
Nova Scotia	1,236	1,799E	F	F	F	F
New Brunswick	F	x	F	x	F	x
Quebec	114,215E	161,951	F	F	127,455	104,585
Ontario	24,433E	36,859	F	F	F	F
Manitoba		418E	F	x	x	x
Saskatchewan	F	F	F	F	274	839
Alberta	F	F	5,978E	F	3,586	3,621
British Columbia	F	F	F	15,974E	x	19,640

Source: Statistics Canada. Table 001-0006 — Production and value of greenhouse vegetables, annual, CANSIM (database).
(accessed: 2014-05-06)

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Greenhouse peppers have recorded successive periods of healthy production area increases and in 2013 stands 45% higher than the total area for 2008. In 2013, 65% of total production area for peppers is located in Ontario, largely due to an increase of 57% in total area for the 2008 to 2013 period. British Columbia, representing 31% of total greenhouse pepper production area in Canada, also registered a 23% increase over time.

Production Area — Greenhouse Peppers (Square Metres)						
	2008	2009	2010	2011	2012	2013
Canada	3,373,223	3,537,868	3,787,568	3,887,737 ^r	4,546,257 ^r	4,887,414
Newfoundland and Labrador	0	255 ^E	271	279	314 ^E	426
Prince Edward Island	x	x	x	120	x	x
Nova Scotia	1,858 ^E	748 ^E	F	F	F	2,701
New Brunswick	F	279 ^E	F	x	x	F
Quebec	F	x	F	F	14,747	46,115 ^E
Ontario	2,074,338	2,196,274	2,487,253	2,469,321	3,013,393 ^r	3,259,085
Manitoba	F	383 ^E	F	x	x	x
Saskatchewan	x	1,095	x	1,541 ^E	F	1,062
Alberta	63,378	83,613	67,897	92,485	71,953 ^r	72,839
British Columbia	1,226,320	1,244,900	1,219,417	1,313,046 ^r	1,441,999 ^r	1,503,999

Source: Statistics Canada. Table 001-0006 — Production and value of greenhouse vegetables, annual, CANSIM (database). (accessed: 2014-05-06)

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Greenhouse Production Volume

Ontario's greenhouse tomato production volumes have increase 40% between 2008 and 2013 and British Columbia's has seen a more moderate increase of 17%. These numbers have combined to produce an overall Canadian increase of 31% for the period. The increases have been steady year over year on all fronts except for British Columbia who experienced a small decline in 2012 but appears to have rebounded with figures reported for 2013. On a volume basis, Ontario represents today 67% of total Canadian greenhouse tomatoes while British Columbia and Quebec provide for respectively 22% and 8%. The landscape has shifted somewhat towards Ontario in this regard as in 2008 they accounted for 63% while British Columbia came in at 25% and Quebec at 10%.

Production Volume — Greenhouse Tomatoes (Kilograms)						
	2008	2009	2010	2011	2012	2013
Canada	217,827,870	242,547,119	251,130,762	266,481,331r	272,992,343r	286,221,330
Newfoundland and Labrador	F	6,033E	8,165	4,237	8,732E	6,807
Prince Edward Island	x	x	x	x	F	F
Nova Scotia	F	x	1,541,890E	F	1,437,296	1,989,164
New Brunswick	x	56,245E	x	x	F	24,824E
Quebec	20,981,187E	20,352,454	24,482,208E	22,467,605	22,659,485	21,840,566
Ontario	136,487,305	155,458,624	156,506,439	170,546,656r	181,352,541r	190,494,608
Manitoba	F	83,969	145,172E	169,095E	161,905	177,887
Saskatchewan	78,517E	62,156	86,804	75,598E	F	127,942
Alberta	4,023,591	4,902,982	6,122,406	7,182,871	6,974,702	8,210,923
British Columbia	53,742,191	59,441,751	62,054,040E	64,129,726	59,894,457	63,024,453

Source: Statistics Canada. Table 001-0006 — Production and value of greenhouse vegetables, annual, CANSIM (database). (accessed: 2014-05-06)

Symbol legend:

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The distribution within Canada of greenhouse cucumber production volumes has changed very little between 2011 and 2013 (figures are not provided previous) with Ontario registering at 78% of the total, British Columbia at 14% and Alberta at 6%. Overall Canada has increased its volumes of produced greenhouse cucumbers by 14% since 2011 with British Columbia, having experienced a 34% rise, being the major contributor to this expansion. While Alberta's volumes surged in 2012, reported figures for 2013 demonstrate a significant decline from the year prior; the 2011 to 2013 period combined eventually has seen Alberta decline by 11% over what had been produced in 2011.

Production Volume — Greenhouse Cucumbers (Kilograms)						
	2008	2009	2010	2011	2012	2013
Canada				152,452,672 ^r	166,731,015 ^r	173,268,152
Newfoundland and Labrador				1,610	F	5,198 ^E
Prince Edward Island				F	x	x
Nova Scotia				347,037	505,742	746,756
New Brunswick				F	F	F
Quebec				F	F	1,390,244
Ontario				119,529,437 ^r	127,663,072 ^r	135,949,514
Manitoba				20,462 ^E	x	x
Saskatchewan				F	86,194	72,036
Alberta				11,676,847 ^r	14,013,117	10,433,570
British Columbia				18,451,582 ^r	21,806,873	24,643,076

Source: Statistics Canada. Table 001-0006 — Production and value of greenhouse vegetables, annual, CANSIM (database). (accessed: 2014-05-06)

Symbol legend:

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Lettuce production volumes, measured in heads, has experienced significant increases over time with 2013 figures of 30.8 million heads being 66% higher than what was produced in 2008. A large majority of greenhouse lettuce is produced in Quebec (72% in 2013) while, though it is difficult to determine exactly due to lack of statistical information, the remainder of production volumes would likely come from Ontario and British Columbia. What is discernable is that Quebec's volumes increased by 76% from 2008 to 2013 and they represent 72% of the market, thus we can surmised that other provincial volumes may have also risen but not nearly to the same degree.

Production Volume — Greenhouse Lettuce (Heads)						
	2008	2009	2010	2011	2012	2013
Canada	18,540,420	18,659,250	22,531,010E	27,589,505Er	26,990,540E	30,807,756
Newfoundland and Labrador	x	x	x	F	30,550	35,000
Prince Edward Island	x	x	F	1,625r	x	5,126E
Nova Scotia	3,400	F	F	F	F	9,611
New Brunswick	F	x	F	x	F	x
Quebec	F	12,642,065E	F	F	17,241,410E	22,246,038E
Ontario	x	3,306,350E	F	F	F	F
Manitoba		F	F	x	x	x
Saskatchewan	F	4,375	x	9,505E	6,780	18,561
Alberta	F	F	F	F	297,515	299,629
British Columbia	F	F	F	x	x	x

Source: Statistics Canada. Table 001-0006 — Production and value of greenhouse vegetables, annual, CANSIM (database). (accessed: 2014-05-06)

Symbol legend:
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Greenhouse pepper volumes are essentially divided two thirds in Ontario and one third in British Columbia with other provinces producing some nominal amounts. Overall, production volumes have progressed by 54% across the country since 2008 with Ontario registering a 57% growth and British Columbia recording a growth rate of 47%. Growth rates for greenhouse pepper production volumes have been generally steady over time except for recently (2012 and 2013) where in both Ontario and British Columbia surges have occurred.

Production Volume — Greenhouse Peppers (Kilograms)						
Geography	2008	2009	2010	2011	2012	2013
Canada	83,111,952	87,538,268	92,532,755	90,191,540	111,990,645 ^r	128,092,426
Newfoundland and Labrador	0	3,048 ^E	2,318 ^E	1,188	F	F
Prince Edward Island	x	x	x	311 ^E	x	x
Nova Scotia	F	2,050 ^E	F	F	x	26,620
New Brunswick	F	F	F	x	F	F
Quebec	F	x	F	F	117,673	F
Ontario	53,012,247	57,173,118	60,977,484	58,410,521	76,347,377 ^r	83,902,075
Manitoba	F	2,400	F	x	x	x
Saskatchewan	x	11,376	x	16,311 ^E	F	10,302
Alberta	1,538,495	2,199,923	1,598,464	2,165,130	2,127,142	1,489,717
British Columbia	28,461,787	27,986,649	29,838,136	29,513,441	33,371,276	41,853,297

Source: Statistics Canada. Table 001-0006 — Production and value of greenhouse vegetables, annual, CANSIM (database). (accessed: 2014-05-06)

Symbol legend:

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E-Use with caution

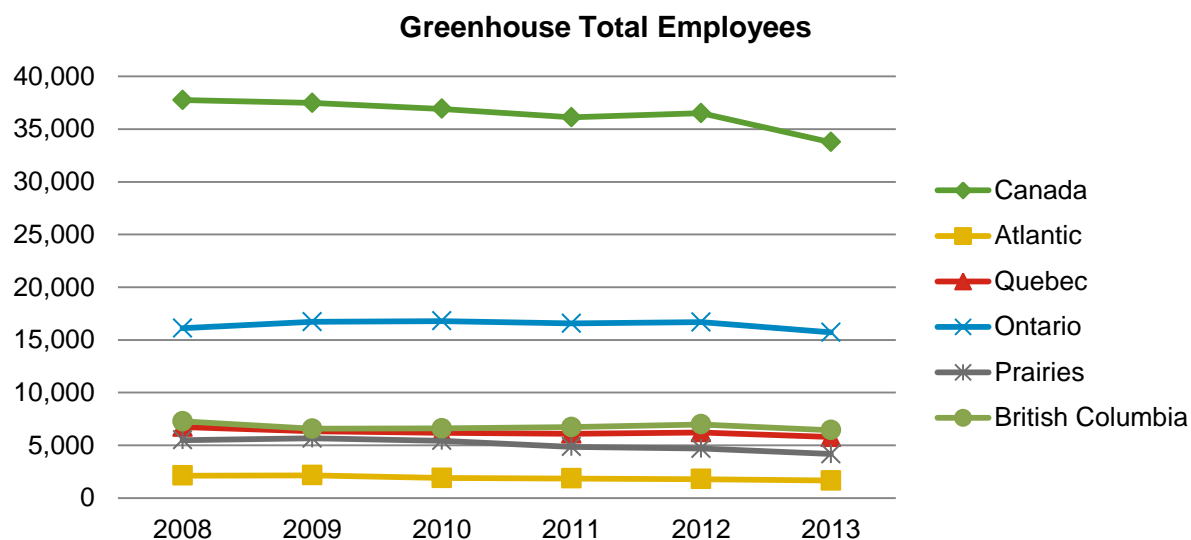
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3.3.2.3 Canadian Greenhouse Employment

In 2013 mixed operations greenhouse producers (vegetables, flowers, and plants) employed 33,761 people when considering both permanent and seasonal staff. This is 11% less employees as were reported in 2008 with a reported drop of 8% alone in the 2013 period.

Ontario accounts for 47% of total employees in 2013 followed by British Columbia (19%), Quebec (17%), and the Prairies at 12%. While total employees has remained relatively stable for Ontario over the 2008 to 2013 period (2% total decline), the Prairies and British Columbia have recorded important declines in terms of numbers, contributing to the overall Canadian reduced number of employees.



Greenhouse Total Employees, Annual (Number)

	2008	2009	2010	2011	2012	2013
Canada	37,745	37,475	36,915	36,110	36,506 ^r	33,761
Atlantic	2,125	2,165	1,900	1,860	1,796	1,656
Quebec	6,750	6,350	6,180	6,100	6,230	5,783
Ontario	16,100	16,720	16,790	16,565	16,685 ^r	15,707
Prairies	5,500	5,660	5,435	4,860	4,690	4,176
British Columbia	7,270	6,580	6,610	6,725	6,980	6,439

Source: Statistics Canada. Table 001-0054 — Total greenhouse, sod and nursery employees, annual (number), CANSIM (database). (accessed: 2014-05-07)

Symbol legend:

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Footnotes:

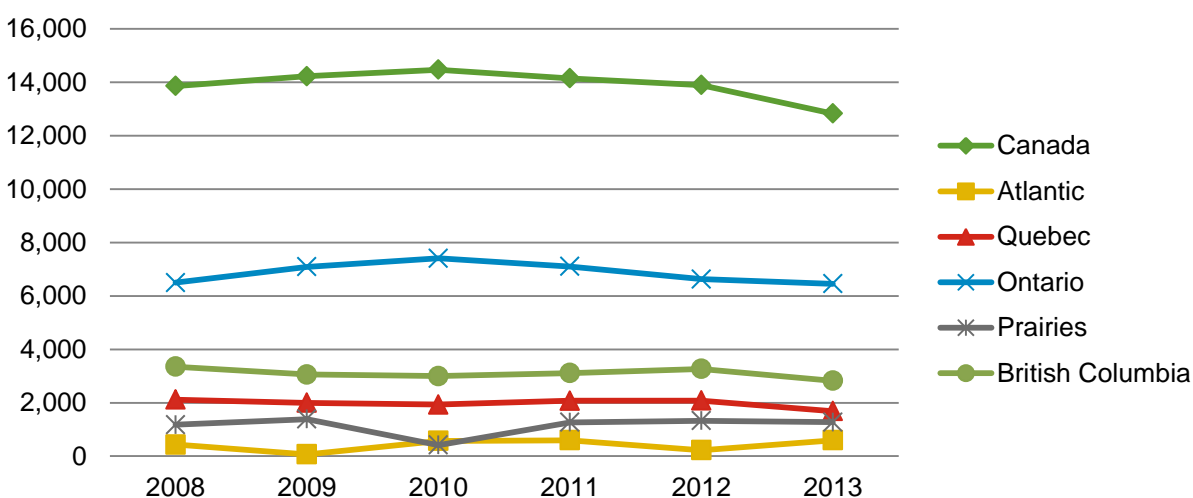
1=Includes mixed operations (vegetables, flowers and plants).

2=Seasonal employees who worked less than 8 months during the year.

3=Permanent employees who worked more than 8 months during the year.

In Quebec and the Prairies roughly 30% of total employees are hired permanently while in Ontario this number is about 40% and in British Columbia the number is approximately 45%. This general trend is present throughout the period of 2008 to 2013. In the Prairies the number of permanent staff has increase by 9% over the period whereby British Columbia and Quebec have each seen reductions of 16% and 21% respectively. Ontario initially saw an increase from 2008 to 2010 however this was followed by successive decreases that produced an overall 2008 to 2013 period decrease of 1%.

Greenhouse Total (Permanent) Employees



Greenhouse Total (Permanent) Employees, Annual (Number)

	2008	2009	2010	2011	2012	2013
Canada	13,860	14,225	14,470	14,150	13,899 ^r	12,832
Atlantic	435	70	570	595	226	594
Quebec	2,120	2,000	1,930	2,075	2,080	1,683
Ontario	6,500	7,090	7,405	7,105	6,628 ^r	6,453
Prairies	1,175	1,385	415	1,265	1,325	1,275
British Columbia	3,350	3,060	3,000	3,110	3,265	2,827

Source: Statistics Canada. Table 001-0054 — Total greenhouse, sod and nursery employees, annual (number), CANSIM (database). (accessed: 2014-05-07)

Symbol legend:

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Footnotes:

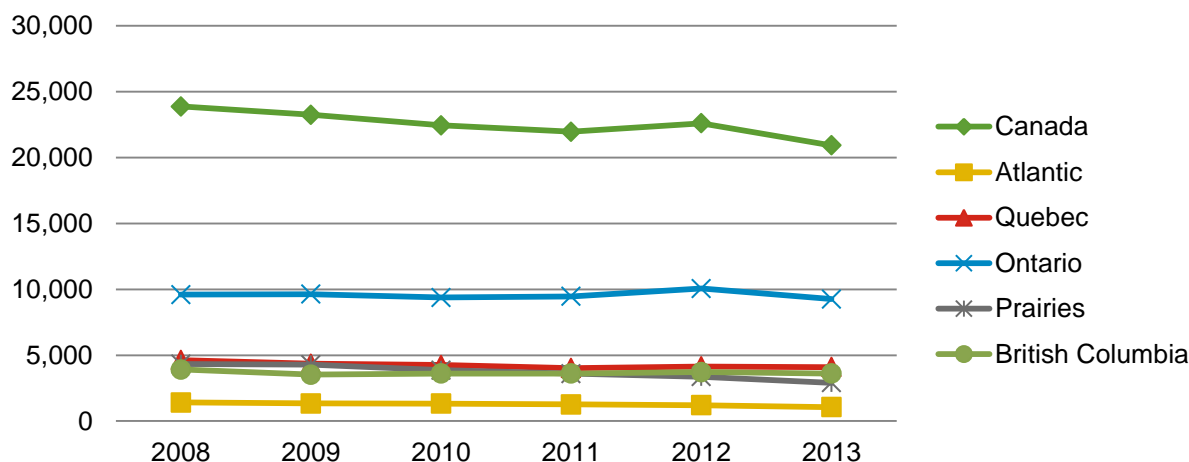
1=Includes mixed operations (vegetables, flowers and plants).

2=Seasonal employees who worked less than 8 months during the year.

3=Permanent employees who worked more than 8 months during the year.

Seasonal staff generally ranges between 55% and 70% of total employees for mixed greenhouse operators. At the lower end of the spectrum is British Columbia at 55% and at the higher end is Quebec at 70%. Generally speaking these ratios have been the same since 2008, except for a few anomalies. Except for Quebec, seasonal staff has declined at a higher rate than permanent staff, most notably in the Prairies that saw a 33% decline over the period of 2008 to 2013.

Greenhouse Total (Seasonal) Employees



Greenhouse Total (Seasonal) Employees, Annual (Number)

	2008	2009	2010	2011	2012	2013
Canada	23,885	23,250	22,445	21,960	22,607 ^r	20,928
Atlantic	1,410	1,345	1,330	1,265	1,205	1,061
Quebec	4,630	4,350	4,250	4,025	4,150	4,100
Ontario	9,600	9,630	9,385	9,460	10,057 ^r	9,254
Prairies	4,325	4,275	3,870	3,595	3,365	2,901
British Columbia	3,920	3,520	3,610	3,615	3,715	3,612

Source: Statistics Canada. Table 001-0054 — Total greenhouse, sod and nursery employees, annual (number), CANSIM (database). (accessed: 2014-05-07)

Symbol legend:

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F=Too unreliable to be published

E=Use with caution

Footnotes:

1=Includes mixed operations (vegetables, flowers and plants).

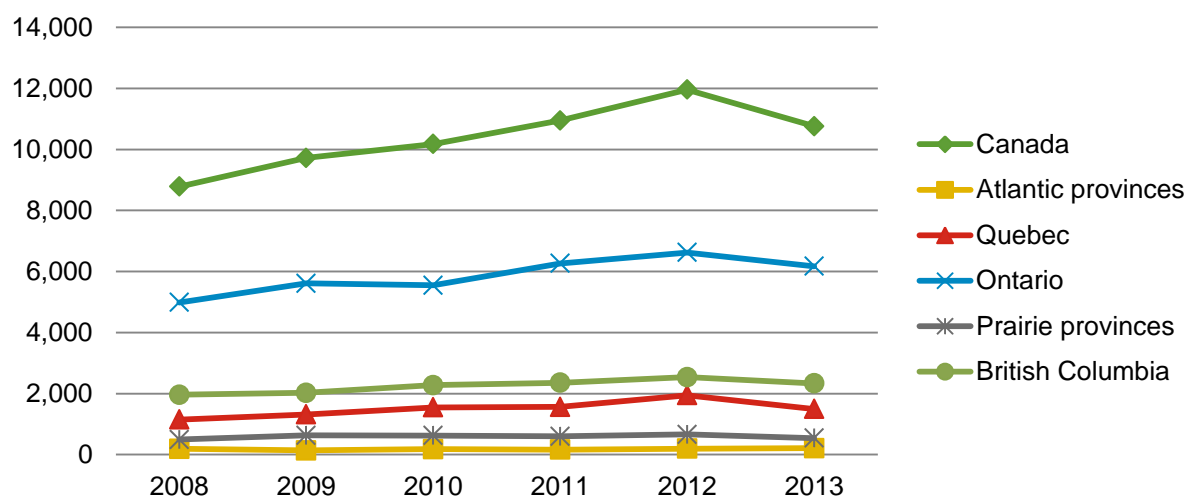
2=Seasonal employees who worked less than 8 months during the year.

3=Permanent employees who worked more than 8 months during the year.

The landscape for total employees is somewhat different when mixed greenhouse operations (those that produce a combination of vegetables and plants or flowers) are removed from the equation. Specialized greenhouse operations staff rose continuously during the 2008 to 2012 time frame however recorded a significant decline in 2013 to end the whole period with an overall increase of 22% in 2013 over 2008. This same trend was seen across all regions of Canada although Ontario experienced somewhat less of a downturn in staff numbers than the rest in 2013.

Ontario accounts for 57% of total Canadian specialized greenhouse operations staff followed by British Columbia at 22% and Quebec at 17%; these numbers are somewhat higher than those recorded for mixed operations greenhouses and these ratios have remained constant since 2008.

Total number of Employees of Specialized Greenhouse Operations



Total Number of Employees of Specialized Greenhouse Operations, Annual (Number)

	2008	2009	2010	2011	2012	2013
Canada	8,785	9,720	10,180	10,950 ^r	11,961 ^r	10,761
Atlantic provinces	190	140	180	165	195	213
Quebec	1,150	1,315	1,550	1,565 ^r	1,945	1,496
Ontario	4,990	5,610	5,550	6,265	6,621 ^r	6,174
Prairie provinces	495	630	625	600	660	542
British Columbia	1,960	2,025	2,275	2,355	2,540	2,336

Source: Statistics Canada. Table 001-0055 — Total number of employees of specialized greenhouse operations, annual (number), CANSIM (database). (accessed: 2014-05-07)

Symbol legend:

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Footnotes:

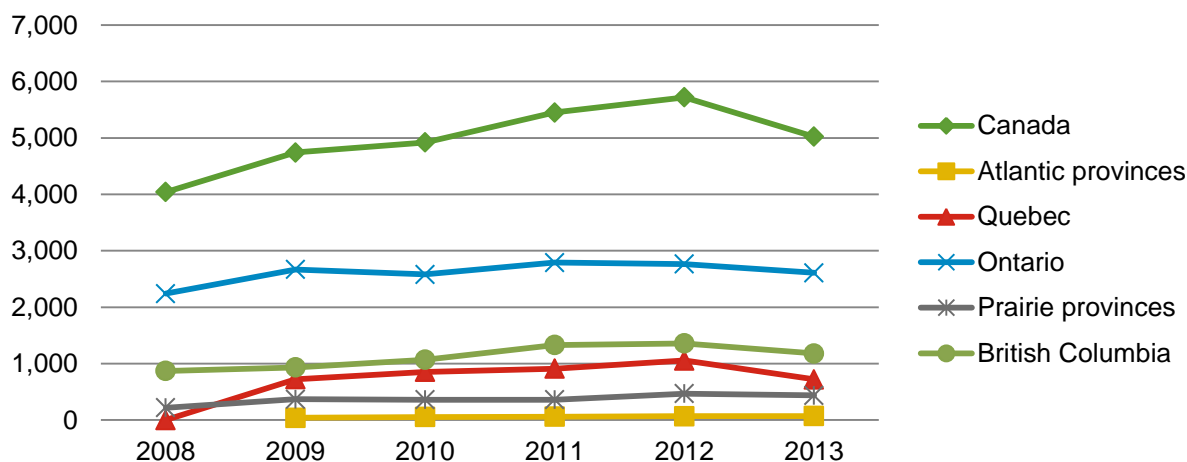
1=Seasonal employees who worked less than 8 months during the year.

2=Permanent employees who worked more than 8 months during the year.

3=Excludes mixed operations (vegetables, flowers and plants).

Across Canada the number of permanent staff for specialized greenhouse operations has been for some years at a ratio of 48% to the whole characterized by differing provincial trends in British Columbia and Ontario. While in Ontario there appears to be a trend towards reduced ratios of permanent to seasonal staff (42% in 2013 versus 45% in 2008) the contrary is true for British Columbia who saw the same ratio move to 54% in 2013 from an original 44% in 2008.

Total Number of (Permanent) Employees Specialized Greenhouse Operations



Total Number of (Permanent) Employees of Specialized Greenhouse Operations, Annual (Number)

Geography	2008	2009	2010	2011	2012	2013
Canada	4,040	4,740	4,920	5,450	5,720 ^r	5,021
Atlantic provinces	F	40 ^E	55	60	70	73
Quebec	660 ^E	725	855	910	1,055	720
Ontario	2,240	2,670	2,580	2,790	2,765 ^r	2,610
Prairie provinces	220	370	360	360	470	438
British Columbia	870	935	1,070	1,330	1,360	1,180

Source: Statistics Canada. Table 001-0055 — Total number of employees of specialized greenhouse operations, annual (number), CANSIM (database). (accessed: 2014-05-07)

Symbol legend:

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F=Too unreliable to be published

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Footnotes:

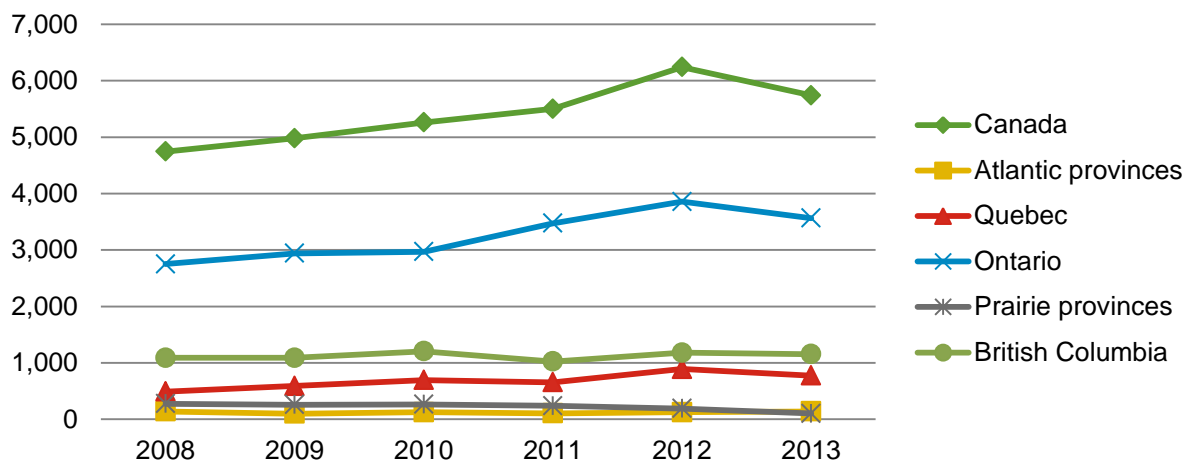
1=Seasonal employees who worked less than 8 months during the year.

2=Permanent employees who worked more than 8 months during the year.

3=Excludes mixed operations (vegetables, flowers and plants).

British Columbia's increase in permanent staff was not followed by the same levels of seasonal staff increases (6% over the period of 2008 to 2013) and Ontario's low rate of increase for permanent staff was counterbalanced by higher than normal increases (30% over the 2008 to 2013 period) in seasonal staff affected to specialized greenhouse operations.

Total Number of (Seasonal) Employees of Specialized Greenhouse Operations



Total Number of (Seasonal) Employees of Specialized Greenhouse Operations, Annual (Number)

	2008	2009	2010	2011	2012	2013
Canada	4,745	4,980	5,260	5,500 ^r	6,241 ^r	5,740
Atlantic provinces	140	100	125	105	125	140
Quebec	490	590	695	655 ^r	890	776
Ontario	2,750	2,940	2,970	3,475	3,856 ^r	3,564
Prairie provinces	275	260	265	240	190	104
British Columbia	1,090	1,090	1,205	1,025	1,180	1,156

Source: Statistics Canada. Table 001-0055 — Total number of employees of specialized greenhouse operations, annual (number), CANSIM (database). (accessed: 2014-05-07)

Symbol legend:

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Footnotes:

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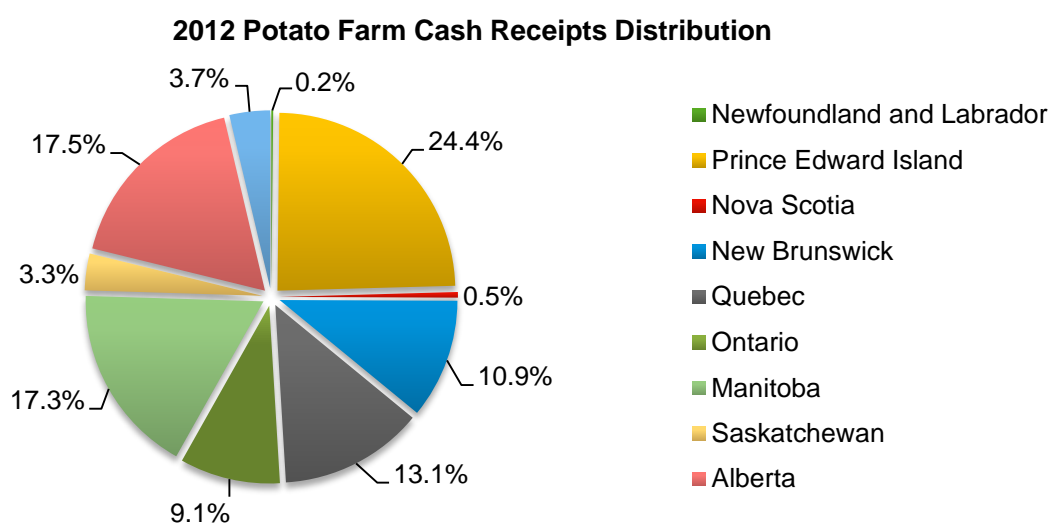
3=Excludes mixed operations (vegetables, flowers and plants).

3.3.3 Potatoes

3.3.3.1 Potato Farm Cash Receipts

Overall, the farm cash receipts for potatoes suffered a significant decline of 11% in 2010 to dip below the \$1 billion dollar mark that had been achieved the year before. 2011 saw a recovery of half of this loss, and since 2011 total cash receipts have held steady slightly above \$1 billion dollars.

The Canadian potato farm cash receipts landscape in 2012 demonstrates that PEI accounts for close to one quarter of total receipts; this was the case in 2011 also after having spent the three prior years (2008 to 2010) at approximately 20% of the marketplace. Alberta also had a good year in 2012 and registered at 17.5% of Canadian cash receipts after having slipped to a third ranking tie with New Brunswick and Quebec in the previous year. Over the five year period New Brunswick has generally remained at around 11% of the Canadian landscape while New Brunswick has registered at approximately 9.5%.



Potatoes-Farm Cash Receipts, Annual (Dollars x 1,000)

	2012 Provincial Share	2008	2009	2010	2011	2012
Canada		971,206	1,099,276	975,850	1,028,714	1,009,648
Newfoundland and Labrador	0.2%	2,804	2,278	1,840	1,859	1,743
Prince Edward Island	24.4%	202,423	215,837	203,757	257,422	246,231
Nova Scotia	0.5%	5,412	8,619	6,232	5,506	5,116
New Brunswick	10.9%	113,401	134,877	115,003	141,947	109,781
Quebec	13.1%	117,556	125,775	123,861	143,010	132,300
Ontario	9.1%	90,946	100,574	103,654	96,579	92,096
Manitoba	17.3%	201,723	251,156	203,767	168,411	174,926
Saskatchewan	3.3%	39,467	53,819	36,111	39,213	33,666
Alberta	17.5%	154,802	163,811	152,880	142,186	176,510
British Columbia	3.7%	42,672	42,528	28,745	32,581	37,279

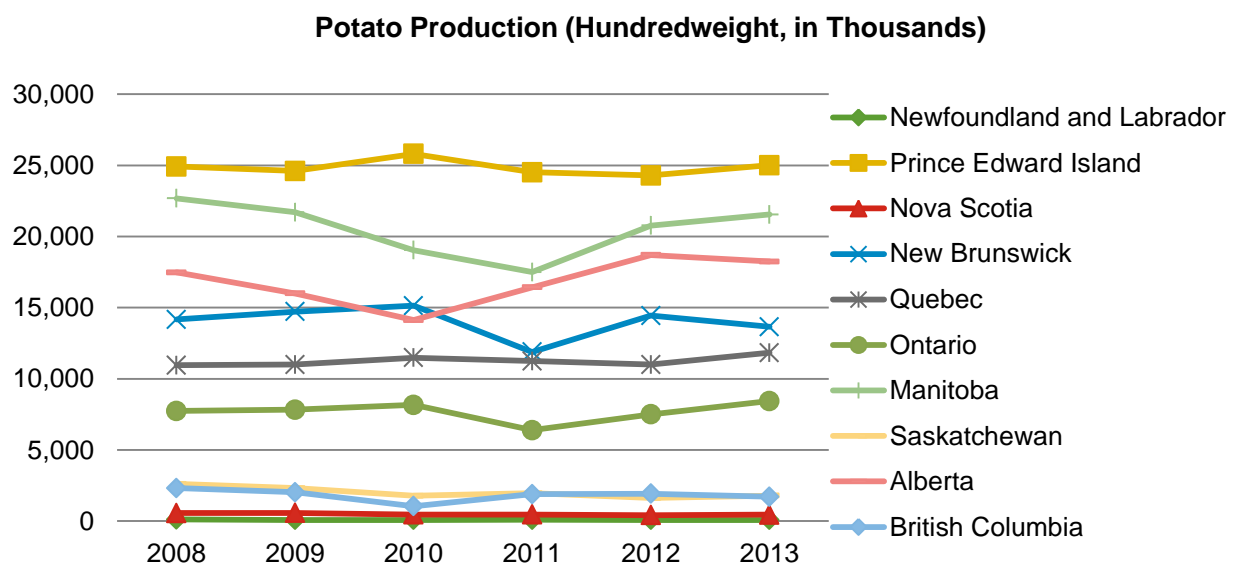
Source: Statistics Canada. Table002-0001 — Farm cash receipts, annual (dollars), CANSIM (database). (accessed: 2014-01-03)

3.3.3.2 Provincial Potato Production

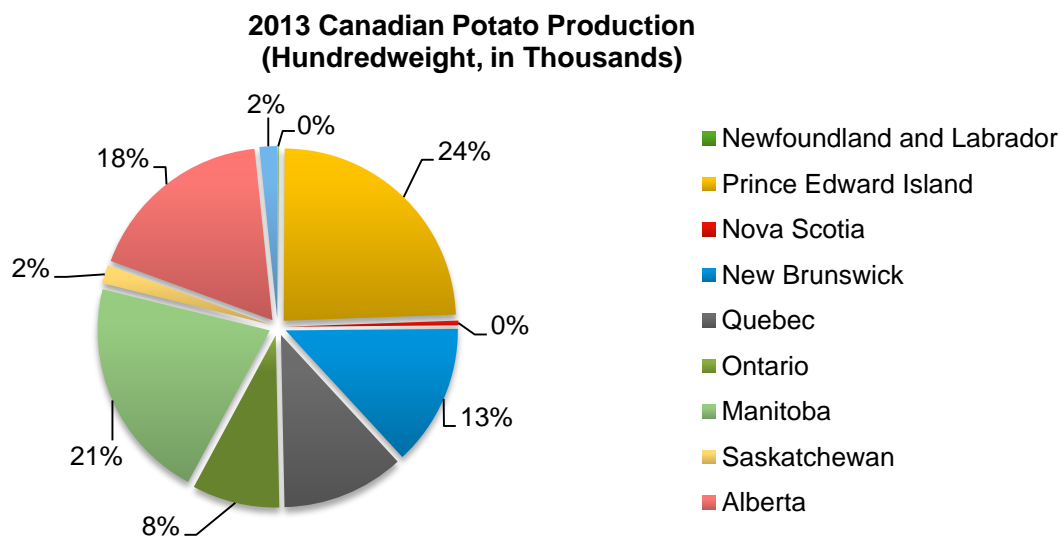
A 9% gain in total Canadian potato production between 2011 and 2012 has allowed the sector to record a similar level of production in 2013 as was present in 2008. PEI has hovered around the 25,000,000 hundredweight level since 2008 characterized by a modest decline between 2008 and 2011 followed by a similarly modest increase from 2011 to 2013 with the net result being very little change for the whole period. Manitoba's progression during this period was different in that the province incurred a decline of 23% between 2008 and 2011 followed by a significant increase and return to previous production levels in 2012 and 2013, nonetheless, the summary for the entire period demonstrates production levels for Manitoba today at 5% below what they were in 2008. Alberta also declined during the beginning of the period in question however the province returned earlier to pre-existing production levels and today stands at 4% more than in 2008.

Potato Production (Hundredweight, in Thousands)						
	2008	2009	2010	2011	2012	2013
Canada	103,560	100,859	97,153	92,372	100,741	102,736
Newfoundland and Labrador	112	84	88	90	88	88
Prince Edward Island	24,920	24,600	25,800	24,510	24,284	25,009
Nova Scotia	572	583	470	460	418	450
New Brunswick	14,170	14,715	15,134	11,883	14,438	13,647
Quebec	10,952	10,998	11,486	11,250	11,001	11,830
Ontario	7,744	7,826	8,170	6,388	7,505	8,438
Manitoba	22,680	21,700	19,040	17,500	20,763	21,545
Saskatchewan	2,613	2,320	1,785	1,960	1,625	1,788
Alberta	17,472	16,003	14,130	16,433	18,695	18,234
British Columbia	2,325	2,030	1,050	1,898	1,925	1,708

Source: Statistics Canada. Table 001-0014 — Area, production and farm value of potatoes, annual, CANSIM (database). (accessed: 2014-05-12)



From a production standpoint the Canadian landscape has changed very little since 2008 in that the ratios for each particular province to the whole have remained relatively stable. Prince Edward Island produces 24% of Canada's total potatoes followed closely by Manitoba at 21%. Alberta provides for 18% and New Brunswick 13% of total Canadian potato production, while Quebec and Ontario produce 12% and 8% respectively.



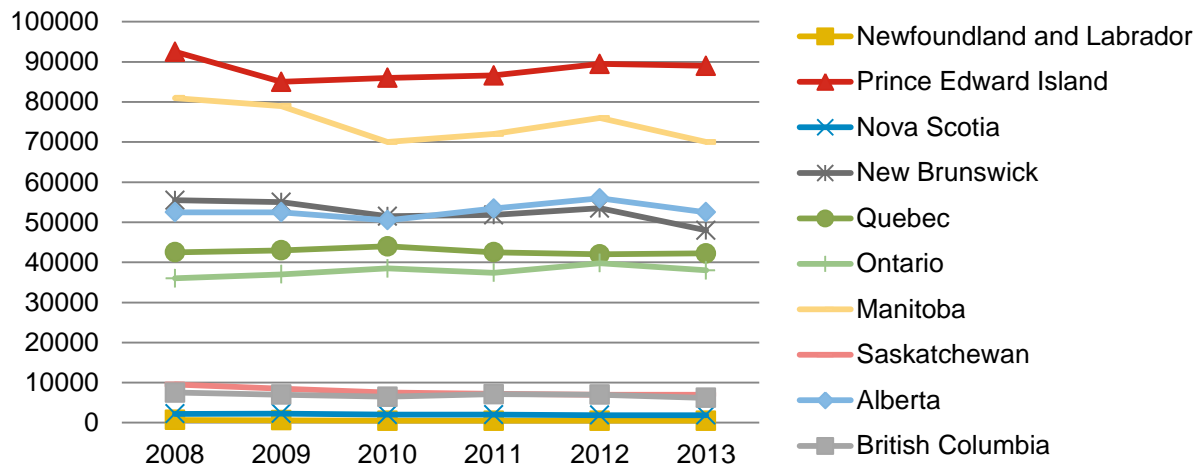
3.3.3.3 Provincial Potato Area and Yield

355,338 acres of potatoes were seeded in Canada in 2013, a 5% decline over the previous year and in total 6% lower than in 2008, 5 years prior. The most significant change within the sector, as far as seeded potato area is concerned, is a decline of 14% between 2008 and 2010 for Manitoba and while seeded area subsequently increase modestly in the following two years to 2012, Manitoba returned in 2013 the same number of acres seeded as was reported for 2010. All other provinces have remained at relatively stable levels of seeded area over time.

Potatoes — Seeded Area (Acres)						
	2008	2009	2010	2011	2012	2013
Canada	379,900	369,900	357,000	360,500	373,154	355,338
Newfoundland and Labrador	700	600	500	500	500	500
Prince Edward Island	92,500	85,000	86,000	86,600	89,500	89,000
Nova Scotia	2,200	2,300	2,000	2,000	1,900	1,900
New Brunswick	55,500	55,000	51,500	51,800	53,500	48,000
Quebec	42,500	43,000	44,000	42,500	42,007	42,255
Ontario	36,000	37,000	38,500	37,400	39,800	38,000
Manitoba	81,000	79,000	70,000	72,000	76,000	70,000
Saskatchewan	9,500	8,500	7,500	7,200	7,000	7,000
Alberta	52,500	52,500	50,500	53,400	55,947	52,483
British Columbia	7,500	7,000	6,500	7,100	7,000	6,200

Source: Statistics Canada. Table 001-0014 — Area, production and farm value of potatoes, annual, CANSIM (database). (accessed: 2014-05-12)

Potatoes — Seeded Area (Acres)



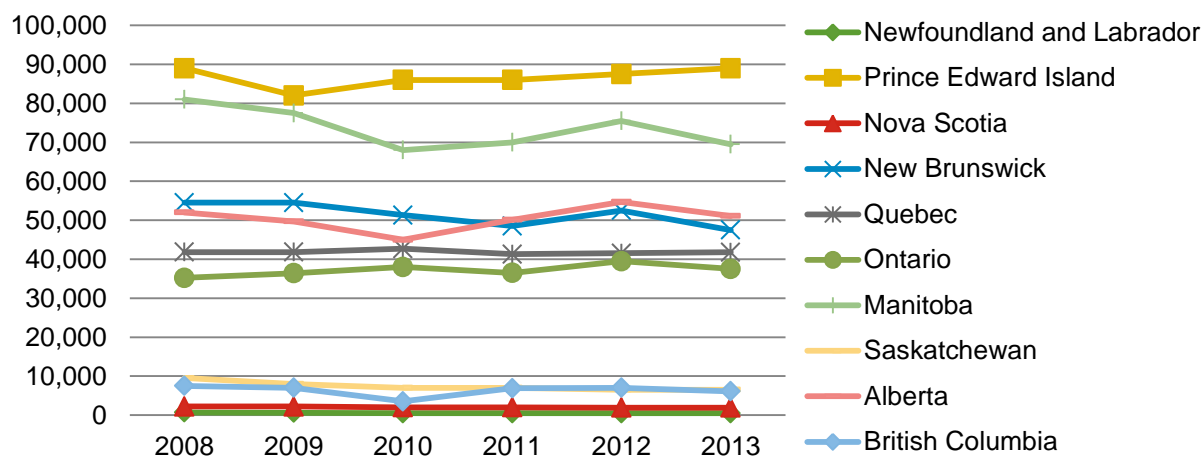
Harvested potato acres have followed similar trends as those for seeded area with overall acres reduced by 6% since 2008 and Manitoba incurring harvested area reductions of 14% in 2010.

Potatoes — Harvested Area (Acres)

	2008	2009	2010	2011	2012	2013
Canada	373,400	359,700	344,000	348,800	367,109	351,343
Newfoundland and Labrador	700	600	500	500	500	500
Prince Edward Island	89,000	82,000	86,000	86,000	87,500	89,000
Nova Scotia	2,200	2,200	2,000	2,000	1,900	1,900
New Brunswick	54,500	54,500	51,300	48,500	52,500	47,500
Quebec	41,800	41,800	42,700	41,300	41,514	41,760
Ontario	35,200	36,400	38,000	36,500	39,500	37,500
Manitoba	81,000	77,500	68,000	70,000	75,500	69,500
Saskatchewan	9,500	8,000	7,000	7,000	6,500	6,500
Alberta	52,000	49,700	45,000	50,100	54,695	51,083
British Columbia	7,500	7,000	3,500	6,900	7,000	6,100

Source: Statistics Canada. Table 001-0014 — Area, production and farm value of potatoes, annual, CANSIM (database). (accessed: 2014-05-12)

Potatoes — Harvested Area (Acres)



The Canadian average yield, expressed in hundredweight per harvested acre, has shown generally steady increases over the 2008 to 2013 time frame, beginning at 277 in 2008 and standing today at 292 hundredweight per harvested acre, 5% more than in 2008.

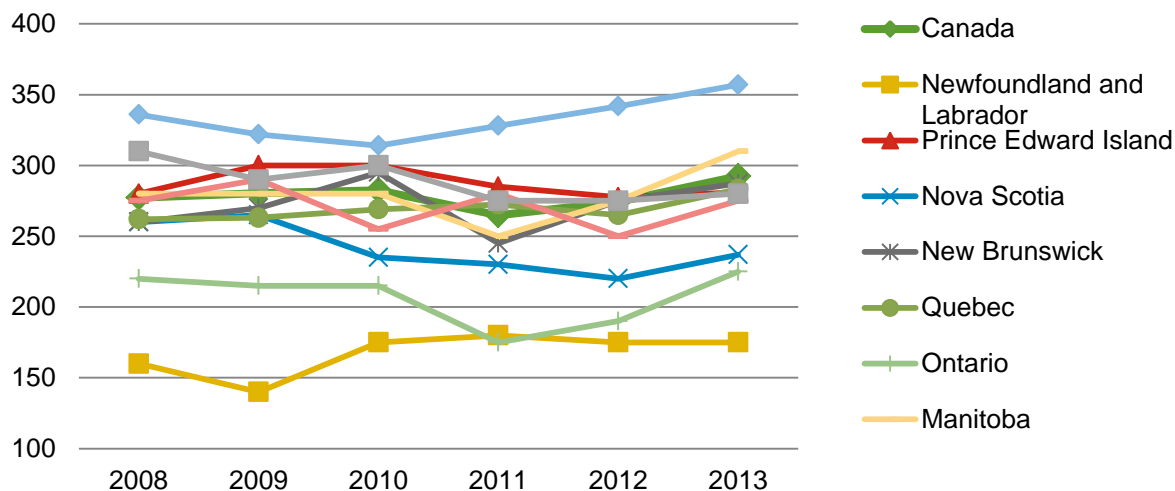
Potatoes — Average yield (Hundredweight Per Harvested Acres)

Crop Year (Aug1-July31)	2008	2009	2010	2011	2012	2013
Canada	277	280	282	265	274	292
Newfoundland and Labrador	160	140	175	180	175	175
Prince Edward Island	280	300	300	285	278	281
Nova Scotia	260	265	235	230	220	237
New Brunswick	260	270	295	245	275	287
Quebec	262	263	269	272	265	283
Ontario	220	215	215	175	190	225
Manitoba	280	280	280	250	275	310
Saskatchewan	275	290	255	280	250	275
Alberta	336	322	314	328	342	357
British Columbia	310	290	300	275	275	280

Source: Statistics Canada. Table 001-0014 — Area, production and farm value of potatoes, annual, CANSIM (database). (accessed: 2014-05-12)

Most provinces have generally followed the Canadian yield trends year over year. Consistently, the Alberta potato sector has yielded much higher (20-25%) than the Canadian average. Ontario has generally been several degrees (25-30%) lower than the Canadian average with 2010 being a particular bad year when they ended the year at 175 hundredweight per harvested acre, only 65% of the Canadian average.

Potatoes — Average Yield (Hundredweight Per Harvested Acres)

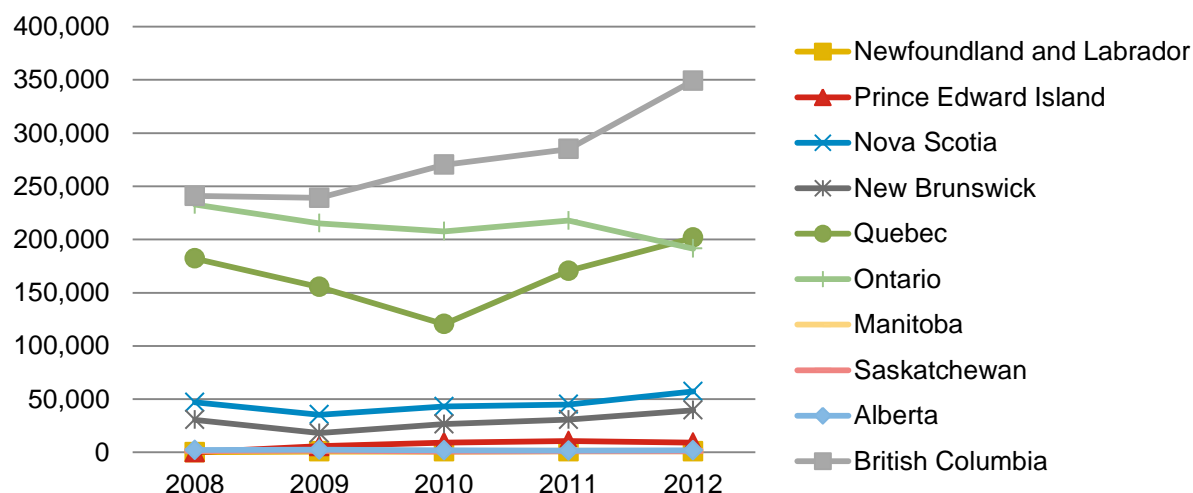


3.3.4 Canada's Fruit Sector

3.3.4.1 Canadian Fruit Farm Cash Receipts

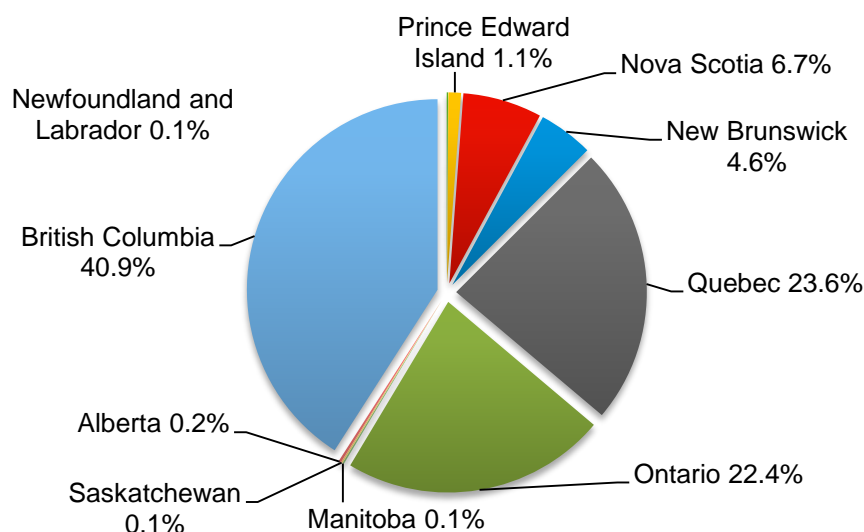
At a total of \$853.2 million dollars in 2012, fruit farm cash receipts have progressed by 14% from 2008 to 2012 largely on the basis of a 45% increase coming from British Columbia. Quebec registered successive years of decline 2009 and 2010 but has since bounced back with significant increases to end the 2008 to 2012 period with an overall increase of 11%. Ontario, on the other hand, has seen their fruit farm cash receipts decline in general over the period by 18% and since they represented close to a third of the landscape in 2008 this decline has been significant to the numbers for Canada as a whole.

Total Fruits Farm Cash Receipts, Annual (Dollars x 1,000)



While in 2008 British Columbia accounted for 32% of the total Canadian fruit farm cash receipts portfolio, today they provide for 41%, testament to their continuous improvements each year throughout the period to 2012. Quebec has remained stable at 24% of the marketplace during the time period while Ontario has lost ground compared to others, registering at 31% of the total in 2008 and ending 2012 at just below 24%. Generally, the remainder of Canadian fruit farm cash receipts originate from Atlantic Canada (12.4% combined) and each of the provinces of Nova Scotia and New Brunswick have registered very positive increase over the period of 29% and 22% respectively.

Farm Cash Receipts — FRUIT 2012 Provincial Share



Total Fruits Farm Cash Receipts, Annual (Dollars x 1,000)

	2012 Provincial Share	2008	2009	2010	2011	2012	1 Yr. Change	5 Yr. Change ¹
Canada		748,607	675,658	681,882	764,405	853,199	11.6%	14.0%
Newfoundland and Labrador	0.1%	0	802	746	883	997	12.9%	24.3%
Prince Edward Island	1.1%	0	5,810	9,276	10,502	9,052	-13.8%	55.8%
Nova Scotia	6.7%	46,990	35,425	43,095	44,997	57,160	27.0%	21.6%
New Brunswick	4.6%	30,616	18,133	26,502	30,728	39,622	28.9%	29.4%
Quebec	23.6%	182,055	155,355	120,458	170,588	201,684	18.2%	10.8%
Ontario	22.4%	232,831	215,130	207,615	217,671	191,447	-12.0%	-17.8%
Manitoba	0.1%	1,470	1,832	1,391	1,675	1,186	-29.2%	-19.3%
Saskatchewan	0.1%	1,315	1,545	741	888	1,011	13.9%	-23.1%
Alberta	0.2%	2,082	2,517	1,886	1,563	1,866	19.4%	-10.4%
British Columbia	40.9%	240,898	239,110	270,170	284,912	349,175	22.6%	44.9%

Source: Statistics Canada. Table002-0001 — Farm cash receipts, annual (dollars), CANSIM (database). (accessed: 2014-01-06)

1. 4 Year Change for PEI and Nova Scotia

3.3.4.2 Fruit Farm Cash Receipts by Commodity

In 2012 small fruit cash receipts account for 71% of the total Canadian fruit farm cash receipts; this compares to a 65% weighting in 2008. By opposition, tree fruit used to represent 35% of total Canadian fruit farm cash receipts while today they register at 29%. While tree fruit farm cash receipts have recorded a 5% decrease over the period, due to receipts from apples having declined 11%, small fruit has increased by 24% since 2008, led by a 54% increase in blueberry farm cash receipts and followed by 21% for grapes.

Fruit Farm Cash Receipts, Annual (Dollars x 1,000)

Type of cash receipts	2008	2009	2010	2011	2012
Total All Fruit	748,607	675,658	681,882	764,405	853,199
Total tree fruits¹¹	259,610	267,183	240,549	240,351	246,393
Apples	177,220	179,063	162,072	155,180	157,722
Total small fruits^{8,9}	488,997	408,475	441,333	524,054	606,806
Blueberries ^{8,9}	163,338	111,748	147,654	203,345	247,272
Cranberries ^{8,9}	107,195	93,417	76,048	88,093	115,420
Strawberries ^{8,9}	61,250	69,178	68,065	71,626	70,826
Grapes ^{8,9}	119,414	98,318	116,156	127,961	144,621

Source: Statistics Canada. Table 002-0001 — Farm cash receipts, annual (dollars), CANSIM (database). (accessed: 2014-02-14)

8. Prior to 2001, receipts from grapes and blueberries were included in Other berries and grapes. The categories Other berries and grapes and Strawberries, taken together, are equal to Total small fruits.

9. The category total small fruits comprises receipts from the sale of numerous small fruits. Blueberries, strawberries and grapes are the major sub-components of total small fruits. Cranberries were added to this table in 2007.

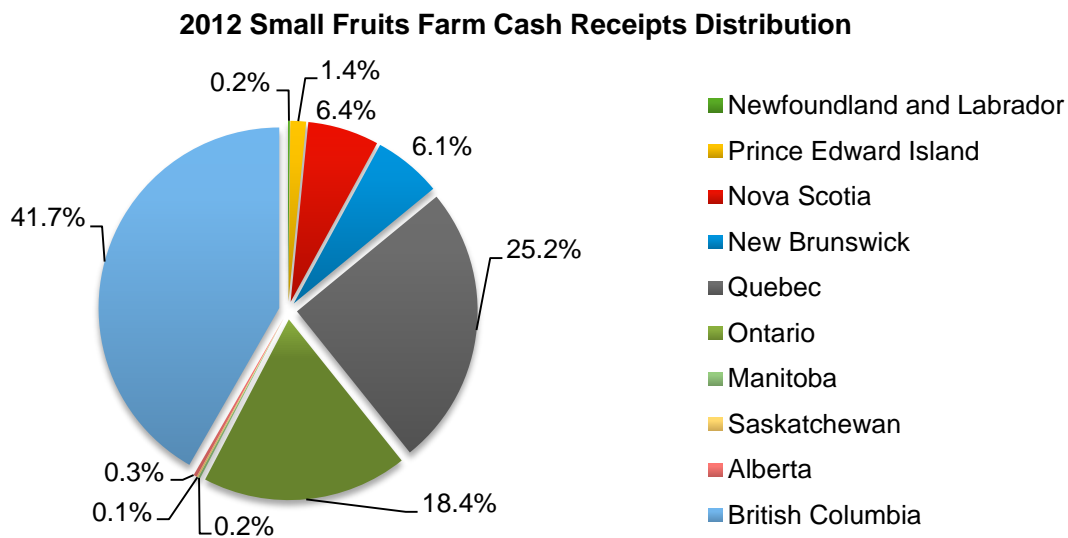
11. The category total tree fruits comprises receipts from the sale of numerous tree fruits. Apples is one of the components of total tree fruits.

Blueberry farm cash receipts have taken the lead for the fruit sector within Canada and now, based on an individual increase over 110% from 2008 to 2012, represent 29% of the total marketplace compared to 22% in 2008. All other commodities within this group have experienced no change in their relative weight to the whole except for apples that have seen their share fall from 24% in 2008 to 18% in 2012.

3.3.4.3 Small Fruits

Small fruit farm cash receipts have certainly seen impressive increases of 19% and 16% for 2012 and 2011 respectively after having dipped significantly from 2008 to 2009. In 2012 Small fruits accounted for 15% of total Canadian horticultural farm cash receipts.

British Columbia now accounts for close to 42% of Canadian farm cash receipts for small fruits whereby in 2008 they came in at 34%. In fact British Columbia's increases account for most of the progress that has been registered for small fruits farm cash receipts over the 2008 to 2012 period. Quebec registered significant declines in 2009 and 2010 but saw a rebound in receipts in 2011 and again in 2012 to average out at an overall period increase of roughly 13%; this has allowed Quebec to maintain its second place ranking at 25% of the marketplace in 2012. While Ontario maintained a share of 23% of the marketplace from 2008 to 2010, stagnating farm cash receipts in 2011 and again in 2012 have brought their share of the Canadian landscape to just over 18%.



Total Small Fruits — Farm Cash Receipts, Annual (Dollars x 1,000)

	2012 Provincial Share	2008	2009	2010	2011	2012
Canada		488,997	408,475	441,333	524,054	606,806
Newfoundland and Labrador	0.2%	x	796	739	877	993
Prince Edward Island	1.4%	x	5,473	8,933	10,150	8,511
Nova Scotia	6.4%	34,290	21,270	29,589	31,467	38,680
New Brunswick	6.1%	28,697	16,126	24,753	28,654	37,070
Quebec	25.2%	135,225	110,206	79,110	129,762	152,971
Ontario	18.4%	110,462	91,730	101,705	109,521	111,726
Manitoba	0.2%	1,450	1,814	1,381	1,657	1,165
Saskatchewan	0.1%	1,250	1,393	673	699	782
Alberta	0.3%	2,040	2,485	1,853	1,530	1,809
British Columbia	41.7%	165,567	157,182	192,595	209,738	253,099

Source: Statistics Canada. Table002-0001 — Farm cash receipts, annual (dollars), CANSIM (database). (accessed: 2014-01-03)

x - Suppressed to meet the confidentiality requirements of the Statistics Act

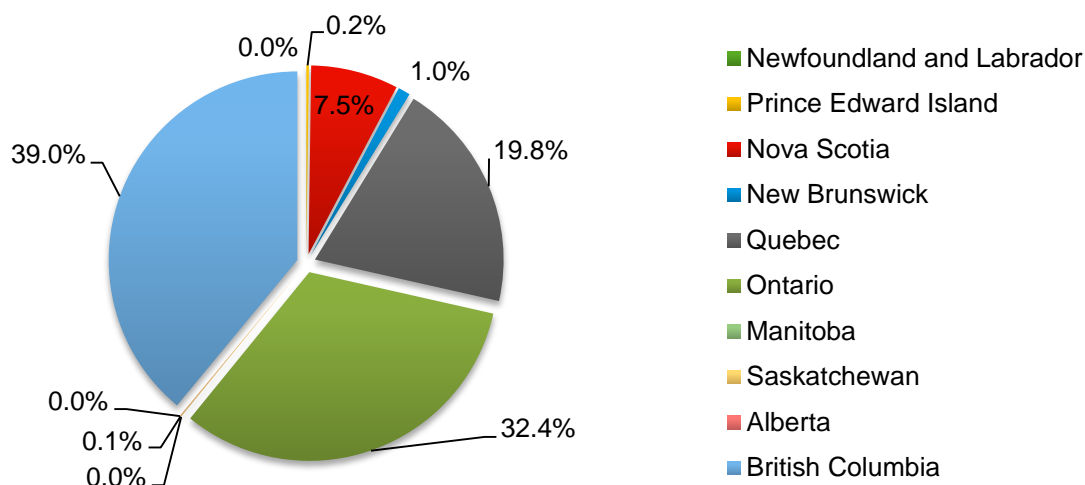
Note: The category total small fruits comprises receipts from the sale of numerous small fruits. Blueberries, strawberries and grapes are the major sub-components of total small fruits. Cranberries were added to this table in 2007.

3.3.4.3 Tree Fruits

Tree fruits farm cash receipts have declined by 5% between 2008 and 2012; at \$246.4 million dollars in 2012, tree fruits represent about 6% of total Canadian horticultural farm cash receipts.

2012 was a pivotal year in the distribution of tree fruit farm cash receipts; while in 2011 Ontario accounted for 45% of the total, in 2012 they now come in at 32%. On the other hand, while British Columbia registered at 31% in 2011 they now account for 39% on the marketplace. Quebec rounds out the majority of the landscape with 20% of receipts in 2012 after having consistently maintained about 17% over the previous three years.

2012 Tree Fruits Farm Cash Receipts Distribution



Total Tree Fruits — Farm Cash Receipts, Annual (Dollars x 1,000)

	2012 Provincial Share	2008	2009	2010	2011	2012
Canada		259,610	267,183	240,549	240,351	246,393
Newfoundland and Labrador	0.0%	x	6	7	6	4
Prince Edward Island	0.2%	x	337	343	352	541
Nova Scotia	7.5%	12,700	14,155	13,506	13,530	18,480
New Brunswick	1.0%	1,919	2,007	1,749	2,074	2,552
Quebec	19.8%	46,830	45,149	41,348	40,826	48,713
Ontario	32.4%	122,369	123,400	105,910	108,150	79,721
Manitoba	0.0%	20	18	10	18	21
Saskatchewan	0.1%	65	152	68	189	229
Alberta	0.0%	42	32	33	33	57
British Columbia	39.0%	75,331	81,928	77,575	75,174	96,076

Source: Statistics Canada. Table002-0001 — Farm cash receipts, annual (dollars), CANSIM (database). (accessed: 2014-01-03)

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3.3.4.5 Blueberries

The blueberry market across Canada is comprised of two distinct types of blueberries, low bush and high bush. From 2008 to 2009 the combined cash receipts for both types of blueberries incurred a significant decline of 32% however subsequently the market rebounded and produced year over year increases in cash receipts of 35%, 36% and 19% respectively for 2010, 2011 and 2012, to end the 2012 period at \$242.6 million dollars or 49% higher than originally in 2008. In 2013 cash receipts contracted to \$188.4 million dollars, a 22% decline over 2012.

Canada enjoyed excellent years for blueberries across each producing area during 2011 and 2012, and 2013 is the first regression in the market since 2009. Quebec is the only province today that produces less than in 2008 although their receipts show more volatility over time. In British Columbia's case 2012 recorded an almost doubling of 2008 cash receipts although this has tempered in 2013 and returned back to just above 2010 levels.

Blueberries — Farm Gate Value Total (Dollars x 1,000)							
*Combined High Bush and Low Bush	2008	2009	2010	2011	2012	2013	2013 Share
Canada	162,700	110,205	149,124	203,449	242,616	188,437	
Newfoundland and Labrador	390	F	151	159E	x	x	
Prince Edward Island	6,200	3,786	8,104	8,780	7,177	x	
Nova Scotia	26,500	13,142	22,278	22,154	28,381	31,890	16.9%
New Brunswick	21,125	8,443	20,067	20,925	x	30,573	16.2%
Quebec	38,690	27,616	11,574	41,278	43,234	24,975	13.3%
Ontario	3,920	4,582	4,330	4,396	x	4,560	2.4%
British Columbia	65,875	52,568	82,620	105,757	125,748	86,735	46.0%

Source: Statistics Canada. Table 001-0009 — Area, production and farm gate value of fresh and processed fruits, by province, annual, CANSIM (database). (accessed: 2014-02-14)

Symbol legend:

r = revised

F = Too unreliable to be published

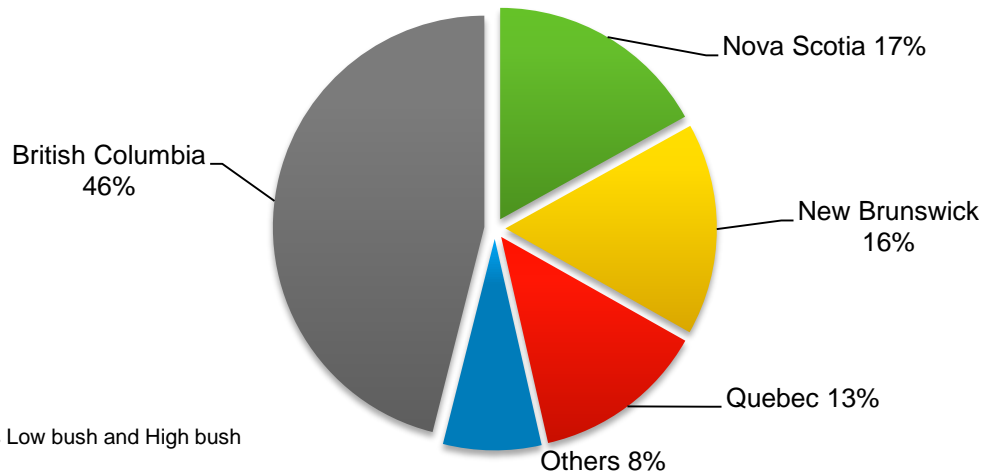
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When combining both High bush and Low bush farm cash receipts British Columbia registers at 46% of the total marketplace in 2013 (this compares with 52% in both 2012 and 2011 and over 55% in 2010). The remainder of the Canadian landscape in 2013 shows Nova Scotia and New Brunswick at 17% and 16% respectively while Quebec follows with 13%.

**Canadian Blueberries*
2013 Share of Farm Gate Value Total**



Marketed production of Canadian blueberries (combined Low bush and High bush) surpassed 120,000 tons in 2013, down 10% on a Canada wide basis from the previous year, but nonetheless 14% higher than the number of tons marketed in 2008. Nova Scotia and New Brunswick's tonnage shows a slight decline during the period however a return to 2008 levels of marketed production in the most recent years. British Columbia, on the other hand, has generally seen continuous increases in marketed production on a year over year basis with the exception of 2013 which is showing a slight decline. Interestingly enough, the share of marketed production for each province in 2013 is very similar to their share of farm cash receipts.

Blueberries — Marketed Production Total (Tons)

*Combined High Bush and Low Bush	2008	2009	2010	2011	2012	2013	2013 Share
Canada	105,289	113,266	92,099	115,897	134,240	120,160	
Newfoundland and Labrador	200	F	112	107E	x	x	
Prince Edward Island	4,800	5,214	6,214	6,669	5,685	x	
Nova Scotia	20,750	16,503	16,395	14,712	20,002	20,700	17.2%
New Brunswick	16,705	11,737	16,290	13,791	x	21,305	17.7%
Quebec	27,914	34,596	6,949E	31,029	27,807	14,761	12.3%
Ontario	920	988	1,140	957	x	975	0.8%
British Columbia	34,000	44,175	45,000	48,634	57,979	55,421	46.1%

Source: Statistics Canada. Table 001-0009 — Area, production and farm gate value of fresh and processed fruits, by province, annual, CANSIM (database). (accessed: 2014-02-14)

Symbol legend:

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Cultivated area includes bearing and non-bearing area. Apart from a few minor exceptions generally cultivated area for combined Low bush and High blueberries in Canada has steadily increase in each jurisdiction on a year over year basis. Today total combined cultivated area is 13% higher than what was present in 2008. Again, on a combined Low bush and High bush basis, Quebec represents 39% of the total acres cultivated in Canada, followed by Nova Scotia at 23%, New Brunswick at 18% and British Columbia at 12%. This distribution is almost identical to that which was present in 2008.

Blueberries — Cultivated Area Total (Acres)							
*Combined High Bush and Low Bush	2008	2009	2010	2011	2012	2013	2013 Share
Canada	160,915	165,994	166,161	174,977	179,539	181,487	
Newfoundland and Labrador	2000	F	1043	1,062E	x	x	
Prince Edward Island	10,000	11,005	11,624	12,304	12,225	x	
Nova Scotia	39,890	39,900	38,569	43,396	41,881	42,226	23.3%
New Brunswick	27,110	26,860	26,995	27,925	31,925	33,026	18.2%
Quebec	63,420	67,154	68,450	68,969	69,950	70,450	38.8%
Ontario	495	575	635	684	x	761	0.4%
British Columbia	18,000	19,000	18,845	20,637	21,632	21,494	11.8%

Source: Statistics Canada. Table 001-0009 — Area, production and farm gate value of fresh and processed fruits, by province, annual, CANSIM (database). (accessed: 2014-02-14)

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A review of bearing areas is most useful when compared to total cultivated areas. In 2013, close to all (93%) of British Columbia's cultivated area for blueberries was bearing fruit, a significant improvement that has taken place progressively year over year since 2008 when only 67% of BC's cultivated plants were bearing. On the east coast of Canada, where the weather does not permit quite the same degree of cultivation, bearing areas are generally between 45-55% of cultivated areas. One significant anomaly to this is that during 2012 and 2013 New Brunswick has lower than normal bearing areas (41% in 2012 and 36% in 2013).

Blueberries — Bearing Area Total (Acres)							
*Combined High Bush and Low Bush	2008	2009	2010	2011	2012	2013	2013 Share
Canada	84,285	86,111	84,700	95,119	91,254	93,054	
Newfoundland and Labrador	800	F	537	F	x	x	
Prince Edward Island	5,000	5,505	5,908	6,124	5,394	x	
Nova Scotia	20,295	18,305	18,677	18,959	19,133	18,927	20.3%
New Brunswick	13,520	11,735	14,813	14,021	13,243	12,042	12.9%
Quebec	32,200	35,441	29,541	37,426	34,119	35,386	38.0%
Ontario	470	495	516	558	x	616	0.7%
British Columbia	12,000	13,880	14,708	17,625	18,500	19,964	21.5%

Source: Statistics Canada. Table 001-0009 — Area, production and farm gate value of fresh and processed fruits, by province, annual, CANSIM (database). (accessed: 2014-02-14)

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Canadian High Bush Blueberry Value and Volume of Production

As can be seen through the table below, figures for high bush blueberries have been recorded for the 2012 and 2013 periods. Clearly, British Columbia leads Canadian high bush blueberry farm cash receipts with 85% of the marketplace in 2013 down slightly from the 89% of the market that BC captured in 2012. As a whole, at \$102.5 million dollars in 2013, farm cash receipts diminished by 27% over 2012 however this period is insufficient to determine if this change is simply the volatility of the market or a trend per se.

Blueberries High Bush— Farm Gate Value (Dollars x 1,000)							
	2008	2009	2010	2011	2012	2013	2013 Share
Canada	141,372 ^r	102,547	
Newfoundland and Labrador	x	x	
Prince Edward Island	7	x	
Nova Scotia	1,261	F	
New Brunswick	x	F	
Quebec	9,507 ^r	5,871	5.7%
Ontario	4550	4,502	4.4%
British Columbia	125,748	86,735	84.6%

Source: Statistics Canada. Table 001-0009 — Area, production and farm gate value of fresh and processed fruits, by province, annual, CANSIM (database). (accessed: 2014-02-14)

Symbol legend:

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Marketed production of high bush blueberries decreased only slightly (4%) in 2013 over 2012 to 59,028 tons with 94% of this production originating from British Columbia.

Blueberries High Bush — Marketed Production (Tons)							
	2008	2009	2010	2011	2012	2013	2013 Share
Canada	61,439	59,028	
Newfoundland and Labrador	x	x	
Prince Edward Island	1	x	
Nova Scotia	322	F	
New Brunswick	x	F	
Quebec	2,117 ^r	1,366	2.3%
Ontario	977	961	1.6%
British Columbia	57,979	55,421	93.9%

Source: Statistics Canada. Table 001-0009 — Area, production and farm gate value of fresh and processed fruits, by province, annual, CANSIM (database). (accessed: 2014-02-14)

Symbol legend:

r = revised

F = Too unreliable to be published

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There was essentially no change in the number of acres cultivated (bearing and planted combined) and again British Columbia leads with 89% of total Canadian cultivated area for high bush blueberries.

Blueberries High bush — Cultivated Area (Acres)							
	2008	2009	2010	2011	2012	2013	2013 Share
Canada	24,290 ^r	24,166	
Newfoundland and Labrador	2	x	
Prince Edward Island	7	x	
Nova Scotia	554	F	
New Brunswick	25	F	
Quebec	1,450 ^r	1,450	6.0%
Ontario	620	540	2.2%
British Columbia	21,632	21,494	88.9%

Source: Statistics Canada. Table 001-0009 — Area, production and farm gate value of fresh and processed fruits, by province, annual, CANSIM (database). (accessed: 2014-02-14)

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High bush blueberries originate most from BC thus bearing area is very high versus cultivated area (93% in 2013). There has been a slight increase in total Canadian bearing area for high bush blueberries supported by an equivalent rise in BC bearing area.

Blueberries High Bush — Bearing Area (Acres)							
	2008	2009	2010	2011	2012	2013	2013 Share
Canada	20,384	22,187	
Newfoundland and Labrador	1	x	
Prince Edward Island	4	x	
Nova Scotia	441	F	
New Brunswick	23	F	
Quebec	922	1,151	5.2%
Ontario	493	504	2.3%
British Columbia	18,500	19,964	90.0%

Source: Statistics Canada. Table 001-0009 — Area, production and farm gate value of fresh and processed fruits, by province, annual, CANSIM (database). (accessed: 2014-02-14)

Symbol legend:
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Canadian Low Bush Blueberry Value and Volume of Production

Low bush blueberries are somewhat more widely produced than their high bush counterpart. New Brunswick leads the way with 35% of Canada's \$85.9 million dollars farm cash receipts of low bush blueberries in 2013, a decline over 2012 of 15%. A particular note to be made here is that most of this recent decline originates from Quebec where 2013 was a particularly bad year for low bush blueberries having incurred a 43% decline in this province alone.

Blueberries Low Bush — Farm Gate Value (Dollars x 1,000)

	2008	2009	2010	2011	2012	2013	2013 Share
Canada	101,244	85,890	
Newfoundland and Labrador	x	F	
Prince Edward Island	7,170	9103	10.6%
Nova Scotia	27,120	26,959	31.4%
New Brunswick	32,731	30,102	35.0%
Quebec	33,727	19,104	22.2%
Ontario	x	F	
British Columbia							

Source: Statistics Canada. Table 001-0009 — Area, production and farm gate value of fresh and processed fruits, by province, annual, CANSIM (database). (accessed: 2014-02-14)

Symbol legend:

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Much the same pattern is seen with marketed production for low bush blueberries whereby a 16% decline for the Canadian market as a whole is characterized by the 48% decline in production originating from Quebec in 2013.

Blueberries Low Bush — Marketed Production (Tons)							
	2008	2009	2010	2011	2012	2013	2013 Share
Canada	72,801	61,132	
Newfoundland and Labrador	x	F	
Prince Edward Island	5,684	6,649	10.9%
Nova Scotia	19,681	19,534	32.0%
New Brunswick	21,530	21,204	34.7%
Quebec	25,690	13,395	21.9%
Ontario	x	F	
British Columbia							

Source: Statistics Canada. Table 001-0009 — Area, production and farm gate value of fresh and processed fruits, by province, annual, CANSIM (database). (accessed: 2014-02-14)

Symbol legend:
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Cultivated area for low bush blueberries has slightly increased from 2012 to 2012 for all provinces producing this commodity and stands today at a total of 157,321 acres across Canada with 44% located in Quebec, 26% and 21% respectively for Nova Scotia and New Brunswick.

Blueberries Low Bush — Cultivated Area (Acres)							
	2008	2009	2010	2011	2012	2013	2013 Share
Canada	155,249	157,321	
Newfoundland and Labrador	x	F	
Prince Edward Island	12,218	12,400	7.9%
Nova Scotia	41,327	41,600	26.4%
New Brunswick	31,900	33,000	21.0%
Quebec	68,500	69,000	43.9%
Ontario	x	F	
British Columbia							

Source: Statistics Canada. Table 001-0009 — Area, production and farm gate value of fresh and processed fruits, by province, annual, CANSIM (database). (accessed: 2014-02-14)

Symbol legend:
r = revised
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Bearing acreage, as a ratio to cultivated acres, stands in 2013 on a Canada wide basis at approximately 45% of total cultivated, almost identical to 2012. The only significant variance from this average is New Brunswick which appears to have a bearing area 9% smaller this year than last.

Blueberries Low Bush — Bearing Area (Acres)							
	2008	2009	2010	2011	2012	2013	2013 Share
Canada	70,870 ^r	70,867	
Newfoundland and Labrador	x	F	
Prince Edward Island	5,390	5,746	8.1%
Nova Scotia	18,692	18,410	26.0%
New Brunswick	13,220	12,018	17.0%
Quebec	33,197	34,235	48.3%
Ontario	x	F	
British Columbia							

Source: Statistics Canada. Table 001-0009 — Area, production and farm gate value of fresh and processed fruits, by province, annual, CANSIM (database). (accessed: 2014-02-14)

Symbol legend:

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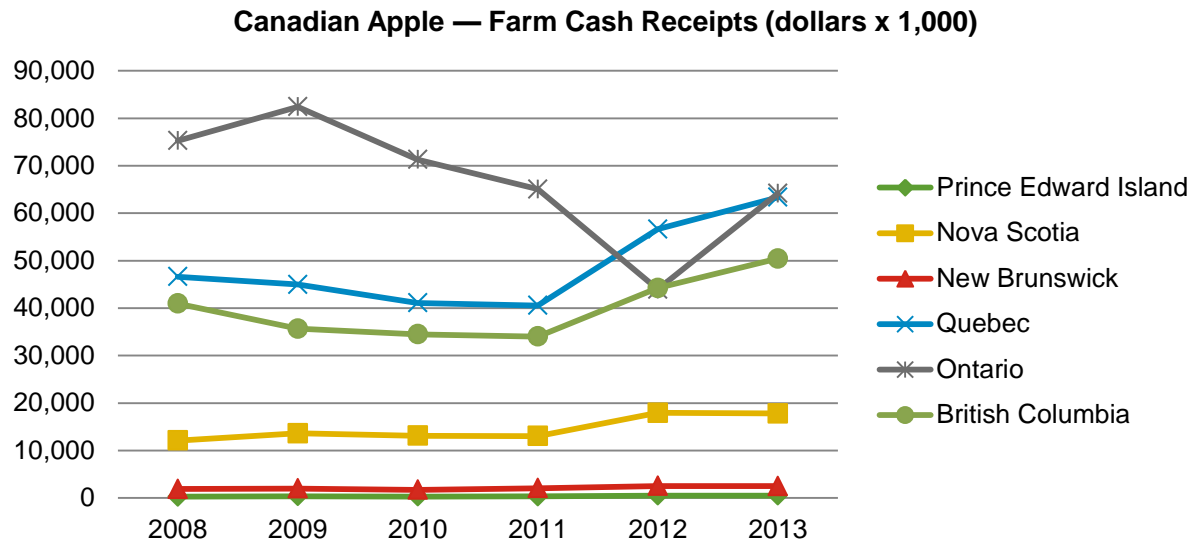
3.3.4.6 Apples

After three years of generally diminishing cash receipts (2009 to 2011), characterized by significant decreases in Ontario particularly, the apple sector rebounded in 2012 with an overall increase over 2011 of 7% but more importantly a subsequent increase of 20% overall in 2013 to end the 5 year period with total Canadian farm cash receipts of just under \$200 million dollars. Overall this is 12% higher than the amount of cash receipts recorded in 2008.

While the Atlantic Provinces have remained generally stable in cash receipts over the time period in question the same is not the case for Quebec, Ontario and British Columbia. In Quebec's case, slight yearly decreases were seen from 2008 to 2011, followed by a 40% increase from 2011 to 2012 and a subsequent 12% increase the year following; Quebec now stands at cash receipts that are 36% higher than in 2008. British Columbia follow this same pattern albeit to a lesser degree and ending 2013 with close to \$50.5 million dollars or 23% higher than what had been recorded in 2008.

Ontario has experienced a tumultuous period from a cash receipts standpoint; recorded cash receipts of \$64.1 million dollars in 2013 are in fact 15% less than what had been seen for 2008, five years earlier. Ontario experienced a dramatic year over year decline of 32% in 2012 however has recaptured a large portion of this decline in 2013 with a 46% year over year improvement.

Canadian Apple Farm Cash Receipts



Canadian Apple — Farm Cash Receipts, Annual (Dollars x 1,000)

	2008	2009	2010	2011	2012	2013
Canada	177,220	179,063	162,072	155,180	165,913	198,715
Newfoundland and Labrador	0	x	5	x	x	x
Prince Edward Island	294	x	328	346	522	504
Nova Scotia	12,100	13,620	13,107	13,053	17,949	17,793
New Brunswick	1,899	1,997	1,729	2,062	2,534	x
Quebec	46,635	44,972	41,080	40,570	56,650	63,328
Ontario	75,276	82,419	71,301	65,059	43,969	64,143
Manitoba	20	18	10	x	x	30
Saskatchewan	5	18	17	26	x	x
Alberta	17	16	14	14	17	x
British Columbia	40,974	35,687	34,481	34,034	44,230	50,430

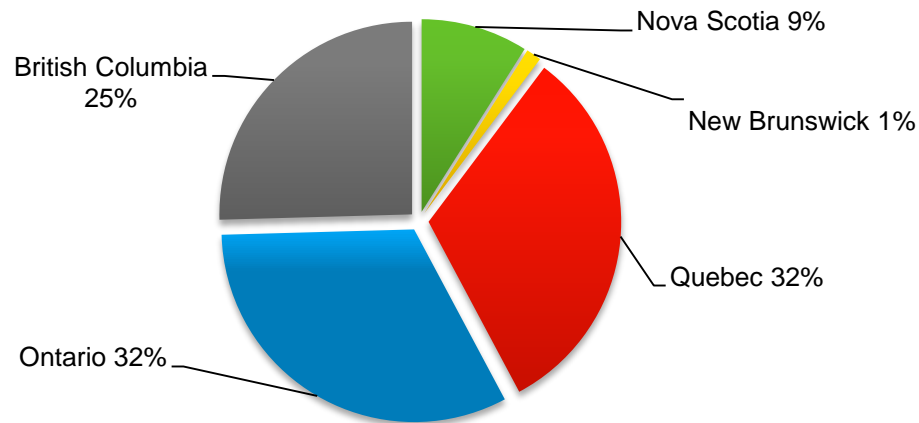
Source: Statistics Canada. Table 002-0001 — Farm cash receipts, annual (dollars), CANSIM (database). (accessed: 2014-05-27)

Symbol legend:

x=Suppressed to meet the confidentiality requirements of the Statistics Act

Almost all of Canadian apple farm cash receipts are represented within the following graph (99%). In 2013, the Canadian apple cash receipts landscape is mostly divided amongst the provinces of Quebec, Ontario and British Columbia with Atlantic Provinces completing the picture at 10% of cash receipts. Nova Scotia has increased its cash receipts continuously over the period since 2008 and now stands 9% of the 2013 total.

Canadian Apple 2013 Provincial Share of Farm Cash Receipts



Canadian Apple Marketed Production

Marketed production of Canadian apples experienced a shock in 2012, when marketed production of Ontario apple producers dipped by over 77% of production over the previous year. Ontario subsequently returned to more normal production levels in 2013.

Overall, Canadian marketed production of apples in 2013 is recorded at 11% less than what was marketed in 2008, influenced mostly by an overall reduction in British Columbia over the timeframe of 24% and the Ontario situation as described above.

Canadian Apples — Marketed production (Tons)

	2008	2009	2010	2011	2012	2013
Canada	470,531	480,047	408,985	435,147	301,944 ^r	421,084
Newfoundland and Labrador	0	x	F	x	x	x
Prince Edward Island	400	x	400	455	619	F
Nova Scotia	42,750	44,500	37,101	40,169	41,340	41,175
New Brunswick	4,250	4,408	4,084	4,355	4,652	F
Quebec	119,091	131,691	116,209	122,661	111,066 ^r	119,079
Ontario	186,750	196,192	149,584	160,969	36,502	166,686
Manitoba	F	F	F	x	x	15
Saskatchewan	5	F	13 ^E	F	x	x
Alberta	F	F	F	20 ^E	18	x
British Columbia	117,250	102,800	101,574	106,499	107,731	89,232

Source: Statistics Canada. Table 001-0009 — Area, production and farm gate value of fresh and processed fruits, by province, annual, CANSIM (database). (accessed: 2014-05-27)

Symbol legend:

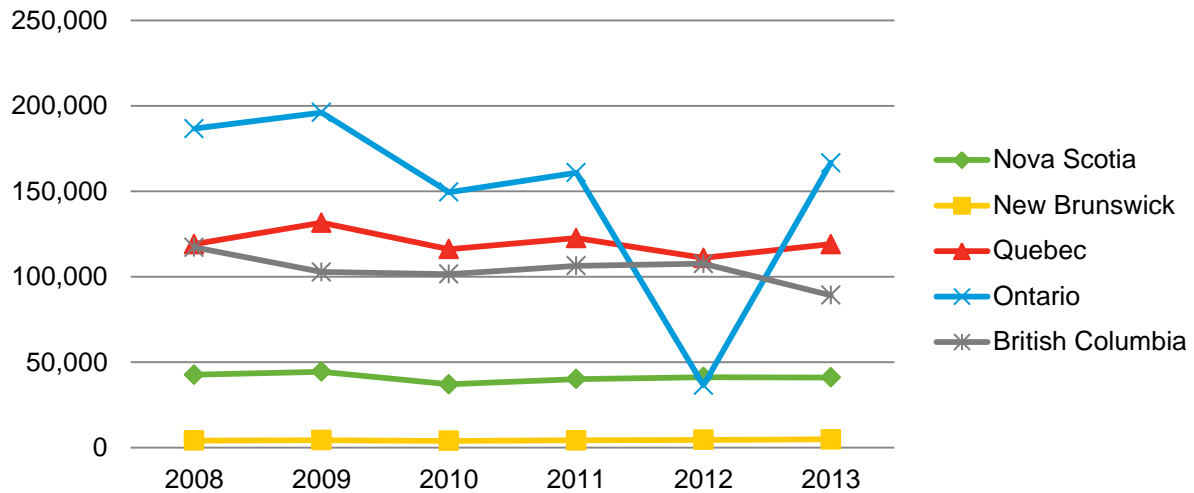
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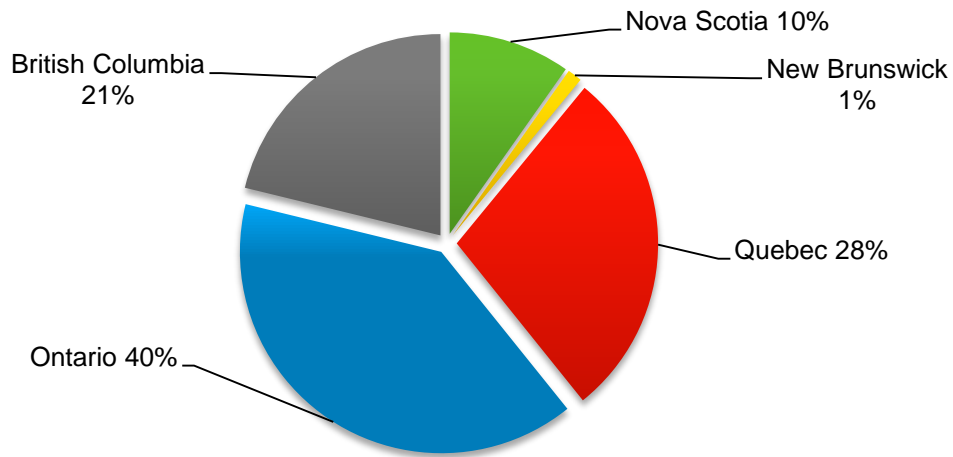
E=Use with caution

Canadian Apples — Marketed Production (Tons)



The 2013 Canadian distribution of marketed production does not reflect Ontario’s demise in 2012 as they have been able to recover most of the lost ground. In 2013 the distribution within Canada demonstrates that 40% of marketed production originates in Ontario while Quebec and British Columbia account for 28 and 21% respectively and the Atlantic following suit with 11%.

Canadian Apples — 2013 Provincial Share of Marketed Production



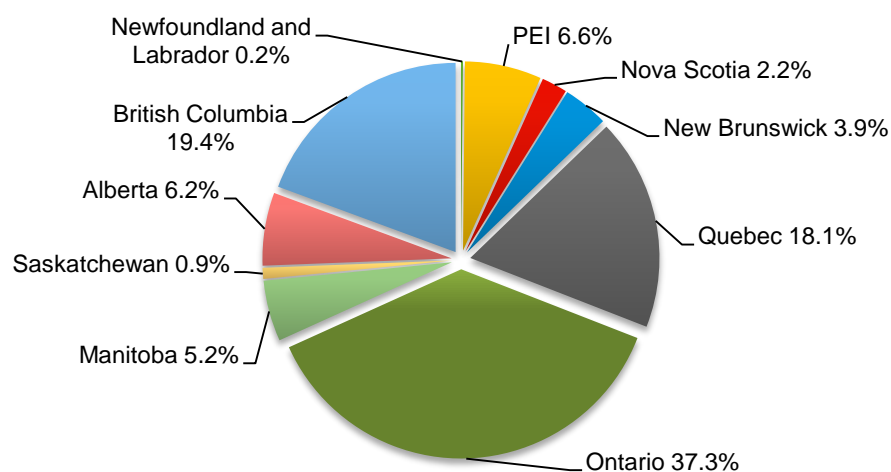
3.4 Canadian Fruit and Vegetable Farm Cash Receipts by Province

3.4.1 Canada

Ontario produces by far the highest horticultural farm cash receipts in Canada capturing \$1.5 billion dollars in 2012 or just over 37% of Canada's total of \$4.06 billion dollars. British Columbia is the second largest horticultural farm cash receipts producer in Canada in 2012 at \$787 million dollars (19.4%) followed closely by Quebec at \$736 million dollars (18.1%).

At the other end of the spectrum is Newfoundland and Labrador with 0.2% of the Canadian landscape (\$6.6 million dollars). The Atlantic Provinces combined amount to \$519.2 million dollars or 12.8% of Canada's horticultural farm cash receipts, roughly the same as the Prairies who register at 12.4% combined or \$502.8 million dollars.

Provincial Share of 2012 Total Horticultural Farm Cash Receipts



Total Horticultural Farm Cash Receipts by Province (\$/1,000)

	2012 (%)	2008	2009	2010	2011	2012
Canada	(%)	3,569,603	3,809,748	3,753,227	3,973,380	4,060,713
Newfoundland and Labrador	0.2%	6,442	7,783	6,599	6,408	6,589
PEI	6.6%	209,737	230,268	223,532	279,503	266,012
Nova Scotia	2.2%	75,349	68,052	71,983	78,540	88,745
New Brunswick	3.9%	150,476	159,682	150,056	181,269	157,834
Quebec	18.1%	644,699	644,362	620,239	687,224	736,394
Ontario	37.3%	1,332,426	1,451,340	1,488,621	1,544,723	1,515,283
Manitoba	5.2%	236,955	289,161	238,119	203,865	211,367
Saskatchewan	0.9%	43,248	58,195	39,758	43,717	38,193
Alberta	6.2%	215,959	228,896	216,623	213,117	253,219
British Columbia	19.4%	643,963	672,007	697,692	735,016	787,080

Source: Statistics Canada. Table002-0001 - Farm cash receipts, annual (dollars), CANSIM (database). (accessed: 2014-01-02)

3.4.2 Newfoundland and Labrador

At \$6.6 million dollars, Newfoundland and Labrador's fruit and vegetable farm cash receipts represent only 5.1% of this provinces total farm cash receipts of \$130.3 million dollars. Of the total fruit and vegetable farm cash receipts, vegetables account for 85% (\$5.6 million dollars). While still relatively small, the fruit sector has been steadily increasing in recent years.

Farm Cash Receipts (\$/1,000)		2008	2009	2010	2011	2012
Nfld and Labrador	Total farm cash receipts	109,323	107,805	117,294	118,823	130,310
	Percentage of Total Canadian	0.2%	0.2%	0.3%	0.2%	0.2%
	Total Fruit and Vegetable farm cash receipts	6,442	7,783	6,599	6,408	6,589
	Percentage of total provincial farm cash receipts	5.9%	7.2%	5.6%	5.4%	5.1%
	Total vegetable farm cash receipts	6,442	6,981	5,853	5,525	5,592
	Percentage of Total Fruit and Vegetable farm cash receipts	100.0%	89.7%	88.7%	86.2%	84.9%
	Total Fruit farm cash receipts	0	802	746	883	997
	Percentage of Total Fruit and Vegetable farm cash receipts	0.0%	10.3%	11.3%	13.8%	15.1%

Source: Statistics Canada. Table002-0001 - Farm cash receipts, annual (dollars), CANSIM (database). (accessed: 2014-01-02)
 Note: Includes program payments

3.4.3 Prince Edward Island

Fruit and vegetables account for 55% (\$266 million dollars) of PEI's total farm cash receipts with 97% of this originating from vegetables. There has been little change in the provincial makeup for farm cash receipts over the last five years.

Farm Cash Receipts (\$/1,000)		2008	2009	2010	2011	2012
PEI	Total farm cash receipts	394,369	410,721	410,321	484,544	480,974
	Percentage of Total Canadian	0.9%	0.9%	0.9%	1.0%	0.9%
	Total Fruit and Vegetable farm cash receipts	209,737	230,268	223,532	279,503	266,012
	Percentage of total provincial farm cash receipts	53.2%	56.1%	54.5%	57.7%	55.3%
	Total vegetable farm cash receipts	209,737	224,458	214,256	269,001	256,960
	Percentage of Total Fruit and Vegetable farm cash receipts	100.0%	97.5%	95.9%	96.2%	96.6%
	Total Fruit farm cash receipts	0	5,810	9,276	10,502	9,052
	Percentage of Total Fruit and Vegetable farm cash receipts	0.0%	2.5%	4.1%	3.8%	3.4%

Source: Statistics Canada. Table002-0001 - Farm cash receipts, annual (dollars), CANSIM (database). (accessed: 2014-01-02)
 Note: Includes program payments

3.4.4 Nova Scotia

At \$88.7 million dollars fruit and vegetables represent just over 15% of the provinces total farm cash receipts; this is roughly the same level recorded over each of the years 2008 to 2012. In 2012 fruit accounted for 64% of total fruit and vegetable farm cash receipts, returning to a provincial distribution similar to that in 2008. It is interesting to note that in 2009 the distribution between fruit and vegetable farm cash receipts was close to even due to a significant decline in fruit farm cash receipts.

Farm Cash Receipts (\$/1,000)		2008	2009	2010	2011	2012
Nova Scotia	Total farm cash receipts	488,520	462,744	496,162	527,865	582,245
	Percentage of Total Canadian	1.1%	1.0%	1.1%	1.1%	1.1%
	Total Fruit and Vegetable farm cash receipts	75,349	68,052	71,983	78,540	88,745
	Percentage of total provincial farm cash receipts	15.4%	14.7%	14.5%	14.9%	15.2%
	Total vegetable farm cash receipts	28,359	32,627	28,888	33,543	31,585
	Percentage of Total Fruit and Vegetable farm cash receipts	37.6%	47.9%	40.1%	42.7%	35.6%
	Total Fruit farm cash receipts	46,990	35,425	43,095	44,997	57,160
	Percentage of Total Fruit and Vegetable farm cash receipts	62.4%	52.1%	59.9%	57.3%	64.4%

Source: Statistics Canada. Table002-0001 - Farm cash receipts, annual (dollars), CANSIM (database). (accessed: 2014-01-02)
 Note: Includes program payments

3.4.5 New Brunswick

New Brunswick's total farm cash receipts include \$158 million dollars originating from fruit and vegetables, or roughly 30% of the total. At \$118.2 million dollars in 2012 vegetables accounted for three quarters of provincial fruit and vegetable farm cash receipts. In 2009 an increase in vegetable farm cash receipts combined with a significant decrease (40%) in fruit receipts produced a surge for vegetables on a distribution basis where they represented close to 89% of the provinces fruit and vegetable farm cash receipts.

Farm Cash Receipts (\$/1,000)		2008	2009	2010	2011	2012
New Brunswick	Total farm cash receipts	476,515	501,530	477,287	540,425	537,426
	Percentage of Total Canadian	1.0%	1.1%	1.1%	1.1%	1.0%
	Total Fruit and Vegetable farm cash receipts	150,476	159,682	150,056	181,269	157,834
	Percentage of total provincial farm cash receipts	31.6%	31.8%	31.4%	33.5%	29.4%
	Total vegetable farm cash receipts	119,860	141,549	123,554	150,541	118,212
	Percentage of Total Fruit and Vegetable farm cash receipts	79.7%	88.6%	82.3%	83.0%	74.9%
	Total Fruit farm cash receipts	30,616	18,133	26,502	30,728	39,622
	Percentage of Total Fruit and Vegetable farm cash receipts	20.3%	11.4%	17.7%	17.0%	25.1%

Source: Statistics Canada. Table002-0001 - Farm cash receipts, annual (dollars), CANSIM (database). (accessed: 2014-01-02)
 Note: Includes program payments

3.4.6 Quebec

Fruit and vegetable receipts of \$736.4 million dollars in 2012 ranks Quebec as one of the top three provinces in Canada in terms of fruit and vegetable farm cash receipts however this remains only a small portion (8.8%) of Quebec's total farm cash receipts of \$8.35 billion dollars in 2012. Of this \$736.4 billion dollars, 73% originates from vegetables in 2012. For their part, fruit farm cash receipts dropped from 2008 to 2010 however rebounded significantly in each of 2011 and 2012 to now register at \$201.7 million dollars and return the province to similar distributions of fruit and vegetable farm cash receipts as existed five years prior.

Farm Cash Receipts (\$/1,000)		2008	2009	2010	2011	2012
Quebec	Total farm cash receipts	7,573,278	7,442,757	7,213,365	7,966,779	8,348,901
	Percentage of Total Canadian	16.4%	16.7%	16.3%	16.1%	15.4%
	Total Fruit and Vegetable farm cash receipts	644,699	644,362	620,239	687,224	736,394
	Percentage of total provincial farm cash receipts	8.5%	8.7%	8.6%	8.6%	8.8%
	Total vegetable farm cash receipts	462,644	489,007	499,781	516,636	534,710
	Percentage of Total Fruit and Vegetable farm cash receipts	71.8%	75.9%	80.6%	75.2%	72.6%
	Total Fruit farm cash receipts	182,055	155,355	120,458	170,588	201,684
	Percentage of Total Fruit and Vegetable farm cash receipts	28.2%	24.1%	19.4%	24.8%	27.4%

Source: Statistics Canada. Table002-0001 - Farm cash receipts, annual (dollars), CANSIM (database). (accessed: 2014-01-02)
 Note: Includes program payments

3.4.7 Ontario

At \$12.3 billion dollars in 2012, Ontario accounts for 23% of Canada's total agricultural farm cash receipts. Of this amount 12.3% or \$1.52 billion dollars originate from fruit and vegetables with \$1.32 billion dollars (87%) coming from vegetables alone. While fruit farm cash receipts have steadily diminished over the last five year period, vegetables have increased by about 20% overall during the same period.

Farm Cash Receipts (\$/1,000)		2008	2009	2010	2011	2012
Ontario	Total farm cash receipts	10,046,738	9,684,732	10,206,796	11,033,567	12,310,889
	Percentage of Total Canadian	21.8%	21.7%	23.0%	22.2%	22.7%
	Total Fruit and Vegetable farm cash receipts	1,332,426	1,451,340	1,488,621	1,544,723	1,515,283
	Percentage of total provincial farm cash receipts	13.3%	15.0%	14.6%	14.0%	12.3%
	Total vegetable farm cash receipts	1,099,595	1,236,210	1,281,006	1,327,052	1,323,836
	Percentage of Total Fruit and Vegetable farm cash receipts	82.5%	85.2%	86.1%	85.9%	87.4%
	Total Fruit farm cash receipts	232,831	215,130	207,615	217,671	191,447
	Percentage of Total Fruit and Vegetable farm cash receipts	17.5%	14.8%	13.9%	14.1%	12.6%

Source: Statistics Canada. Table002-0001 - Farm cash receipts, annual (dollars), CANSIM (database). (accessed: 2014-01-02)
 Note: Includes program payments

3.4.8 Manitoba

Vegetables represent almost all of the fruit and vegetable cash receipts of \$211.4 million dollars recorded in Manitoba in 2012. In turn, this \$211.4 million dollars is just 4.1% of Manitoba's total agricultural farm cash receipts of \$5.18 billion dollars in 2012. Total fruit and vegetable farm cash receipts are roughly 10% lower in 2012 than they were in 2008.

Farm Cash Receipts (\$/1,000)		2008	2009	2010	2011	2012
Manitoba	Total farm cash receipts	4,843,809	4,853,362	4,780,519	4,969,622	5,177,726
	Percentage of Total Canadian	10.5%	10.9%	10.8%	10.0%	9.6%
	Total Fruit and Vegetable farm cash receipts	236,955	289,161	238,119	203,865	211,367
	Percentage of total provincial farm cash receipts	4.9%	6.0%	5.0%	4.1%	4.1%
	Total vegetable farm cash receipts	235,485	287,329	236,728	202,190	210,181
	Percentage of Total Fruit and Vegetable farm cash receipts	99.4%	99.4%	99.4%	99.2%	99.4%
	Total Fruit farm cash receipts	1,470	1,832	1,391	1,675	1,186
	Percentage of Total Fruit and Vegetable farm cash receipts	0.6%	0.6%	0.6%	0.8%	0.6%

Source: Statistics Canada. Table002-0001 - Farm cash receipts, annual (dollars), CANSIM (database). (accessed: 2014-01-02)
 Note: Includes program payments

3.4.9 Saskatchewan

Almost all of Saskatchewan's \$38.2 million dollars in fruit and vegetable cash receipts are derived from vegetables and this amount represent only a very small portion (0.3%) of this provinces total agricultural farm cash receipts of \$11.84 billion dollars. Despite a high of \$58.2 million dollars in fruit and vegetable cash receipts in 2009, at \$38.2 million dollars in 2012 the province has registered an overall decline for the five year period of roughly 11%.

Farm Cash Receipts (\$/1,000)		2008	2009	2010	2011	2012
Saskatchewan	Total farm cash receipts	9,427,015	9,244,398	9,117,239	11,044,491	11,838,272
	Percentage of Total Canadian	20.5%	20.7%	20.6%	22.3%	21.8%
	Total Fruit and Vegetable farm cash receipts	43,248	58,195	39,758	43,717	38,193
	Percentage of total provincial farm cash receipts	0.5%	0.6%	0.4%	0.4%	0.3%
	Total vegetable farm cash receipts	41,933	56,650	39,017	42,829	37,182
	Percentage of Total Fruit and Vegetable farm cash receipts	97.0%	97.3%	98.1%	98.0%	97.4%
	Total Fruit farm cash receipts	1,315	1,545	741	888	1,011
	Percentage of Total Fruit and Vegetable farm cash receipts	3.0%	2.7%	1.9%	2.0%	2.6%

Source: Statistics Canada. Table002-0001 - Farm cash receipts, annual (dollars), CANSIM (database). (accessed: 2014-01-02)
 Note: Includes program payments

3.4.10 Alberta

In 2012 Alberta recorded \$253.2 million dollars of fruit and vegetable farm cash receipts, the highest level for these commodities during the five year preceding period. This remains however only 2.1% of Alberta's 2012 figure of \$11.95 billion dollars for total agricultural farm cash receipts. Almost all of the provinces fruit and vegetable farm cash receipts originate from vegetables with only \$1.87 million dollars registered for fruit in 2012.

Farm Cash Receipts (\$/1,000)		2008	2009	2010	2011	2012
Alberta	Total farm cash receipts	10,178,520	9,326,081	9,000,917	10,321,065	11,950,619
	Percentage of Total Canadian	22.1%	20.9%	20.3%	20.8%	22.1%
	Total Fruit and Vegetable farm cash receipts	215,959	228,896	216,623	213,117	253,219
	Percentage of total provincial farm cash receipts	2.1%	2.5%	2.4%	2.1%	2.1%
	Total vegetable farm cash receipts	213,877	226,379	214,737	211,554	251,353
	Percentage of Total Fruit and Vegetable farm cash receipts	99.0%	98.9%	99.1%	99.3%	99.3%
	Total Fruit farm cash receipts	2,082	2,517	1,886	1,563	1,866
	Percentage of Total Fruit and Vegetable farm cash receipts	1.0%	1.1%	0.9%	0.7%	0.7%

Source: Statistics Canada. Table002-0001 - Farm cash receipts, annual (dollars), CANSIM (database). (accessed: 2014-01-02)

Note: Includes program payments

3.4.11 British Columbia

British Columbia's total agricultural farm cash receipts have progressed at about the same pace as Canada's as a whole during the 2008 to 2012 period. Fruit and vegetable receipts have steadily progressed over these five years registering an overall 22% over this period and coming in at \$787.1 million dollars in 2012. The distribution in cash receipts between fruit and vegetables remained steady at about 37% and 63% respectively between 2008 and 2011 however a surge in fruit farm cash receipts saw this provincial distribution shift to over 44% for fruit in 2012. Overall British Columbia has always generally shown small but steady growth across all lines except for the significant year to year increases in fruit farm cash receipts experience since 2009.

Farm Cash Receipts (\$/1,000)		2008	2009	2010	2011	2012
British Columbia	Total farm cash receipts	2,521,749	2,525,388	2,505,164	2,604,593	2,831,948
	Percentage of Total Canadian	5.5%	5.7%	5.7%	5.2%	5.2%
	Total Fruit and Vegetable farm cash receipts	643,963	672,007	697,692	735,016	787,080
	Percentage of total provincial farm cash receipts	25.5%	26.6%	27.9%	28.2%	27.8%
	Total vegetable farm cash receipts	403,065	432,897	427,522	450,104	437,905
	Percentage of Total Fruit and Vegetable farm cash receipts	62.6%	64.4%	61.3%	61.2%	55.6%
	Total Fruit farm cash receipts	240,898	239,110	270,170	284,912	349,175
	Percentage of Total Fruit and Vegetable farm cash receipts	37.4%	35.6%	38.7%	38.8%	44.4%

Source: Statistics Canada. Table002-0001 - Farm cash receipts, annual (dollars), CANSIM (database). (accessed: 2014-01-02)

Note: Includes program payments

4.0 Trade

4.1 Canadian Fruit and Vegetable Products Imports, Exports and Trade Balance

The horticultural sector accounts for an annual export value of over \$3.2 billion dollars a year and a number of Canada's horticultural crops may be found around the world. Canada imports of horticultural products are over twice as much as exports leaving a trade deficit within horticulture of close to \$3.8 billion dollars. What is noteworthy is the fact that total imports, historically twice as high as exports, have also progressed at a much higher rate than exports since 2007, 21% versus 5.7%, leading to a continuously widening horticultural trade balance.

Canadian Horticultural Imports, Exports and Trade Balance (\$/millions)

	2007	2008	2009	2010	2011	Change Since 2007
Total Exports	3,108	3,252	3,224	3,138	3,286	5.7%
Total Imports	5,829	6,252	6,581	6,655	7,051	21.0%
Trade Balance	-2,721	-3,000	-3,357	-3,517	-3,765	38.4%

Source: Statistical Overview of Canadian Horticulture 2010-2011, AAFC October 2012

4.2 Canada's 2012 Top Import Sources for Fruit and Vegetable Products

The United States consistently accounts for 56% or more of total Canadian fruit and vegetable imports. The top 5 import sources (representing 80% of total imports) have remained the same since 2007 with the exception of 2009 when Ecuador and Columbia slightly surpassed Costa Rica in terms of value.

Canada's Top 10 Horticulture Import Sources (\$/Millions)

(Listed according to 2011 ranking)

Country	2007	2008	2009	2010	2011
United States	3,386	3,618	3,795	3,694	3,939
Mexico	637	689	770	909	966
Chile	297	328	335	357	349
Costa Rica	188	199	172	191	201
China	163	156	164	166	177
Guatemala	74	99	119	113	166
Columbia	138	149	173	154	140
Ecuador	96	129	175	154	136
Turkey	68	68	85	88	105
Peru	52	54	59	72	93
Others	730	763	734	757	779
Total	5,829	6,252	6,581	6,655	7,051

Source: Statistical Overview of Canadian Horticulture 2010-2011, AAFC October 2012

4.3 Canada's 2012 Top Export Destinations for Fruit and Vegetable Products

Over the five years between 2007 and 2011 the top three export destinations for horticulture products, representing close to 90% of total exports, have remained unchanged. The United States is, by far, our single largest destination in terms of horticulture sales, accounting for over \$2.7 billion dollars in value.

Canada's Top 10 Horticulture Export Destinations (\$/Millions)

(Listed according to 2011 ranking)

Country	2007	2008	2009	2010	2011
United States	2,592	2,765	2,741	2,676	2,737
Japan	110	100	93	96	111
Germany	44	39	46	43	54
Mexico	31	33	44	39	33
Netherlands	21	23	15	18	31
China	29	17	14	16	25
France	21	23	19	17	25
United Kingdom	31	35	27	21	24
Australia	17	18	14	20	22
Philippines	7	6	15	8	17
Others	205	193	196	184	207
Total	3,108	3,252	3,224	3,138	3,286

Source: Statistical Overview of Canadian Horticulture 2010-2011, AAFC October 2012

4.3.1 Canada's 2012 Top Export Destinations for Vegetable Products (Field and Greenhouse)

Total Canadian vegetable exports (field vegetables, greenhouse vegetables and mushrooms) in 2012 amounted to \$1.05 billion, 98% of which were exported to the USA.

Canada's Top 10 Export Destinations - Vegetable Products ¹															
Country	2008			2009			2010			2011			2012		
	CAD\$ (millions)	% of Total	Rank	CAD\$ (millions)	% of Total	Rank	CAD\$ (millions)	% of Total	Rank	CAD\$ (millions)	% of Total	Rank	CAD\$ (millions)	% of Total	Rank
United States	947.6	97.7%	1	948.2	98.4%	1	1037.5	98.2%	1	1032.3	97.7%	1	1028.8	98.2%	1
Japan	6.7	0.7%	2	9.2	1.0%	2	6.3	0.6%	2	8.4	0.8%	2	5.2	0.5%	2
Australia	0.0	0.0%	10	0.1	0.0%	8	0.0	0.0%	9	4.6	0.4%	3	1.5	0.1%	3
China	0.1	0.0%	5	0.5	0.1%	4	3.0	0.3%	3	0.8	0.1%	5	1.3	0.1%	4
France*	5.1	0.5%	3	0.5	0.1%	3	1.5	0.1%	4	3.0	0.3%	4	1.1	0.1%	5
Spain*	0.2	0.0%	4	0.1	0.0%	7	0.1	0.0%	8	0.1	0.0%	7	1.0	0.1%	6
Italy*	0.1	0.0%	6	0.4	0.0%	5	0.1	0.0%	7	0.1	0.0%	8	0.8	0.1%	7
Turkey	0.0	0.0%	9	0.0	0.0%	10	0.9	0.1%	5	0.0	0.0%	9	0.7	0.1%	8
Brazil	0.1	0.0%	7	0.0	0.0%	9	0.0	0.0%	10	0.0	0.0%	10	0.6	0.1%	9
Venezuela	0.1	0.0%	8	0.3	0.0%	6	0.6	0.1%	6	0.2	0.0%	6	0.6	0.1%	10
Other	9.7	1.0%		4.7	0.5%		6.8	0.6%		6.9	0.7%		6.0	0.6%	
Total	969.7			964.0			1056.8			1056.4			1047.6		

Source: Statistical Overview of the Canadian Vegetable Industry 2012, published November 2013, AAFC

1. Excludes potato products

* EU member states

4.3.2 Canada's Major Exported Fresh Vegetables

Canadian Fresh Vegetable Exports by Commodity (\$/1,000)

Commodity	2008	2009	2010	2011	2012	Change 1 Yr	Change 5 Yrs	% of 2012 Exports
Tomatoes ¹	286,368	290,672	308,158	299,533	274,321	-8.4%	-4.2%	26.2%
Peppers ¹	201,541	188,588	230,995	206,767	225,669	9.1%	12.0%	21.5%
Cucumbers and gherkins ^{1,2}	91,258	99,207	103,176	125,059	126,590	1.2%	38.7%	12.1%
Mushrooms ^{2,3}	83,022	89,019	109,612	110,736	115,770	4.5%	39.4%	11.0%
Beans ⁴	27,230	28,790	31,357	34,677	41,648	20.1%	52.9%	4.0%
Carrots	37,228	41,197	36,577	48,327	38,896	-19.5%	4.5%	3.7%
Lettuce	28,348	28,775	26,986	23,783	28,574	20.1%	0.8%	2.7%
Cabbage	20,457	16,876	26,724	29,850	25,413	-14.9%	24.2%	2.4%
Onions and shallots ³	41,175	26,551	39,893	20,421	22,432	9.8%	-45.5%	2.1%
Corn ⁴	18,767	21,879	18,339	18,007	20,635	14.6%	10.0%	2.0%
Peas ⁴	23,117	22,522	19,229	18,084	17,233	-4.7%	-25.5%	1.6%
Cauliflower and broccoli	6,739	6,657	5,340	7,971	8,869	11.3%	31.6%	0.8%
Asparagus	4,296	5,828	4,517	5,250	6,711	27.8%	56.2%	0.6%
Leguminous vegetables ⁴	2,578	3,174	2,607	3,196	4,194	31.2%	62.7%	0.4%
Eggplant	1,668	2,524	4,306	3,417	3,989	16.7%	139.1%	0.4%
Spinach ⁴	1,596	2,968	3,195	2,891	3,625	25.4%	127.1%	0.3%
Celery	3,832	1,328	1,731	2,826	2,668	-5.6%	-30.4%	0.3%
Sweet Potatoes	102	106	241	4,855	1,825	-62.4%	1689.2%	0.2%
Leeks	416	519	895	993	1,282	29.1%	208.2%	0.1%
Garlic	428	554	558	495	377	-23.8%	-11.9%	0.0%
Brussels sprouts	168	1,208	244	223	262	17.5%	56.0%	0.0%
Turnips	578	85	78	159	175	10.1%	-69.7%	0.0%
Other vegetables ^{2,3,4}	88,728	84,957	81,962	88,744	76,589	-13.7%	-13.7%	7.3%
Total	969,640	963,984	1,056,720	1,056,264	1,047,747	-0.8%	8.1%	

Source: Statistical Overview of the Canadian Vegetable Industry 2012; Statistics Canada (CATSNET July 2013)

Note: Potatoes not included

1. Includes greenhouse vegetables
2. Includes provisionally preserved
3. Includes dried
4. Includes frozen

4.3.3 Canada's 2012 Top Export Destinations for Potato Products

Canada's Top 10 Export Destinations - Potato Products																								
Country	2008-09						2009-10						2010-11						2011-12					
	CAN\$ (millions)				% of Total	Rank	CAN\$ (millions)				% of Total	Rank	CAN\$ (millions)				% of Total	Rank	CAN\$ (millions)				% of Total	Rank
	Fresh	Seed	Processed (1)	Total			Fresh	Seed	Processed (1)	Total			Fresh	Seed	Processed (1)	Total			Fresh	Seed	Processed (1)	Total		
United States	184.3	25.6	873.9	1083.7	82.1%	1	115.6	23.1	772.5	911.2	80.9%	1	141.6	25.9	727.0	894.5	81.2%	1	136.9	29.4	775.5	941.7	83.1%	1
Japan			36.6	36.6	2.8%	3			28.4	28.4	2.5%	3			30.2	30.2	2.7%	3			33.3	33.3	2.9%	2
Mexico		1.8	35.9	37.7	2.9%	2		2.5	39.2	41.8	3.7%	2		2.1	29.3	31.4	2.8%	2		2.2	29.7	31.9	2.8%	3
Philippines			11.7	11.7	0.9%	5			10.4	10.4	0.9%	5			11.6	11.6	1.1%	4			16.1	16.1	1.4%	4
Costa Rica			11.9	11.9	0.9%	4			10.8	10.8	1.0%	4			6.3	6.3	0.6%	5			9.7	9.7	0.9%	5
Thailand	3.3	0.4		3.8	0.3%	7	5.1	0.6		5.7	0.5%	6	4.4	0.7		5.1	0.5%	7	6.8	1.2		8.0	0.7%	6
Indonesia	1.1			1.1	0.1%	10	2.4			2.4	0.2%	8	5.4			5.4	0.5%	6	5.1			5.1	0.4%	7
Venezuela		5.5		5.5	0.4%	6		5.6		5.6	0.5%	7		1.7		1.7	0.2%	8		2.8		2.8	0.2%	8
Dominican Republic	1.1			1.1	0.1%	8	1.2			1.2	0.1%	10	1.6			1.6	0.1%	9	1.5			1.5	0.1%	9
Uruguay		1.1		1.1	0.1%	9		1.8		1.8	0.2%	9		1.3		1.3	0.1%	10		1.0		1.0	0.1%	10
Other	5.1	4.9	116.1	126.1	9.6%		5.8	5.0	96.1	106.8	9.5%		26.5	7.0	79.1	112.7	10.2%		1.5	1.9	79.1	82.5	7.3%	
Total	195.0	39.3	1086.0	1320.3			130.1	38.6	957.4	1126.2			179.5	38.8	883.6	1101.9			151.8	38.5	943.5	1133.8		

Source: 2011-2012 Potato Market Information Review, AAFC June 2013

(1) Includes Frozen

4.3.4 Canada's 2012 Top Export Destination for Fruit Products

Canada's Top 10 Export Destinations - Fruit Products															
Country	2008			2009			2010			2011			2012		
	CAD\$ (millions)	% of Total	Rank	CAD\$ (millions)	% of Total	Rank	CAD\$ (millions)	% of Total	Rank	CAD\$ (millions)	% of Total	Rank	CAD\$ (millions)	% of Total	Rank
United States	338.6	70.6%	1	284.9	70.0%	1	265.4	67.0%	1	303.5	59.6%	1	388.3	64.1%	1
Japan	30.6	6.4%	2	20.1	4.9%	3	23.4	5.9%	3	34.6	6.8%	3	39.8	6.6%	2
United Kingdom*	23.4	4.9%	3	13.5	3.3%	4	10.2	2.6%	5	12.4	2.4%	7	10.5	1.7%	10
Germany*	20.6	4.3%	4	27.1	6.7%	2	23.5	5.9%	2	35.5	7.0%	2	36.7	6.1%	3
Netherlands*	17.0	3.5%	5	10.1	2.5%	5	13.5	3.4%	4	25.1	4.9%	4	23.1	3.8%	4
China	10.4	2.2%	6	7.9	1.9%	8	9.8	2.5%	6	15.4	3.0%	5	14.4	2.4%	7
France*	9.2	1.9%	7	8.7	2.1%	7	7.1	1.8%	8	13.4	2.6%	6	12.8	2.1%	8
Belgium*	5.1	1.1%	8	6.0	1.5%	9	5.8	1.5%	9	10.3	2.0%	9	16.0	2.6%	6
Taiwan	3.1	0.6%	9	9.3	2.3%	6	8.5	2.1%	7	11.2	2.2%	8	10.8	1.8%	9
Hong Kong	0.8	0.2%	10	4.1	1.0%	10	5.3	1.3%	10	10.2	2.0%	10	18.2	3.0%	5
Other	21.1	4.4%		15.2	3.7%		23.7	6.0%		38.0	7.5%		35.6	5.9%	
Total	479.9			406.9			396.2			509.6			606.2		

Source: Statistical Overview of the Canadian Fruit Industry 2012, published September 2013, AAFC

* EU member states

4.3.5 Canada's Major Exported Fresh Fruit

Blueberries, cranberries, cherries and apples form over 90% of total fresh fruit exports with blueberries comprising alone close to 66% of the total.

Canada's Top 10 Fresh Fruit Exports (Dollars x 1,000)					
Commodity	2008	2009	2010	2011	2012
Blueberries ^{1,4}	301,309	236,366	245,153	335,797	397,946
Cranberries	63,791	66,948	48,011	53,686	74,640
Cherries ²	15,829	27,513	30,098	41,500	43,381
Apples ³	36,722	24,116	24,722	26,051	31,108
Raspberries ⁴	26,594	13,306	11,454	10,219	9,223
Strawberries ⁴	1,014	1,037	1,555	1,264	1,966
Apricots ³	2	8	3	4	1,581
Grapes ³	1,823	1,763	1,344	2,854	1,482
Hazelnuts and filberts ³	997	1,309	1,459	775	622
Melons ⁵	1,278	1,179	3,593	1,518	508
Other	30,450	33,320	28,885	35,891	43,761
Total	479,809	406,865	396,277	509,559	606,218

Source: Statistical Overview of the Canadian Fruit Industry 2012, published September 2013, AAFC

Notes:

1. Includes high bush and low bush blueberries
2. Includes sweet and sour cherries
3. Includes dried
4. Includes frozen
5. Includes watermelons

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