

Nova Scotia Department of Agriculture

An Overview of the Nova Scotia Agriculture and Agri-Food Industry

2010

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Foreword

The 2010 Profile of the Nova Scotia Agriculture and Agri-food Industry provides a comprehensive statistical overview of the industry. It is the first such document that has been produced and is intended to be updated each year to provide a series of yearbooks that will map the progress of the agri-food industry in the province over time.

The document organizes information to allow stakeholders to understand the current state of the industry and how it has arrived there. This will help identify strengths and weaknesses internal to the industry as well as external opportunities and threats that the industry faces.

The suite of statistics and associated analyses allow for convenient reference on a wide range of topics, from economic impact and trade, geographic location, production, financial performance and government support to information on climate and media exposure of agri-food issues. The data referenced are from a variety of sources, the majority being from Statistics Canada. An adjustment to include Nova Scotia's exports of mink pelts using provincial export permit data is used in the report. Mink pelts are Nova Scotia's largest agri-food export but are largely unaccounted for in standard export data due to technical difficulties unique to the fur industry. Adjusting for mink increased total agri-food exports in 2010 from \$183 million reported in CATSNET (standard trade statistics database) to \$277 million. In order to estimate Nova Scotia's mink exports by country, Ontario's mink exports to country proportions were multiplied by Nova Scotia estimates of total mink exports.

After a number of years of statistics reflecting the industry's worsening financial performance, 2010 saw key indicators such as exports and farm incomes increase over the previous year, while farm gate values decreased slightly. While this partial reversal is a positive for the industry as a whole, the situation of different sectors within agri-food differ greatly. Encouragingly, there appears to be a growing public interest in agriculture and food leading to more questions being asked regarding where food comes from and how it is produced. This presents a significant opportunity now and in the years ahead.

Key Terms

Agriculture- Agriculture is used throughout the document to include all aspects of primary agriculture from food to fur production.

Agri-food- The agri-food industry in this document includes primary food and fibre production (primary agriculture) as well as further processing (food manufacturing). While fish and fishery products are often included in a broader definition of the Nova Scotia agri-food industry, this document focuses on the non-fishery agri-food industry.

Adjusted for inflation- In figures where a series of yearly data are presented, the dollar values are adjusted for inflation by using the Consumer Price Index (CPI) for Nova Scotia. Figures are adjusted to constant dollars in the most recent year available.

Capital cost allowance- A tax term which defines the portion of the cost of depreciating property (equipment and buildings) that is tax deductible.

Exposure score- A scoring system devised to gauge the visibility (exposure) of a theme in the media. The methodology can be found in the annual agri-food media summaries at: <http://gov.ns.ca/agri/bde/eanalysis.shtml>

Farm cash receipts (FCR)- This is the farm gate value of the primary agriculture industry. These numbers are for revenues received during the calendar year.

Farm value- This is the farm value of the primary agriculture industry during the crop year.

Gross Domestic Product (GDP)- Refers to the final value of output from an industry, province or country.

Net cash income- Farm cash receipts less operating expenses (market income).

Net operating income- Operating revenues less operating expenses. Profit or loss excluding capital cost allowance, inventory change and adjustments for tax purposes.

Operating expenses- The business costs incurred by a farm operating in the production of agricultural commodities (includes inter-farm purchases, excludes capital cost allowance).

Operating revenues- Agricultural sales, program payments and insurance proceeds, custom work, machine rental, rental income and miscellaneous revenues (includes inter-farm sales).

Total net income- Net cash income adjusted for the value of inventory change, depreciation and income in kind.

Executive summary

This section provides a snapshot of some of the key information from each section of the overview. More information on these topics can be found in the sections that follow.

The agriculture industry is present in all 18 Nova Scotia counties, albeit at significantly different scales. Kings County has the most farms of any county with 604 in 2006, followed by Cumberland (553) and Colchester (442). Hants, Lunenburg, Pictou, Annapolis and Antigonish also have over 225 farms. Victoria, Queens, Richmond and Shelburne have fewer than 50 farms. In total, Nova Scotia has 3,795 farms as of 2006.

The total area of farms (which includes crop and pasture land, summerfallow, natural land for pasture, woodlands, wetlands, and Christmas tree area) follows a pattern similar with the number of farms by county. The province has 403,044 ha of total farm area. Cumberland (73,025 ha) has the most farm area, while Richmond (1,131 ha) has the least. Victoria County has the largest farms on average at 181 ha. Digby (43 ha) has the smallest farms on average. The Nova Scotia average is 106 ha/farm, significantly lower than the Canadian average of 295 ha/farm.

Figure i. Number of farms-2006

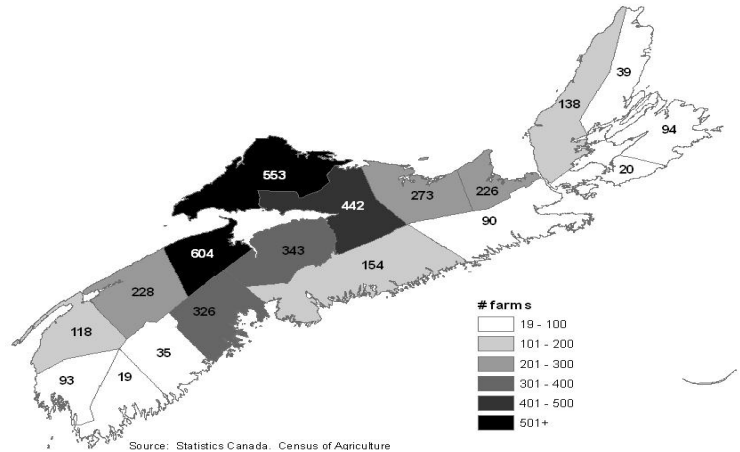
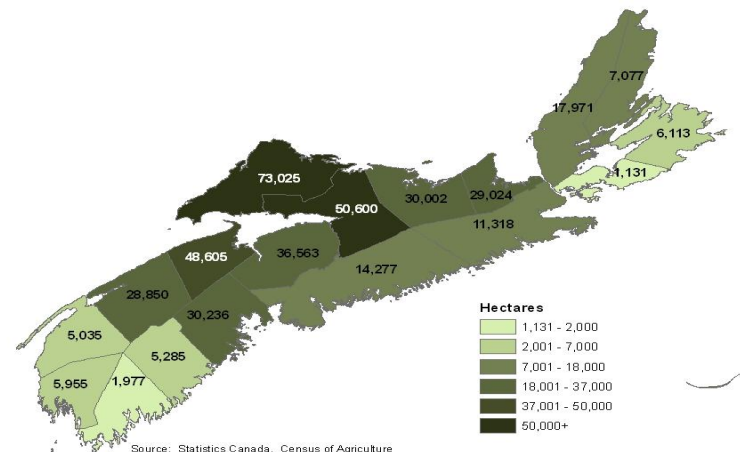


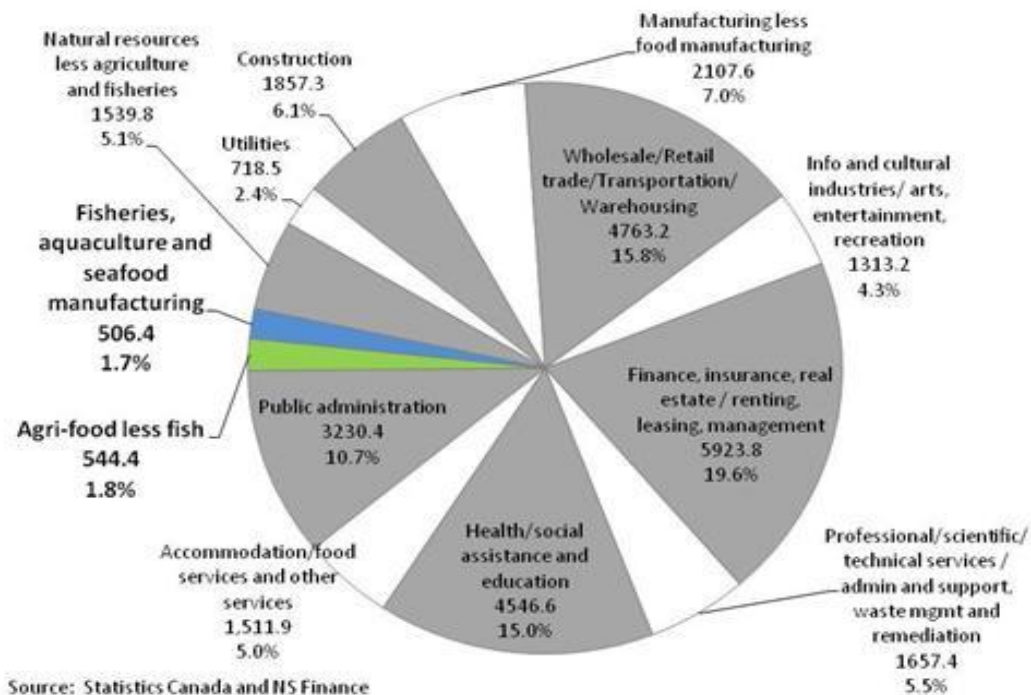
Figure ii. Total farm area- 2006



In 2007 (the most recent data available for current \$ GDP¹) the contribution to the NS economy from the agriculture and food industries (less fish) as measured by gross domestic product (GDP) was \$544.4 million- 1.8 percent of the provincial economy. Primary agriculture GDP was \$198.9 million- 0.7 percent of the total economic output of Nova Scotia. Including fisheries, agri-food GDP amounts to \$1.05 billion- 3.5 percent of the provincial economy.

While small in comparison to some other sectors of the economy, the contribution of agri-food is that of a cornerstone industry - using physical resources tied to the land and sea to produce goods and upon which other parts of the economy have grown.

Figure iii. NS GDP by industry (\$millions)- 2007

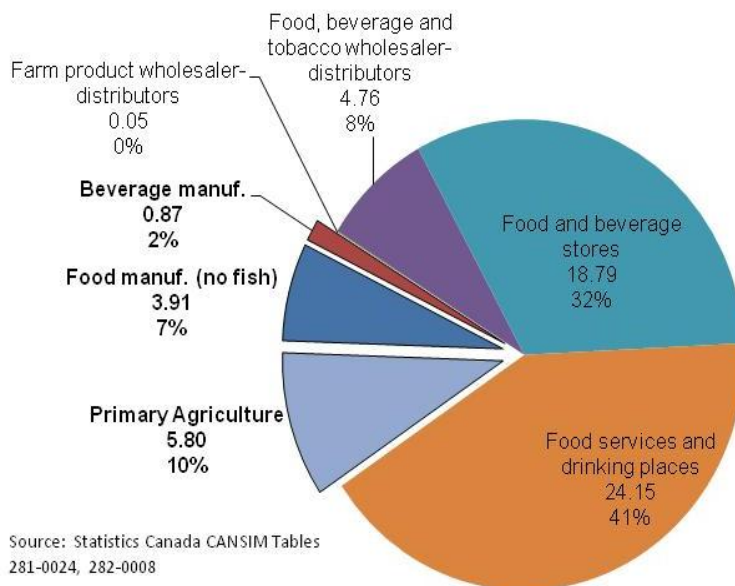


¹ Adjusted for inflation (chained 2002 \$) are available to 2010 but cannot be used to estimate industry percentages of total NS GDP output. Current \$ GDP figures (available to 2007) must be used for this calculation.

The agriculture and agri-food industry is a significant employer in Nova Scotia. In 2010, primary agriculture employed 5,800, while non-fishery food manufacturing employed 3,910 and beverage manufacturing, 865. Using this definition the agri-food industry employed 10,575 people in 2010, down 1,062 (9.1 percent) from 2009 with primary agriculture losing 800, non-fishery food manufacturing down 362 and beverage manufacturing adding 8 employees. The 10,575 jobs accounted for 2.3 percent of total provincial employment in 2010.

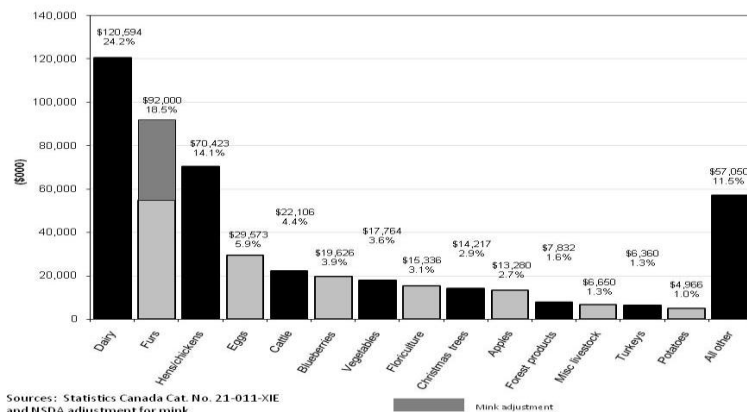
When a broader definition of the industry is taken to consider food wholesalers/distributors, grocery and other food and beverage stores, and restaurants, the agri-food industry (less fisheries) employed 58,323 in 2010, down 2.6 percent from 2009. This amounts to over 13 percent of total provincial employment. Grocery stores and restaurants/drinking establishments accounted for 73 percent of agri-food industry employment under this breakdown.

Figure iv. Agri-Food industry employment (thousands)- 2010 (no-fish)



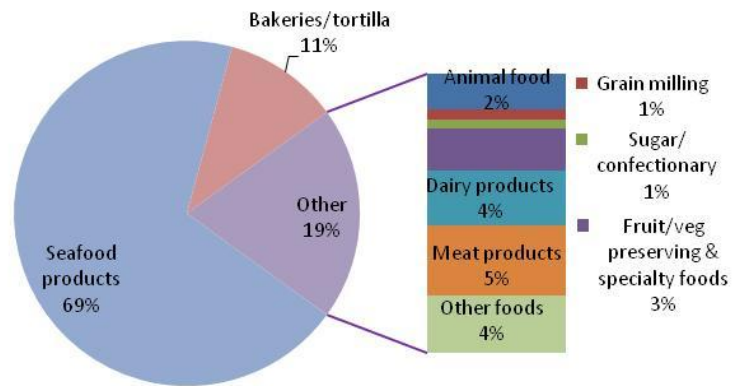
In terms of importance measured by farm gate revenues, Nova Scotia agriculture is closely split between supply managed (dairy, poultry and eggs) at 47% of market revenues with the remainder coming from non supply managed sectors. Dairy is perennially the top revenue-generating sector, followed by fur (mink) and chicken. Eggs, cattle, blueberries, vegetables, floriculture, Christmas trees and apples all generated more than \$10 million in farm gate revenues in 2010. Mink farm cash receipts have been adjusted to reflect the true sector value in NS (see comments in foreword).

Figure v. Nova Scotia farm revenues by sector- 2010



Seafood manufacturing businesses numbered 320 (-13 from 2008) in 2009. Bakeries were the second most numerous at 50 (+2), followed by meat product manufacturers (23, -1). Dairy product manufacturers (18, same), other foods (19, +2), fruit and vegetable preservation/specialty foods (14, -1), animal food (12, +1), sugar/confectionary manufacturers (3, -1) and grain/oilseed milling businesses (3, same) make up the remainder of the sector. Most of these categories lost a small number of businesses or remained relatively constant over the past 5 years. Other food manufacturing increased by 6 (46 percent) since 2004.

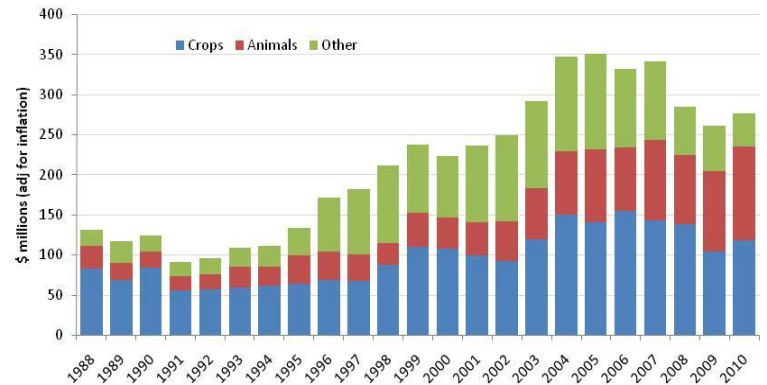
Figure vi. Breakdown of food manufacturing establishments-2009



Statistics Canada CANSIM Table 301-0006

International non-fishery agri-food exports from Nova Scotia increased for the first time in three years (adjusting for inflation) to \$277 million in 2010, an increase of 8 percent over 2009. A rising Canadian dollar and the global recession are key factors behind a general decline in exports from previously reached record highs, topping out at \$351 million in 2007.

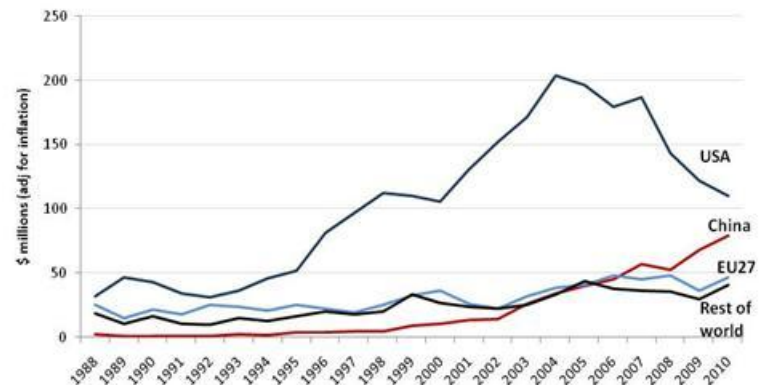
Figure vii. NS international agri-food exports (no fish)



Source: Statistics Canada and AAFC CATS-NET trade data and NSDA adjustments for mink

The United States remains Nova Scotia's most important export destination, consuming \$110 million of Nova Scotia's agri-food exports in 2010. However, as a result of Nova Scotia's high-growth mink industry, China, which consumes the majority of the province's mink exports, has been catching up and is now well above all 27 European countries combined. Similarly, South Korea, a major consumer of Nova Scotia mink exports, has surpassed Japan, importing \$15 million worth of Nova Scotia agri-food exports- almost all of which were mink pelts.

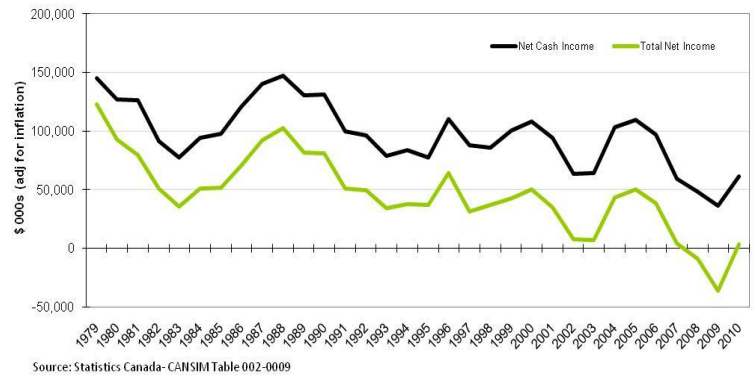
Figure viii. Agri-food product exports by partner (no fish)



Source: Statistics Canada and AAFC CATS-NET trade data and NSDA adjustments for mink

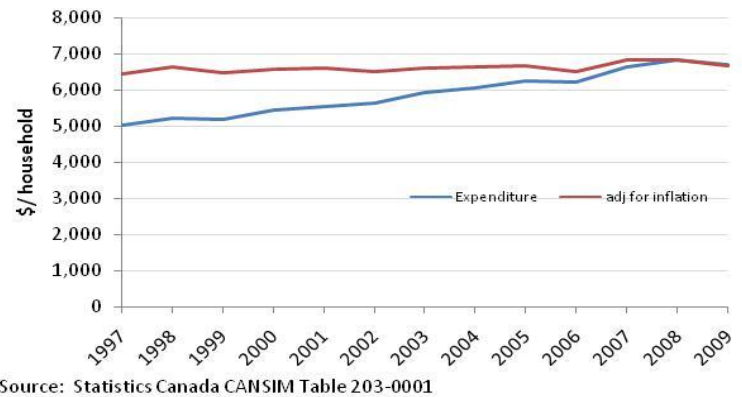
Adjusted for inflation, net cash income (market revenues less expenses) have fallen by almost half compared with the average in the 1980s, reaching a record low of \$35.6 million (unadjusted) in 2009. In 2010 however, for the first time in five years, net cash income increased (by 73 percent) and totaled \$61.5 million. Subtracting depreciation (\$59.2 million) and adding inventory change (\$349,000) and income-in-kind (\$905,000) gives a positive industry total net income for the first time in three years at \$3.6 million in 2010.

Figure ix. Net cash income and total net income



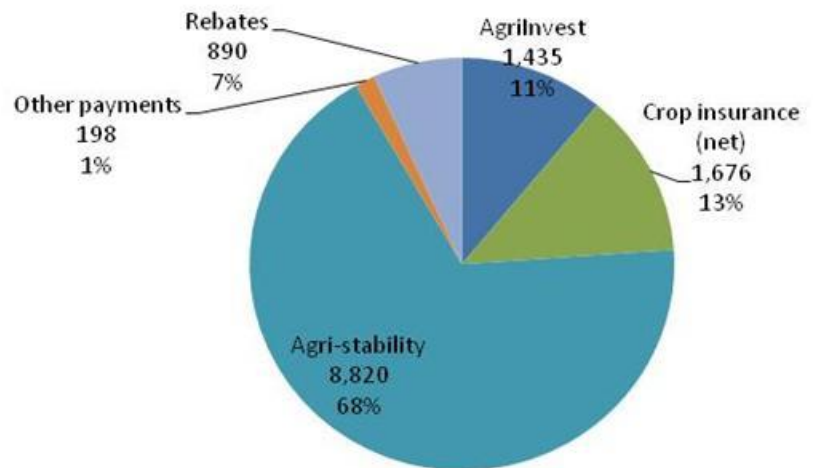
Average annual household expenditures on food have risen steadily since 1997, falling only three times between 1997 and 2009. Adjusting for inflation, food expenditures have been relatively steady, increasing only 4 percent over this period.

Figure x. Average household spending on food



In 2009, average household expenditures on food in Nova Scotia were 6,682, down 2.1 percent from 2008.

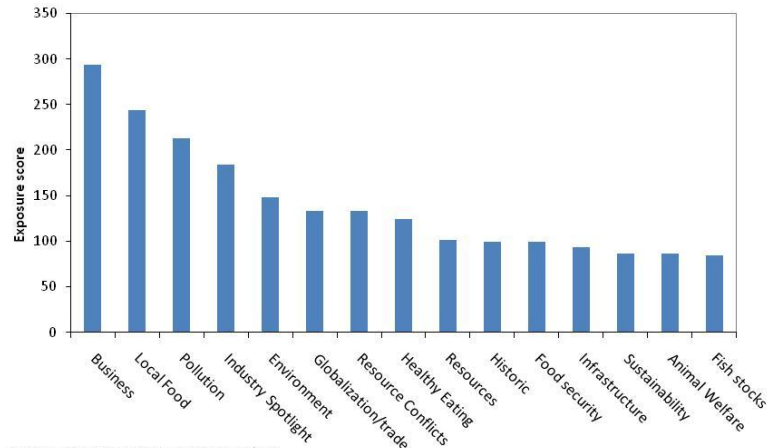
Figure xi. Net government program payments/rebates (thousands)- 2010



Payments from government programs net of producer premiums totaled \$12,129,000 in 2010. An additional \$890,000 were allocated to rebates on interest (\$490,000) and fertilizer and lime (\$400,000). Agri-stability payments increased \$364,000 from 2009 to account for 68 percent of program payments. Crop insurance payments net of producer premiums increased \$296,000 from 2009 and made up 13 percent of payments in 2010. The largest decreases in spending from 2009 were in the NISA and CAIS programs (-\$1.7 million and -\$1.1 million, respectively) and in AgrilInvest payments (-\$989,000). NISA and CAIS have been replaced by the AgriStability and AgrilInvest programs.

The agri-food business theme received the most exposure of agri-food articles in 2010. The main sub-theme was the attempted (and ultimately rejected) takeover bid on fertilizer giant Potash Corp of Saskatchewan. The Canadian government rejected the bid of Australian firm BHP Billiton. Local food (restaurant reviews, farmers' markets), pollution (Gulf of Mexico oil spill), Industry spotlight (seals, wine, and lobster) and the environment (secondary to pollution theme) rounded out the top five themes in 2010.

Figure xii. Media exposure of agri-food themes- 2010



Source: NSDA Newspaper Content Analysis

Agriculture in Nova Scotia

The agriculture industry is present in all 18 Nova Scotia counties, albeit at significantly different scales. Kings County has the most farms of any county with 604 in 2006, followed by Cumberland (553) and Colchester (442). Hants, Lunenburg, Pictou, Annapolis and Antigonish also have over 225 farms. Victoria, Queens, Richmond and Shelburne have fewer than 50 farms. In total, Nova Scotia has 3,795 farms as of 2006.

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Nova Scotia has 116,612 ha in crop production (excluding Christmas trees). Kings leads all counties in terms of area in crops with 21,433 ha. Cumberland (20,978 ha), Colchester (16,554 ha) and Hants (14,139 ha) all have large amounts of crop land by Nova Scotia standards. Richmond County has the smallest area in crops (113 ha) while Queens, Victoria, Digby and Shelburne also have less than 1,000 ha in crops.

Figure A1. Number of farms- 2006

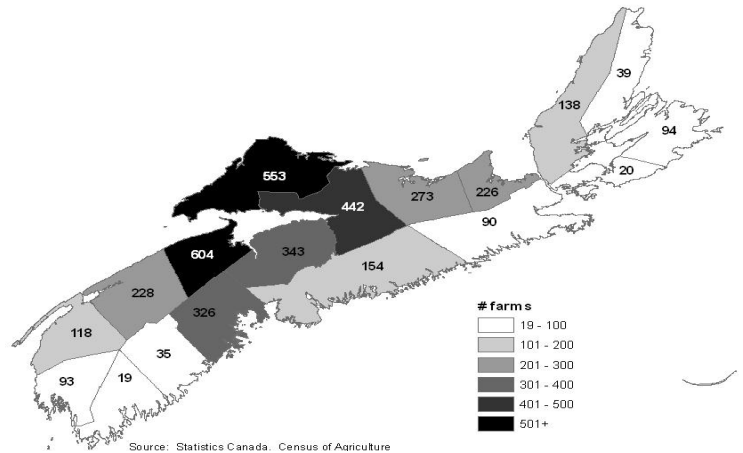


Figure A2. Total farm area- 2006

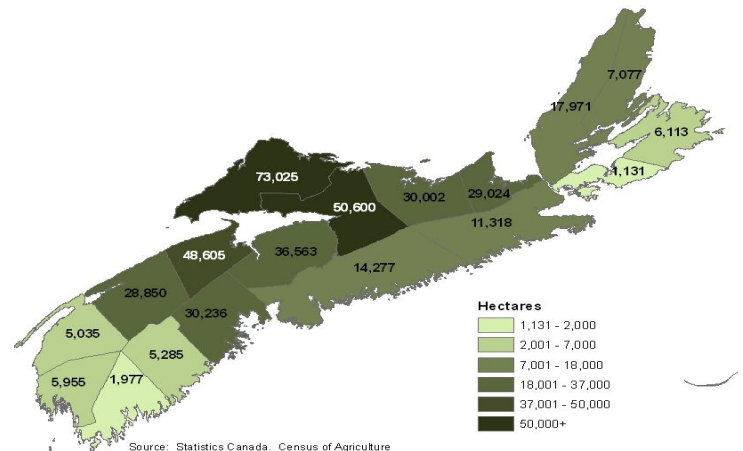
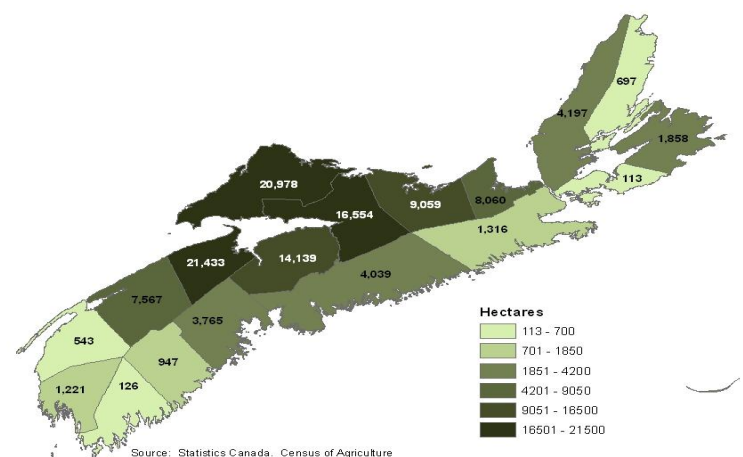
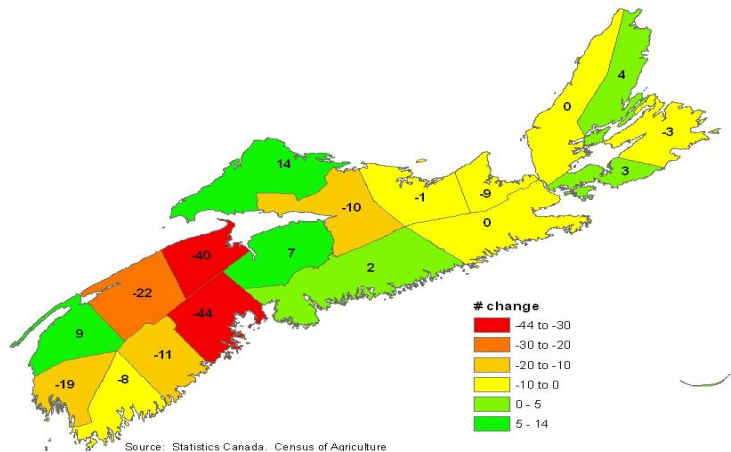


Figure A3. Area in crops- 2006



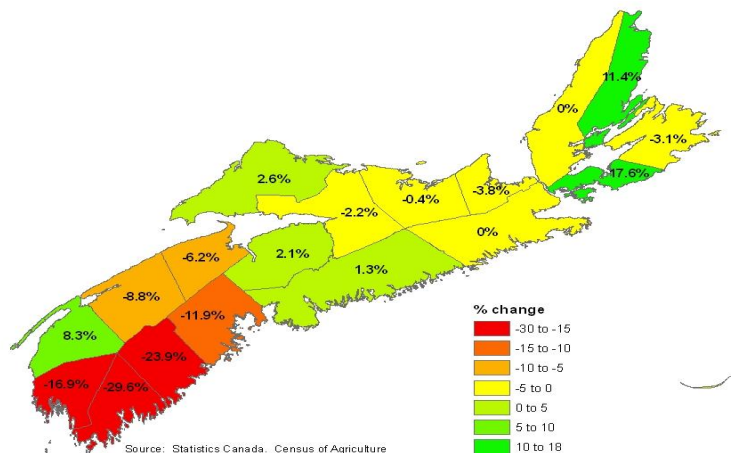
There was a decline of 128 farms between 2001 and 2006. Lunenburg (-44) and Kings (-40) lost the most farms. In total, ten of eighteen Nova Scotia Counties lost farms between 2001 and 2006 (Annapolis (-22), Yarmouth (-19), Queens (-11), Colchester (-10), Antigonish (-9), Shelburne (-8), Cape Breton (-3) and Pictou (-1)). Two counties, Guysborough and Inverness, saw no change in farm numbers, while Halifax (+2), Richmond (+3), Victoria (+4), Hants (+7), Digby (+9) and Cumberland (+14) saw an increase in farm numbers.

Figure A4. Change in number of farms- 01 to 06



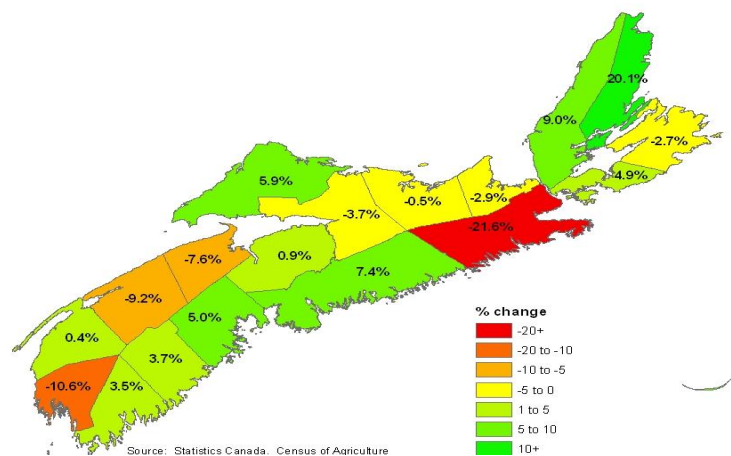
Nova Scotia lost approximately 3 percent of its farms between 2001 and 2006 (128 farms). The largest percentage loss of farms were seen in southern Nova Scotia with Shelburne losing (30 percent), Queens (24), Yarmouth (17) and Lunenburg (12). The largest percentage gains were in Cape Breton with Richmond seeing an increase of 18 percent and Victoria 11 percent. Digby was opposite the trend in southern Nova Scotia with an increase of 8 percent. The remainder of the province had more moderate percentage gains and losses in the number of farms, with more counties losing rather than gaining farms.

Figure A5. % Change in number of farms- 01 to 06



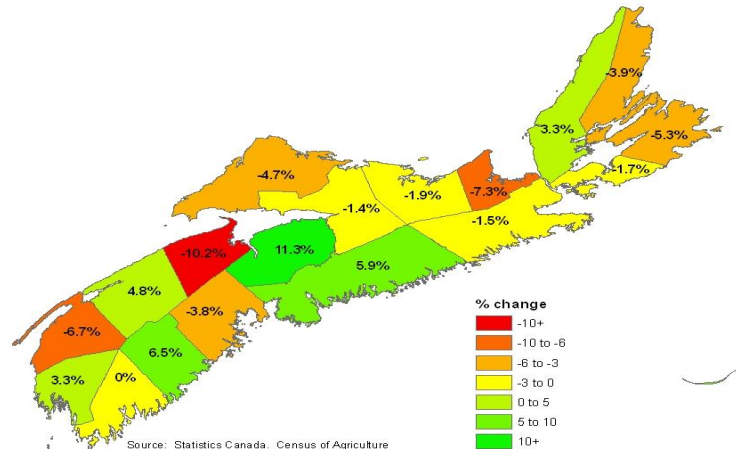
Nova Scotia lost 4000 ha of total farm area between 2001 and 2006. In absolute terms, Kings saw the largest decrease (-3,979 ha) followed by Guysborough (-3,112 ha). In percentage terms, Guysborough saw by far the largest decline (21.6%), more than double Yarmouth, which had the second largest decline (10.6%). More counties actually saw farm area increases. In absolute terms Cumberland had the largest increase (4,084 ha). Victoria had the largest percentage increase (20.1%).

Figure A6. Change in total farm area- 01 to 06



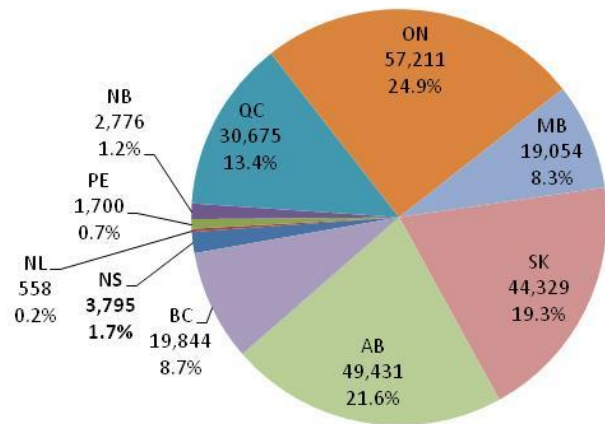
In total, there was 2,605 ha less crop land in production in 2006 compared with 2001. Kings had the largest decline in crop area in both absolute (-2,432 ha) and percentage (-10.2%) terms. Eleven counties had less area in crop production in 2006, while one county, Shelburne, saw no change. In the remaining six counties, crop area increased from 2001, led by Hants County, also in both absolute (1,437 ha) and percentage (11.3%) terms.

Figure A7. Change in crop area- 01 to 06



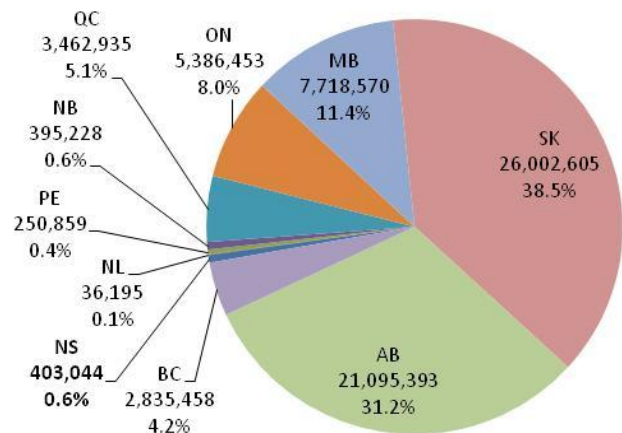
At the national level, Nova Scotia is a small province in terms of number of farms. In 2006, the 3,795 Nova Scotia farms made up 1.7 percent of the Canadian total, up slightly from 1.6 percent in 2001. This places Nova Scotia 7th out of the ten provinces. Nova Scotia has the most farms of the four Atlantic Canadian provinces.

Figure A8. Farms by province- 2006



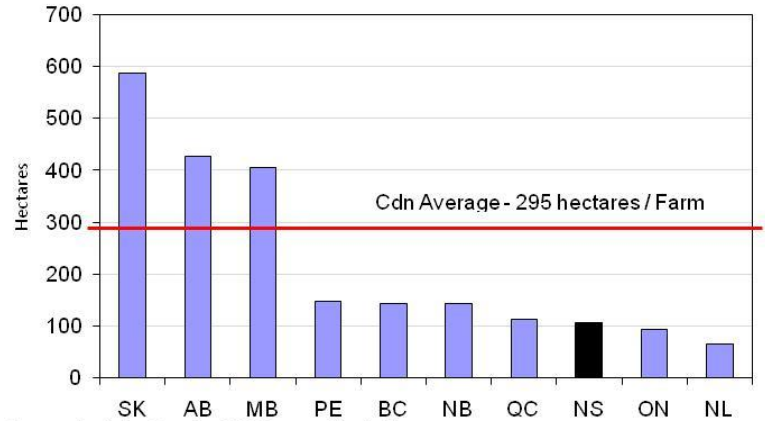
The area of land in farming in Nova Scotia (403,044 ha in 2006) places the province essentially equal with New Brunswick as 7th largest in Canada. Nova Scotia's farms are smaller than the Canadian average, which is significantly higher due to large prairie farms.

Figure A9. Farm area by province- 2006



Nova Scotia has some of the smallest farms in the country at an average of 106 hectares / farm. This is well below the Canadian average of 295 hectares. Only Ontario and Newfoundland have smaller average farm sizes. The average amount of land in crops in Nova Scotia is 38.5 hectares, while the Canadian average is 184.4 hectares.

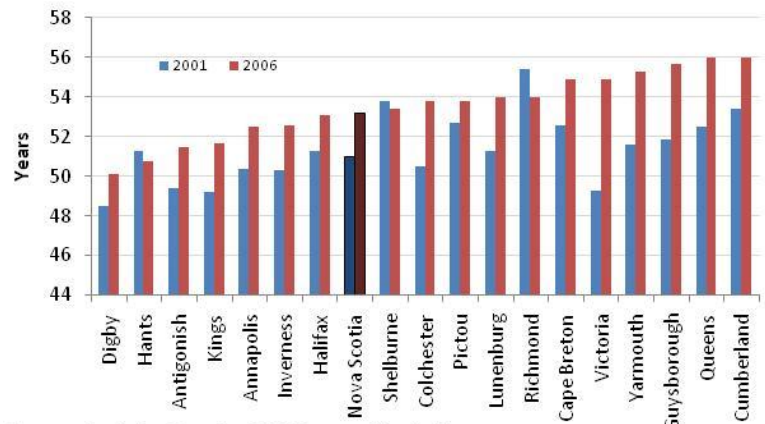
Figure A10. Average farm size- 2006



Source: Statistics Canada. 2006 Census of Agriculture

The average age of Nova Scotia farmers was 53.2 as of the 2006 Census of Agriculture. This is up from 51 in 2001. All but three counties saw increases in the average age of farmers with Victoria having the largest increase (5.6 years). Digby County has the youngest farmers at 50.1 years. Richmond had the largest decrease in average age at 1.4 years.

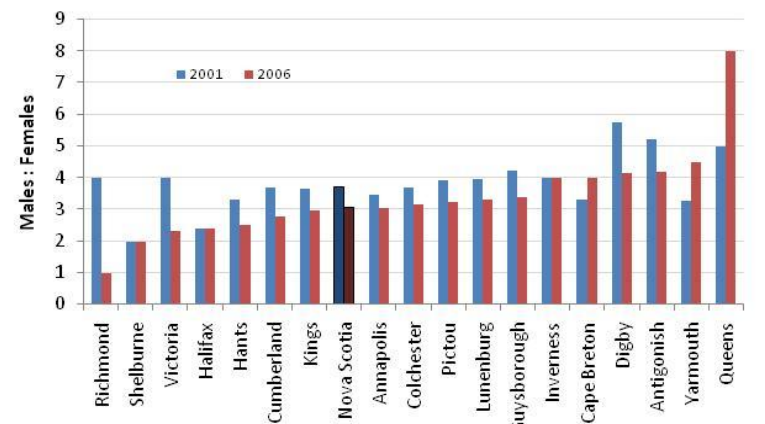
Figure A11. Average age of farmers- 2006 and 2001



Source: Statistics Canada. 2006 Census of Agriculture

While there were over three male farmers to every one female farmer in 2006 (3.06), this is down from 3.7 in 2001. Richmond County has the highest percentage of female farmers with a ratio of 1:1, down significantly from 4 males : 1 female in 2001. All but three counties saw gains in the number of female vs male farmers. Queens has the largest male to female farmer ratio at 8 to 1, up from 5 in 2001.

Figure A12. Sex of farm operators- 2006 and 2001



Source: Statistics Canada. 2006 Census of Agriculture

As of the 2006 Statistics Canada Census of Agriculture, Nova Scotia had 3,795 farms. The largest sector in terms of number of farms is fruit farming, consisting largely of blueberry and apple operations, and farms producing other fruit. Livestock farming, including dairy, beef, fur (mink) and other livestock is a major component of Nova Scotia agriculture.

The province makes up less than 2 percent of the total number of farms in Canada and is not a major player in any specific sector of agriculture with the notable exceptions of fur (in which NS mink farms comprise 1/4 of the Canadian industry) and fruit farming (11 percent of farms in Canada).

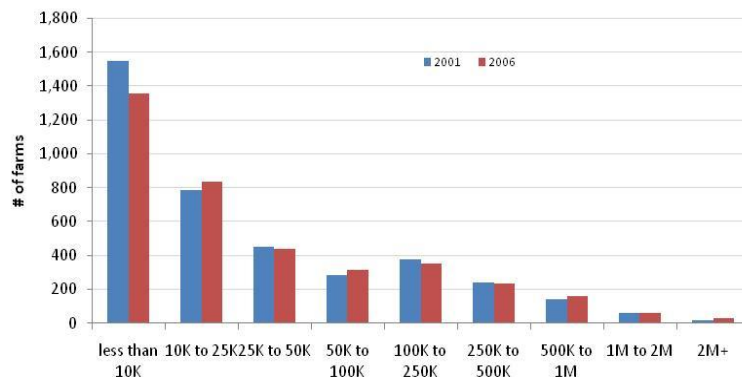
Table 1. Number of farms by main crop/animal

Item	Quantity of NS Farms	Percentage of Canada
Total farms	3,795	2%
Fruit farming	907	11%
Beef	716	1%
Nursery and tree production	412	8%
Dairy	297	2%
Hay farming	279	2%
Horse/equine	184	1%
Livestock combination farming	156	2%
Other vegetables (except potato) farming	125	3%
All other miscellaneous crop farming	123	1%
Floriculture production	97	4%
Fur production	95	25%
Chicken	67	3%
Sheep farming	54	2%
Hogs	51	1%
Chicken egg production	49	3%
Other food crops grown under cover	31	3%
Apiculture	25	2%
Fruit and vegetable combination farming	25	4%
Goat farming	22	2%
All other miscellaneous animal production	19	1%
Potato farming	17	1%
Other grain farming	15	0%
Turkey production	8	3%
Combination poultry and egg production	6	4%
Corn farming	6	0%
Wheat farming	3	0%
Mushroom production	3	2%
Poultry hatcheries	2	4%
Other poultry production	1	0%

Source: Statistics Canada. 2006 Census of Agriculture

The majority of farms in Nova Scotia are considered small farms as classified by gross farm revenues. Over 77 percent of farms had less than \$100,000 in gross revenues. Thirty-six percent of farms have less than \$10,000 in gross revenues. Very large farms (over \$1 million) comprise 2.5 percent of Nova Scotia farms.

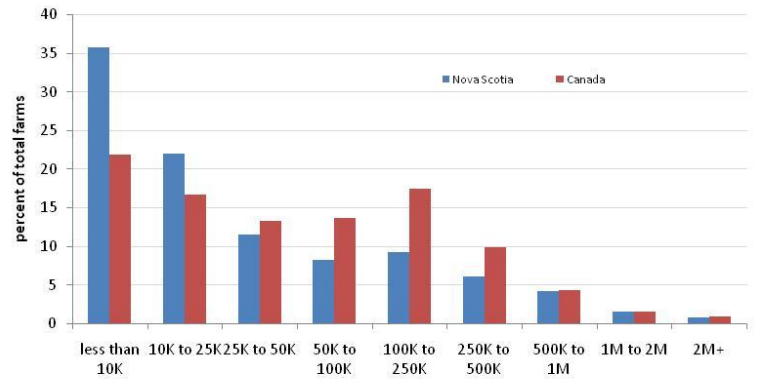
Figure A13. Farms by gross farm receipts



Source: Statistics Canada. 2006 Census of Agriculture

While the majority of Nova Scotia farms are small, the composition of small to large farms is also more pronounced than the Canadian industry as a whole. While 56 percent of Nova Scotia farms generate less than \$25,000 in revenues, only 36 percent of total Canadian farms fit into this category. The Canadian industry as a whole is also significantly more comprised of medium sized farms than is the provincial industry. Approximately 32 percent of Canadian farms are in the \$100K-1 million range, compared with 20 percent provincially.

Figure A14. Farms by gross farm receipts (percent of total farms)- Nova Scotia and Canada

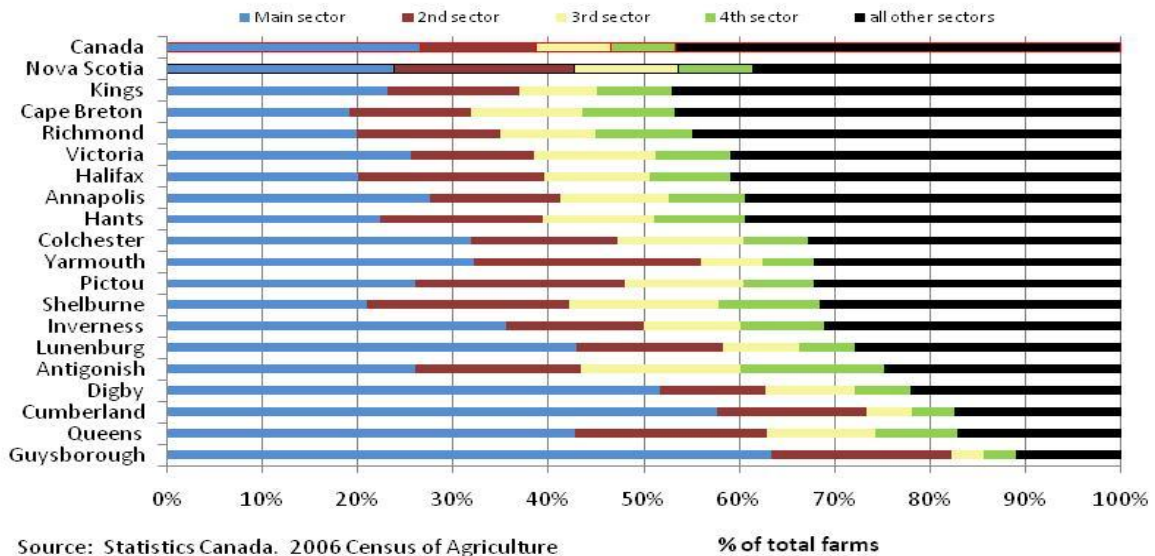


Source: Statistics Canada. 2006 Census of Agriculture

In terms of number of farms per sector, Nova Scotia agriculture is relatively specialized in comparison with the Canadian average (Figure A15). The four main sectors by number of farms (fruits, beef, nursery/tree production, dairy) account for 61 percent of farms in NS compared to 53 percent of Canadian agriculture.

Agriculture in Kings Country is the most diversified in the province while Guysborough is the most specialized (Nursery and tree production). Cumberland (fruit, blueberries) and Digby (fur, mink) are also highly specialized in one sector.

Figure A15. Level of specialization/diversification by county (% of farms by sector)



Source: Statistics Canada. 2006 Census of Agriculture

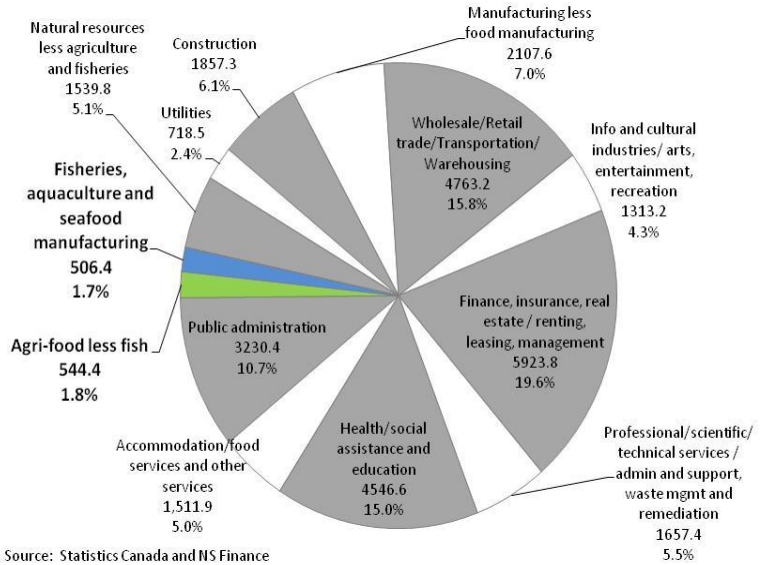
Importance of Agriculture to the Nova Scotia Economy and General Trends

In 2007 (the most recent data available for current \$ GDP²) the contribution to the NS economy from the agriculture and food industries as measured by gross domestic product (GDP) was \$544.4 million- 1.8 percent of the provincial economy. Primary agriculture GDP was \$198.9 million- 0.7 percent of the total economic output of Nova Scotia. Including fisheries, agri-food GDP amounts to \$1.05 billion- 3.5 percent of the provincial economy.

While small in comparison to some other sectors of the economy, the contribution of agri-food is that of a cornerstone industry - using physical resources tied to the land and sea to produce goods and upon which other parts of the economy have grown.

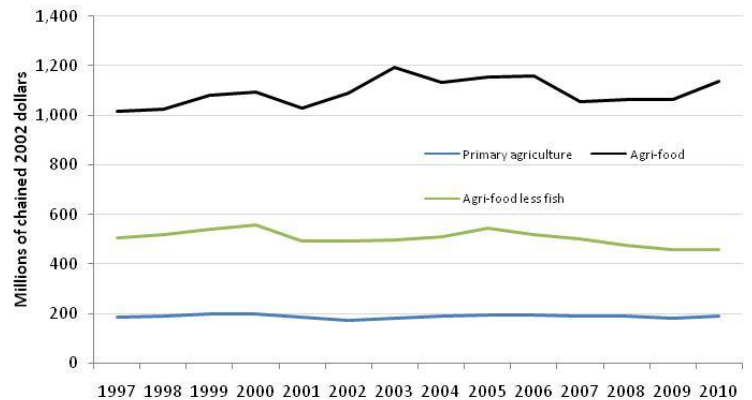
Agri-food less fishery products GDP rebounded slightly (0.4) percent in 2010 but has fallen by 15.6 percent since 2005 (the most recent high). Primary agriculture GDP has been relatively constant and increased 4.1 percent from 2009. An 11.6 percent increase in fisheries, aquaculture and fish processing led to total agri-food industry GDP increasing 6.8 percent over 2009.

Figure B1. NS GDP by industry (\$millions)- 2007



Source: Statistics Canada and NS Finance

Figure B2. NS GDP by industry (\$millions chained 2002)



Source: Calculations based on data from Statistics Canada and NS Finance

² Adjusted for inflation (chained 2002 \$) are available to 2010 but cannot be used to estimate industry percentages of total NS GDP output. Current \$ GDP figures (available to 2007) must be used for this calculation.

Employment

The agriculture and agri-food industry is a significant employer in Nova Scotia. In 2010, primary agriculture employed 5,800, while non-fishery food manufacturing employed 3,910 and beverage manufacturing 865. Using this definition the agri-food industry employed 10,575 people in 2010, down 1,062 (9.1 percent) from 2009 with primary agriculture losing 800, non-fishery food manufacturing down 362 and beverage manufacturing adding 8 employees. The 10,575 jobs account for 2.3 percent of total provincial employment.

When a broader definition of the industry is taken to consider food wholesalers/distributors, grocery and other food and beverage stores, and restaurants, the agri-food industry (less fisheries) employed 58,323 in 2010, down 2.6 percent from 2009. This amounts to over 13 percent of total provincial employment. Grocery stores and restaurants/drinking establishments accounted for 73 percent of agri-food industry employment under this breakdown.

As seen in Figures B4 and B4(a), the broadest category of agri-food employment has risen over time but has been mostly driven by grocery/beverage store and restaurant employment increases. The more “traditional” agri-food categories have had a much different experience, with primary agriculture employment moving around a ten year average of approximately 6,000, while non-fishery food manufacturing has declined for seven consecutive years to 3,910 in 2010 from 5,857 in 2004.

Figure B3. Agri-food industry employment (thousands)-2010 (no-fish)

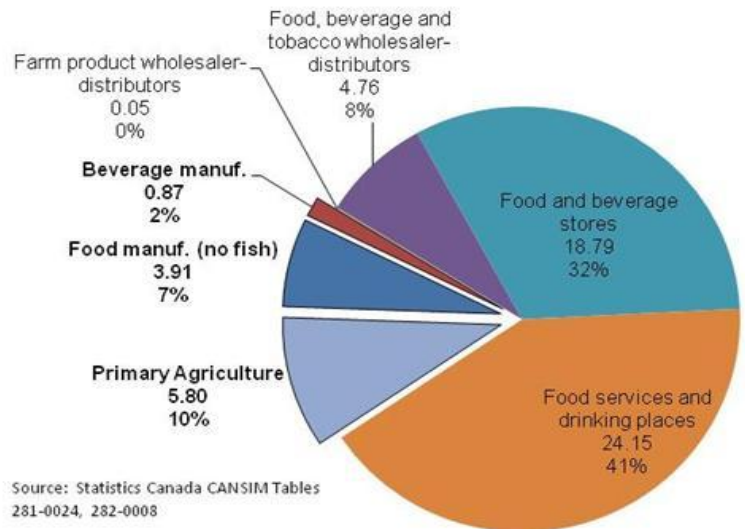


Figure B4. Agri-food industry 4 employment (no-fish)

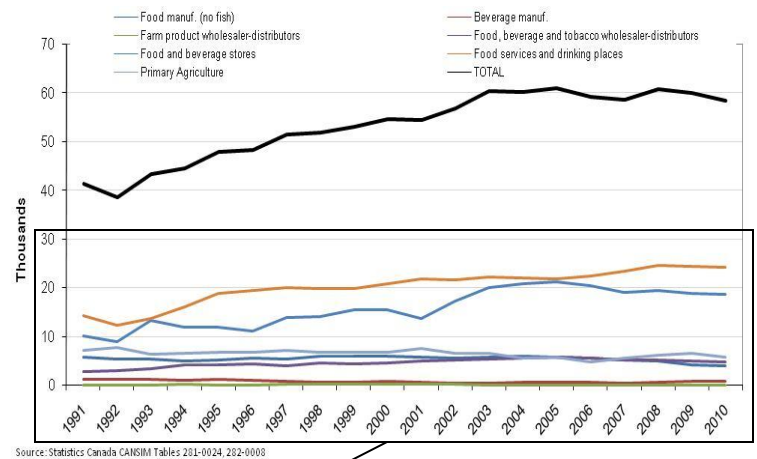
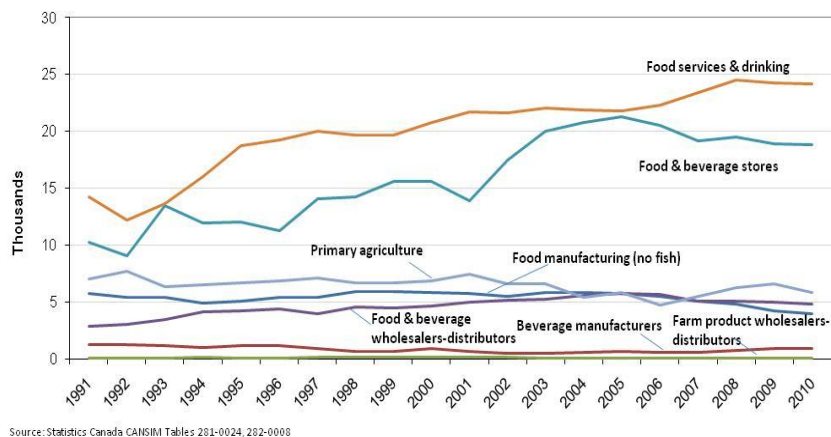
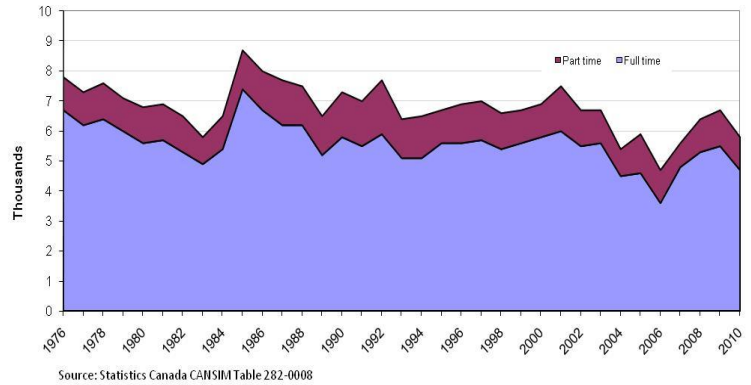


Figure B4 a). Agri-food industry employment (no-fish)



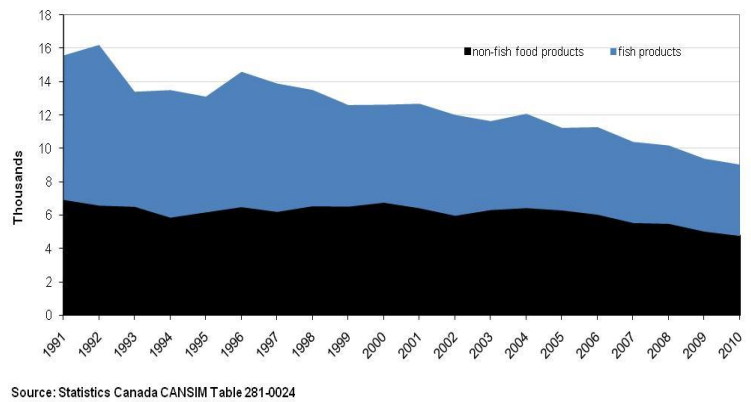
Farm employment dropped by approximately 800 between 2009 and 2010 to 5,800. This is the first decrease since 2006. Farm employment in 2010 was below the 10 year average of 6,060. The largest decrease was in full time employment (-700). Full time jobs make up approximately 81 percent of farm-level employment

Figure B5. Farm-level employment



There were 9,048 food and beverage manufacturing employees in Nova Scotia in 2010. The fish packing and processing sector accounts for 4,273 (47 percent) of these jobs. Fish product manufacturing jobs were 5,343 below the 1992 high, while non-fish product jobs were down 2,160 to 4,775 from the high of 6,935 in 1991. Fish product jobs have declined from comprising 55 percent of food and beverage manufacturing employment in 1991.

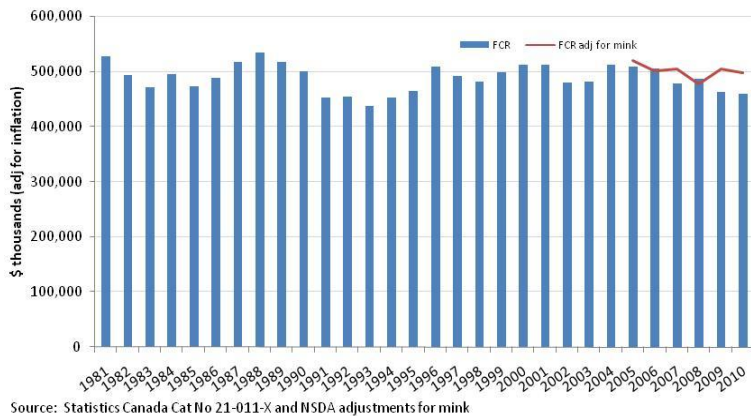
Figure B6. Food and beverage manufacturing employment



Farm gate sales

Adjusting for mink, agricultural farm cash receipts (FCR) were \$497.7 million in 2010. The most important sectors are dairy, poultry and fur (mink). A breakdown of farm sales is given in the following section. Adjusting for inflation, agricultural revenues are on the decline, falling in three out of the past five years to a level 4.3 percent below 2005.

Figure B7. Farm cash receipts



Changes in farm sales have differed by sector. Of the five most important sectors by revenue over the past 10 years, three (dairy, chicken, fur) have seen increases in revenues over the past decade. Gains have also been experienced in the apple, turkey and miscellaneous livestock sectors. The largest decreases have been in hogs, floriculture and potatoes. The hog industry in particular has struggled in recent years.

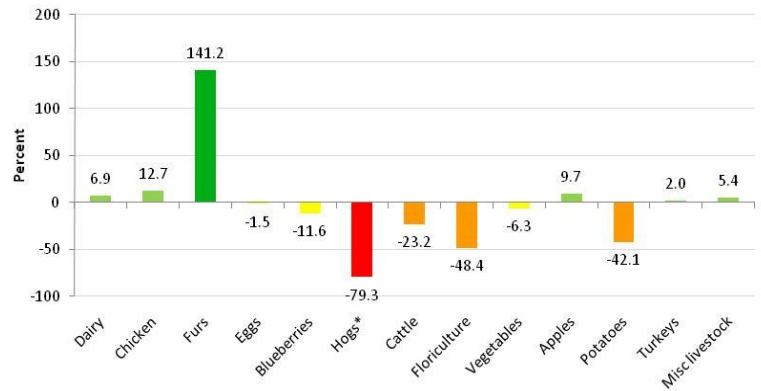
Exports

At \$277 million in 2010, international exports are a major driver of Nova Scotia's agri-food sector. In 2007, exports amounted to 60 percent of the total output of the agri-food sector (less fisheries) as measured by Gross Domestic Product (GDP). This is up from 43 percent in 2002³. Total exports have been rising steadily since 1991 reaching a high of \$351 million in 2005. Adjusting for inflation, exports rose for the first time in three years, increasing 6 percent from 2009. While exports have decreased 21 percent from 2005, there has been an overall tripling of exports since 1991.

Interprovincial agri-food exports were estimated to be \$1.1 billion in 2007- the latest year for which data are available. This amounts to 14.5 percent of total interprovincial exports from NS. Fruits, vegetables, other food products and feed makes up the largest component of interprovincial exports at \$393 million (36 percent) after increasing 22 percent over 2006. Meat, fish and dairy had been the leading category since 2000 but fell 24 percent (\$99.7 million) from 2008 to make up 29 percent of interprovincial exports. Soft drink/ alcoholic beverages make up 15 percent of NS exports to other provinces, while fish, seafood and hunting/trapping products and other agricultural products make up 13 and 7 percent, respectively.

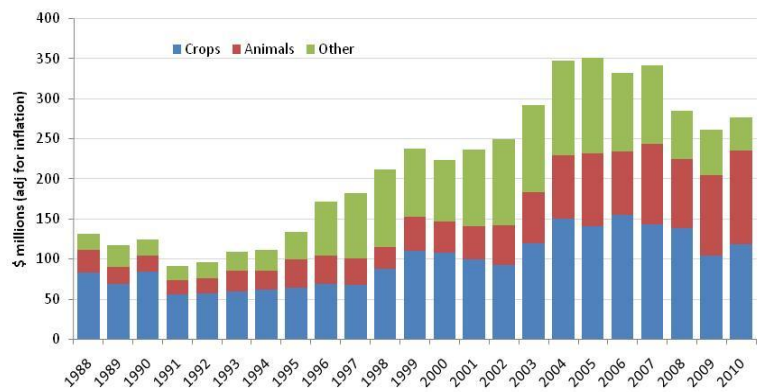
³ Comparable GDP figures (in current dollars) are only available from 2002 to 2007.

Figure B8. Change in revenues by sector (avg 08-10 / 01-03) adjusted for inflation



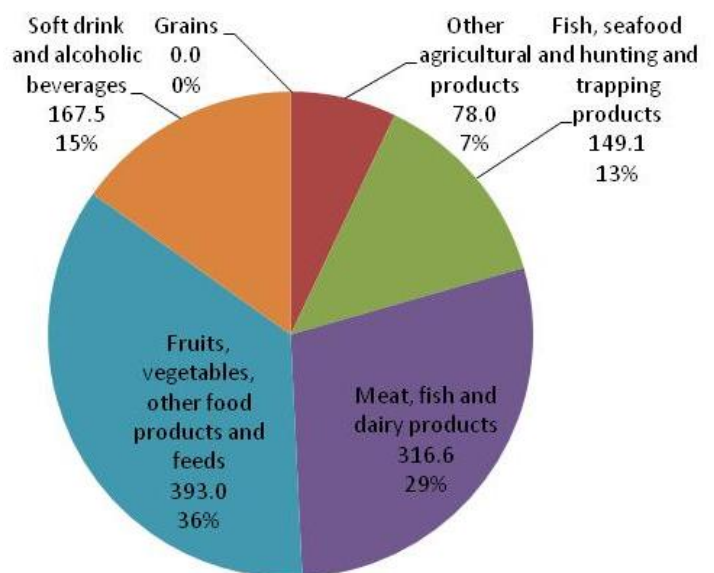
Source: Statistics Canada Cat. No. 21-011-XIE * missing data for 2010

Figure B9. International exports of agri-food products (no fish)



Source: Statistics Canada and AAFC CATS-NET trade data and NSDA adjustments for mink

Figure B10. Interprovincial exports of agri-food products



Statistics Canada. CANSIM Table 386-0002

What we grow and raise in NS (Primary Agriculture Overview)

In terms of importance measured by farm gate revenues, Nova Scotia agriculture is closely split between supply managed (dairy, poultry and eggs) at 47% of market revenues with the remainder coming from non supply managed sectors. Dairy is perennially the top revenue-generating sector, followed by fur (mink) and chicken. Eggs, cattle, blueberries, vegetables, floriculture, Christmas trees and apples all generated more than \$10 million in farm gate revenues in 2010. Mink farm cash receipts have been adjusted to reflect the true sector value in NS (see comments in Foreword).

Dairy

Milk production has remained generally constant over the past 20 years, never straying more than 4 percent in any year from 2010 production of 169,677 kilolitres. Adjusted for inflation, the farm value of milk production has been relatively constant, after dropping in the early 1990s.

Over time, industrial uses of milk have gained importance against fluid uses. This trend has been gradual, with percentage use of milk going to fluid versus industrial use settling around 60:40 over the past 10 years.

Figure C1. Nova Scotia farm revenues by sector-2010

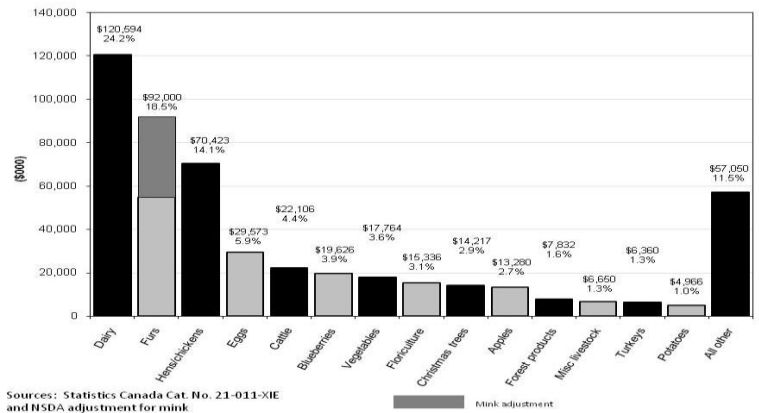
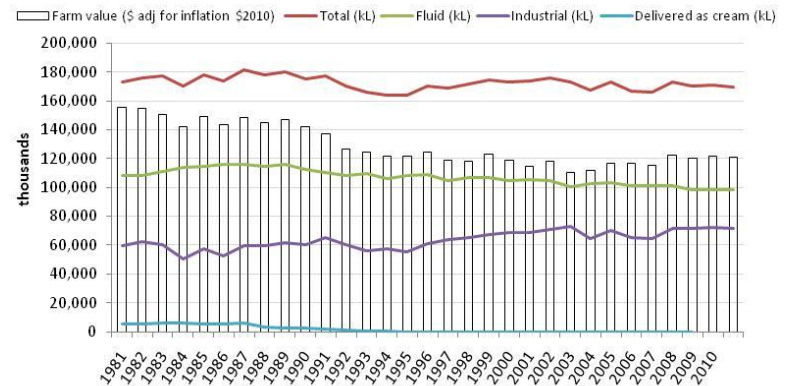


Figure C2. Milk sold off farms



Poultry

Chicken continues to dominate poultry production, making up 97 percent of birds, 92 percent of weight and 92 percent of value.

Nova Scotia farms produced 35,561 kg of chicken and 3,014 kg of turkey in 2010. Chicken production has increased steadily over time, although this has slowed in the past 10 years. Turkey production increased slightly after falling 31 percent in 2009 after a three year period during which turkey production had increased over 10 percent. An oversupply of turkey in Canada led to lower prices and a substantial reduction of turkey processing in Nova Scotia. A significant percentage of Nova Scotia turkey quota was leased to producers outside of the province.

Fur

Mink pelts account for 99.9 percent of ranch raised fur, with a small amount of fox comprising the remainder.

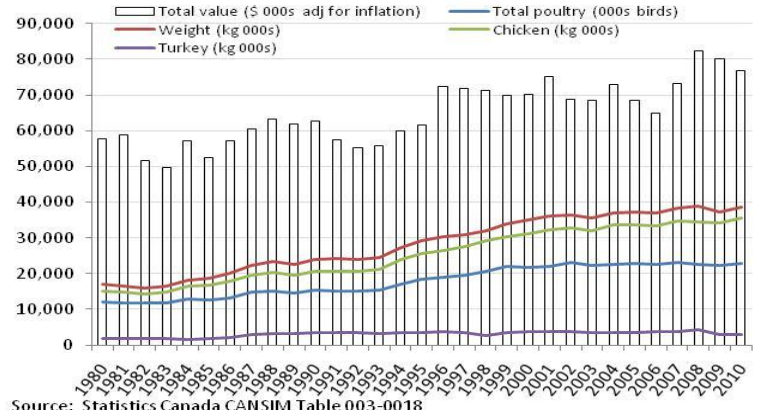
Mink production increased 14 percent between 2009 and 2010 to 1.4 million pelts. Production has increased by 85 percent since 2005.

Value has been volatile but strong in recent years. Estimated 2010 farm value is \$90 million, a 12 percent increase over 2009 and 54 percent from 2005 (adjusting for inflation).

Eggs

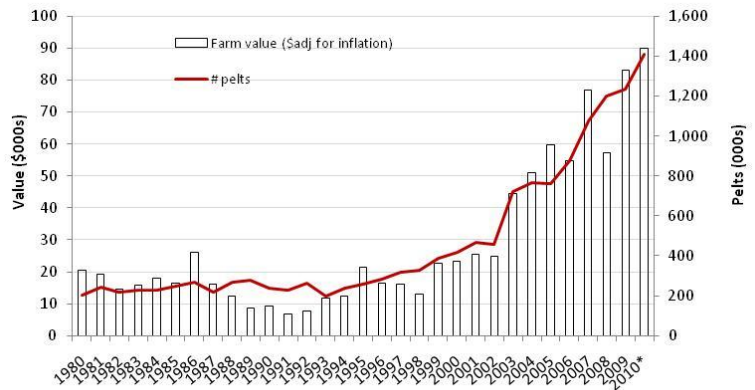
Egg production fell 4.3 percent from 2009 but 2010 production of 18,817 thousand dozens of eggs contributed to the general increase since the late 1990s. Egg production is up 14 percent from a low in 1998 but efficiency is down with eggs per 100 layers hitting 29,072- the lowest since 2000. Farm value per dozen eggs was \$1.32 in 2010. Adjusting for inflation, the value of egg production, while falling significantly over time, has stabilized over the past two decades and is up 9.8 percent from 1999 (adjusting for inflation).

Figure C3. Poultry production and value



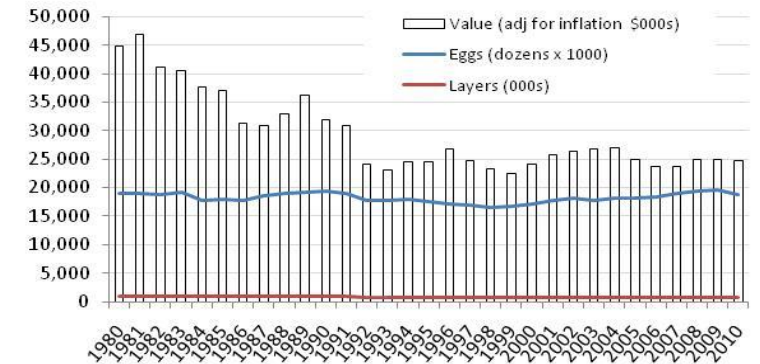
Source: Statistics Canada CANSIM Table 003-0018

Figure C4. Production and value of ranch-raised fur



Source: NSDA calculation from export permit data * estimated

Figure C5. Production and value of eggs



Source: Statistics Canada CANSIM Table 003-0020

Cattle

Beef cattle numbers dropped 6.9 percent from 2009 to average 18,900 head, the lowest number in over 40 years. Dairy cattle numbers were up approximately 375 to 22,600 consistent with the previous five year average. Cattle for slaughter declined 16.6 percent to 8,150 in 2010. Calves under 1 year old declined 7.8 percent from 2009 to 21,375, a record low. Farm revenues for cattle totaled \$22.1 million in 2010, down 12 percent from 2009 but 28 percent higher than the low experienced in 2004 after BSE (adjusting for inflation). Farm revenues from calves increased slightly to \$2.1 million in 2010.

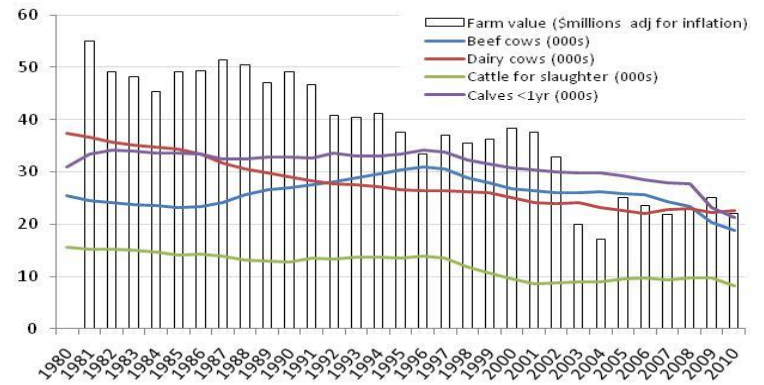
Fruit

Apples and blueberries (the vast majority being wild or low-bush) are the largest fruit crops in the province. For much of the last 50 years, these crops were following opposite trajectories, with apple production generally trending down and blueberries up. In 2010, there were 33.7 thousand tonnes (1,781 ha) of apples (down 17 percent from 2009) and 14.9 thousand tonnes (8,158 ha) of blueberries produced (down 1 percent).

Nova Scotia produces a number of other fruit crops, albeit at relatively small scale. The largest of these is strawberries, which has seen declining production (2010 production of 1,222 is up 18 percent from 2009 but 52 percent below the high in the mid-90s). For fruits with sufficient available data⁴, pears, plums and prunes have had declining production. Peach and raspberry production has been relatively constant although peach production in 2010 was a seven-year high. Grapes (reflecting the growing popularity of NS wine) have seen rising production. Grape production in 2010 was 820 tonnes, up from 56 tonnes in 1987.

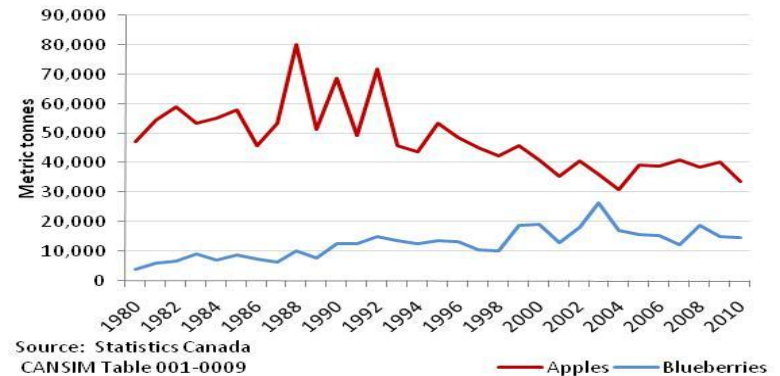
⁴ Blank data indicate suppressed data for confidentiality requirements or unreliable data.

Figure C6. Cattle numbers and value



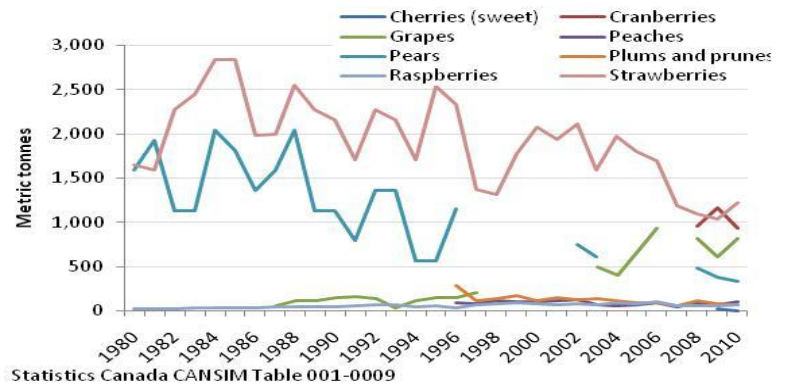
Source: Statistics Canada CANSIM Table 003-0032

Figure C7. Apple and blueberry production



Source: Statistics Canada CANSIM Table 001-0009

Figure C8. Other fruit production



Source: Statistics Canada CANSIM Table 001-0009

Cultivated area of Nova Scotia's two main fruit crops have gone in opposite directions. Apple area in 2010 was 1,983 ha, the lowest in recent record after declining 12 of the past 15 years.

Blueberry area has risen in each of the past 15 years reaching 16,539 ha in 2010, 13.4 percent higher than 10 years previous.

Grape area has seen the largest increase in recent years, totaling 210 hectares in 2010 (an increase of 26.5 percent from 2009), up from 56 in 1996. Cranberry area decreased 10 hectares from 2009 to 111. Peach area has increased slightly over the past 15 years and was 20 hectares in 2009 and 2010. In percentage terms, pears, plums and raspberries have seen the largest decline in acreage. Strawberries area has declined the most in absolute terms, losing 215 hectares, or nearly half of the 1996 cultivated area.

Figure C9. Cultivated area of apples and blueberries

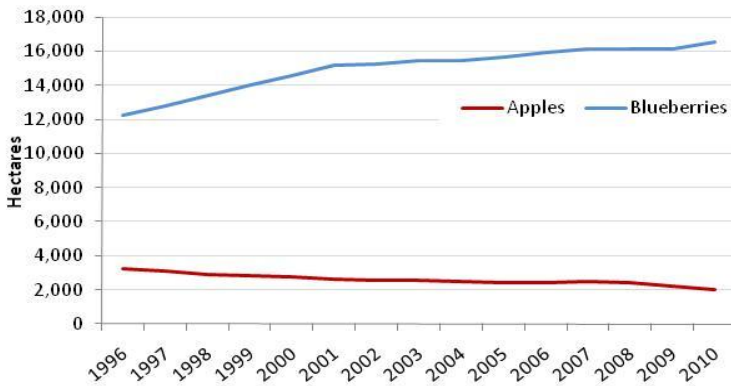
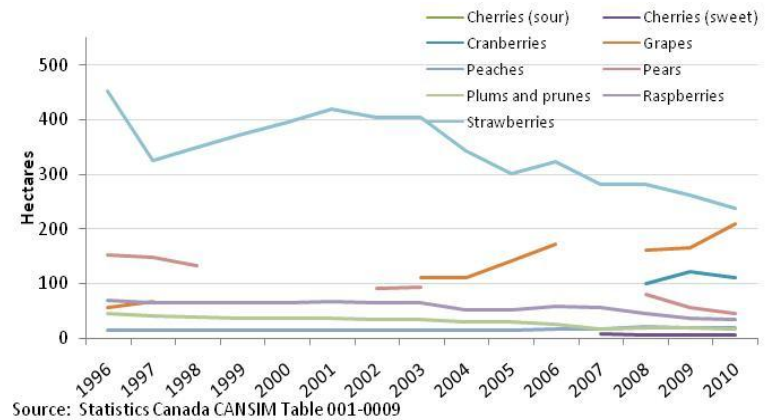


Figure C10. Cultivated area of other fruits



The farm value, production and area harvested of fruit crops for 2010 are given in Table C1. Blueberries and apples are the most important crops by all indicators. With the exception of grapes, most fruit crops in Nova Scotia are experiencing declines

in production and economic importance. Aside from grapes (which increased in value by 47.3 percent over the previous 10 years), only peaches and apples saw positive changes in terms of farm value.

Table C1. Fruit acreage, production and value- 2010

	Bearing/ harvested area (hectares)	Production (tonnes)	Farm value (\$)	Change in value over previous 10 year average (%)
Blueberries	8,158	14,873	\$22,278,000	-23.0%
Apples	1,781	33,657	12,178,000	0.1
Strawberries	172	1,222	4,561,000	-12.3
Cranberries	87	933	1,324,000	-49.5*
Grapes	166	820	1,236,000	47.3*
Raspberries	28	62	500,000	-6.2
Pears	45	331	195,000	-40.5*
Peaches	18	103	123,000	5.1
Plums/ prunes	16	61	70,000	-49.1
Cherries (sweet)	6	2	8,000	-85.9*
Cherries (sour)	2	X	X	X
Apricots	n/a		X	X
Notes:				
* =missing data				
Change in value over previous 10 years is adjusted for inflation				
Source: Statistics Canada CANSIM Table 001-0009				

Field vegetables

Field vegetable production is largely driven by carrots and to a lesser extent onions. Turnip and cabbage production, while still significant, has decreased over time, excluding a spike in cabbage production in 2008.

Carrot production dropped 2,000 tonnes in 2010 from a record 47,125 tonnes in 2009. Production is still 44 percent higher than the previous 10 year average. The onion sector produced 9,747 tonnes in 2010. There were 1,028 hectares of carrots harvested in 2010 along with 251 hectares of onions.

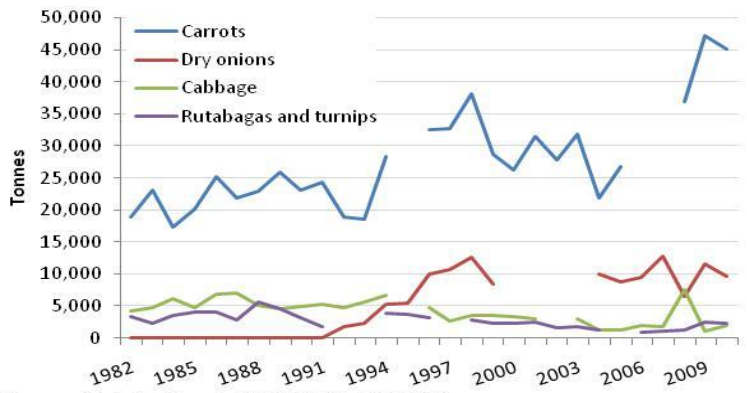
In terms of 2010 production, the second-tier vegetables include beans (169 T, 136 ha), Corn (1,015 T, 190 ha), Peas (25 T, 30 ha), Cauliflower (data n/a) and lettuce (233 T, 97 ha). All of these commodities have dropped significantly in terms of production, although corn production has been relatively constant.

There are 15 vegetables that make up the remainder of the sector. Of these, beet production has dropped the most, from a high of 1,722 tonnes in the late 80s to 342 tonnes in 2010 (although this is the most production since 1995). Cucumbers (148 T, 24 ha) and tomatoes (69 T, 12 ha) have also seen significant declines in production. Pumpkin production (497T, 61 ha) jumped from zero to 771 tonnes in 2007, and has been moderate since.

Other vegetables include: asparagus, broccoli, Brussels sprouts, celery, leeks, parsnips, shallots, spinach, peppers and radishes. The large spike in 2007 was due to broccoli production of 1,497 tonnes. Data since 2007 have not been reliable enough to publish.

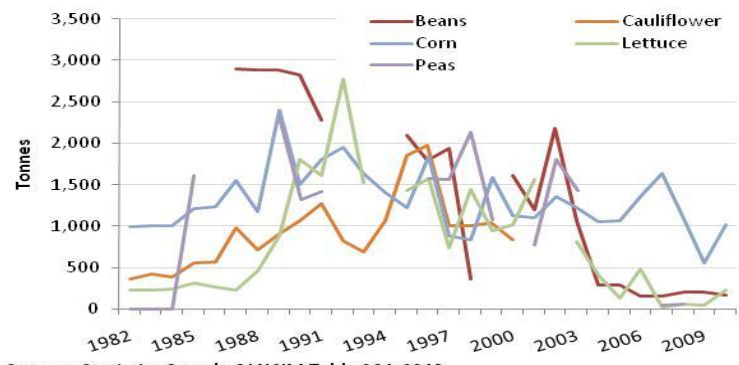
The farm value of vegetable crops for 2010 are given in Table C2. Carrots and onions are the most important sectors in terms of farm value. Radishes and leeks have seen the largest increase in value of the past 10 years, while peas and peppers have seen the largest decline.

Figure C11. Production of vegetables



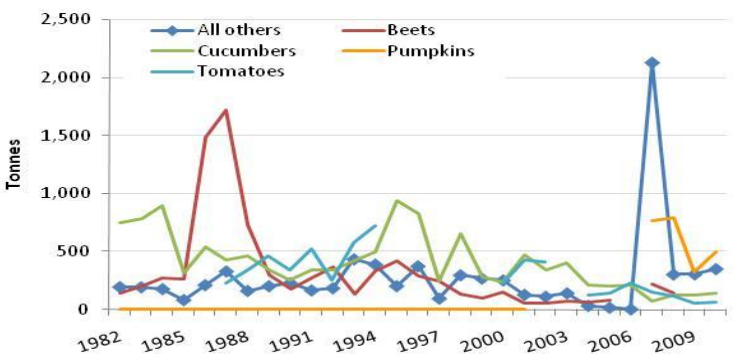
Source: Statistics Canada CANSIM Table 001-0013

Figure C12. Production of vegetables



Source: Statistics Canada CANSIM Table 001-0013

Figure C13. Production of vegetables



Source: Statistics Canada CANSIM Table 001-0013

The farm value of vegetable crops for 2010 are given in Table C2. Carrots and onions are the most important sectors in terms of farm value. Radishes and leeks have seen the largest increase in value of

the past 10 years, while peas and peppers have seen the largest decline.

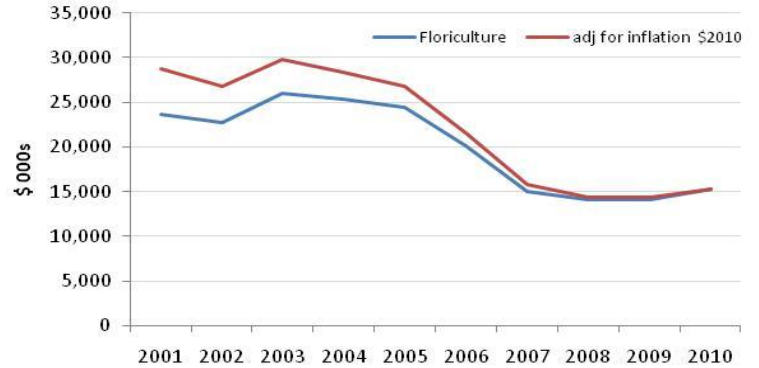
Table C2. Vegetable acreage, production and value- 2010

	Bearing/ harvested area (hectares)	Production (tonnes)	Farm value (\$)	Change in value over previous 10 year average (%)
Carrots	1,028	45,097	\$6,143,000	35.8%*
Dry onions	251	9,747	2,959,000	-0.4*
Lettuce	97	233	798,000	58.8*
Turnips/ rutabagas	77	2,327	635,000	-18.0*
Beets	18	342	628,000	292.7
Corn	190	1,015	597,000	-20.5
Beans	136	169	568,000	-12.3
Cabbage	99	1,977	488,000	-44.6*
Pumpkins	61	497	231,000	243.1
Spinach	12	49	195,000	91.4*
Cucumber	24	148	186,000	-6.5
Squash/ zucchinis	55	230	136,000	95.6
Tomatoes	12	69	\$130,000	-55.0%*
Shallots	6	X	126,000	n/a*
Leeks	4	37	110,000	1,063.3
Peas	30	25	108,000	-69.7*
Peppers	4	18	41,000	-62.9*
Asparagus	8	4	27,000	-43.6*
Radishes	2	5	15,000	3,528.2*
Brussels Sprouts	2	2	12,000	n/a*
Celery	2	2	8,000	n/a*
Broccoli	231	X	X	X
Cauliflower	67	X	X	X
Parsnips	X	X	X	X
Notes:				
* =missing data				
Change in value over previous 10 years is adjusted for inflation				
Source: Statistics Canada CANSIM Table 001-0009				

Floriculture

2010 continued a two-year rebound after a five-year decline in floriculture revenues. The increase to \$15,366,000 from 2009 was 9.2 percent. Adjusting for inflation, revenues have nearly halved (-48.5 percent) since a 2003 high of almost \$30 million.

Figure C14. Floriculture cash receipts

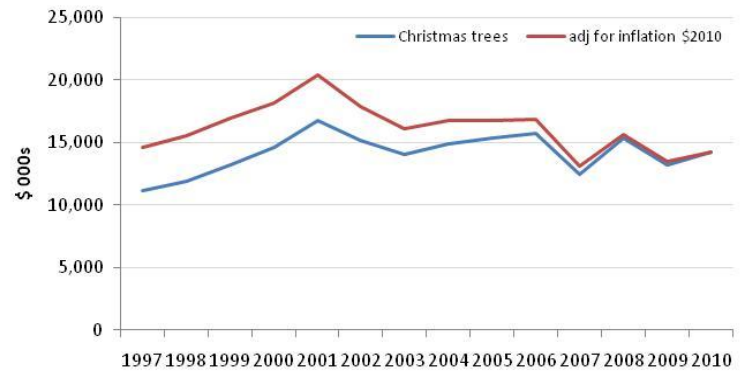


Source: Statistics Canada Cat No: 21-011-X

Christmas trees

The farm value of Christmas trees increased 7.4 percent to \$14.2 million in 2010. Adjusting for inflation, this is the third lowest value on record.

Figure C15. Christmas tree cash receipts

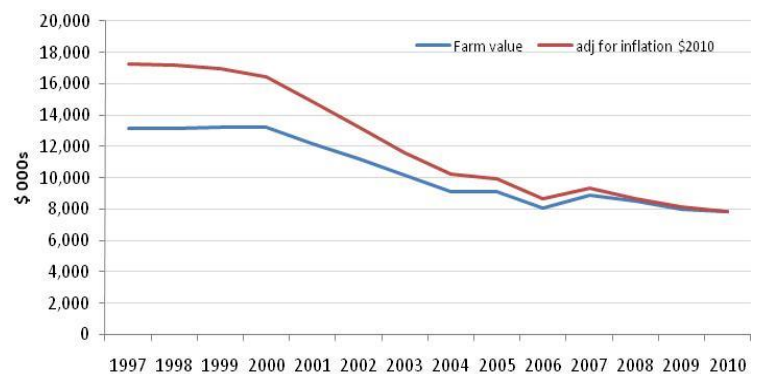


Source: Statistics Canada Cat No: 21-011-X

Forest products

Farm forest product sales reached \$7.83 million in 2010. Adjusted for inflation this is the lowest level in recent record, down 3.8 percent from 2009.

Figure C16. Forest products cash receipts



Source: Statistics Canada Cat No: 21-011-X

Hogs

The Nova Scotia hog industry has undergone major changes over the past few years- leading to a large decline in yearly hog production. Total supply has fallen from 185,000 head in 2001 to 39,100 in the first three quarters of 2010. In the fourth quarter, data were suppressed (due to low farm numbers) for the first time. As of 2009, the pig crop (pigs born) had declined in all but one year since 2001, averaging a loss of 10 percent per year. The largest decline was in 2009; down over 34 percent from 2008. In 2010, the pig crop increased slightly based on the data available, however without the suppressed fourth quarter information, a gain for the year can not be confirmed. Interprovincial imports returned to nil in the third quarter of 2008, after 22 quarters of positive addition (averaging about 5,000 head/quarter over this period) to the provincial hog supply.

There has been a fundamental change in hog output from the province's hog industry. Prior to 2007, 95 percent of hog output was "other disposition" (general slaughter). The first of two waves of exports began in 2007 with nine consecutive quarters of positive international exports (weaner pigs to the US) averaging 18,000 head/quarter. The first quarter of 2009 saw the end of international hog exports, which were replaced by a larger number of interprovincial exports (21,000 per quarter). Interprovincial exports now account for over 90 percent of NS hog output. The overall decline in hog supply is mostly attributable to the consecutive waves of exports not being replaced at the same rate. The decline may have bottomed out at the moment, with the beginning of 2010 seeing the first positive change (albeit minor at an average of 933 head over three quarters) in four years.

Figure C17. Hog production

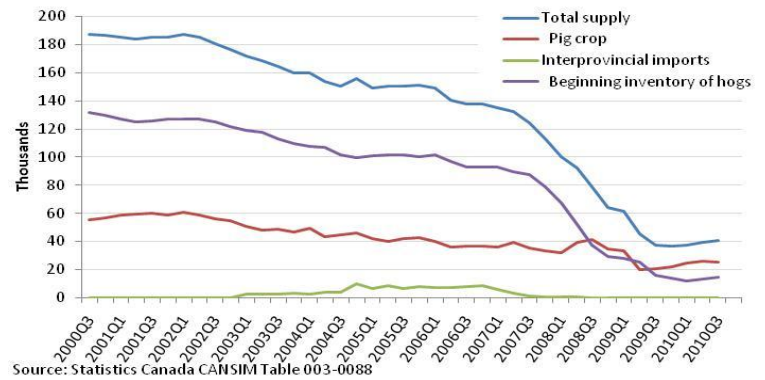
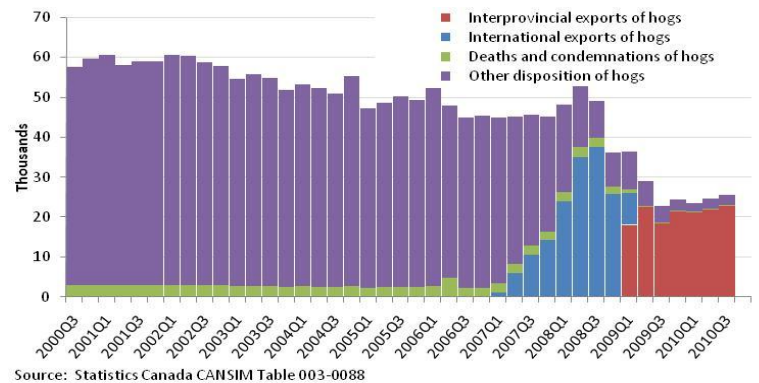


Figure C18. Hog output



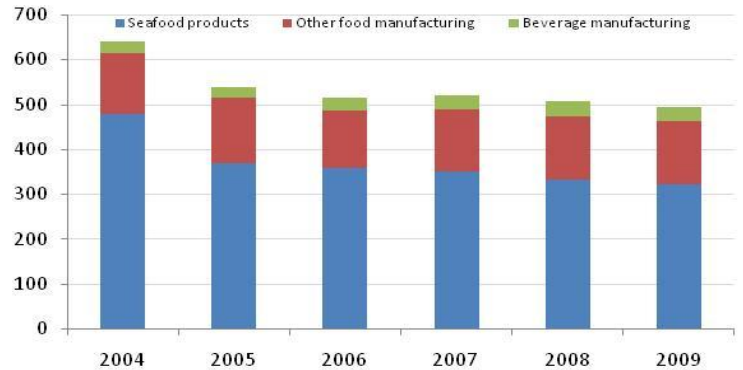
Beyond Primary Agriculture – The size and importance of the other components of the agri-food system

The most recent data available for food processing businesses (2009) show a steady decline in number. In 2009, there were 462 food manufacturers, down 11 (2.3 percent) from 2008 and 151 (24.6 percent) from 2004. Seafood product preparation and packaging accounted for 69 percent of food manufacturing businesses in 2009, down from 78 percent in 2004. Non-seafood manufacturing businesses increased by 7 (5.2 percent) over the past 5 years. There were also 32 beverage manufacturers in 2009, up from 28 in 2004. Beverage manufacturing businesses include 13 wineries, 12 soft-drink manufacturers, 6 breweries and 1 distillery. The amount of wineries has more than doubled since 2004.

Seafood manufacturing businesses numbered 320 (-13 from 2008) in 2009. Bakeries were the second most numerous at 50 (+2), followed by meat product manufacturers (23, -1). Dairy product manufacturers (18, same), other foods (19, +2), fruit and vegetable preservation/ specialty foods (14, -1), animal food (12, +1), sugar/confectionary manufacturers (3, -1) and grain/oilseed milling businesses (3, same) make up the remainder of the sector. Most of these categories lost a small number of businesses or remained relatively constant over the past 5 years. Other food manufacturing increased by 6 (46 percent) since 2004.

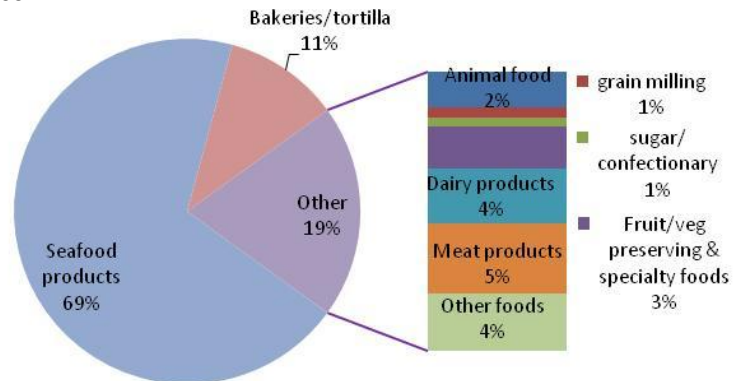
Revenues and expenses have been on the decline in recent years largely due to the decline in the number of businesses. Revenues were 9.6 percent higher than expenses in 2009. In 2008 this margin was 9.7 percent. In terms of average expense categories per business, production worker salaries and cost

Figure D1. Number of food manufacturing establishments



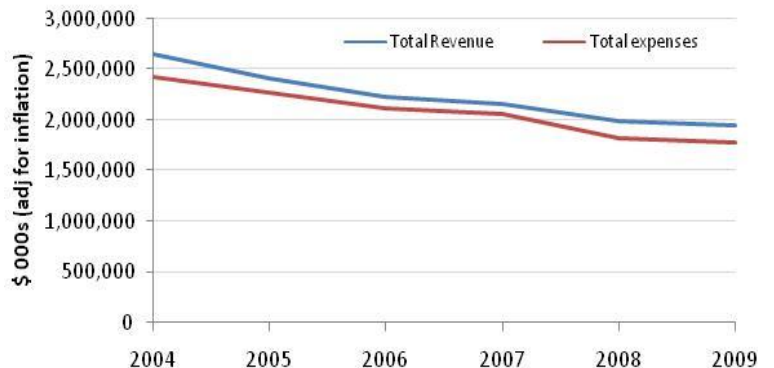
Source: Statistics Canada CANSIM Table 301-0006

Figure D2. Breakdown of food manufacturing establishments-2009



Statistics Canada CANSIM Table 301-0006

Figure D3. Food manufacturing sector revenues and expenses



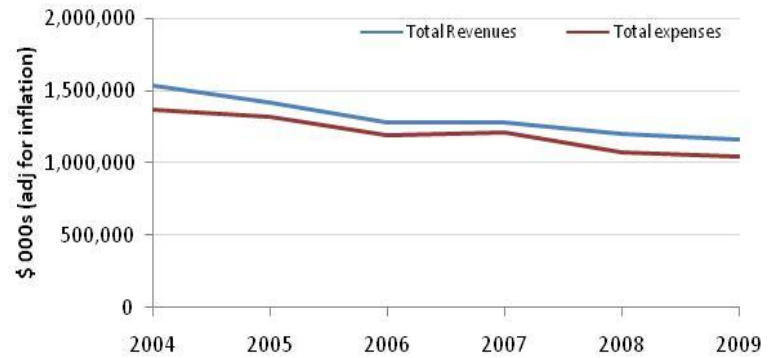
Source: Statistics Canada CANSIM Table 301-0006

of materials and supplies have declined in comparison with the previous 5 year average (15 and 10 percent, respectively, adjusted for inflation). Average salary expense of non-manufacturing employees has increased by 12 percent, as have expenses for water and energy (6 percent) and vehicle fuel (31 percent). Revenues in 2009 amounted to \$1.95 billion, down from 2 billion in 2008 and \$2.41 billion in 2004 (all unadjusted for inflation). Expenses were \$1.79 billion, down from \$1.83 billion in 2008 and \$2.21 billion in 2004 (unadjusted).

Excluding seafood processors, sector revenues amounted to \$1.17 billion in 2009 with the margin between revenues and expenses at 12 percent (up from 9 percent in 2008). Excluding seafood, average production worker expenses per business have decreased from the previous 5-year average (32 percent), while non-manufacturing employee salary expense has decreased 2 percent, adjusted for inflation. Cost of energy and water has decreased 4 percent, while vehicle fuel expense has increased 5 percent and costs of supplies and materials have decreased 20 percent⁵.

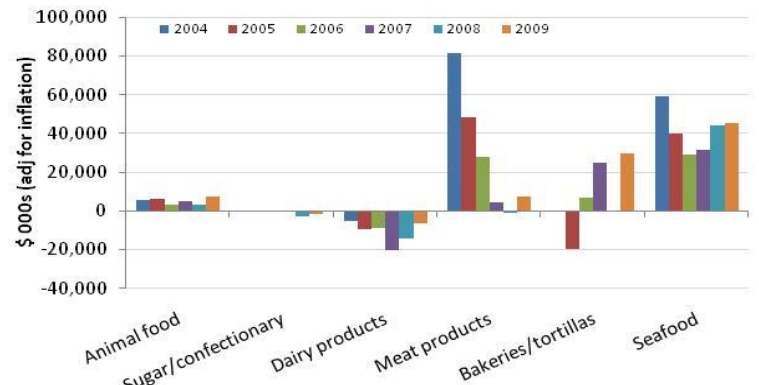
Animal food manufacturers and seafood processors are the only sectors that have had positive margins between revenues and expenses in every year since 2004. Animal food producer margins were over \$7.6 million in 2009, an average of \$632,000 per firm. Seafood margins increased 3 percent to reach \$45.6 million (avg \$142,500 per firm). Dairy product manufacturers lost money in each year during this period. Collectively, revenues less expenses were

Figure D4. Food manufacturing sector revenues and expenses (excluding seafood)



Source: Statistics Canada CANSIM Table 301-0006

Figure D5. Food manufacturing revenues less expenses by sector



Source: Statistics Canada CANSIM Table 301-0006

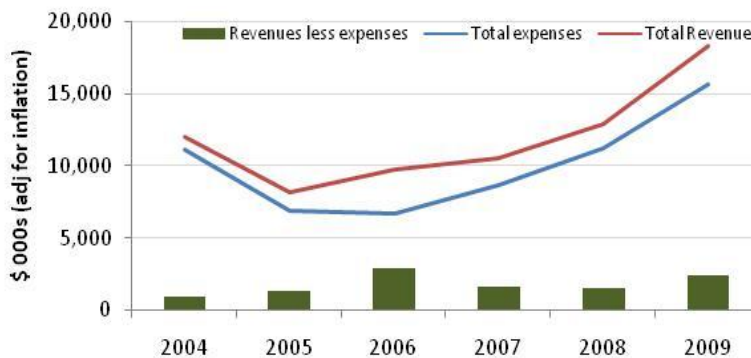
⁵ It is important to note that these calculations are derived from dividing total food manufacturing expenses (1.04 billion in 2009) by number of businesses (142). Businesses that enter and leave the industry will have different cost structures which can affect the trend. While the comparison of the change in different expenses categories is useful, the numbers on their own do not verify that the positive or negative change in these expense categories is a general trend.

-\$6.4 million in 2009 (-\$357,000 / firm) and continues a 2 year improvement in margins from 2007. Meat product manufacturers have seen the steepest decline in margins, falling from \$73.8 million (\$3.36 million/ firm) in 2004 to a negative \$1.24 million (-\$51,700 / firm) in 2008 before rebounding to \$7.43 million in 2009 (323,000 / firm). The sugar/confectionary and bakeries/ tortilla manufacturing sectors did not have data for each year. In 2009, the sugar/confectionary manufacturing sector had revenues minus expenses of -\$1.6 million (-\$526,700 / firm). Bakeries/tortilla manufactures had margins of \$29.7 million (\$593,700 / firm).

The only beverage manufacturing sector for which detailed data are available is the growing winery sector. In 2009 revenues reached a record \$18.3 million (1.4 million / winery). This is an increase of 42 percent over 2008. Expenses were \$15.6 million for a profit margin of \$2.7 million (\$208,000 / winery).

Adjusting for inflation, average expenses of wineries generally increased in 2009 compared with the previous 5 year average except for salaries (down 4.5 percent for production workers and 0.6 percent for non-manufacturing employees) and cost of water and energy (down 4.5 percent). Vehicle fuel increased 28.5 percent and cost of materials and supplies have increased 9.4 percent per winery, on average. This would be highly influenced by the overall expansion of the sector.

Figure D6. Wineries revenues, expenses and profit margins



Source: Statistics Canada CANSIM Table 301-0006

Trade in Agri-food

International

Exports

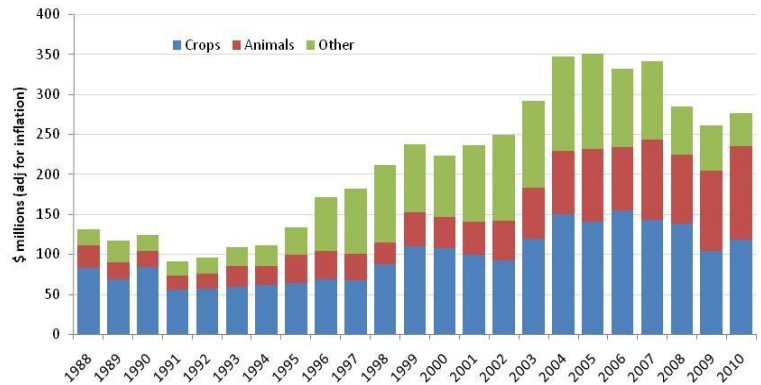
At \$277 million in 2010, international exports are a major driver of Nova Scotia's agri-food sector. In 2007, exports amounted to 60 percent of the total output of the agri-food sector (less fisheries) as measured by Gross Domestic Product (GDP). This is up from 43 percent in 2002⁶. Total exports have been rising steadily since 1991 reaching a high of \$351 million in 2005. Adjusting for inflation, exports rose for the first time in three years, increasing 6 percent from 2009. While exports have decreased 21 percent from 2005, there has been an overall tripling of exports since 1991.

Growth over this period was largely driven by mink pelts (accounting for 45 percent of the increase) and blueberries (22 percent). Combined, various vegetable crops were also significant, accounting for 9 percent of the increase.

The 2008 US-led recession, a high Canadian dollar, and the closure of the Moirs chocolate factory in Dartmouth at the end of 2007, contributed to the declines in exports following 2007. The rebound in exports in 2010 was primarily led by growth in mink, blueberries and, to a smaller extent, potatoes.

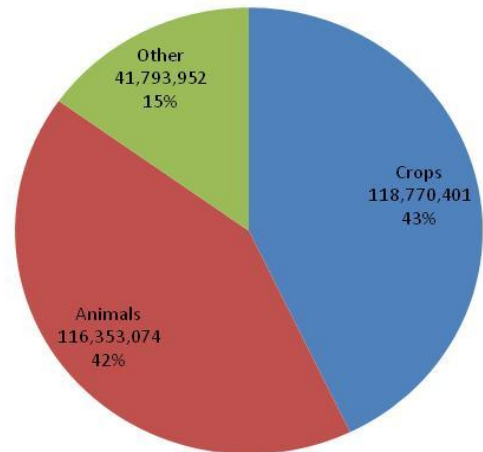
Animal and crop exports are similar in value, accounting for 42 and 43 percent of 2010 exports, respectively. Other agri-food exports made of the remaining 15 percent. Animal product exports have increased substantially over time. Animal product exports accounted for less than 17 percent of agri-food exports in 1990.

Figure E1. NS agri-food exports (no fish)



Source: Statistics Canada and AAFC CATS-NET trade data and NSDA adjustments for mink

Figure E2. Breakdown of NS exports- 2010



Source: Statistics Canada and AAFC CATS-NET trade data and NSDA adjustments for mink

⁶ Comparable GDP figures (in current dollars) are only available from 2002 to 2007.

Trends by export commodities

At \$99 million in 2010, mink is now Nova Scotia's largest agricultural export. Blueberries are second at \$73 million. No other single commodity comes close to these export values. Of the \$73 million in blueberry exports, \$68 million are wild blueberries and \$5 million are cultivated. The large majority of blueberry exports are processed rather than fresh.

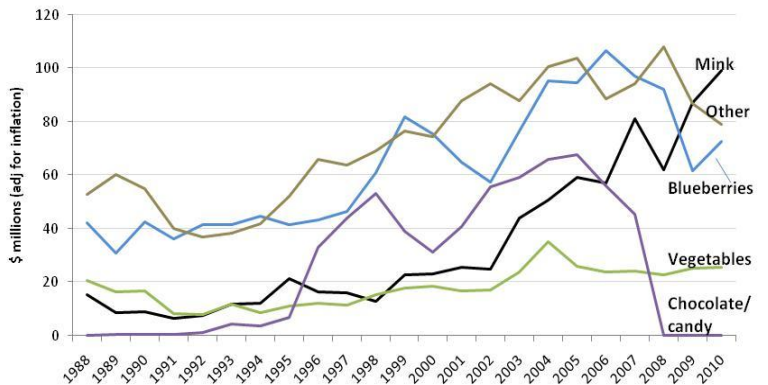
Mink is the fastest growing export commodity, increasing in relative importance from 7 percent of the total value of agri-food exports in 1991 to 36 percent in 2010. Over this same period, blueberries (almost entirely processed wild blueberries) declined in relative importance (from 40 percent to 26 percent) but grew in absolute terms from \$25 million to \$73 million (current dollars). Combined, various vegetable crops remained fairly stable over this period. Chocolate/candy reached a high of \$62 million in 2005, but was followed by a collapse in export values in 2008 coinciding with the closure of the Moirs chocolate factory at the end of 2007.

Export trends by trading partner

The United States remains Nova Scotia's most important export destination, consuming \$110 million of Nova Scotia's agri-food exports in 2010. However, as a result of Nova Scotia's high-growth mink industry, China, which consumes the majority of the province's mink exports, has been catching up and is now well above all 27 European countries combined. Similarly, South Korea, a major consumer of Nova Scotia mink exports, has surpassed Japan, importing \$15 million worth of Nova Scotia agri-food exports—almost all of which were mink pelts.

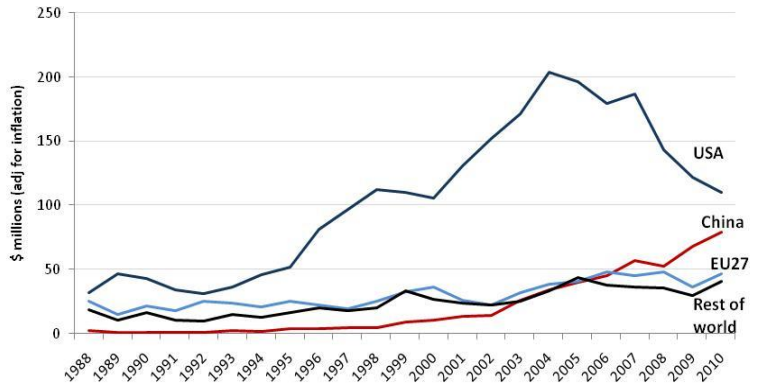
Nova Scotia agri-food exports to the United States are more diverse in comparison with the trade-relationship with China. While the US consumes a wide variety of export products, China consumes almost exclusively a single commodity, mink. Similarly, 67 percent of Europe-bound Nova Scotia agri-food exports are blueberries.

Figure E3. Export trends by product



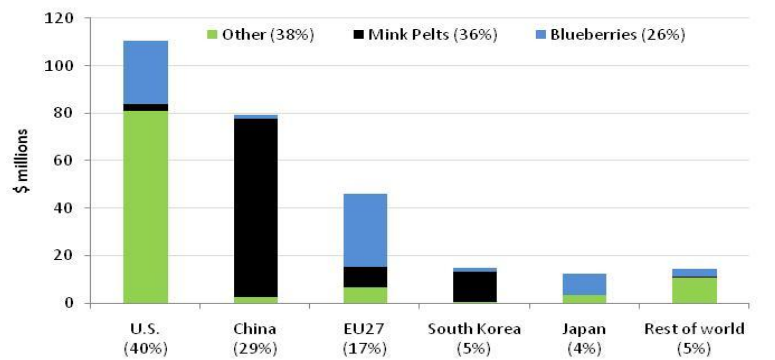
Source: Statistics Canada and AAFC CATS-NET trade data and NSDA adjustments for mink

Figure E4. Exports by trading partner



Source: Statistics Canada and AAFC CATS-NET trade data and NSDA adjustments for mink

Figure E5. Agri-food product exports by partner (no fish)- 2010



Source: Statistics Canada and AAFC CATS-NET trade data and NSDA adjustments for mink

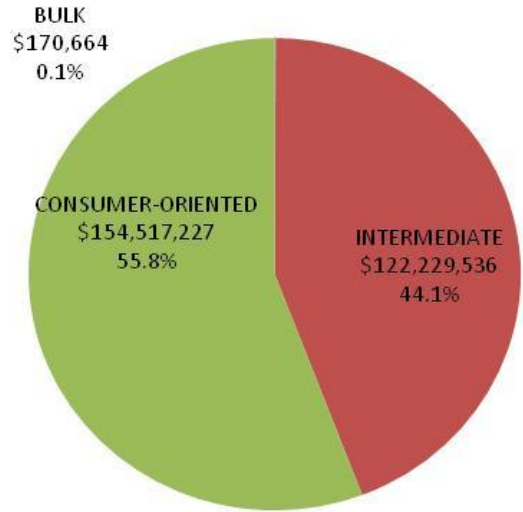
Bulk, intermediate, consumer oriented (BICO) breakdown of exports

The majority of Nova Scotia’s international agri-food exports are consumer-oriented (finished) products, although exports of intermediate products (small transformation from bulk, not ready for final consumption) are a close second. Consumer-oriented product exports totaled \$154.5 million in 2010, accounting for 55.8 percent of exports. Intermediate agri-food exports were \$122.2 million (44.1 percent) in 2010. The value of bulk exports was small at 0.1 percent of total exports.

Frozen fruits and vegetables were the largest consumer-oriented products exported, amounting to \$70.1 million and \$16.3 million, respectively. Raw furskins (mink) were the most important intermediate exports (and largest overall) at \$99.4 million, while “other oilseeds and oleaginous fruits (used for cooking oil)” was the largest bulk export, valued at \$123 thousand. Bulk exports fell by 92 percent from 2009 due to a steep decline in soybean exports. Intermediate and consumer-oriented products increased 10 percent (led by mink) and 9 percent (led by frozen blueberries), respectively.

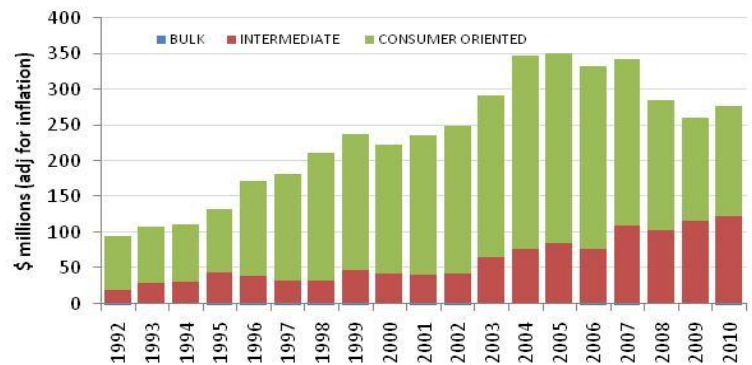
While exports increased in 2010, the more recent trend was a significant decline since 2004-2007, mostly related to a sharp drop in consumer-oriented agri-food products. While the rise of the Canadian dollar certainly played a role in this decline, the most dominant single factor was the loss of confectionary product exports after Moirs’ chocolate factory moved operations to Mexico in 2007. Intermediate exports, led by mink, have increased steadily over time and, combined with the decline in consumer-oriented exports, have accounted for close to half of non-fishery agri-food exports in recent years.

Figure E6. International exports (Bulk, Intermediate, Consumer-oriented)- 2010 (no fish)



Statistics Canada and AAFC CATS-NET trade data and NSDA Adjustments for mink

Figure E7. International exports (Bulk, Intermediate, Consumer-oriented)- (no fish)



Source: Statistics Canada and AAFC CATS-NET trade data and NSDA adjustments for mink

Notes on imports, processing, and ‘value adding’

Unfortunately, import data by province of destination are unavailable. The only import data available at the provincial level are Canadian imports by “province of clearance” (i.e., the province in which a product enters Canada). Accordingly, roughly \$100 million of Canadian non-fishery agri-food imports enter Canada through Nova Scotia every year (\$92 million in 2010).

The proportion of these Canadian imports that stay in Nova Scotia is unknown. Also unknown is the value and composition of foreign imports that arrive in Nova Scotia through the rest of Canada.

Nevertheless, imports are important and much of our agri-food exports depend on imported ingredients which are then processed (value is added) before exporting.

Blueberries:

In the case of blueberries, there were \$73 million in exports but the farm gate value for blueberries was approximately \$20 million. Much of this difference is accounted for by the considerable “value adding” (i.e. processing) after purchase from farmers such as freezing and packaging but in addition to this, large quantities of fresh wild blueberries are imported into Nova Scotia for processing from New Brunswick, PEI and Maine. The volume of wild blueberries processed and marketed by our two Nova Scotia processing companies is easily three times the volume of the Nova Scotia-grown crop. Therefore, the \$73 million value of Nova Scotia’s blueberry exports reflects a significant portion of non-Nova Scotia grown blueberries as inputs combined with the Nova Scotia crop.

Mink:

In the case of mink, the 2010 exported value was about \$99 million and the farm gate value was

approximately \$92 million⁷. The similarity of the two numbers reflects the fact that almost all mink exported from Nova Scotia were both raised and pelted in the province and also that all or almost all pelts produced in Nova Scotia are exported. The difference reflects the very few exported pelts that were pelted in Nova Scotia but raised outside of the province. Frozen whole mink are shipped to Nova Scotia for pelting primarily from Newfoundland and Prince Edward Island, as well as a smaller amount from New Brunswick and other sources. Therefore, in the case of mink, almost all exported value is created in Nova Scotia and derived from the primary agriculture sector.

Other agricultural commodities:

Much of the remainder of Nova Scotia’s agri-food exports are in food manufacturing, which generally involve a great deal of processing and imported ingredients. In some cases, none of the ingredients are locally sourced and do not depend on the province’s primary agriculture sector. These industries profit by adding value to imported ingredients and are a significant component of the larger agri-food industry.

⁷ Both figures are NS Department of Agriculture estimates derived from provincial export permit data.

Interprovincial

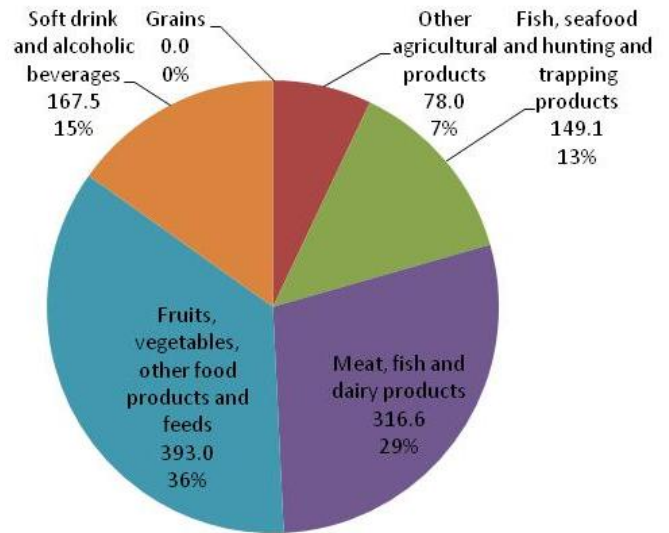
Interprovincial agri-food exports were estimated to be \$1.1 billion in 2007- the latest year for which data are available. This amounts to 14.5 percent of total interprovincial exports from NS. Fruits, vegetables, other food products and feed makes up the largest component of interprovincial exports at \$393 million (36 percent) after increasing 22 percent over 2006. Meat, fish and dairy had been the leading category since 2000 but fell 24 percent (\$99.7 million) from 2006 to make up 29 percent of interprovincial exports.

Soft drink/ alcoholic beverages make up 15 percent of NS exports to other provinces, while fish, seafood and hunting/trapping products and other agricultural products account for 13 percent and 7 percent, respectively.

As a whole, interprovincial trade in agri-food products from NS is estimated to have increased 32 percent between 1997 and 2007, adjusting for inflation. Agri-food exports have fallen 19 percent since highs experienced in 2003.

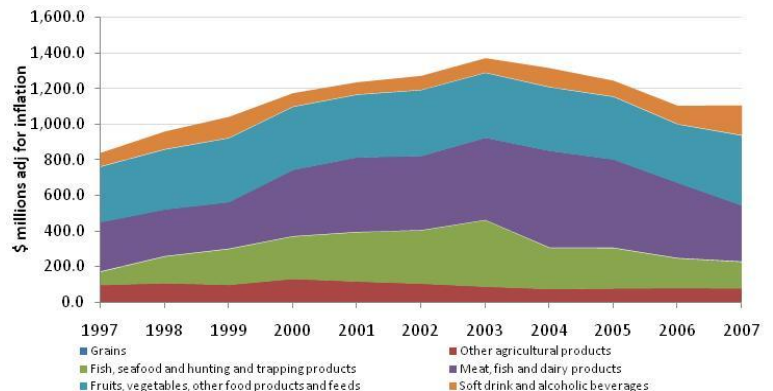
The largest increases have come from meat, fish, dairy exports followed by fish, seafood, hunting and trapping products. Fruits/vegetables and other food and feed products as well as soft-drink/ beverage manufacturing have also increased interprovincial exports while other agricultural products have declined.

Figure E8. Interprovincial agri-food exports from NS-2007



Statistics Canada. CANSIM Table 386-0002

Figure E9. Interprovincial agri-food exports from NS

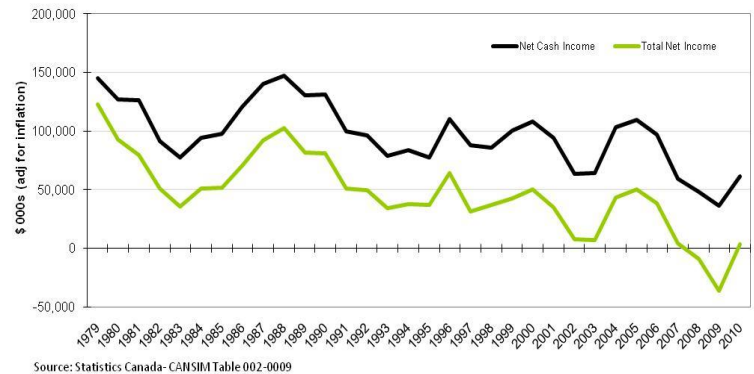


Source: Statistics Canada CANSIM Table 386-0002

Financial performance

Adjusted for inflation, net cash income (market revenues less expenses) have fallen by almost half compared with the average in the 1980s, reaching a record low of \$35.6 million (unadjusted) in 2009. In 2010 however, for the first time in five years, net cash income increased (by 73 percent) and totaled \$61.5 million. Subtracting depreciation (\$59.2 million) and adding inventory change (\$349,000) and income-in-kind (\$905,000) gives a positive industry total net income for the first time in three years at \$3.6 million in 2010.

Figure F1. Net cash income and total net income



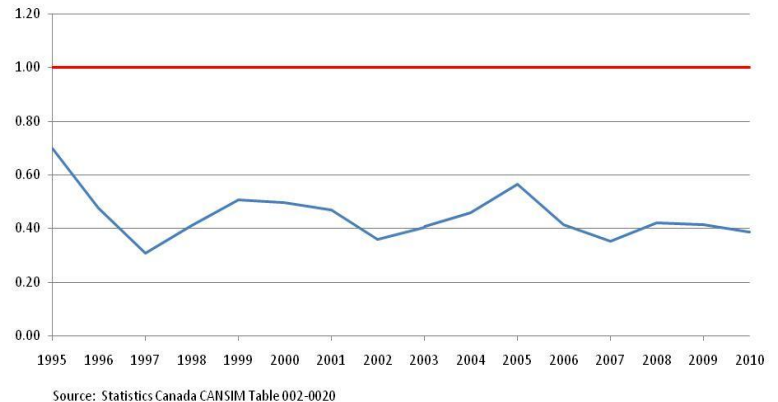
The following ratios are derived from farms with more than \$10,000 in sales.

An indicator of the ability to cover short term liabilities without affecting normal business operations.

Farm operators with an acid-test of less than 1 cannot pay back their current liabilities. This ratio has fallen dramatically since the early 1990s, leveling off somewhat over the past 12 years. The value of 0.39 in 2010, while not the lowest the ratio has been for Nova Scotia, is far below the level needed to be able to pay off short term liabilities (i.e. at least 1) and is indicative that the sector is struggling financially.

Figure F2. Liquidity acid test- NS Agriculture

$$\text{Acidtest} = \frac{(\text{Cash, bonds, savings} + \text{Accounts receivable})}{\text{Current Liabilities}}$$



Solvency

Solvency measures the amount of debt owed by farmers compared to the amount of equity they have invested in the business. Nova Scotia agriculture as a whole has seen a reduction in solvency over time.

In 2010 the sector had \$3.05 in equity for every \$1 in debt. This is down from \$4.36 in equity to \$1 in debt in 1995, although 2010 was the first time in five years were the ratio improved over the past year.

The steadily increasing leverage ratio indicates that creditors are increasingly funding the agricultural sector in Nova Scotia.

Farm owners financed 75 percent of farm assets in 2010, up slightly from 2009. Over time, creditors are funding an increasing share of the assets of Nova Scotia farms. While young farmers would be one positive occurrence that would decrease the equity ratio, this has not generally been the case recently, with farmers' average age increasing between the 2001 and 2006 census from 51 to 53.2 years.

The sector is becoming increasingly leveraged as indicated by the rising ratio of liabilities to assets which surpassed 0.25 in 2008 and further increased to 0.26 in 2009. In 2010, there was a slight improvement with the ratio dropping slightly to 0.247.

Figure F3. Leverage ratio

$$\text{LeverageRatio} = \frac{\text{TotalLiabilities}}{\text{Equity}}$$

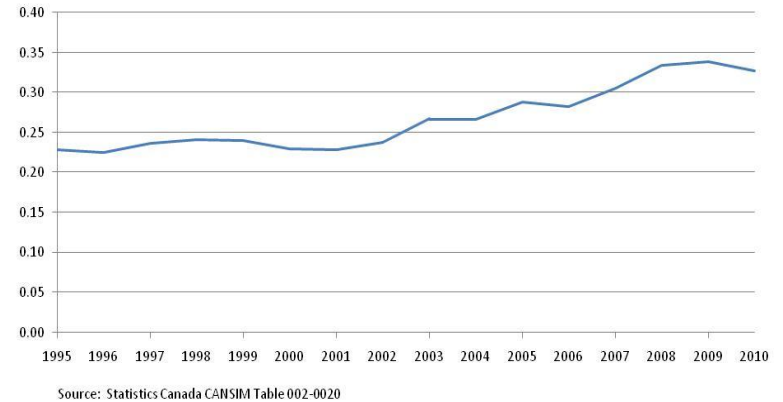


Figure F4. Equity ratio

$$\text{EquityRatio} = \frac{\text{Equity}}{\text{TotalAssets}}$$

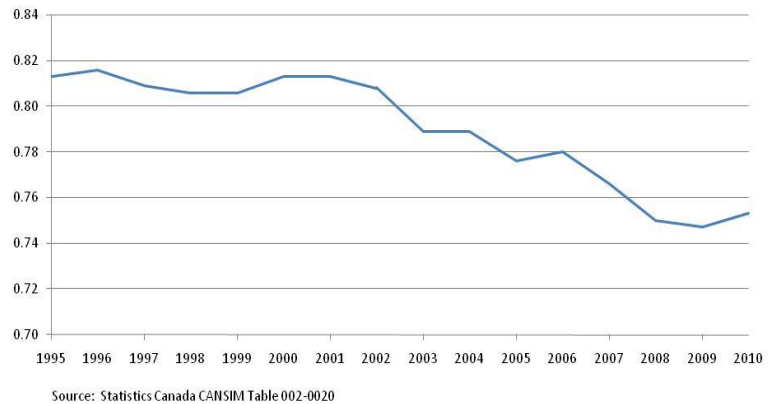
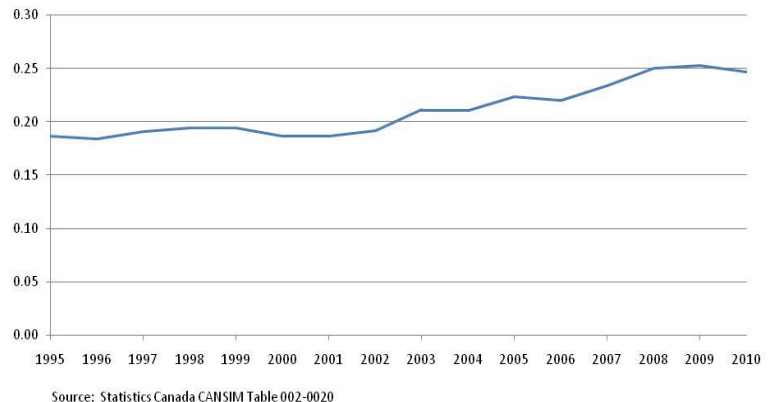


Figure F5. Debt ratio

$$\text{DebtRatio} = \frac{\text{TotalLiabilities}}{\text{TotalAssets}}$$



Profitability

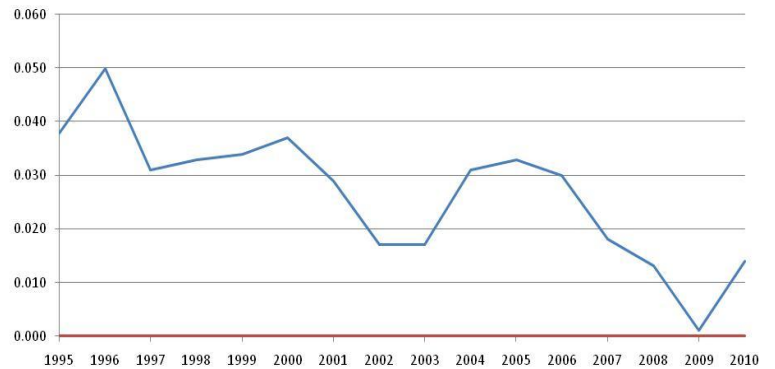
The key measure of competitiveness and productivity is the sustained ability to generate sufficient levels of profit to keep a farm in business.

Return on assets has fallen substantially in recent years, but rebounded in 2010 for the first time in six years. Assets include those owned by the farmer and those financed through borrowing.

The situation is worse when equity is considered against returns (i.e. assets owed are subtracted from total assets). Again this ratio has declined sharply, reaching negative territory in 2008 and further decreasing to 2009. In 2010, return on equity returned to positive territory, equaling 2007 performance.

Figure F6. Return on assets ratio

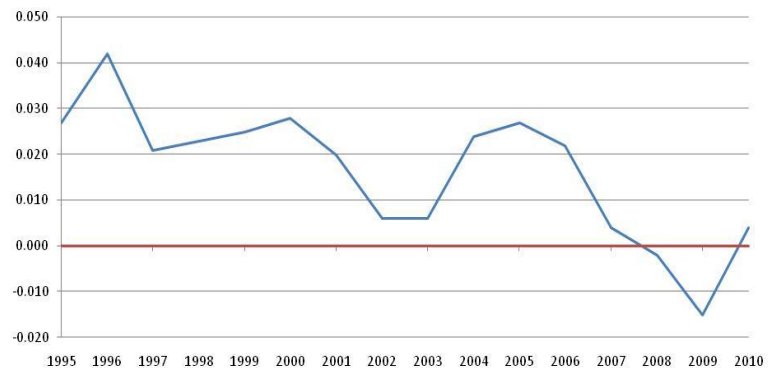
$$ROA = \frac{NetIncBefo\ reTax + interest\ exp\ ense}{AvgTotalAssets}$$



Source: Statistics Canada CANSIM Table 002-0020

Figure F7. Return on equity ratio

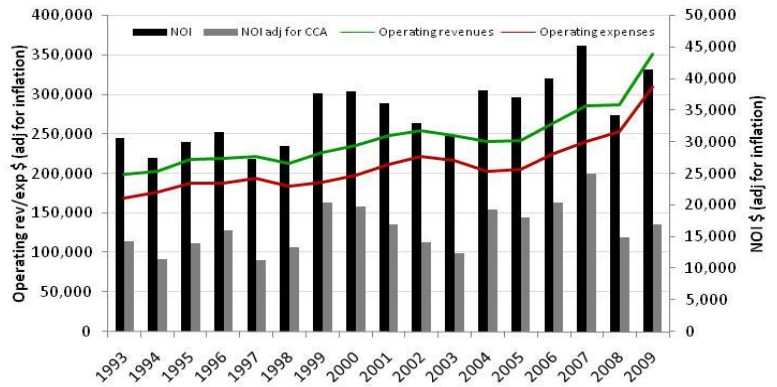
$$ROE = \frac{NetIncBefo\ reTax}{AvgEquity}$$



Source: Statistics Canada CANSIM Table 002-0020

Operating revenues, expenses and incomes for all farm types⁸ jumped sharply in 2009. Revenues (led by poultry and dairy) increased more than expenses (led by feed and salaries). This resulted in an average increase in net operating income of \$7,014 per farm (20 percent). Adjusting for capital cost allowance, net operating income (NOI) increased \$2,121 per farm (14 percent).

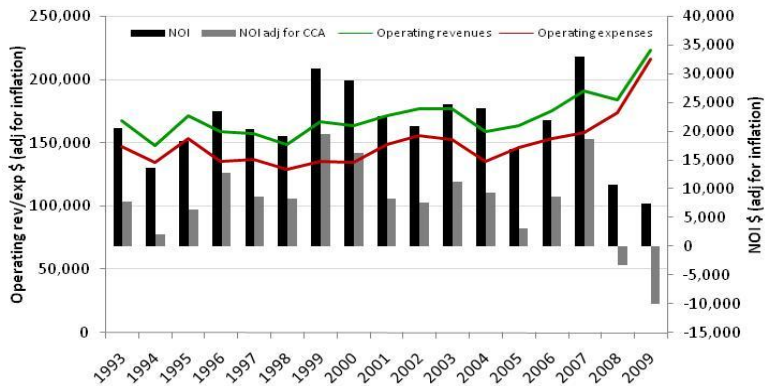
Figure F8. Average net operating revenues, expenses and income- all farm types



Source: Statistics Canada CANSIM Table 002-0044

For mainly crop producing farms, operating revenues and expenses both increased in 2009 with the latter closing the gap with revenues. This led to a decrease in average net operating income of \$3,310 (31 percent) to \$7,398. Accounting for capital cost allowance, NOI declined \$6,727 per farm to -\$10,044. Other crop revenues were the leading revenue category while salaries, general crop expenses and custom work/machine rental were the expenses that saw the largest increases.

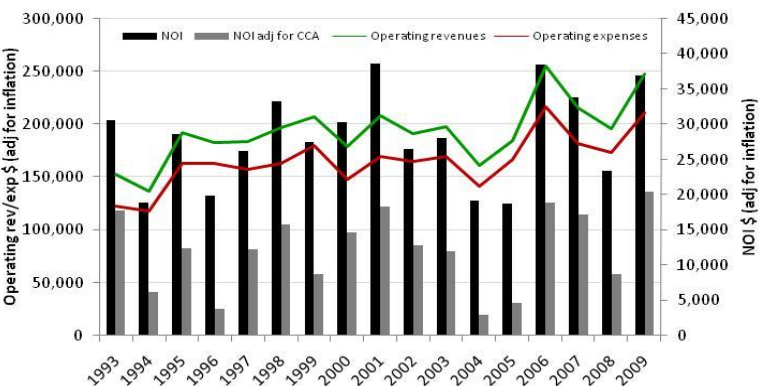
Figure F9. Average net operating revenues, expenses and income- crop production



Source: Statistics Canada CANSIM Table 002-0044

Other vegetable farms saw operating revenues increase more than expenses in 2009 with vegetable revenues leading the increase. Salaries and custom work/machinery rental expenses increased significantly from 2008. Average net operating income increased 58 percent to \$36,909. Adjusting for CCA, NOI increased 134 percent to \$20,452.

Figure F10. Average net operating revenues, expenses and income- other vegetable production (exc potatoes)

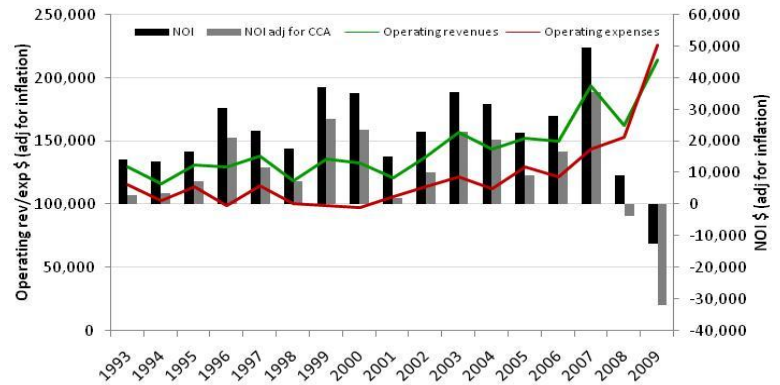


Source: Statistics Canada CANSIM Table 002-0044

⁸ Unincorporated farms with gross operating revenues of \$10,000 or more and incorporated farms \$25,000 or more.

While fruit revenues contributed to a 31 percent increase in operating revenues in 2009, increased expenses of 47 percent led to a severe loss in fruit farm operating incomes. Most expense categories increased- led by salaries, crop expenses and custom work/ machinery rental. Average net operating income fell \$21,633 to -\$12,367. Adjusting for CCA, NOI fell -\$28,182 to an average of -\$31,960 per farm.

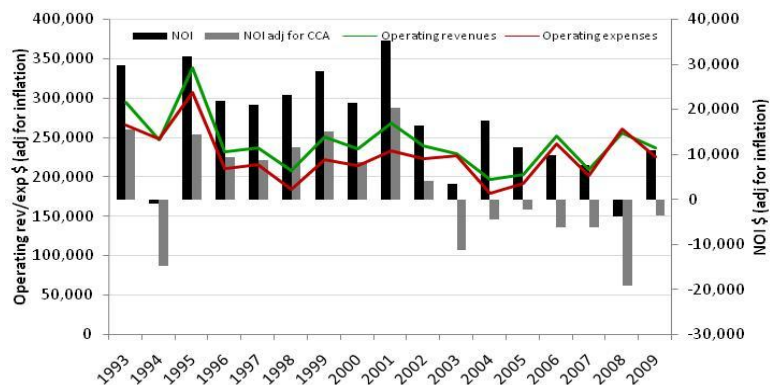
Figure F11. Average net operating revenues, expenses and income- fruit farming



Source: Statistics Canada CANSIM Table 002-0044

Greenhouses, nurseries and floriculture operations had a relatively good year in 2009 after a string of poor years dating back to 2003. Despite an 8 percent reduction in revenues, average NOI increased to \$10,873 from -\$3,756 in 2008. Adjusting for CCA NOI rose \$15,734 but is still negative at -\$3,601. The industry seems to be scaling back as many expense categories decreased, led by seed and plant expenses, salaries, interest expenses and custom work/ machine rental expense.

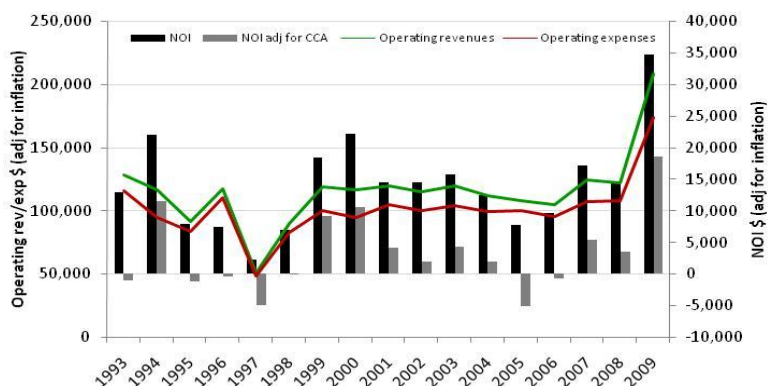
Figure F12. Avg net operating revenues, expenses and income-greenhouse, nursery, floriculture production



Source: Statistics Canada CANSIM Table 002-0044

Other crop farms saw a large increase in average NOI in 2009 to \$34,743 from \$14,589 in 2008. Adjusting for CCA NOI increased by \$15,170 to \$18,674. The key factor behind this was increases in operating revenues (led by fruit and vegetable revenues) of 70 percent outpacing increases in expenses of 61 percent. Salaries, custom work/ machine rental expense, pesticides and other crop expenses saw the largest increases.

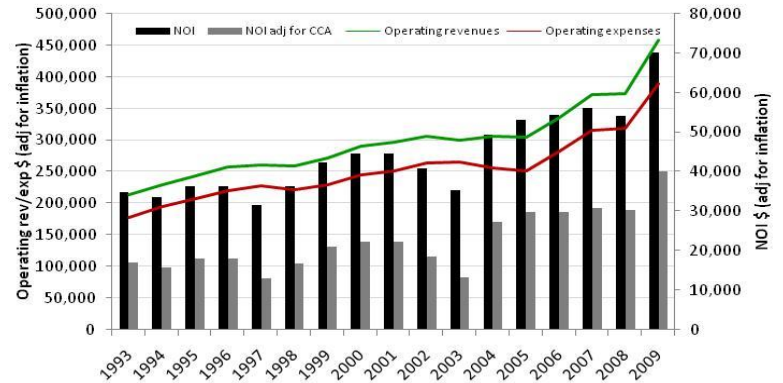
Figure F13. Average net operating revenues, expenses and income- other crop production



Source: Statistics Canada CANSIM Table 002-0044

Animal producing farms had a good year on average in 2009. Operating revenues (led by poultry/egg and dairy revenues) increased by 23 percent. Expenses increased by 22 percent with feed the largest expense increase. Average NOI increased 29 percent to \$70,306 per farm. Adjusting for CCA, NOI increased 32 percent to \$40,141.

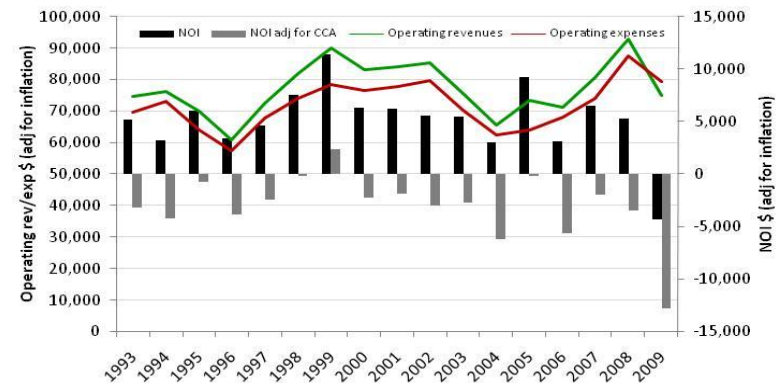
Figure F14. Average net operating revenues, expenses and income- animal production



Source: Statistics Canada CANSIM Table 002-0044

Accounting for depreciation, beef farming in NS has lost money in all but one of the past 17 years, with 2009 being the worst year for NOI to date. Net operating income fell \$9,598 to -\$4,305- the first negative NOI during this period. Accounting for CCA, NOI fell to -\$12,725. Operating revenues fell 19 percent to fall below operating expenses, which fell 10 percent from 2008. The largest decrease in revenues was due to lower program payments and cattle revenues. Cattle purchases, custom work/machinery rental expense and salaries had the largest declines of all expenses.

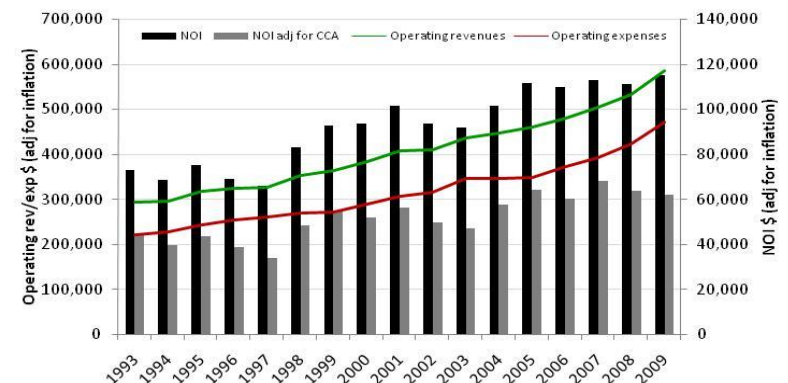
Figure F15. Average net operating revenues, expenses and income- beef cattle farming



Source: Statistics Canada CANSIM Table 002-0044

Dairy farms continued to perform well in 2009 with revenues increasing an average of \$52,282 while expenses increased an average of \$48,469. Salaries and feed expenses increased the most over the year, while interest expense dropped 5.4 percent. Net operating revenues increased 3.4 percent to \$115,381 per farm. Accounting for CCA, NOI dropped slightly (2.4 percent) from 2008 to \$62,227.

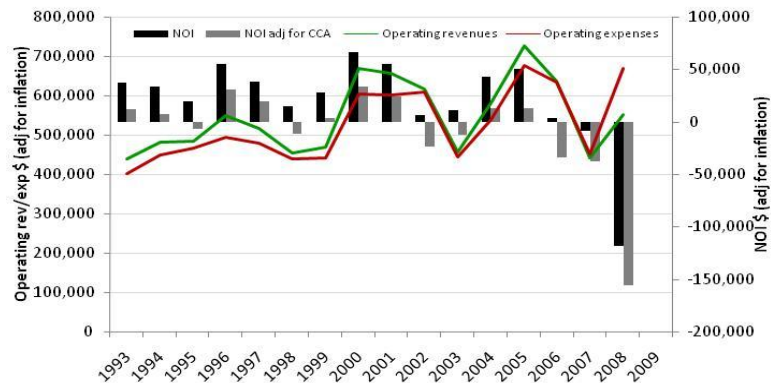
Figure F16. Average net operating revenues, expenses and income- dairy farming



Source: Statistics Canada CANSIM Table 002-0044

Hog farming data were not available in 2009 due to the decline of the sector. Operating expenses in 2008 had increased to become 21 percent higher than revenues. Hog revenues and program payments were the leading revenue categories in 2008, while feed and interest expenses led the increase in operating expenses. Net operating income fell an average of \$109,758 to -\$118,269 per farm. Accounting for CCA, average NOI was -\$156,610 in 2008.

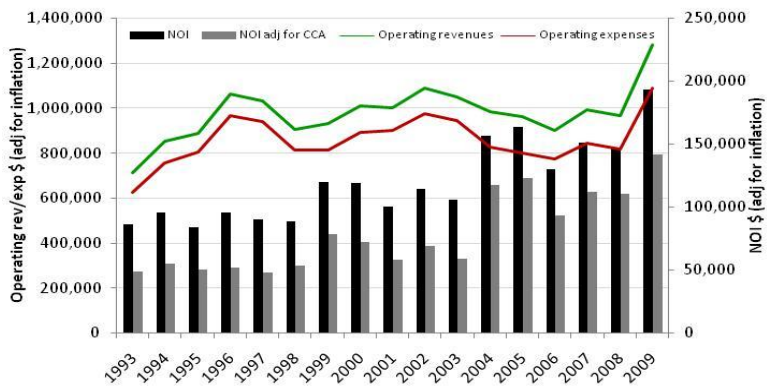
Figure F17. Average net operating revenues, expenses and income- hog farming



Source: Statistics Canada CANSIM Table 002-0044

Poultry and egg farming had a record year in 2009, with average NOI increasing 32 percent to \$193,946 (\$141,822 accounting for CCA). Operating revenues and expenses also increased 32 percent with poultry and egg revenues and custom work/ machinery rentals the leading revenue categories. Feed, poultry and egg purchases and salaries were the expense categories that increased the most over 2008.

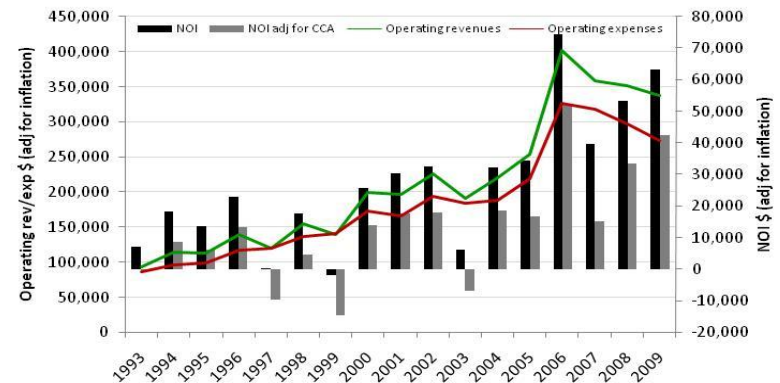
Figure F18. Average net operating revenues, expenses and income- poultry and egg farming



Source: Statistics Canada CANSIM Table 002-0044

After a rapid increase in production, the “other animal” sector (which includes mink farms) has seen operating revenues and expenses shrink from the record highs in 2006. Other livestock revenues fell sharply (-\$23,350) in 2009 while program payments increased substantially (\$27,617). The decline in expenses was led by reductions in other livestock purchases, salaries, and custom work/ machinery rental expense. Overall, the margin between revenues and expenses widened in 2009, as seen by average NOI increasing 19 percent to \$63,316 (\$42,543 accounting for CCA).

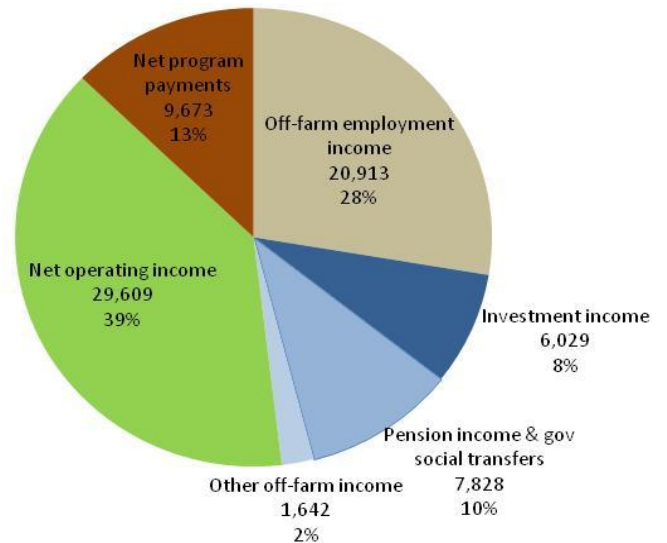
Figure F19. Average net operating revenues, expenses and income- other animal production



Source: Statistics Canada CANSIM Table 002-0044

Average farm family income (including program payments) amounted to \$75,694 in 2009, the latest year for which data are available. This is an increase of 9.3 percent from 2008. All sources of off-farm income amounted to 48.1 percent of total income, down from 52.5 in 2008. Off farm income (up 0.2 percent), investment income (up 14.5 percent), pensions and other government social transfers (up 3.7 percent), net operating income (up 16.1 percent) and net program payments (up 30.5 percent) all increased. Off-farm employment income (down 3.8 percent) and other off farm income (down 7.2 percent) decreased from 2008.

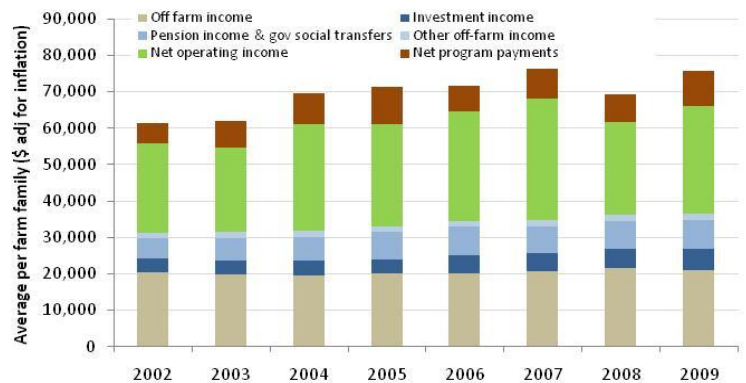
Figure F20. Average farm-family income by source- 2009



Source: Statistics Canada CANSIM Table 002-0034

Net operating income (income derived from farming) and program payments have been the most variable components of farm family income in recent years. The 16 percent increase in NOI was the main factor behind the overall increase in average farm family income in 2009, along with a significant increase in program payments. In general, the other income categories have increased slightly during this period.

Figure F21. Average farm-family income by source



Source: Statistics Canada CANSIM Table 002-0034

Key external trends

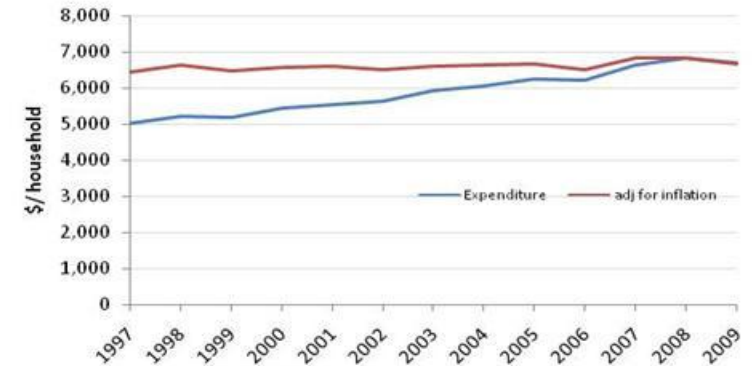
Household expenditures on food have risen steadily, falling only three times between 1997 and 2009. Adjusting for inflation, food expenditures have been relatively steady, increasing only 4 percent over this period.

In 2009, average household expenditures on food in Nova Scotia were 6,682, down 2.1 percent from 2008.

During the past two years, the percentage of food being purchased from stores (supermarkets etc.) has increased slightly, partially reversing a trend of a higher percentage of the food budget of Nova Scotians going to restaurants at the expense of stores. While 79 percent of food was purchased from stores in 2009, this has declined from 82 percent in 1997. In 2009, the average household spent \$6,682 on food; \$5,273 from stores, \$1,369 from restaurants and \$40 as board to private households.

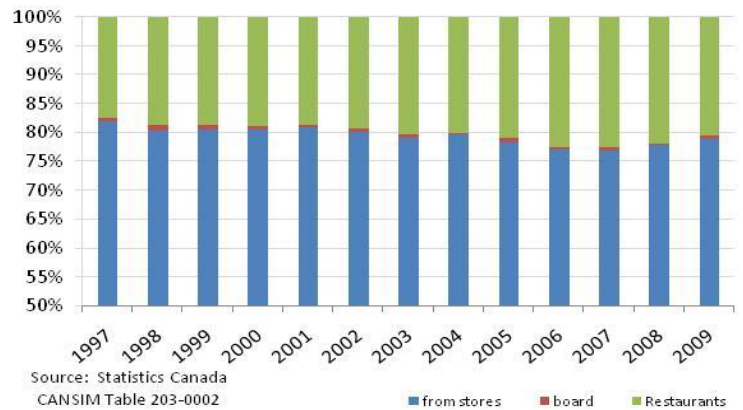
In 2009, food accounted for 11 percent of total household expenditures, continuing a slow but consistent decline from 12.2 percent in 1997. In 2008, food expenditures made up 11.3 percent of total expenditures.

Figure G1. Average household spending on food



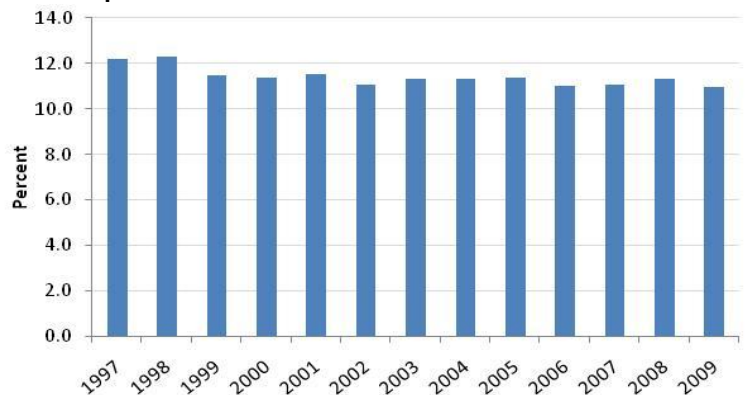
Source: Statistics Canada CANSIM Table 203-0001

Figure G2. Average household food expenditures by source-percent



Source: Statistics Canada CANSIM Table 203-0002

Figure G3. Average household food expenditures as percent of total expenditures

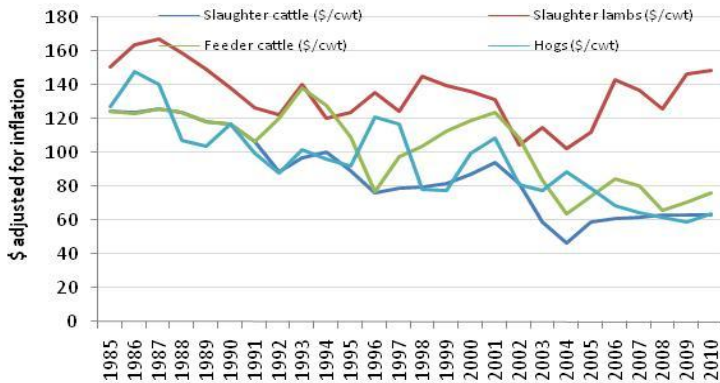


Source: Statistics Canada CANSIM Table 203-0001

While food purchases by consumers have stayed relatively constant in dollar terms (adjusting for inflation), the price farmers receive has been declining with some exceptions (Figures G4- G7).

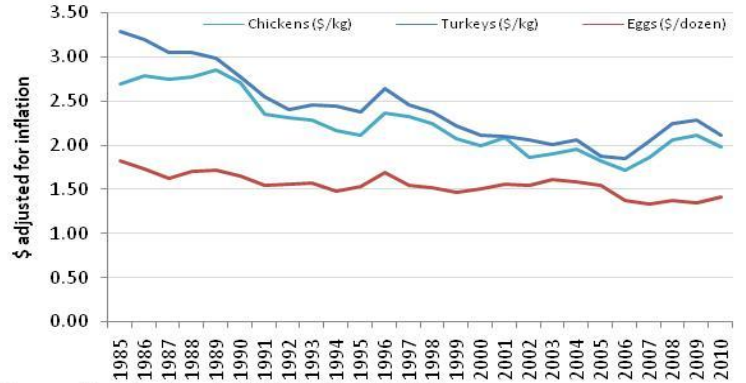
Farm prices for slaughter and feeder cattle and hogs have decreased significantly over time, while lamb prices have rebounded in recent years. Poultry and egg prices have also decreased over time while milk prices have risen significantly from a low in 2002.

Figure G4. Farm product prices- Cattle, lambs, hogs (adj for inflation)



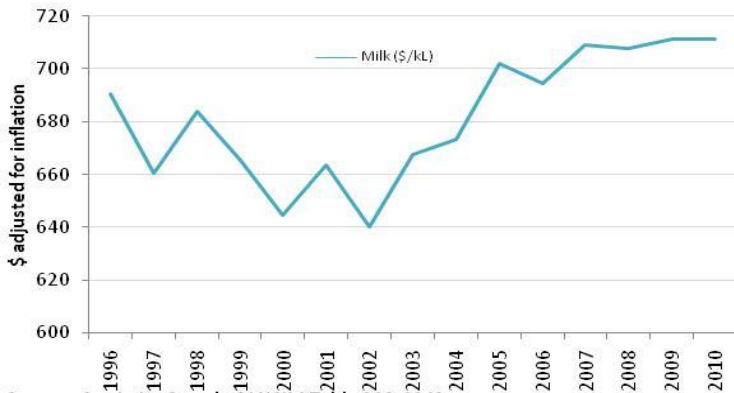
Source: Statistics Canada CANSIM Table 002-0043

Figure G5. Farm product prices- Poultry and eggs (adj for inflation)



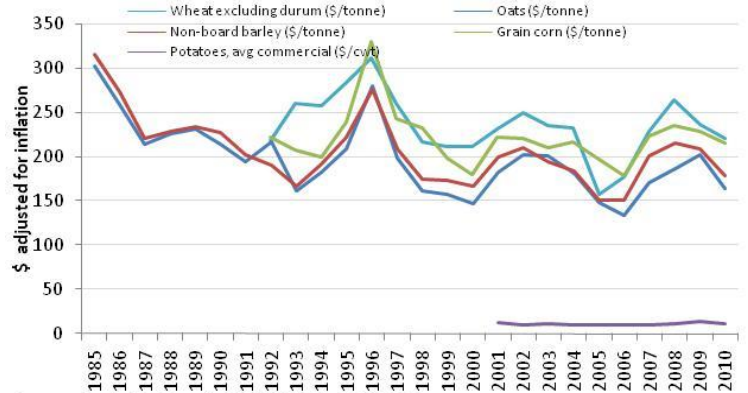
Source: Statistics Canada CANSIM Table 002-0043

Figure G6. Farm product prices- milk (adj for inflation)



Source: Statistics Canada CANSIM Table 002-0043

Figure G7. Farm product prices- crops (adj for inflation)



Source: Statistics Canada CANSIM Table 002-0043

Government and the Agriculture and Agri Food Sector

Payments from government programs net of producer premiums totaled \$12,129,000 in 2010. An additional \$890,000 were allocated to rebates on interest (\$490,000) and fertilizer and lime (\$400,000). Agri-stability payments increased \$364,000 from 2009 to account for 68 percent of program payments. Crop insurance payments net of producer premiums increased \$296,000 from 2009 and made up 13 percent of payments in 2010. The largest decreases in spending from 2009 were in the NISA and CAIS programs (-\$1.7 million and -\$1.1 million, respectively) and in AgrilInvest payments (-\$989,000). NISA and CAIS have been replaced by the AgriStability and AgrilInvest programs.

Net government program payments decreased 19 percent between 2009 and 2010 adjusting for inflation. Payments were 33 percent lower than the previous 10 year average which was driven up substantially by large program payments in 2004 and 2005.

Figure H1. Net government program payments/rebates- 2010 (thousands)

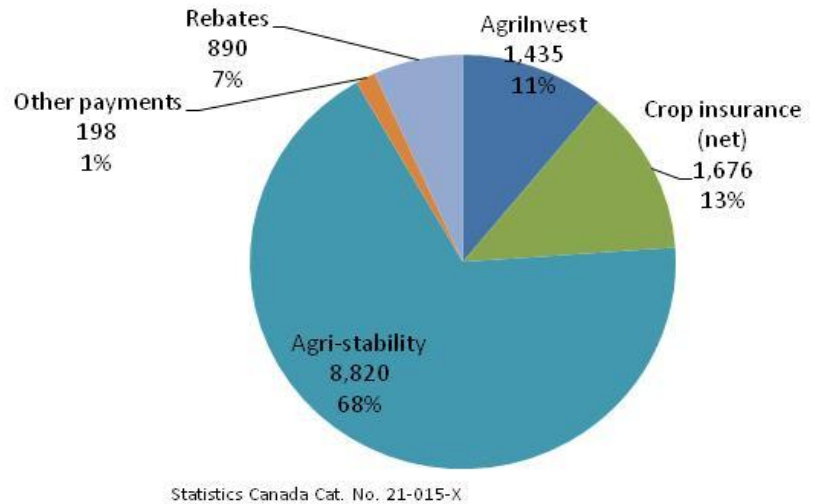
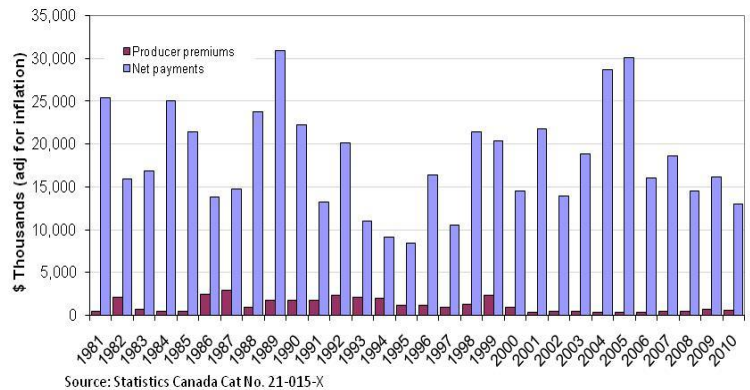


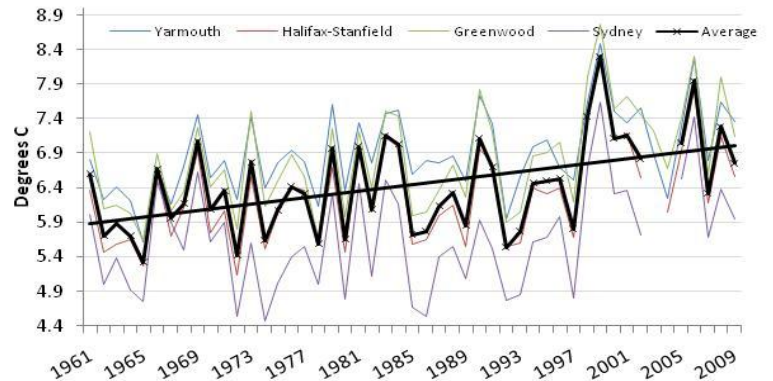
Figure H2. Net government program payments



Climate

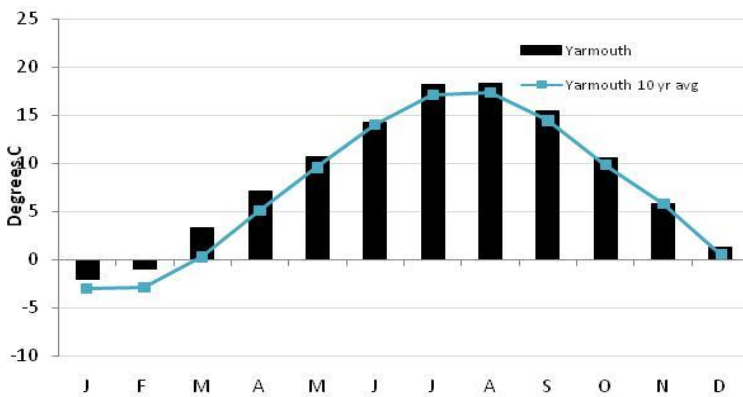
Temperatures in Nova Scotia were higher than average in 2010. 2010 was the hottest year on record since 1999 in Yarmouth, Halifax and Greenwood while data for Sydney were not available for all of 2010 at the time of publication. Between April and October, average temperatures were 7.6 percent higher than the previous ten year average. The long-term trend over the past five decades has been an increase in temperatures, averaging approximately 1.2 C over this period. Data for Sydney are for 2009.

Figure I1. Avg annual temperature at selected sites



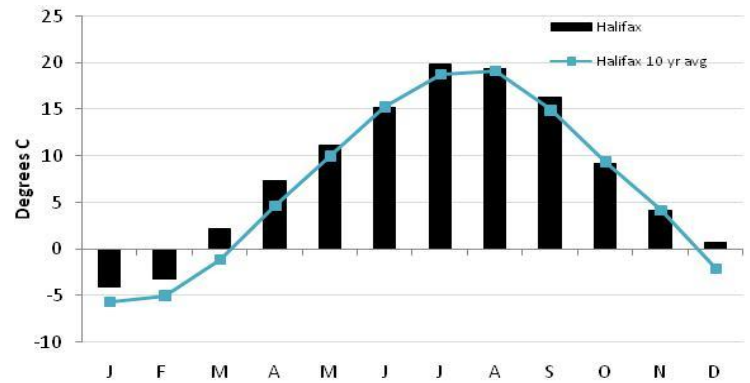
Source: Environment Canada and NSDA calculations

Figure I2. Temperature at Yarmouth- 2010 and prev 10 year avg



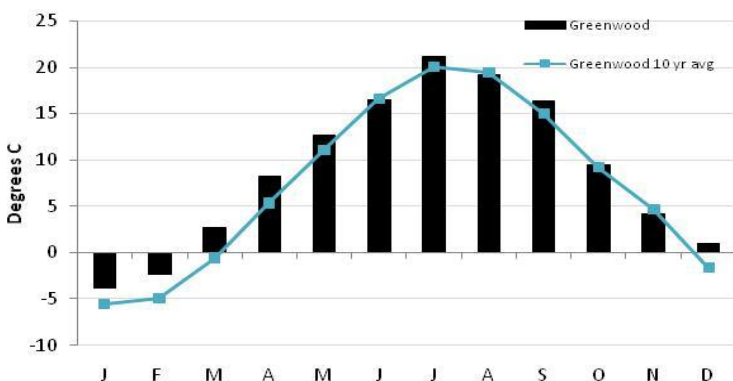
Source: Environment Canada Note: No data available for August 2010

Figure I3. Temperature at Halifax airport- 2010 and prev 10 year avg



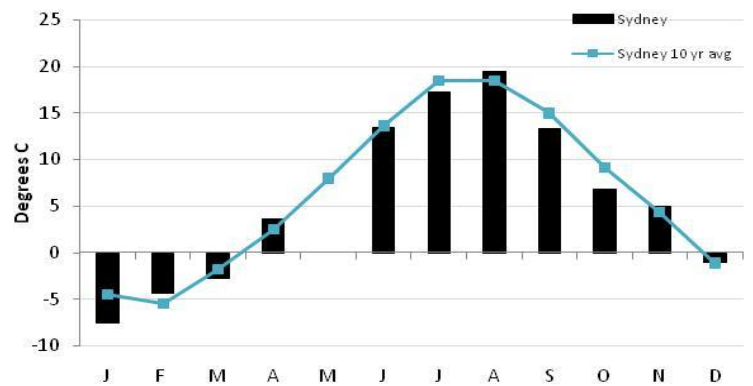
Source: Environment Canada

Figure I4. Temperature at Greenwood- 2010 and prev 10 year avg



Source: Environment Canada

Figure I5. Temperature at Sydney- 2009 and prev 10 year avg



Source: Environment Canada

There was slightly more precipitation in 2010 in comparison to the previous ten year average⁹. Precipitation for Halifax, Greenwood and Yarmouth averaged 112 mm per month, 5 percent higher than the previous ten year average. Much of this increase was due to large amounts of precipitation in November. Between April and October, precipitation was 8.9 percent lower than the previous ten year average. The latest data available for Sydney are for 2009.

Figure 16. Avg annual precipitation at selected sites

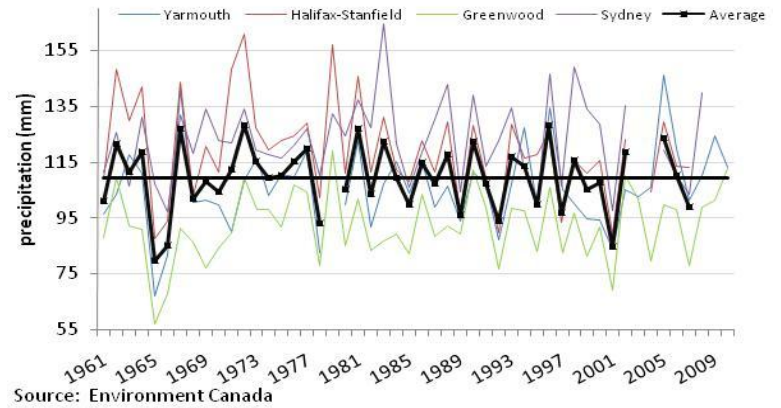


Figure 17. Precipitation at Yarmouth- 2010 and prev 10 year avg

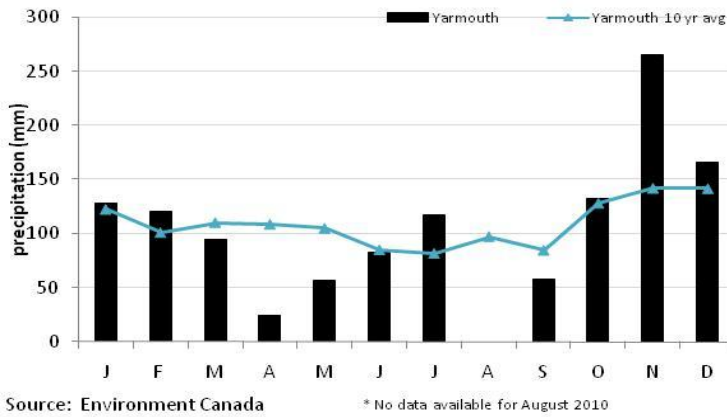


Figure 18. Precipitation at Halifax airport- 2010 and prev 10 year avg

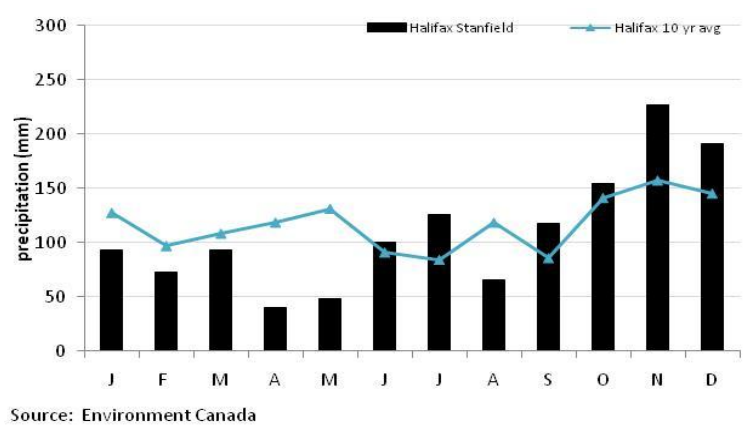


Figure 19. Precipitation at Greenwood- 2010 and prev 10 year avg

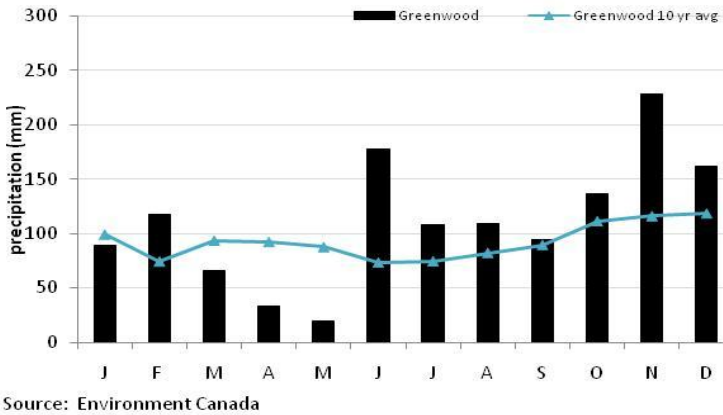
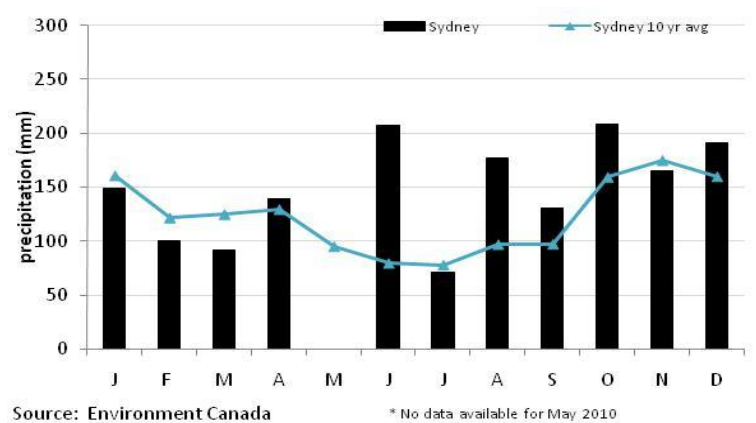


Figure 110. Precipitation at Sydney- 2009 and prev 10 year avg



⁹ Omitting data for August for Yarmouth (precipitation data were unavailable for August 2010).

Media

The exposure of agri-food topics in Nova Scotia's main newspaper, the Chronicle Herald, has been measured since May 2007. Exposure score of individual agri-food themes takes into account the number of articles, size of articles, images, and front page articles. Monthly and annual summaries can be found on the Nova Scotia Department of Agriculture website.

The agri-food business theme received the most exposure of agri-food articles in 2010. The main sub-theme was the attempted (and ultimately rejected) takeover bid on fertilizer giant Potash Corp of Saskatchewan. The Canadian government rejected the bid of Australian firm BHP Billiton. Local food (restaurant reviews, farmers' markets), pollution (Gulf of Mexico oil spill), Industry spotlight (seals, wine, and lobster) and the environment (secondary to pollution theme) rounded out the top five themes in 2010.

The pollution theme received the most exposure of agri-food themes in 2010 due to the potential impact on Gulf of Mexico fisheries of the BP oil spill in April. The debate over using bio-solids (treated human waste) on agricultural lands led to that theme receiving the second highest exposure score increase over 2009. Food spotlight, globalization/trade and agri-business articles also increased significantly in terms of media exposure. Articles highlighting specific agri-food industries had the largest drop in exposure in 2010, largely due to a high amount of coverage related to the lobster, wine and seal industries in 2009. Food safety (with continued decline in coverage after the 2008 Maple Leaf listeriosis outbreak), the economy (declined coverage in wake of 2008 recession), and animal welfare (mostly related to sealing) also saw significant declines in media exposure.

Figure J1. Media exposure of agri-food themes- 2010

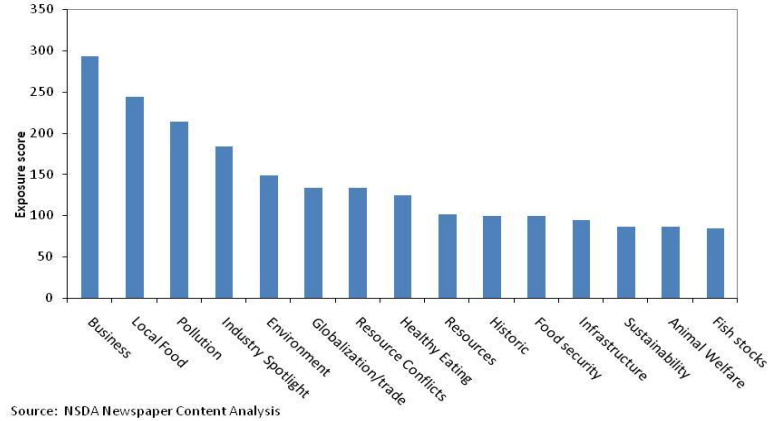
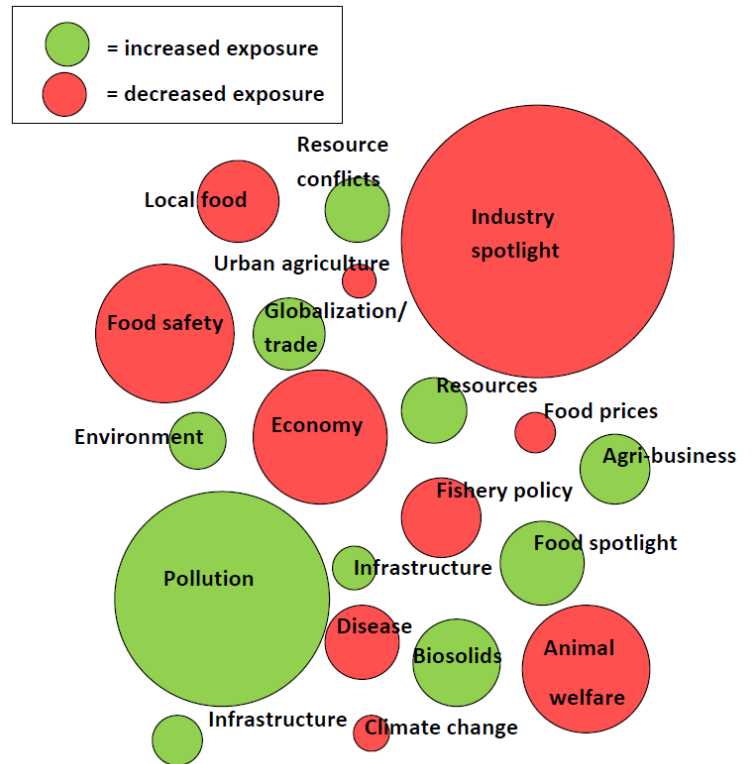


Figure J2. Change in media exposure by theme 2009-2010



Sources

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Statistics Canada. CANSIM Table 282-0008.

Statistics Canada. CANSIM Table 301-0006.

Statistics Canada. CANSIM Table 386-0002.

Statistics Canada. Catalogue No. 21-011-X.

Statistics Canada. Catalogue No. 21-015-X.

Appendices

Appendix A - NS's Agriculture Exports to the World by Year and Commodity

	\$Thousands				% of Total in 2010	Average Annual Growth		
	2000	2005	2009	2010		2000 to 2010	2005 to 2010	2009-2010
Fur	18,812	54,175	85,448	99,411	36%	18%	13%	16%
Mink	18,812	54,175	85,448	99,300	36%	18%	13%	16%
Other Furs	0	0	0	111	0%	~	~	~
Fruits	62,985	92,123	66,832	82,754	30%	3%	-2%	24%
Blueberries, Wild	59,321	84,454	58,055	67,621	24%	1%	-4%	16%
Blueberries, Cultivated	1,513	2,007	2,246	5,167	2%	13%	21%	130%
Cranberries	285	1,310	289	2,276	1%	23%	12%	637%
Other Berries	105	92	91	31	0%	-11%	-19%	-65%
Apples	615	1,886	2,895	3,735	1%	20%	15%	29%
Other Fruits	1,147	2,374	3,256	3,924	1%	13%	11%	21%
Other Crops & Crop Products	61,846	109,074	55,036	42,179	15%	-4%	-17%	-23%
Choc / Candy / Sugars	25,248	62,021	205	244	0%	-37%	-67%	19%
Cocoa, Non-chocolate	11,766	9,646	7,776	6,077	2%	-6%	-9%	-22%
Bread / Baked Goods	4,583	7,830	8,093	5,050	2%	1%	-8%	-38%
Wafers / Waffles	3,941	3,575	884	2,443	1%	-5%	-7%	176%
Essential Oils	0	20	2,765	258	0%	~	66%	-91%
Christmas Trees	9,559	10,910	6,664	7,213	3%	-3%	-8%	8%
Maples	33	12	109	385	0%	28%	101%	254%
Other Trees	28	17	3,842	3,849	1%	63%	197%	0%
Feed	1,324	484	8,589	6,626	2%	17%	69%	-23%
Beverages, Alcoholic	1,324	2,007	76	118	0%	-21%	-43%	55%
Beverages, Non-alcoholic	489	214	2,735	1,435	1%	11%	46%	-48%
Misc Food Preparations	3,551	12,338	13,298	8,481	3%	9%	-7%	-36%
Vegetables	15,026	23,715	24,869	25,794	9%	6%	2%	4%
Potatoes	516	5,917	2,455	7,340	3%	30%	4%	193%
Other Vegetables	14,511	17,798	22,414	18,454	7%	2%	1%	-18%
Other Animals & Animal Products	8,378	17,665	9,805	13,225	5%	5%	-6%	35%
Bees & Bee Products	38	3	4	362	0%	25%	162%	9873%
Other Farm Animals & Products	7,772	16,004	8,547	11,631	4%	4%	-6%	36%
Other Non-farm Animals & Products	567	1,659	1,255	1,232	0%	8%	-6%	-2%
Grains & Grasses	1,742	4,603	5,715	4,901	2%	11%	1%	-14%
Wheat	1,478	3,838	5,437	4,640	2%	12%	4%	-15%
Other Grains or Mixed Grains	264	764	278	261	0%	0%	-19%	-6%
Plants / Flowers / Spices	6,800	8,161	4,418	4,892	2%	-3%	-10%	11%
Live Plants	3,843	4,783	2,895	3,240	1%	-2%	-7%	12%
Flowers	45	199	0	2	0%	-29%	-62%	~
Seeds	20	61	58	136	0%	21%	17%	133%
Spices/Other Plant Parts	2,893	3,118	1,464	1,515	1%	-6%	-13%	3%
Dairy	828	4,072	909	1,583	1%	7%	-17%	74%
Livestock, Dairy	309	0	0	0	0%	-100%	~	~
Milk, Any Form	195	1,053	47	470	0%	9%	15%	899%
Dairy Products	324	3,019	862	1,112	0%	13%	-18%	29%
Hogs	1,903	5,418	2,174	968	0%	-7%	-29%	-55%
Livestock, Hogs	10	23	77	9	0%	-1%	-16%	-88%
Meat, Hogs	1,892	5,395	2,097	959	0%	-7%	-29%	-54%
Beef	967	1,913	402	853	0%	-1%	-15%	112%
Livestock, Beef	0	10	0	34	0%	~	28%	~
Meat, Beef	206	500	140	407	0%	7%	-4%	190%
Hides / Skins / Other Products	761	1,403	262	412	0%	-6%	-22%	57%
Poultry	573	273	142	272	0%	-7%	0%	92%
Eggs	0	0	0	70	0%	~	~	~
Meat, Chicken	542	159	117	182	0%	-10%	3%	56%
Meat, Turkey	0	103	0	4	0%	~	-47%	1005%
Birds, Other	31	11	25	16	0%	-6%	7%	-35%
Nuts	8	153	48	44	0%	18%	-22%	-8%
Sheep / Lamb	2	47	25	40	0%	34%	-3%	64%
ALL EXPORTS	179,870	321,392	255,821	276,917	100%	4%	-3%	8%

Source: All Data is from Statistics Canada (CATS Net) except for Mink Exports, which are based on data from Provincial Export Permits. Totals reflect this adjustment. Data is summed into noted categories.

Appendix B - NS's 2010 Agriculture Exports to the World by Top Trading Partners and Commodity
\$Thousands

	US	China	EU27	Korea	Japan	Australia	Switzerland	SPM*	Russia	RoW	World	% of Total
Fur	2,736	75,088	8,381	12,740	0	0	76	0	204	185	99,411	36%
Mink	2,722	75,084	8,288	12,740	0	0	76	0	204	185	99,300	36%
Other Furs	14	4	93	0	0	0	0	0	0	0	111	0%
Fruits	30,731	3,386	33,663	1,857	8,994	1,618	4	81	1,095	1,325	82,754	30%
Blueberries, Wild	23,350	1,753	29,573	1,766	8,879	1,118	0	0	511	670	67,621	24%
Blueberries, Cultivated	3,262	0	1,299	0	0	265	0	0	0	341	5,167	2%
Cranberries	825	0	975	0	0	0	0	0	327	149	2,276	1%
Other Berries	4	0	8	0	0	0	0	0	0	19	31	0%
Apples	3,113	0	610	0	0	0	0	0	0	13	3,735	1%
Other Fruits	176	1,633	1,199	91	115	236	4	81	256	133	3,924	1%
Other Crops & Crop Products	38,514	3	1,286	0	215	65	27	542	12	1,515	42,179	15%
Choc / Candy / Sugar	76	0	12	0	84	0	0	70	0	2	244	0%
Cocoa, Non-chocolate	6,058	0	4	0	0	0	0	16	0	0	6,077	2%
Bread / Baked Goods	4,911	0	27	0	0	0	0	106	0	6	5,050	2%
Wafers / Waffles	2,432	0	0	0	0	0	0	11	0	0	2,443	1%
Essential Oils	258	0	0	0	0	0	0	0	0	0	258	0%
Christmas Trees	5,822	0	0	0	5	0	0	11	12	1,364	7,213	3%
Maples	123	0	171	0	0	65	26	0	0	0	385	0%
Other Trees	3,849	0	0	0	0	0	0	0	0	0	3,849	1%
Feed	6,335	0	217	0	0	0	0	55	0	18	6,626	2%
Beverages, Alcoholic	26	3	78	0	11	0	0	0	0	0	118	0%
Beverages, Non-alcoholic	723	0	546	0	0	0	0	166	0	0	1,435	1%
Misc Food Preparation	7,903	0	231	0	115	0	0	107	0	125	8,481	3%
Vegetables	23,338	54	77	96	0	32	0	318	105	1,774	25,794	9%
Potatoes	4,982	54	29	96	0	32	0	288	105	1,754	7,340	3%
Other Vegetables	18,356	0	48	0	0	0	0	30	0	20	18,454	7%
Other Animals & Animal Products	5,417	699	1,785	233	2,787	0	1,581	4	0	719	13,225	5%
Bees & Bee Products	4	347	0	0	8	0	0	3	0	0	362	0%
Other Farm Animals	5,295	163	861	233	2,779	0	1,581	1	0	719	11,631	4%
Other Non-farm Animals	118	189	925	0	0	0	0	0	0	0	1,232	0%
Grains & Grasses	4,148	0	51	0	0	0	0	117	0	585	4,901	2%
Wheat	4,148	0	16	0	0	0	0	25	0	451	4,640	2%
Other Grains or Mixtures	0	0	34	0	0	0	0	93	0	134	261	0%
Plants / Flowers / Spices	4,851	0	15	0	0	0	0	26	0	0	4,892	2%
Live Plants	3,232	0	5	0	0	0	0	3	0	0	3,240	1%
Flowers	0	0	0	0	0	0	0	2	0	0	2	0%
Seeds	133	0	0	0	0	0	0	2	0	0	136	0%
Spices/Other Plant Products	1,486	0	10	0	0	0	0	19	0	0	1,515	1%
Dairy	0	0	114	0	0	0	0	258	0	1,211	1,583	1%
Livestock, Dairy	0	0	0	0	0	0	0	0	0	0	0	0%
Milk, Any Form	0	0	1	0	0	0	0	17	0	452	470	0%
Dairy Products	0	0	113	0	0	0	0	241	0	759	1,112	0%
Hogs	250	32	40	29	148	0	0	57	45	367	968	0%
Livestock, Hogs	0	0	0	0	0	0	0	9	0	0	9	0%
Meat, Hogs	250	32	40	29	148	0	0	48	45	367	959	0%
Beef	404	42	406	0	0	0	0	0	0	1	853	0%
Livestock, Beef	34	0	0	0	0	0	0	0	0	0	34	0%
Meat, Beef	0	0	406	0	0	0	0	0	0	1	407	0%
Hides / Skins / Other	370	42	0	0	0	0	0	0	0	0	412	0%
Poultry	9	0	48	0	0	0	0	105	0	110	272	0%
Eggs	0	0	0	0	0	0	0	0	0	70	70	0%
Meat, Chicken	0	0	44	0	0	0	0	98	0	40	182	0%
Meat, Turkey	0	0	1	0	0	0	0	2	0	1	4	0%
Birds, Other	9	0	2	0	0	0	0	5	0	0	16	0%
Nuts	29	0	0	0	0	0	0	15	0	0	44	0%
Sheep / Lamb	0	0	25	0	0	0	0	15	0	0	40	0%
ALL EXPORTS	110,427	79,304	45,891	14,955	12,145	1,715	1,688	1,539	1,460	7,792	276,917	100%
% of Total Exports	40%	29%	17%	5%	4%	1%	1%	1%	1%	3%	100%	

*Saint Pierre and Miquelon

Source: All Data is from Statistics Canada (CATS Net) except for Mink Exports, which are based on data from Provincial Export Permits. Totals reflect this adjustment. Data is summed into noted categories.