

Industry Profile

A PROFILE OF FISHERIES AND SEAFOOD INDUSTRY IN NEW BRUNSWICK

**Supplement to the Report of the Stakeholders
Action Groups
September 30, 2007**

New  Nouveau
Brunswick
C A N A D A

Seafood Production and Markets

New  Nouveau
Brunswick
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Primary Production

- Value of Commercial Landings
\$207.3 million*
- Aquaculture Farm Gate Value
\$230.5 million
\$437.8 million

*DFO Statistics



Value (2005)

- Total Production \$1.092 billion
- Total Exports \$ 832 million



New Brunswick Advantages

- Its diversity
- Its ability to adapt to market needs
- Its quality
- Its expertise



Industry Profile - 2005

- New Brunswick Processing industry:
 - *Exports: \$834,000,000*
 - *Number of active plants in NB: 134*
 - *Landings in NB: \$185,000,000*
 - *Employment: 5020 equivalent FTE from a seasonal workforce of about 12,000*
 - *Export to 50 countries*



Industry Profile - 2005

- For comparison
 - *Canada exports \$4.5 billion*
 - *NB ranks 4th for seafood exports in Canada*
 - *Canadian lobster represents \$1 billion*
 - *China exports \$5.5 billion, with exports to the US reaching 1.3 billion in 2004 (more than doubled in 5 years).*
 - *NB exports to China now more important than any single EU market.*



Canadian Production by Province (\$ million)

Province	Aquaculture	Fisheries
BC	336.9	330.1
QC	12.5	152.3
NFLD	33.5	517.6
PEI	28.8	140.1
NS	40.4	731.7
NB	<u>230.5</u>	<u>207.3</u>
Canada	682.6	2,079.1



New Brunswick Seafood Exports by Country

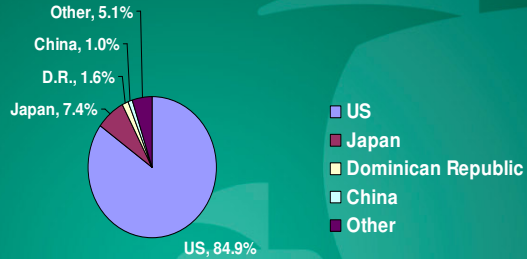
Country Value (\$ million)

- **U.S.** **706.6**
- **Japan** **61.6**
- **Dominican Republic** **13.3**
- **China** **8.1**
- **Other Caribbean** **6.2**
- **Denmark** **4.3**
- **France** **3.1**
- **Belgium** **3.0**
- **United Kingdom** **2.0**
- **Other** **24.1**



832.3

Countries by Value



New Brunswick Exports by Species

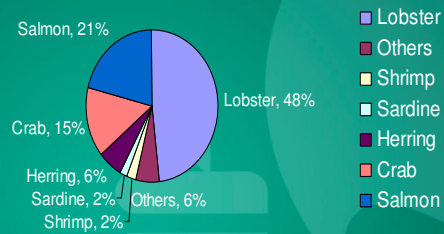
Species Value (\$ million)

- Lobster** **401.8**
- Salmon** **175.7**
- Crab (all crab species)** **124.4**
- Herring** **49.8**
- Sardine** **15.5**
- Shrimp** **15.0**
- Other** **50.1**



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Exports by Species



Seafood Processing

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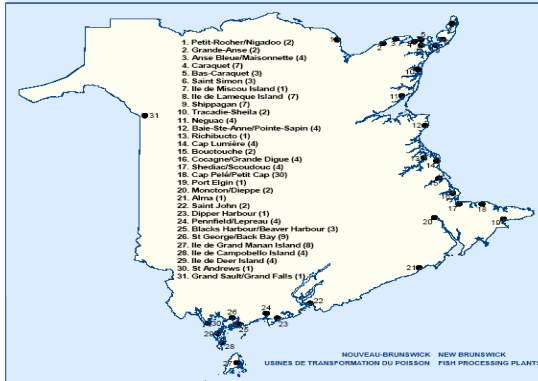
Seafood Processing in New Brunswick

- **Total Production (2005)**
= \$1.092 billion
- **Number of Licensed Processing
Operations**
= 134

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Geographic Distribution of Fish Plants

- North East **43**
- South East **54**
- South West **37**
134





 New Brunswick
 CANADA

Number of Processing Licenses for Major Species

<u>Region</u>	<u>Snow Crab</u>	<u>Lobster</u>	<u>Shrimp</u>	<u>Herring</u>
N-E	14	24	7	35
S-E	9	21	2	38
S-W	<u>0</u>	<u>5</u>	<u>0</u>	<u>4</u>
	23	50	9	77



 New Brunswick
 CANADA

Employment

• Aquaculture Production	1,400
• Aquaculture Processing	560
• Fisheries Harvesting	7,000
• Fisheries Processing	<u>5,020</u>
	13,980

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Seafood Harvesting

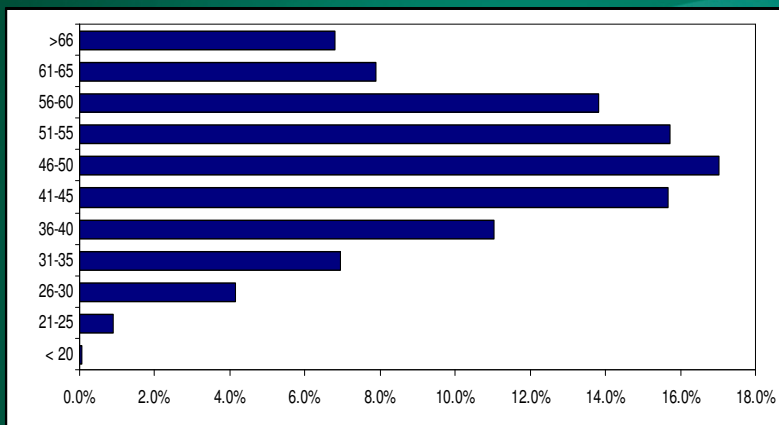
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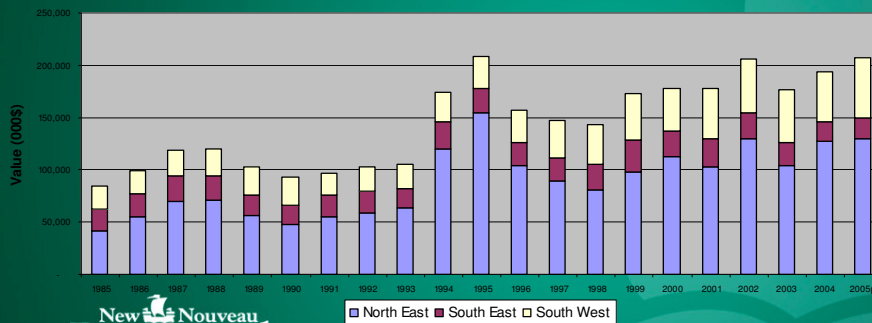
Industry Statistics - 2005

Sectors	Harbours	Number of Vessels			Number of Fishers			Crew-members	Total	Licences	
		< 45'	45'-65'	65'+	Coastal	Core	Full-Time / Others			Non-Aboriginals	Aboriginals
North East	36	1,230	85	22	841	784	70	1,591	3,286	5,798	299
South East	22	595	3	0	239	483	18	484	1,224	3,292	537
South West	32	612	57	11	449	335	0	732	1,516	1,727	90
Total	90	2,437	145	33	1,529	1,602	88	2,807	6,026	10,817	926

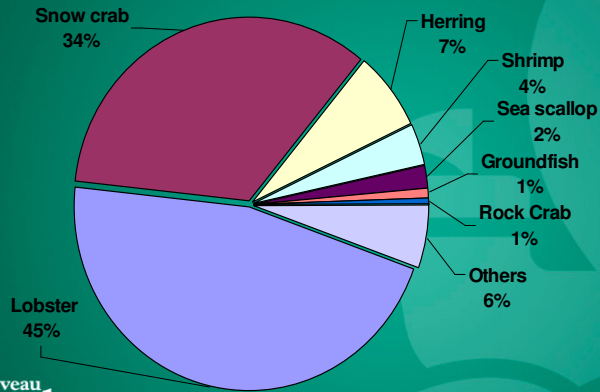
Age Structure of Core Fishers - 2005



Historical Landings Value By Region 1985-2005



Percentages of Landed Value By Species - 2005



New Brunswick
Canada

Total value of landings: \$207.3 million

Aquaculture

	Production* (m.t.)	Value* (\$ Millions)
Salmon	35,000	225.0
Trout	300	3.0
Oysters	1,900	2.0
Mussels	500	0.6
Total	37,700	230.6

Number of production sites**	
Salmon	94
Shellfish	538
Inland	223
Employment***	
Farm, hatchery and other direct	1,400
Processing	560

New Brunswick
Canada

* 2005 Data

**2007 Data

***Industry Study - 2001

Example of Opportunities

- There is a major trend worldwide toward investing in marine biotechnologies and seeking optimum use of marine resources.
- It is estimated that there are more than 58,000 tonnes of co-products (waste or products that cannot be marketed for food) in New Brunswick. Most of these are processed into compost and fish meal.
- The use of co-products, often rich in bioactive molecules with unique properties (antimicrobial, anti-cancer), offers commercial potential that should be developed.