

Food and Beverage Manufacturing Sales (\$ Millions)

In 2016, Alberta food and beverage manufacturing sales reached a new high of \$14.6 billion or 23.3% of the province's total manufactured goods (\$62.6 billion). The leading food sub-sector was meat product manufacturing (including poultry) at \$7.3 billion, which accounted for 53.9% of the provincial food sales.

| | 2015r | 2016p | % Chg. |
|--|-----------------|-----------------|--------------|
| All Manufacturing Industries | 69,607.1 | 62,560.3 | -10.1 |
| Food and Beverage Manufacturing Industries .. | 13,329.7 | 14,559.4 | 9.2 |
| % Share of All Manufacturing | 19.1% | 23.3% | |
| Food Manufacturing Industries | 12,064.1 | 13,574.2 | 12.5 |
| Meat Product Manufacturing (incl. Poultry)..... | 6,775.6 | 7,309.8 | 7.9 |
| % Share of Food Manufacturing | 56.2% | 53.9% | |
| Grain and Oilseed Milling | 1,631.3 | 1,754.7 | 7.6 |
| Animal Foods (incl. Livestock Feed)..... | 1,174.7 | 1,016.8 | -13.4 |
| All Other Food Manufacturing | 2,482.5 | 3,492.9 | 40.7 |
| Dairy Products | 734.9 | 1,559.8 | 112.3 |
| Bread and Bakery Products | 542.7 | x | - |
| Other Food Manufacturing ⁽¹⁾ | 1,204.9 | 1,933.1 | 60.4 |
| Beverage Manufacturing Industries | 1,265.6 | 985.2 | -22.2 |

(1) Includes manufacturing of coffee, tea, seasonings, dressings, flavourings, specialty foods, sugar and confectionery products, seafood products, cookies, crackers, pasta and fruit and vegetable preserving.

Food and Beverage Retail Sales (\$ Millions)

| | 2015r | 2016p | % Chg. |
|---|-----------------|-----------------|-------------|
| Total Alberta Food and Beverage Stores | 14,661.5 | 14,649.2 | -0.1 |
| Grocery Stores (Supermarkets and Convenience) | 11,436.6 | 11,288.2 | -1.3 |
| Specialty Food Stores | 533.1 | 557.3 | 4.5 |
| Beer, Wine and Liquor Stores | 2,691.8 | 2,803.7 | 4.2 |

Average Household Food Expenditure, 2015 (Per Year)

| | Alberta | % of Food | Canada | % of Food |
|---|-----------|-----------|----------|-----------|
| Total Household Expenditure | \$110,024 | | \$82,697 | |
| Food Expenditure | \$10,171 | | \$8,629 | |
| % Share of Total Expenditure | 9.2% | | 10.4% | |
| Food Purchased From Restaurants .. | \$3,058 | | \$2,502 | |
| Food Purchased From Stores | \$7,112 | 100.0% | \$6,126 | 100.0% |
| Fruits and Vegetables | \$1,675 | 23.6% | \$1,465 | 23.9% |
| Meat and Processed Meat | \$1,568 | 22.0% | \$1,194 | 19.5% |
| Dairy Products and Eggs | \$1,030 | 14.5% | \$903 | 14.7% |
| Bakery Products | \$547 | 7.7% | \$574 | 9.4% |
| Cereal Grains and Cereal Products | \$408 | 5.7% | \$341 | 5.6% |
| Fish and Seafood | \$194 | 2.7% | \$213 | 3.5% |

Per Capita Consumption of Red Meats and Poultry, Canada

| | Units | 1997 | 2015r | 2016p |
|-----------------------|-------------------|-------|-------|-------|
| Beef | kg ⁽¹⁾ | 31.46 | 24.32 | 25.00 |
| Pork | kg ⁽¹⁾ | 25.42 | 23.02 | 20.90 |
| Mutton and Lamb | kg ⁽¹⁾ | 0.74 | 1.04 | 1.02 |
| Chicken | kg ⁽²⁾ | 25.47 | 31.83 | 32.51 |
| Turkey | kg ⁽²⁾ | 4.23 | 4.15 | 4.25 |

(1) Carcass weight basis. (2) Eviscerated weight basis.

Note: These data represent food available for consumption and not actual quantities of food consumed since they do not allow for losses such as waste and/or spoilage in stores, households, private institutions or restaurants. Also, aggregate data for fresh fruit, fresh vegetables, poultry, fish, fluid milk and alcoholic beverages shown in previous editions of the Agriculture Statistics Factsheet are no longer available.

Farm Operating Expenses ⁽¹⁾ (\$ Millions)

| | 2015r | 2016p | % Chg. |
|--|-----------------|-----------------|-------------|
| Property Taxes | 113.0 | 119.6 | 5.8 |
| Cash and Share Rent | 591.7 | 631.5 | 6.7 |
| Cash Wages, Room and Board | 725.1 | 743.2 | 2.5 |
| Interest | 644.4 | 656.0 | 1.8 |
| Machinery Fuel | 578.7 | 527.2 | -8.9 |
| Machinery Repairs | 694.8 | 715.6 | 3.0 |
| Fertilizer and Lime | 1,325.8 | 1,182.6 | -10.8 |
| Pesticides | 624.1 | 652.2 | 4.5 |
| Commercial Feed | 1,328.4 | 1,400.2 | 5.4 |
| Livestock and Poultry Purchases | 1,419.7 | 966.7 | -31.9 |
| Electricity and Telephone | 256.3 | 237.1 | -7.5 |
| Heating Fuel | 67.6 | 58.2 | -13.9 |
| Miscellaneous | 1,975.1 | 2,092.2 | 5.9 |
| Total Operating Expenses After Rebates | 10,344.8 | 9,982.3 | -3.5 |
| Depreciation on Buildings | 296.3 | 289.4 | -2.3 |
| Depreciation on Machinery | 1,422.2 | 1,456.2 | 2.4 |
| Total Expenses After Rebates and Depreciation | 12,063.3 | 11,727.9 | -2.8 |

(1) Net of provincial or federal rebates.

Net Farm Income ⁽¹⁾ (\$ Millions)

| | 2015r | 2016p | % Chg. |
|---|----------|----------|--------|
| 1. Total Farm Cash Receipts | 13,592.6 | 13,490.5 | -0.8 |
| 2. Total Operating Expenses After Rebates | 10,344.8 | 9,982.3 | -3.5 |
| 3. Net Cash Income (1 - 2) | 3,247.7 | 3,508.2 | 8.0 |
| 4. Income in Kind | 13.7 | 11.9 | -13.2 |
| 5. Depreciation Charges | 1,718.5 | 1,745.9 | 1.6 |
| 6. Realized Net Income (3 + 4 - 5) | 1,542.9 | 1,774.4 | 15.0 |
| 7. Value of Inventory Change | -241.6 | 308.1 | s |
| 8. Total Net Income (6 + 7) | 1,301.3 | 2,082.4 | 60.0 |

(1) Refers to income directly related to the farm business; excludes non-farming income (such as wages and salaries from off-farm employment, pension and investment income).

Capital Investment Expenditures ⁽¹⁾ (\$ Millions)

| | 2015r | 2016p | % Chg. |
|--|-----------------|-----------------|--------------|
| All Industries | 75,676.2 | 62,119.5 | -17.9 |
| Agri-Food Industries | 1,862.2 | 1,787.0 | -4.0 |
| % Share of All Industries | 2.5% | 2.9% | |
| Agriculture Industries | 1,587.4 | 1,569.2 | -1.1 |
| Crop Production | 1,226.6 | 1,232.8 | 0.5 |
| Animal Production | 357.9 | 336.4 | -6.0 |
| Support Services | 2.9 | x | - |
| Food and Beverage Manufacturing Industries .. | 274.8 | 217.8 | -20.7 |
| Food Industries | 214.0 | 171.6 | -19.8 |
| Beverage Industries | 60.8 | 46.2 | -24.0 |

(1) Capital investment expenditures refers to the cost of procuring, constructing and installing new durable plants, machinery and equipment, whether for replacement of worn or obsolete assets, as additions to existing assets or for lease or rent to others.

International Agri-Food Exports (\$ Millions)

In 2016, Alberta exports of primary and processed agricultural and food products (agri-food) were almost \$10.0 billion, down slightly by 2.0% from 2015. Lower exports of major grains combined with weaker prices contributed to the decline. Gains were reported mainly in exports of value added products such as crude canola oil, dairy products, honey, processed meat and processed potatoes, among others. These exports accounted for just over 50% of the Alberta total. Exports of beef, the largest value added product, were 9.8% higher in quantity, while value fell 1.5% due to lower prices. Increased exports of value added products moderated the overall decline in total agri-food exports. Exports of primary commodities fell about 8.0% and were just below 50% of the total. Among primary commodities, canola seed became the largest export product, with wheat falling just behind. China remained the largest customer of canola seed, followed by Japan and Mexico. The United States continues to be Alberta's largest market, accounting for 40.5% of total agri-food exports. The next largest markets were China (13.8%), Japan (12.3%) and Mexico (5.4%).

| | 2015r | 2016p | % Chg. |
|--|---------------|---------------|---------------|
| Canada Agri-Food Exports | 56,109 | 56,473 | 0.6 |
| Alberta Agri-Food Exports | 10,182 | 9,992 | -1.9 |
| Alberta as a % of Canada | 18.1% | 17.7% | |
| Value Added Processed Products | 4,802 | 5,036 | 4.9 |
| As a % of Alberta Agri-Food Exports | 47.2% | 50.4% | |
| Beef and Veal (incl. Offal) | 1,696 | 1,671 | -1.5 |
| Crude Canola Oil | 324 | 558 | 72.2 |
| Pork (incl. Offal) | 469 | 472 | 0.7 |
| Processed Potatoes | 329 | 337 | 2.4 |
| Prepared Animal Feeds | 317 | 273 | -13.7 |
| Malt Roasted or Not Roasted | 238 | 241 | 1.5 |
| Oilseed Cake and Meal | 253 | 236 | -6.7 |
| Other Value Added Processed Products | 1,176 | 1,247 | 6.1 |
| Primary Commodities (Crops and Animals) | 5,380 | 4,956 | -7.9 |
| As a % of Alberta Agri-Food Exports | 52.8% | 49.6% | |
| Canola Seed | 1,677 | 1,842 | 9.8 |
| Wheat | 2,423 | 1,819 | -24.9 |
| Live Cattle (excl. Purebred) | 585 | 623 | 6.4 |
| Barley | 195 | 142 | -27.1 |
| Hay and Fodder | 96 | 89 | -7.0 |
| Other Primary Commodities | 403 | 441 | 9.5 |
| Alberta's Top Five Export Markets in 2016 | 2015r | 2016p | % Chg. |
| 1. United States (40.5% Share) | 3,998 | 4,046 | 1.2 |
| 2. China (13.8% Share) | 1,588 | 1,375 | -13.4 |
| 3. Japan (12.3% Share) | 1,101 | 1,226 | 11.3 |
| 4. Mexico (5.4% Share) | 572 | 540 | -5.8 |
| 5. South Korea (2.4% Share) | 233 | 237 | 1.8 |

r - revised p - preliminary n/a - not applicable - - not available
x - confidential kg - kilogram e - estimated s - per cent change suppressed

Note: Totals may not add up due to rounding.

Data Sources: Alberta Agriculture and Forestry; Statistics Canada; Agriculture and Agri-Food Canada; G3 Canada Limited; and CanFax.

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