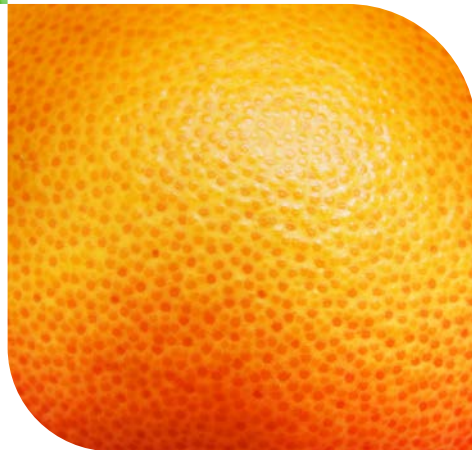


Economic Footprint

of Canada's Fresh Produce Sector

2023





Key Findings

This research study investigated the economic footprint of Canada's fresh produce sector on the broader Canadian economy in 2022. The major findings are as follows:

- The fresh produce sector's total contribution to GDP in 2022 was nearly \$15 billion in 2019 dollars. The sector's direct impact on GDP was almost \$7.4 billion, while the indirect and induced impacts are estimated to be roughly \$4.6 billion and \$2.9 billion, respectively.
- Farm-gate sales for vegetables rose by 11.2 per cent to nearly \$1.6 billion and fruit sales increased by 15.3 per cent to \$1.4 billion in 2022 compared with 2021.
- The total number of direct, indirect, and induced jobs added to the Canadian economy in 2022 because of the fresh produce sector was over 185,400.
- The fresh produce industry, including the supply chain and the induced economic activity from their employees' spending, added a total of nearly \$4.1 billion in government revenues in 2022.
- Total labour income earned in the economy because of the economic activity in the fresh produce sector was nearly \$10 billion.



Introduction

This report provides a comprehensive assessment of the economic footprint (or economic impact) of the fresh produce sector in Canada.

This study follows similar studies conducted in 2014 and 2017 where the Conference Board of Canada (Conference Board) estimated the economic impact of the fresh produce sector in Canada for 2013 and 2016, respectively. In the report published in 2014, the Conference Board estimated that the fresh produce sector's economic impact on the Canadian economy in 2013 was \$11.4 billion in gross domestic product (GDP) and 147,900 jobs. The report published in 2017 found that the fresh produce sector's aggregate footprint in 2016 was \$13.9 billion in GDP and 181,600 jobs.

Like the two past studies, this report relies on data from Statistics Canada to isolate the industry's direct economic contribution to the Canadian economy, as well as the

Conference Board's Input-Output model of the Canadian economy. The economic footprint of the fresh produce sector is estimated for Canada and six provinces: Prince Edward Island, Nova Scotia, New Brunswick, Ontario, Quebec, and British Columbia.

The first section of this report describes the fresh produce sector in Canada. The methodology used to estimate the economic footprint is discussed in the second section. The third section presents the economic impact results broken down by the sector's contribution to GDP, employment, government revenue, and labour income, and provides an overview of the economic footprint for the selected provinces. The final section concludes.



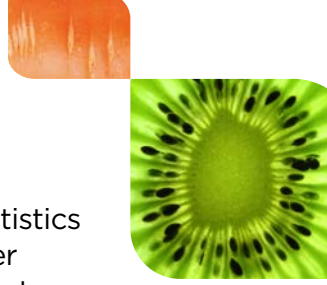
Overview of Canada's Fresh Produce Sector

The fresh produce sector is an important segment of Canada's agriculture industry. Development within the fresh produce sector impacts the performance of all sectors along the supply chain, such as farm inputs (e.g., fertilizer and machinery); food transportation, storage, and processing; food services and retail; and support services. From the farm gate to the dinner plate, the fresh produce supply chain contributes billions of dollars to Canada's GDP and supports hundreds of thousands of jobs from coast to coast to coast.

The fresh produce supply chain is globally integrated, relying on both domestic and international markets. Due to its northern latitude and diverse climate, Canada has a short growing season for fresh produce. As a result, the country is highly dependent on imports to satisfy domestic demand for fresh produce throughout the year. Approximately eighty cents of every dollar spent on fresh produce in Canada is spent on imported products. Most fresh produce imports come from the United States followed by Mexico (Statistics Canada, 2022c, 2022d). At the same time, roughly half of Canada's production of fresh produce is exported. The United States is the largest destination for Canadian exports of fresh produce (Statistics Canada, 2022c, 2022d, 2022e). Due

to the perishable nature of fresh produce, trade with the United States and Mexico is facilitated by geographic proximity.

The COVID-19 pandemic plunged the world into a crisis of previously unknown magnitude and impacted many industries, including the fresh produce sector which was one of the most disrupted industries. The pandemic impacted all segments of the fresh produce supply chain, from growers and shippers to retailers. The sector had to contend with supply chain issues such as shipping delays, labour shortages, and significant increases in operating costs (e.g., higher fertilizer and fuel prices) (Canadian Produce Marketing Association, n.d.a; Statistics Canada, 2021, 2023b).



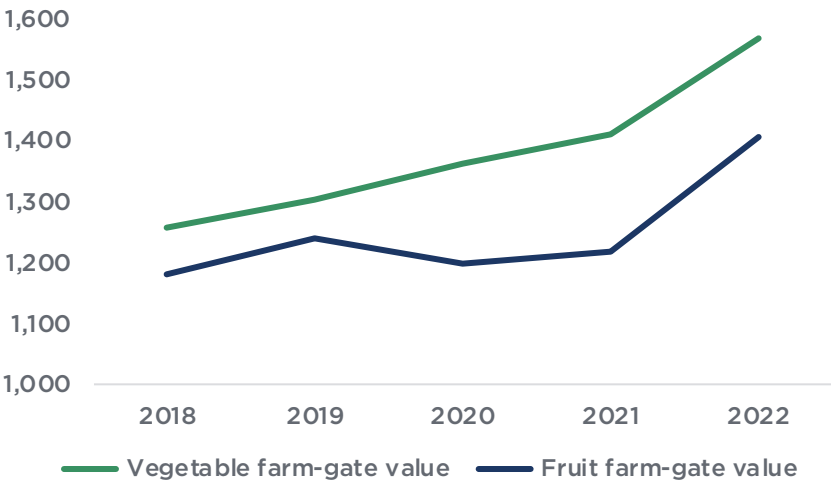
The pandemic compounded labour issues in the agriculture sector. Even prior to the pandemic, farmers in the fresh produce sector faced challenges finding workers. A lack of domestic workers willing to work in the sector together with increased economic opportunities in Mexico, a lack of willingness to migrate to Canada from other countries for agricultural jobs, and an ageing-out of the more experienced agricultural workers have limited access to workers with the necessary skills (Chenarides et al., 2021).

Though challenges persist, particularly higher operating expenses and difficulties finding workers, the fresh produce sector has demonstrated its resilience, as production was up in 2022 compared to 2021. In 2022, total fruit and vegetable (excluding potatoes) production rose by 6.1 per

cent to 3.5 billion kilograms (Statistics Canada, 2023b). Despite weather challenges—a cold wet spring that delayed planting in New Brunswick, Quebec, Manitoba, and British Columbia, and Hurricane Fiona that held up harvests in Prince Edward Island—potato production in Canada was up 0.8 per cent in 2022 (Statistics Canada, 2022b).

Mainly driven by higher prices and increased production, farm-gate values—the value received by producers at the point of first transition, when ownership changes hands—of fresh produce were also up in 2022 compared to 2021. Farm-gate sales for vegetables rose by 11.2 per cent to nearly \$1.6 billion (Statistics Canada, 2023h; see Chart 1). For fresh fruit, total sales increased by 15.3 per cent to \$1.4 billion (Statistics Canada, 2023g).

CHART 1
Farm-gate value of fresh fruits and vegetables increases in 2022
(farm-gate value, \$ millions)



Source: Statistics Canada (2023g, 2023h).

The increase in the farm-gate value for fresh vegetables was driven by higher sales of dry onions, carrots, and tomatoes (see Chart 2). The rise

in farm-gate sales for fruit was driven by increases in low-bush blueberries, cranberries, and apples (see Chart 3).

CHART 2

Higher sales for dry onions, carrots, and tomatoes (farm-gate value, \$ thousands)

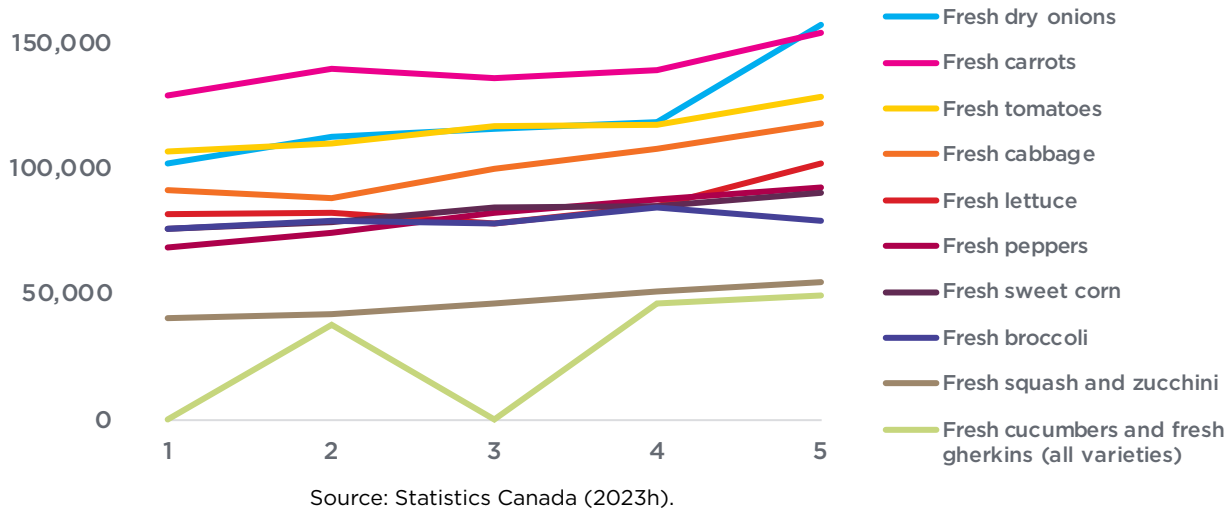
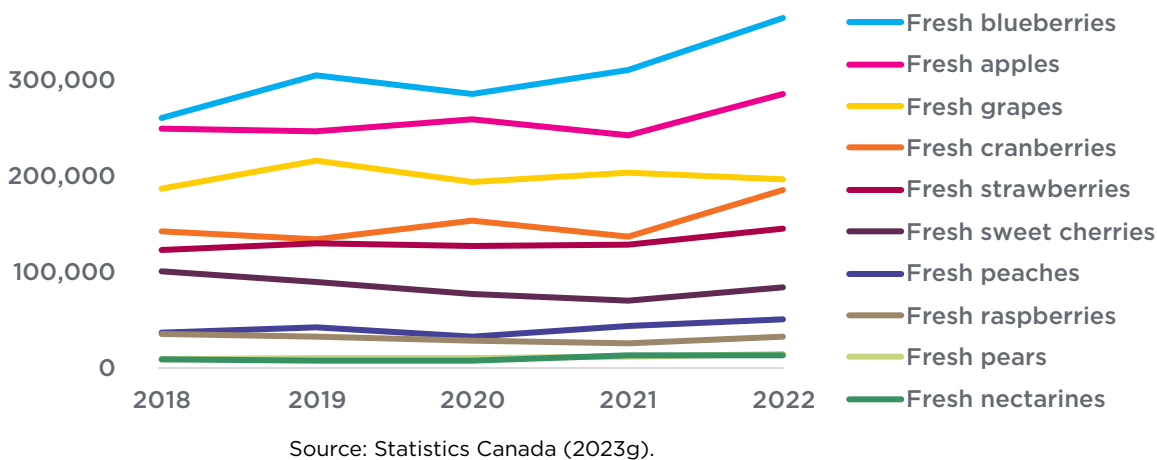


CHART 3

Blueberries, cranberries, and apples contribute to the rise in farm-gate sales of fruit (farm-gate value, \$ thousands)



Despite the record production of fresh produce, the availability of fresh fruits and vegetables in Canada has declined (see Chart 4). Compared to 2021, the amount of fresh fruit available per person in Canada declined by 5.1 per cent to 72.9 kilograms. Although fresh fruit production rose by 12.7 per cent in 2022, it was not enough to keep pace with the 16.8 per cent growth in

exports and a 3.6 per cent reduction in imports. A similar trend was observed for fresh vegetables, where availability fell 5.9 per cent between 2021 and 2022 to 64.7 kilograms per person. The increase in fresh vegetable exports (7.8 per cent) and the decline in imports (7.5 per cent) more than offset the 3.9 per cent increase in production in 2022 (Statistics Canada, 2023a).

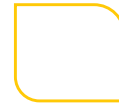
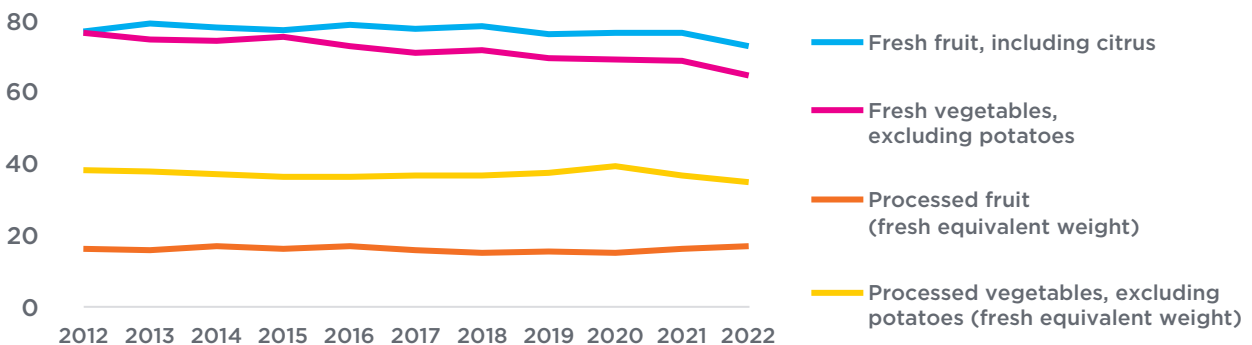


CHART 4

Availability of fresh fruit and vegetables decline in 2022

(kilograms per person, kg)



Source: Statistics Canada (2023a).

Food inflation remains stubbornly high in Canada and produce inflation has particularly hit Canadians hard. Compared to 2021, prices for fresh vegetables including potatoes were up 10.4 per cent and fresh fruit prices were up 8.3 per cent in 2022 (Statistics Canada, 2023b). To save money, Canadians are increasingly swapping fresh produce for frozen produce (Canadian Produce Marketing Association, n.d.b).

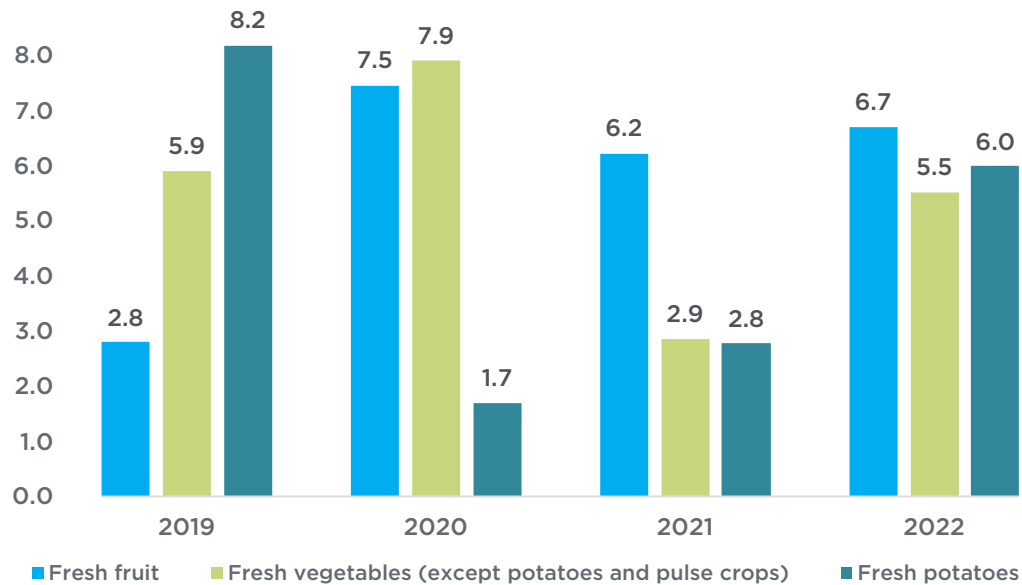
Prices received by farmers, as measured by the Farm Product Price Index (FPPI), also jumped in 2022. The FPPI for fresh fruit was up 6.7 per cent in 2022 compared to 2021. Prices received by farmers for potatoes were up 6 per cent while fresh vegetable prices (excluding potatoes and pulse crops) were up 5.5 per cent in 2022 (see Chart 5) (Statistics Canada, 2023e).



CHART 5

Prices received by farmers rise in 2022

(Farm Produce Price Index, annual percentage change)



Source: Statistics Canada (2023e).

The rise in consumer prices and the prices farmers receive from the sale of their agricultural products reflect the higher operating costs farmers have had to contend with. Driven by increasing prices for fertilizer (up 55 per cent) and machinery fuel (up 53 per cent), the Farm Input Price Index (FIPI), which measures the change in the price of farm inputs faced by Canadian farmers, was up 18.5 per cent in 2022 compared to 2021. Compared to the pre-pandemic period (i.e., 2019), the FIPI has

increased by 27.5 per cent between 2019 and 2022 (Statistics Canada, 2023c). At the same time, many farmers across Canada have reported that input costs have increased beyond the rise in consumer prices. In a member survey by the Fruit and Vegetable Growers of Canada (2022), 44 per cent of respondents reported selling at a loss, and 77 per cent indicated they have not been able to increase their selling price in line with their costs.



Methodology

This study employs an economic impact methodology to evaluate the impacts the fresh produce sector has on the Canadian economy. The economic impact is estimated utilizing data from Statistics Canada and the Conference Board's Input-Output model at the national and provincial levels.

The economic impact (or economic footprint) is defined as a sector's overall contribution to national economic activity. It includes the direct, indirect, and induced impacts. The largest impact is the economic activity directly attributed to an industry (direct impact). The total impact that the fresh produce sector has on the Canadian economy is the sum of the direct, indirect, and induced impacts described below.

- The direct impact measures the value added to the economy from the fresh produce sector that is attributed directly to the sector's employees, wages earned, and firms' profits.
- The indirect impact (or supply-chain impact) measures the value added that the "direct impact" firms generate within the economy through their demand for intermediate inputs or other support services. These purchases of goods and services from suppliers make up the supply chain. For example, activity in the fresh produce sector creates demand for fertilizer, pesticides, and farm machinery.

- The induced impact (or income effect) captures the impacts when farm employees spend their earnings and owners spend their profits on other goods and services. The purchases at other businesses in the wider economy lead to more employment, higher wages, and increased income and tax revenues, and can be felt across a wide range of industries.

For the purpose of this study, fresh produce is defined as the sum of the following commodities from Statistics Canada's Input-Output Commodity Codes list: fresh potatoes (MPG111A05), fresh fruits and nuts (MPG111A06), and fresh vegetables (MPG111A08) (Statistics Canada, 2019). The results provided in this report are the impacts for 2022 and all dollar values are expressed in 2019 dollars. Values are expressed in 2019 dollars to align with the 2019 Canadian Supply-Use Tables (SUTs; the most recent data available) published by Statistics Canada.¹

1. SUTs describe an entire economy by industry by tracing the production of products by domestic industries, combined with imports, through their use as intermediate inputs or as final consumption, investment, or exports. The Canadian SUTs break down the economy into 236 industries, 278 categories of final demand, and 496 product groups.

Impact

The fresh produce sector's total, direct, indirect, and induced impacts are estimated for four key economic variables: GDP, employment, government revenues (i.e., taxes), and labour income. Aggregated national results are presented as are the economic impacts for six key fresh produce-producing provinces: Prince Edward Island, Nova Scotia, New Brunswick, Ontario, Quebec, and British Columbia.

Fresh produce GDP refers to the unduplicated value of goods and services produced by businesses that directly produce or provide goods and services to the fresh produce sector within Canada (or province) during a given period. Employment is defined as the number of full-year jobs, and accounts for full-time, part-time, and seasonal employment, as well as both employed and self-employed workers in the fresh produce sector. Labour income is defined as the sector's contribution to the income of workers and other members of society annually. The fresh produce sector's contribution to government revenues is defined as the total federal, provincial, and municipal taxes generated by the industry. As noted above, the economic impacts of the fresh produce sector are for 2022 and all dollar values are expressed in 2019 dollars.

The sections that follow provide a discussion of the fresh produce sector's contribution to the four key economic variables for Canada and the selected provinces.

Gross Domestic Product

The contribution of the fresh produce sector on Canada's GDP is significant due to the industry's value of production, employment, and labour income, as well as its significant role in retail and wholesale trade, and its impact on supporting

industries. When accounting for the direct impact and the economic ripple effects sustained by supply-chain (indirect impact) and income effects (induced impact), the fresh produce sector's aggregate footprint is \$14.9 billion in GDP (see Table 1).

TABLE 1
Economic impact of the fresh produce sector on GDP, 2022
(\$ millions, 2019)

	Canada	Prince Edward Island	Nova Scotia	New Brunswick	Quebec	Ontario	British Columbia	Other provinces and territories
Direct	7,378.1	740.6	167.4	226.8	1,191.3	2,022.5	925.6	2,103.8
Indirect	4,586.5	258.3	119.4	144.9	746.4	1,501.3	478.3	1,337.9
Induced	2,946.2	159.2	91.0	84.2	444.7	1,092.8	396.6	677.8
Total	14,910.9	1,158.1	377.8	455.9	2,382.4	4,616.6	1,800.5	4,119.5

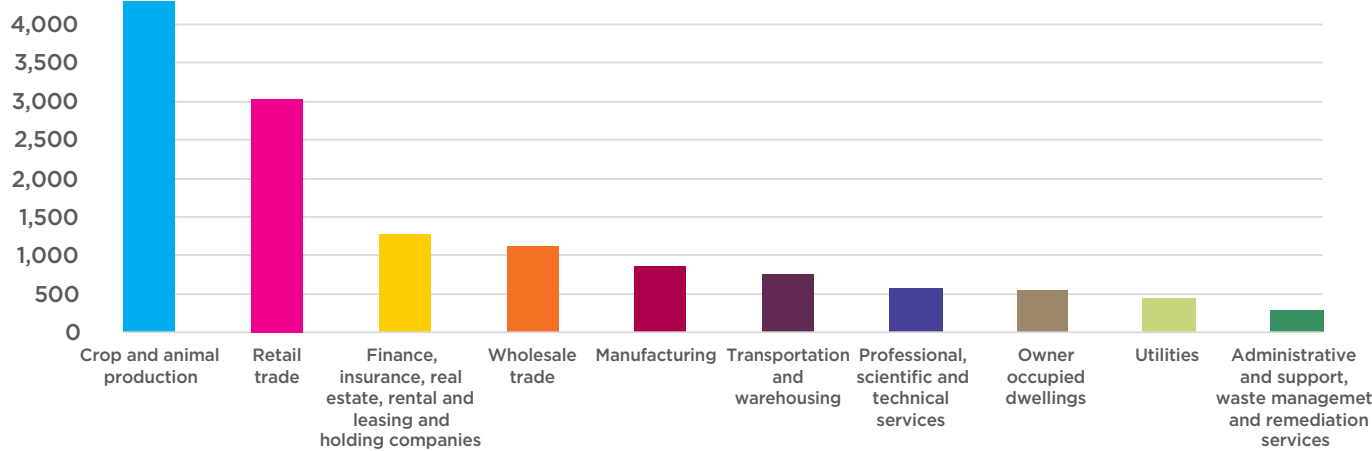
Source: Conference Board of Canada.



The total impact on GDP is concentrated in Ontario at \$4.6 billion, followed by Quebec at \$2.4 billion, British Columbia at \$1.8 billion, Prince Edward Island at \$1.2 billion, New Brunswick at \$0.5 billion, and Nova Scotia at \$0.4 billion. Despite Prince Edwards Island’s small size—representing a meagre 0.4 per cent of Canada’s population and contributing only 0.3 per cent to Canada’s GDP in 2022—the province accounts for nearly 8 per cent of the total Canada-wide fresh produce sector’s impact on GDP.

The total impact on GDP for the Canadian fresh produce sector is concentrated in select industries, namely crop production², retail trade, financial services, and wholesale trade (see Chart 5). Appendix A Table A1 provides a detailed breakdown of the sector’s total impact on GDP by industry.

CHART 6
Fresh produce sector has a wide-reaching impact on Canadian industries
(impact on GDP by sector, \$ millions, 2019)



Source: Conference Board of Canada.

Our analysis reveals that the direct impact on GDP is confined to four main industries that reflect how fresh produce is sourced and used in the Canadian economy. The crop production industry has the largest direct impact on GDP at nearly \$4.0 billion followed by \$2.5 billion from retail trade, \$0.6 billion from wholesale trade, and \$0.2 billion from transportation and warehousing (see Appendix A Table A2).

Food and beverage wholesalers play a key role in purchasing produce from local farmers or acquiring it in large quantities from other countries. Subsequently, these wholesalers provide the products to the retail sector, where they are then marketed and made available to consumers. Since farmers and producers typically live far from the places distributing their products, transportation and warehousing are necessary.

2. Crop production includes animal production to align with Statistics Canada’s input-output industry classification category “Crop and Animal Production.”

The overall footprint of the produce sector expands when we consider the supply-chain benefits (indirect impact) and re-spending activities (induced impact). According to our estimates, financial services and real estate account for the highest contribution to the indirect impact on GDP, around \$0.7 billion, followed by manufacturing (\$0.6 billion) and professional, scientific, and technical services (\$0.5 billion) (see Appendix A Table A3).

The financial services sector significantly supports the fresh produce industry in terms of day-to-day operations and future growth. Financial institutions, such as banks and credit unions, offer financial products and services that assist farmers directly and wholesalers and retailers in various aspects of supply chain operations. For instance, farmers are dependent upon agricultural

finance so that they can invest in new productivity-enhancing machinery and equipment. Other financial supports provide farmers with protection against income and production losses and thus help mitigate uncertainties and risks associated with the fresh produce industry such as adverse weather conditions.

For the induced impact of the fresh produce sector on GDP, our estimates suggest that \$2.9 billion is generated from re-spending activities (i.e., when the wages of directly or indirectly employed workers and owners' profits are spent on other goods and services in the economy). The largest induced impact on GDP comes from the financial services and real estate sector (\$0.6 billion), followed by retail trade (\$0.5 billion) and manufacturing (\$0.4 billion) (see Appendix A Table A4).

Employment

The fresh produce industry has a significant impact on employment in Canada. Our estimates suggest that the fresh produce sector supports 185,400 jobs in the Canadian economy. The sector creates direct employment opportunities in the industry and across various supply chain stages, including production, processing, distribution, and retail.

The direct employment impact of the Canadian produce sector is 116,900 jobs, while the jobs created through various stages of the supply chain and re-spending activities are 68,500 jobs (see Table 2). The total impact on employment is concentrated in Ontario at 59,200 jobs, followed by Quebec at 30,300 jobs, British Columbia at 24,900 jobs, and the Maritime provinces at 31,100 jobs (see Table 2).

TABLE 2

Economic impact of the fresh produce sector on employment, 2022 (thousands)

	Canada	Prince Edward Island	Nova Scotia	New Brunswick	Quebec	Ontario	British Columbia	Other provinces and territories
Direct	116.9	13.1	4.0	3.8	18.6	35.9	16.2	25.3
Indirect	39.9	3.1	1.4	1.6	7.0	13.2	4.8	8.7
Induced	28.6	1.7	1.2	1.1	4.7	10.1	4.0	5.9
Total	185.4	18.0	6.6	6.5	30.3	59.2	24.9	39.9

Source: Conference Board of Canada.

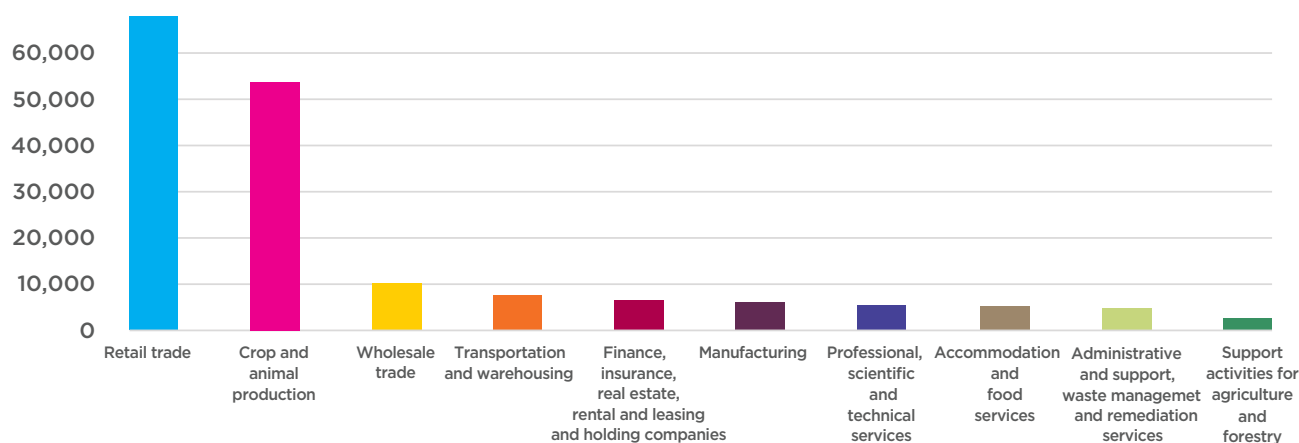
The jobs supported by the industry are concentrated overwhelmingly in select industries, which in order of their total employment are retail trade, crop production, wholesale trade, transportation and warehousing, and

financial services and real estate (see Chart 6). Appendix A Table A5 provides a detailed breakdown of the sector's total impact on employment by industry.

CHART 7

Retail trade and crop and animal production account for the lion's share of jobs supported by the fresh produce sector

(number of jobs)



Source: Conference Board of Canada.

The direct impact of the fresh produce sector on employment in Canada is concentrated in retail trade at nearly 57,500 jobs followed by roughly 49,300 jobs generated in the crop production sector (see Appendix A Table A6 for details).

Supply chain (or indirect) impacts on employment are estimated at 39,900 jobs. The distribution of these jobs is broad-based across many industries. Professional, scientific and technical services; transportation and warehousing; financial services and real estate; crop production; and

manufacturing are among the leading industries benefiting from the supply chain effects on employment (see Appendix A Table A7).

Our results suggest that the induced impact of the fresh produce sector resulted in 28,600 jobs in 2022. The largest impact in terms of the induced impact on employment is in the retail trade sector with roughly 7,600 jobs followed by accommodation and food services with nearly 3,300 jobs (see Appendix A Table A8).

Fiscal Impact

The annual contribution of the Canadian fresh produce sector to taxes varies year to year based on the overall performance of the industry, economic conditions, and government tax policies. Our results suggest that the Canadian fresh produce sector contributed \$4.1 billion to the public purse in 2022. Out of this total, \$1.7 billion resulted from the direct impact of the produce sector, and

\$2.4 billion was collected in taxes through the supply chain and re-spending activities. The share of total taxes collected by provinces follows a similar pattern as GDP and employment. Ontario collected the most government revenue with \$1.3 billion, followed by Quebec with \$0.8 billion, the Maritime provinces with \$0.6 billion, and British Columbia with \$0.4 billion (see Table 3).

TABLE 3

Economic impact of the fresh produce sector on government revenues, 2022
(\$ millions, 2019)

	Canada	Prince Edward Island	Nova Scotia	New Brunswick	Quebec	Ontario	British Columbia	Other provinces and territories
Direct	1,729.7	201.9	39.9	46.4	309.3	427.3	174.0	530.9
Indirect	1,414.8	80.6	39.3	44.8	289.0	480.1	138.4	342.7
Induced	944.1	50.8	30.3	28.5	184.8	361.4	100.8	187.6
Total	4,088.7	333.3	109.5	119.7	783.1	1,268.8	413.2	1,061.2

Source: Conference Board of Canada.

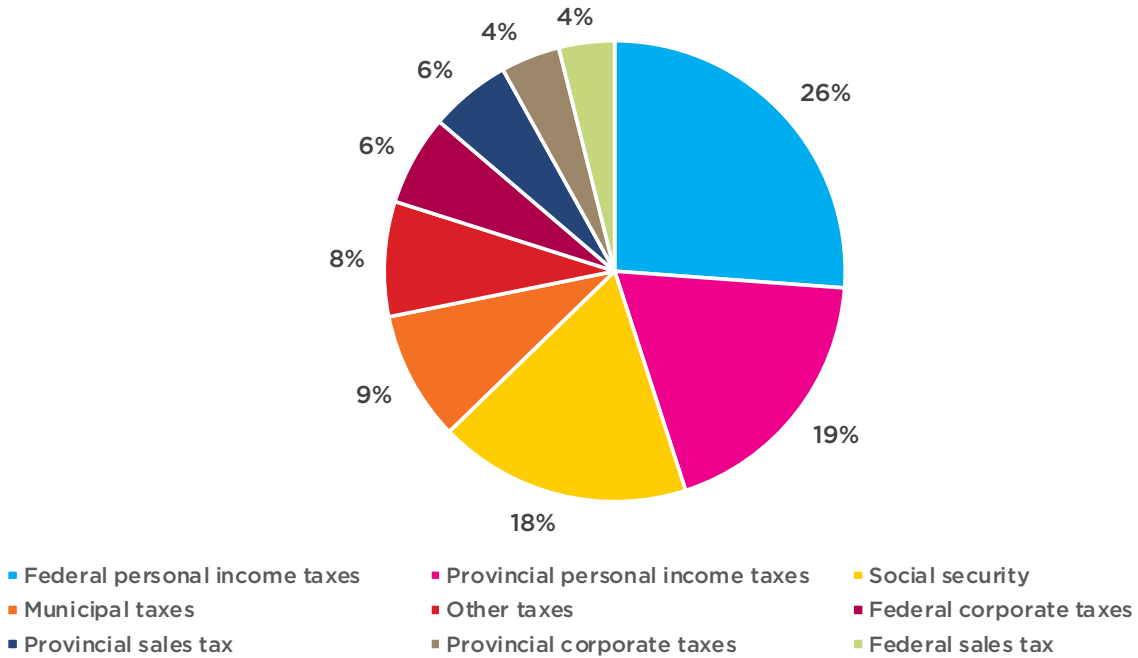
All three levels of the government benefitted from the direct, indirect, and induced impacts of activity in the fresh produce sector. A breakdown of the total fiscal effects for Canada suggests that federal personal income taxes (26 per cent), provincial personal

income taxes (19 per cent), and social security (18 per cent) are the primary contributors to government revenue (see Chart 10). Appendix A Table A9 provides a detailed breakdown of the fiscal impacts by tax category.

CHART 8

Breakdown of the government revenue in 2022

(sum of direct, indirect, and induced effects by tax category, percentage)



Source: Conference Board of Canada.

Labour Income

Our estimates suggest that the fresh produce sector contributed \$9.9 billion in labour income. As with GDP, employment, and government revenue, the fresh produce sector's total impact on labour income is concentrated in

Ontario followed by Quebec, British Columbia, and the three Maritime provinces (see Table 4). Appendix A Table A10 provides a detailed breakdown of the sector's total impact on labour income by industry.


TABLE 4

Economic impact of the fresh produce sector on labour income, 2022

(\$ millions, 2019)

	Canada	Prince Edward Island	Nova Scotia	New Brunswick	Quebec	Ontario	British Columbia	Other provinces and territories
Direct	5,206.9	590.0	136.9	153.8	818.4	1,508.0	719.2	1,280.6
Indirect	2,704.6	164.3	75.1	85.5	465.2	949.4	298.2	667.0
Induced	2,022.4	109.4	65.1	57.2	302.9	742.7	296.6	448.5
Total	9,933.9	863.7	277.1	296.6	1,586.5	3,200.1	1,314.0	2,396.1

Source: Conference Board of Canada.



In terms of the direct impact on labour income, the fresh produce sector contributed roughly \$5.2 billion to labour income. The direct income impact of the fresh produce sector is concentrated in crop production (\$2.6 billion), followed by retail trade (\$2.0 billion), wholesale trade (\$0.4 billion), and transportation and warehousing (\$0.1 billion) (see Appendix A Table A11).

Our estimates suggest that the indirect labour income impact

(\$2.7 billion) is the strongest for the finance insurance, real estate, rental and leasing and holding companies (FIRE) sector, followed by professional scientific and technical services, manufacturing, and transportation and warehousing (see Appendix A Table A12). The fresh produce sector's induced impact on labour income totalled \$2.0 billion and was largely driven by the housing sector, followed by the retail, and the FIRE sectors (see Appendix A Table A13).

Provincial Analysis

The following is a summary of the economic impacts that the fresh produce sector has in Prince Edward Island, Nova Scotia, New Brunswick, Quebec, Ontario, and British Columbia.

THE ECONOMIC IMPACT OF THE PRODUCE SECTOR ON PRINCE EDWARD ISLAND

- The total economic impact of the fresh produce sector on GDP in Prince Edward Island is \$1.2 billion. The sector directly contributes \$0.7 billion to GDP, while \$0.4 billion is added to GDP through the supply chain and re-spending activities.
- The sector supports a total of nearly 18,000 jobs in Prince Edward Island. Employment generated

directly in the fresh produce sector is roughly 13,150, while the indirect and induced impacts on employment are nearly 4,850 jobs.

- In terms of taxes, the fresh produce sector is estimated to generate nearly \$0.3 billion in government revenue, with \$0.2 billion arising from direct impacts, and \$0.1 billion through the supply chain and re-spending activities.
- It is projected that the fresh produce sector contributes \$0.9 billion in labour income in Prince Edward Island. Labour income directly generated by the sector is \$0.6 billion and \$0.3 billion is from the indirect and induced impacts.



THE ECONOMIC IMPACT OF THE PRODUCE SECTOR ON NOVA SCOTIA

- The total economic impact of the fresh produce sector on GDP in Nova Scotia is \$0.4 billion. The sector directly contributes \$0.2 billion to GDP, while \$0.2 billion is added to GDP through the supply chain and re-spending activities.
- For Nova Scotia, the sector supports a total of nearly 6,600 jobs. Employment generated directly by the fresh produce sector is roughly 4,000, while the indirect and induced impacts on employment are nearly 2,600 jobs.
- In terms of taxes, the fresh produce sector is estimated to generate nearly \$0.1 billion in government revenue, with \$0.04 billion arising from direct impacts, and \$0.07 billion through the supply chain and re-spending activities.
- It is projected that the fresh produce sector contributes \$0.3 billion in labour income in Nova Scotia. Of this total, \$0.1 billion is generated directly by the fresh produce sector while \$0.1 billion is from the indirect and induced impacts.

THE ECONOMIC IMPACT OF THE PRODUCE SECTOR ON NEW BRUNSWICK

- The total economic impact of the fresh produce sector on GDP in New Brunswick is \$0.5 billion. The sector contributes \$0.2 billion to GDP directly, while \$0.2 billion is added to GDP through the supply chain and re-spending activities.

- The sector supports a total of over 6,500 jobs in New Brunswick. Employment generated directly by the fresh produce sector is over 3,800, while the indirect and induced impacts on employment are nearly 2,700 jobs.
- In terms of taxes, the fresh produce sector is estimated to generate nearly \$0.1 billion in government revenue, with \$0.05 billion arising from direct impacts, and \$0.07 billion through the supply chain as well as re-spending activities.
- It is projected that the fresh produce sector contributes \$0.3 billion in labour income in New Brunswick. Of this total, \$0.2 billion is generated directly by the sector while \$0.1 billion is from the indirect and induced impacts.

THE ECONOMIC IMPACT OF THE PRODUCE SECTOR ON QUEBEC

- The total economic impact of the fresh produce sector on GDP in Quebec is \$2.4 billion. The sector directly contributes \$1.2 billion to GDP, while \$1.2 billion is added to GDP through the supply chain and re-spending activities.
- For Quebec, the fresh produce sector supports a total of over 30,300 jobs. Employment generated directly by the sector is nearly 18,600, while the indirect and induced impacts on employment are roughly 11,700 jobs.



- In terms of taxes, the fresh produce sector is estimated to generate \$0.8 billion in government revenue, with \$0.3 billion arising directly from the sector, and \$0.5 billion through the supply chain and re-spending activities.
- It is projected that the fresh produce sector contributes \$1.6 billion in labour income in Quebec. Labour income directly generated by the sector is \$0.8 billion and \$0.8 billion is from the indirect and induced impacts.

THE ECONOMIC IMPACT OF THE FRESH PRODUCE SECTOR ON ONTARIO

- The total economic impact of the fresh produce sector on GDP in Ontario is \$4.6 billion. The sector directly contributes \$2.0 billion to GDP, while \$2.6 billion is added to GDP through the supply chain and re-spending activities.
- For Ontario, the fresh produce sector supports a total of over 59,200 jobs. Employment generated directly in the sector is 35,900, while the indirect and induced impacts on employment are 14,300 jobs.
- In terms of taxes, the fresh produce sector is estimated to generate nearly \$1.3 billion in government revenue, with \$0.4 billion arising from direct impacts and \$0.8 billion through the supply chain and re-spending activities.

- It is projected that the fresh produce sector contributes \$1.5 billion in labour income in Ontario. Of this total, \$0.7 billion is generated directly by the sector while \$1.7 billion is from the indirect and induced impacts.

THE ECONOMIC IMPACT OF THE PRODUCE SECTOR ON BRITISH COLUMBIA

- The total economic impact of the fresh produce sector on GDP in British Columbia is \$1.8 billion. The sector directly contributes \$0.9 billion to GDP, while \$0.9 billion is added to GDP through the supply chain and re-spending activities.
- For British Columbia, the fresh produce sector supports a total of over 24,900 jobs. Employment generated directly by the sector is nearly 16,200, while the indirect and induced impacts on employment are almost 8,800 jobs.
- In terms of taxes, the fresh produce sector is estimated to generate nearly \$0.4 billion in government revenue, with \$0.2 billion arising directly from the sector, and \$0.2 billion through the supply chain and re-spending activities.
- It is projected that the fresh produce sector contributes \$1.3 billion in labour income in British Columbia. Labour income directly generated by the sector is \$0.7 billion and \$0.6 billion is from the indirect and induced impacts.



Conclusion

This report provided an overview of the economic footprint of the fresh produce sector in Canada. The Conference Board estimates that the fresh produce sector in Canada is directly responsible for nearly \$7.4 billion in direct value added to GDP, creating direct job opportunities for 116,900 people, adding over \$1.7 billion to government revenues, and generating over \$5.2 billion in labour income in 2022.

The economic impacts of the sector, however, extend far beyond the direct contributions associated with growing and selling fresh produce. Including direct, supply-chain, and induced impacts, the fresh produce sector's total economic footprint was \$14.9 billion to GDP in 2022. Overall, the sector supported over 185,400 jobs, generated \$4.1 billion in government revenues, and contributed \$9.9 billion in labour income in 2022.

Our findings highlight the economic importance of the fresh produce industry in Canada, specifically in Ontario, Quebec, British Columbia, and the three Maritime provinces. The sector has the largest economic impact on Ontario, followed by Quebec, British Columbia, and the

Maritime provinces. This order is not surprising, as it is in line with the relative economic sizes of each province. Despite Prince Edward Island's small size in terms of population and overall economic contribution to the country, the fresh produce sector in the province punches above its weight—contributing nearly 8 per cent to the Canada-wide fresh produce impact on GDP and almost 10 per cent of the total employment effect.

We have demonstrated the sector's substantial contributions to GDP, job creation, government revenue, and labour income. Our results underscore the significant role played by the fresh produce sector in supporting the Canadian economy.

Appendix A: Additional Data Tables

TABLE A1

Total economic impact of the fresh produce sector on GDP by industry, 2022

(sum of direct, indirect, and induced effects by industry; \$ millions, 2019)

	Canada	Prince Edward Island	Nova Scotia	New Brunswick	Quebec	Ontario	British Columbia	Other provinces and territories
Crop and animal production	4,299.5	364.4	57.8	153.8	754.4	1,289.3	581.8	1,098.0
Retail trade	3,029.3	329.4	105.8	81.4	430.7	755.0	337.7	989.2
Finance, insurance, real estate, rental and leasing and holding companies	1,268.8	57.3	33.7	28.2	190.7	560.2	141.4	257.3
Wholesale trade	1,114.3	93.8	32.9	29.9	198.7	350.3	108.8	299.8
Manufacturing	857.4	43.9	25.0	38.4	141.3	243.2	66.3	299.3
Transportation and warehousing	756.2	64.2	26.5	26.3	123.6	202.0	68.3	245.4
Professional, scientific and technical services	573.0	30.8	15.6	10.0	101.3	237.7	74.9	102.7
Owner occupied dwellings	550.0	37.1	13.1	10.0	61.3	190.6	93.8	144.0
Utilities	450.1	18.9	5.7	21.2	99.8	153.6	69.4	81.6
Administrative and support, waste management and remediation services	291.5	9.8	6.1	14.2	53.3	118.5	31.0	58.6
Information and cultural industries	262.9	16.4	8.1	6.7	39.3	106.8	30.2	55.5
Repair construction	242.6	5.8	2.1	5.0	43.3	103.8	27.8	54.8
Mining, quarrying, and oil and gas extraction	240.1	1.1	1.5	1.1	6.4	11.7	13.4	205.0
Accommodation and food services	209.5	16.2	8.8	6.7	26.2	61.3	34.8	55.4
Support activities for agriculture and forestry	184.1	28.7	13.3	4.5	22.0	33.9	44.7	37.1
Health care and social assistance	91.4	6.7	3.6	2.9	14.7	34.7	11.6	17.1
Government education services	59.4	4.9	3.2	1.7	7.4	22.1	7.2	12.8
Arts, entertainment and recreation	48.7	2.3	1.3	0.9	7.6	18.3	7.9	10.3
Non-profit institutions serving households	40.8	3.1	1.4	1.5	6.4	14.0	4.9	9.4
Government health services	28.2	2.0	2.1	1.5	4.5	8.3	3.0	6.7
Educational services	13.9	0.7	0.3	0.3	2.1	6.0	2.1	2.4
Forestry and logging	6.0	0.5	0.6	0.4	1.2	0.9	1.4	0.9
Fishing, hunting and trapping	5.5	0.9	1.5	0.5	0.5	0.3	0.3	1.4
Other	287.5	19.4	7.8	8.8	45.4	93.9	37.7	74.6
Total	14,910.9	1,158.1	377.8	455.9	2,382.4	4,616.6	1,800.5	4,119.5

Source: Conference Board of Canada.

TABLE A2**Direct economic impact of the fresh produce sector on GDP by industry, 2022**

(\$ millions, 2019)

	Canada	Prince Edward Island	Nova Scotia	New Brunswick	Quebec	Ontario	British Columbia	Other provinces and territories
Crop and animal production	3,955.3	341.2	49.3	140.7	682.7	1,192.8	556.4	992.1
Retail trade	2,489.5	290.1	81.3	58.8	350.3	592.4	267.3	849.2
Wholesale trade	629.1	68.7	23.3	18.1	109.6	164.5	67.7	177.4
Transportation and warehousing	201.8	32.5	11.0	7.7	34.8	42.9	21.6	51.3
Accommodation and food services	30.4	2.6	0.4	0.3	2.6	6.8	4.2	13.5
Manufacturing	22.5	1.0	0.8	0.3	4.2	7.3	2.7	6.1
Non-profit institutions serving households	14.9	1.6	0.3	0.4	2.2	4.4	1.7	4.3
Government education services	8.0	0.3	0.3	0.0	0.6	3.1	1.0	2.6
Information and cultural industries	6.8	0.4	0.2	0.2	0.6	2.1	0.7	2.6
Arts, entertainment and recreation	4.8	0.3	0.1	0.1	0.5	1.8	1.0	1.2
Professional, scientific and technical services	2.5	0.0	0.0	0.0	0.4	1.3	0.3	0.4
Finance, insurance, real estate, rental and leasing and holding companies	1.5	0.0	0.0	0.0	1.1	0.2	0.1	0.1
Other	11.2	1.9	0.4	0.2	1.8	2.9	1.1	3.0
Total	7,378.1	740.6	167.4	226.8	1,191.3	2,022.5	925.6	2,103.8

Source: Conference Board of Canada.

TABLE A3**Indirect economic impact of the fresh produce sector on GDP by industry, 2022**

(\$ millions, 2019)

	Canada	Prince Edward Island	Nova Scotia	New Brunswick	Quebec	Ontario	British Columbia	Other provinces and territories
Finance, insurance, real estate, rental and leasing and holding companies	747.0	34.3	20.7	17.8	115.4	319.8	70.7	168.3
Manufacturing	633.8	31.3	17.2	31.5	97.2	161.8	41.9	252.8
Professional, scientific and technical services	454.0	26.6	12.3	8.2	81.5	184.8	56.8	83.8
Transportation and warehousing	413.2	25.5	11.6	15.3	60.1	124.1	45.7	131.0
Utilities	369.3	15.1	4.1	14.8	84.3	126.6	61.1	63.4
Wholesale trade	312.6	17.1	5.3	7.3	52.2	116.6	22.8	91.1
Crop and animal production	308.7	20.9	6.3	10.8	66.5	85.9	22.2	96.1
Mining, quarrying, and oil and gas extraction	212.7	1.0	1.2	0.9	5.1	9.2	11.1	184.2
Administrative and support, waste management and remediation services	211.4	7.7	4.6	10.2	39.0	83.4	20.2	46.3
Repair construction	183.9	4.6	1.4	4.1	35.3	80.4	17.1	40.9
Support activities for agriculture and forestry	181.8	28.5	13.1	4.4	21.6	33.3	44.4	36.5
Retail trade	157.7	18.5	6.3	6.5	23.2	41.8	16.1	45.5
Information and cultural industries	139.7	8.0	3.9	3.4	21.8	57.8	14.8	29.9
Accommodation and food services	57.6	5.5	3.4	2.4	7.6	14.4	9.3	14.9
Arts, entertainment and recreation	14.8	0.6	0.4	0.3	2.9	5.0	2.1	3.4
Government education services	13.9	1.7	0.8	0.5	2.7	3.8	1.5	2.9
Government health services	8.0	0.5	0.8	0.4	1.5	2.2	0.6	1.9
Health care and social assistance	8.0	0.2	0.3	0.4	1.6	2.3	0.8	2.3
Educational services	5.4	0.2	0.2	0.1	0.9	2.5	0.5	0.9
Forestry and logging	4.4	0.4	0.4	0.3	1.0	0.6	1.1	0.7
Non-profit institutions serving households	4.3	0.3	0.2	0.2	0.7	1.5	0.5	1.0
Fishing, hunting and trapping	3.2	0.6	1.1	0.3	0.1	0.1	0.1	1.0
Other	141.2	9.2	3.8	4.8	24.1	43.4	16.8	39.1
Total	4,586.5	258.3	119.4	144.9	746.4	1,501.3	478.3	1,337.9

Source: Conference Board of Canada.

TABLE A4**Induced economic impact of the fresh produce sector on GDP by industry, 2022**

(\$ millions, 2019)

	Canada	Prince Edward Island	Nova Scotia	New Brunswick	Quebec	Ontario	British Columbia	Other provinces and territories
Owner occupied dwellings	550.0	37.1	13.1	10.0	61.3	190.6	93.8	144.0
Finance, insurance, real estate, rental and leasing and holding companies	520.3	23.0	13.0	10.3	74.2	240.2	70.7	88.9
Retail trade	382.1	20.8	18.2	16.1	57.2	120.9	54.3	94.5
Manufacturing	201.2	11.6	7.0	6.6	39.9	74.1	21.7	40.3
Wholesale trade	172.7	8.0	4.3	4.6	36.9	69.3	18.3	31.3
Transportation and warehousing	141.2	6.2	3.9	3.3	28.7	35.0	0.9	63.2
Accommodation and food services	121.5	8.2	5.0	4.0	15.9	40.1	21.3	27.0
Professional, scientific and technical services	116.6	4.2	3.2	1.8	19.4	51.7	17.8	18.5
Information and cultural industries	116.5	7.9	4.0	3.1	16.9	46.9	14.7	23.0
Health care and social assistance	83.4	6.4	3.3	2.5	13.1	32.4	10.9	14.8
Utilities	80.8	3.7	1.6	6.4	15.6	27.0	8.4	18.2
Administrative and support, waste management and remediation services	80.2	2.1	1.5	4.0	14.3	35.1	10.8	12.3
Repair construction	58.7	1.2	0.7	0.9	8.0	23.3	10.7	13.8
Government education services	37.5	2.9	2.1	1.2	4.1	15.3	4.7	7.3
Crop and animal production	35.6	2.3	2.2	2.3	5.2	10.6	3.2	9.8
Arts, entertainment and recreation	29.2	1.4	0.8	0.5	4.3	11.5	4.8	5.8
Mining, quarrying, and oil and gas extraction	27.4	0.1	0.3	0.2	1.2	2.5	2.3	20.9
Non-profit institutions serving households	21.5	1.2	0.9	0.9	3.5	8.1	2.8	4.2
Government health services	20.1	1.5	1.3	1.1	2.9	6.1	2.4	4.9
Educational services	8.4	0.5	0.1	0.1	1.2	3.4	1.6	1.5
Support activities for agriculture and forestry	2.3	0.2	0.2	0.1	0.4	0.6	0.3	0.5
Fishing, hunting and trapping	2.3	0.3	0.4	0.2	0.5	0.2	0.2	0.4
Forestry and logging	1.5	0.1	0.2	0.1	0.3	0.2	0.3	0.2
Other	135.1	8.3	3.6	3.8	19.5	47.7	19.7	32.4
Total	2,946.2	159.2	91.0	84.2	444.7	1,092.8	396.6	677.8

Source: Conference Board of Canada.

TABLE A5**Total economic impact of the fresh produce sector on employment by industry, 2022**

(sum of direct, indirect, and induced effects by industry; (number of jobs))

	Canada	Prince Edward Island	Nova Scotia	New Brunswick	Quebec	Ontario	British Columbia	Other provinces and territories
Retail trade	67,857.3	7,285.8	2,659.0	2,131.3	10,516.8	18,417.9	7,263.6	19,583.0
Crop and animal production	53,700.7	5,442.6	1,597.9	2,101.8	8,916.4	20,102.0	9,367.4	6,172.6
Wholesale trade	10,401.1	1,333.8	444.0	349.2	1,789.0	2,597.1	1,346.7	2,541.4
Transportation and warehousing	7,761.0	746.2	343.4	300.2	1,350.2	2,194.7	818.3	2,007.9
Finance, insurance, real estate, rental and leasing and holding companies	6,683.2	336.2	173.1	158.6	1,180.8	2,845.2	695.4	1,293.8
Manufacturing	6,036.9	458.1	255.3	391.9	1,230.8	1,748.3	616.7	1,335.7
Professional, scientific and technical services	5,657.1	394.5	170.9	125.5	1,055.5	2,171.9	785.7	953.1
Accommodation and food services	5,404.6	434.3	258.7	225.3	763.5	1,522.5	834.6	1,365.6
Administrative and support, waste management and remediation services	4,913.8	237.1	127.7	216.3	971.0	1,940.0	559.3	862.3
Support activities for agriculture and forestry	2,642.4	356.5	123.9	75.4	284.2	641.5	784.8	376.1
Repair construction	2,539.5	84.4	27.2	52.2	372.0	1,087.4	319.8	596.5
Information and cultural industries	1,691.1	89.8	46.9	44.1	309.8	620.1	237.2	343.2
Health care and social assistance	1,373.8	129.5	57.8	43.0	195.9	541.6	162.5	243.6
Arts, entertainment and recreation	1,113.4	66.4	40.1	23.1	176.6	384.0	180.3	243.0
Utilities	1,054.7	53.3	12.6	53.3	197.9	400.2	112.0	225.3
Non-profit institutions serving households	891.2	90.9	35.7	38.4	145.2	267.8	106.5	206.6
Government education services	604.2	49.9	38.6	18.6	80.6	217.9	73.9	124.7
Mining, quarrying, and oil and gas extraction	426.5	1.0	6.3	4.3	24.9	30.3	17.5	342.3
Educational services	423.5	30.4	9.6	6.0	57.6	170.3	72.8	76.8
Government health services	418.2	38.0	34.7	22.9	67.2	105.7	45.1	104.6
Forestry and logging	55.4	8.3	7.3	3.8	13.7	7.1	7.8	7.3
Fishing, hunting and trapping	35.9	4.4	10.1	2.8	2.8	7.9	1.7	6.2
Other	3,743.3	325.7	113.1	133.0	608.8	1,192.5	501.6	868.8
Total	185,428.8	17,997.2	6,594.0	6,520.8	30,311.2	59,214.0	24,911.3	39,880.4

Source: Conference Board of Canada.

TABLE A6

Direct economic impact of the fresh produce sector on employment by industry, 2022
(number of jobs)

	Canada	Prince Edward Island	Nova Scotia	New Brunswick	Quebec	Ontario	British Columbia	Other provinces and territories
Retail trade	57,490.4	6,503.8	2,109.6	1,627.2	8,935.3	15,165.8	5,943.7	17,205.0
Crop and animal production	49,261.0	5,075.3	1,379.6	1,890.8	8,050.1	18,640.9	8,869.9	5,354.4
Wholesale trade	6,325.4	1,012.3	324.2	214.4	975.5	1,241.6	911.9	1,645.5
Transportation and warehousing	2,192.0	385.8	144.9	70.0	424.9	426.9	230.5	509.1
Accommodation and food services	570.9	55.4	8.2	8.3	56.6	112.1	68.3	262.0
Non-profit institutions serving households	317.7	47.5	7.4	9.5	49.4	79.3	34.4	90.1
Manufacturing	208.2	14.6	7.7	3.5	22.7	58.5	31.2	70.1
Information and cultural industries	137.0	6.9	1.9	3.6	16.8	45.3	13.8	48.8
Arts, entertainment and recreation	117.6	8.9	2.7	1.5	13.2	39.6	21.9	29.8
Government education services	77.9	3.0	3.9	0.4	4.4	30.4	10.5	25.4
Professional, scientific and technical services	27.9	0.0	0.5	0.3	4.9	13.7	3.0	5.6
Finance, insurance, real estate, rental and leasing and holding companies	8.2	0.0	0.0	0.0	6.1	1.1	0.4	0.6
Other	181.1	36.2	5.9	3.1	29.6	45.2	16.4	44.6
Total	116,915.2	13,149.8	3,996.5	3,832.5	18,589.3	35,900.3	16,155.9	25,290.9

Source: Conference Board of Canada.

TABLE A7

Indirect economic impact of the fresh produce sector on employment by industry, 2022
(number of jobs)

	Canada	Prince Edward Island	Nova Scotia	New Brunswick	Quebec	Ontario	British Columbia	Other provinces and territories
Professional, scientific and technical services	4,465.6	340.5	133.2	100.6	844.4	1,677.1	592.7	777.1
Transportation and warehousing	4,058.1	294.1	145.8	178.5	655.8	1,289.6	453.1	1,041.2
Finance, insurance, real estate, rental and leasing and holding companies	4,016.9	198.5	107.9	105.9	736.7	1,633.4	368.4	866.1
Crop and animal production	3,876.2	328.3	165.0	172.0	799.3	1,286.0	438.9	686.6
Manufacturing	3,871.0	298.6	174.2	312.6	781.9	1,081.3	361.3	861.2
Administrative and support, waste management and remediation services	3,540.3	186.0	95.9	155.7	714.9	1,357.5	349.1	681.2
Retail trade	2,741.6	357.2	128.8	124.2	393.8	764.0	276.7	696.9
Wholesale trade	2,615.3	215.3	65.4	83.1	495.7	872.4	235.4	647.9
Support activities for agriculture and forestry	2,610.6	354.1	121.9	74.2	279.0	630.8	779.9	370.7
Repair construction	1,918.4	66.7	18.4	42.6	303.2	842.8	196.6	448.1
Accommodation and food services	1,554.0	152.0	100.2	81.7	225.8	376.0	227.5	390.9
Information and cultural industries	971.4	61.3	28.1	23.3	187.0	349.1	129.5	193.2
Utilities	858.6	42.6	9.1	37.1	166.6	331.0	96.8	175.4
Mining, quarrying, and oil and gas extraction	369.9	0.9	5.0	3.6	19.8	23.2	14.2	303.2
Arts, entertainment and recreation	330.8	17.6	13.7	7.4	61.8	103.3	49.6	77.4
Educational services	162.9	10.2	6.0	2.9	25.3	72.7	16.6	29.3
Government education services	145.5	17.8	9.7	5.7	30.1	38.8	15.4	28.0
Government health services	103.1	7.1	11.6	5.2	21.7	24.1	8.7	24.8
Non-profit institutions serving households	98.1	8.9	4.6	5.4	16.3	29.2	11.1	22.5
Health care and social assistance	68.7	3.4	3.4	2.6	10.7	24.6	5.1	18.9
Forestry and logging	41.1	6.4	4.5	2.9	10.6	5.2	6.2	5.4
Fishing, hunting and trapping	19.3	2.8	7.5	1.5	0.5	2.3	0.6	4.2
Other	1,479.3	134.7	45.1	59.9	260.0	430.8	171.1	377.8
Total	39,916.8	3,105.1	1,404.9	1,588.6	7,040.7	13,245.1	4,804.5	8,728.1

Source: Conference Board of Canada.

TABLE A8

Induced economic impact of the fresh produce sector on employment by industry, 2022
(number of jobs)

	Canada	Prince Edward Island	Nova Scotia	New Brunswick	Quebec	Ontario	British Columbia	Other provinces and territories
Retail trade	7,625.4	424.8	420.6	379.9	1,187.7	2,488.2	1,043.2	1,681.1
Accommodation and food services	3,279.7	227.0	150.3	135.3	481.2	1,034.4	538.9	712.7
Finance, insurance, real estate, rental and leasing and holding companies	2,658.1	137.7	65.2	52.7	438.1	1,210.7	326.7	427.1
Manufacturing	1,957.6	144.9	73.4	75.8	426.2	608.5	224.3	404.5
Transportation and warehousing	1,511.0	66.4	52.8	51.7	269.6	478.2	134.7	457.6
Wholesale trade	1,460.5	106.1	54.4	51.7	317.8	483.1	199.3	248.0
Administrative and support, waste management and remediation services	1,373.5	51.1	31.9	60.6	256.2	582.4	210.2	181.1
Health care and social assistance	1,305.1	126.1	54.3	40.3	185.2	517.1	157.4	224.7
Professional, scientific and technical services	1,163.6	54.0	37.2	24.7	206.2	481.2	189.9	170.4
Arts, entertainment and recreation	665.1	39.9	23.8	14.2	101.6	241.0	108.9	135.7
Repair construction	621.1	17.7	8.9	9.6	68.8	244.6	123.2	148.4
Information and cultural industries	582.7	21.7	17.0	17.3	106.0	225.7	93.8	101.3
Crop and animal production	563.5	38.9	53.3	39.0	67.0	175.1	58.6	131.6
Non-profit institutions serving households	475.3	34.4	23.7	23.5	79.5	159.3	61.0	94.0
Government education services	380.8	29.1	25.0	12.5	46.2	148.7	48.0	71.3
Government health services	315.0	30.9	23.1	17.7	45.5	81.6	36.4	79.7
Educational services	260.6	20.2	3.7	3.1	32.3	97.7	56.2	47.5
Utilities	196.1	10.6	3.5	16.2	31.3	69.3	15.2	49.9
Mining, quarrying, and oil and gas extraction	56.6	0.2	1.3	0.6	5.1	7.1	3.3	39.1
Support activities for agriculture and forestry	31.8	2.5	2.0	1.1	5.2	10.7	4.9	5.3
Fishing, hunting and trapping	16.6	1.6	2.7	1.4	2.3	5.6	1.1	2.0
Forestry and logging	14.3	1.9	2.8	1.0	3.2	1.9	1.6	1.9
Other	2,083.0	154.7	62.1	69.9	319.1	716.5	314.1	446.5
Total	28,596.8	1,742.3	1,192.6	1,099.7	4,681.3	10,068.6	3,950.9	5,861.4

Source: Conference Board of Canada.



TABLE A9

Total fiscal impact of the fresh produce sector by tax category, 2022

(sum of direct, indirect, and induced effects by tax category; \$ millions, 2019)

	Canada	Prince Edward Island	Nova Scotia	New Brunswick	Quebec	Ontario	British Columbia	Other provinces and territories
Federal personal income taxes	1,069.6	82.1	24.9	26.9	194.5	324.9	124.4	291.9
Provincial personal income taxes	771.0	77.5	23.9	22.7	188.3	201.6	58.2	198.8
Social security	724.9	59.3	20.8	22.3	116.2	219.2	84.5	202.7
Municipal taxes	371.1	8.6	11.7	8.5	59.3	157.3	32.0	93.8
Other taxes	329.7	45.6	3.3	9.9	69.8	64.1	23.3	113.7
Federal corporate taxes	259.6	18.0	6.3	8.8	41.9	87.0	28.4	69.1
Provincial sales tax	233.2	17.8	9.1	9.2	57.9	102.9	18.7	17.6
Provincial corporate taxes	169.7	15.7	4.6	6.7	32.7	57.4	14.8	37.7
Federal sales tax	159.8	8.7	4.7	4.6	22.6	54.3	28.9	35.9
Total	4,088.7	333.3	109.5	119.7	783.1	1,268.8	413.2	1,061.2

Source: Conference Board of Canada.

TABLE A10**Total economic impact of the fresh produce sector on labour income by industry, 2022**

(sum of direct, indirect, and induced effects by industry; \$ millions, 2019)

	Canada	Prince Edward Island	Nova Scotia	New Brunswick	Quebec	Ontario	British Columbia	Other provinces and territories
Crop and animal production	2,840.4	335.0	42.0	94.3	465.8	905.3	442.2	556.0
Retail trade	2,370.1	212.1	91.4	68.3	365.5	666.2	272.3	694.4
Wholesale trade	710.3	81.3	27.4	18.9	115.6	192.9	82.7	191.5
Finance, insurance, real estate, rental and leasing and holding companies	672.6	30.1	17.4	14.5	106.1	291.0	78.1	135.3
Transportation and warehousing	489.5	42.0	19.3	17.9	81.7	129.6	58.0	141.1
Professional, scientific and technical services	473.4	25.3	13.1	8.3	84.7	205.8	58.5	77.7
Owner occupied dwellings	459.4	32.4	11.5	8.7	46.6	151.8	84.8	123.5
Manufacturing	442.2	24.3	14.6	20.0	91.4	142.2	40.0	109.6
Administrative and support, waste management and remediation services	213.4	7.1	4.9	9.5	39.3	85.8	24.4	42.5
Repair construction	211.7	5.1	1.8	3.8	32.8	95.3	24.9	48.1
Accommodation and food services	157.0	11.3	6.5	5.3	21.9	46.6	25.5	39.8
Utilities	135.0	5.6	1.7	6.8	25.1	51.3	15.0	29.5
Support activities for agriculture and forestry	129.6	15.6	5.1	2.8	17.8	29.5	32.1	26.6
Information and cultural industries	121.4	4.8	3.2	2.8	22.1	50.2	15.8	22.5
Mining, quarrying, and oil and gas extraction	69.2	0.2	0.8	0.5	2.5	4.1	2.7	58.4
Health care and social assistance	65.0	4.6	2.6	1.9	10.3	26.4	7.5	11.6
Government education services	40.8	3.5	2.2	1.2	5.4	14.8	5.0	8.7
Non-profit institutions serving households	38.3	3.0	1.3	1.4	6.0	13.0	4.8	8.9
Arts, entertainment and recreation	36.9	1.8	1.0	0.6	6.3	14.0	5.5	7.7
Government health services	25.8	1.9	2.0	1.4	4.0	7.4	2.8	6.3
Educational services	12.0	0.8	0.3	0.2	1.6	5.0	2.0	2.1
Forestry and logging	4.1	0.4	0.4	0.3	0.9	0.6	0.8	0.6
Fishing, hunting and trapping	4.2	0.6	1.0	0.4	0.4	0.3	0.2	1.3
Other	211.6	14.9	5.8	6.6	32.6	71.0	28.5	52.3
Total	9,933.9	863.7	277.1	296.6	1,586.5	3,200.1	1,314.0	2,396.1

Source: Conference Board of Canada.

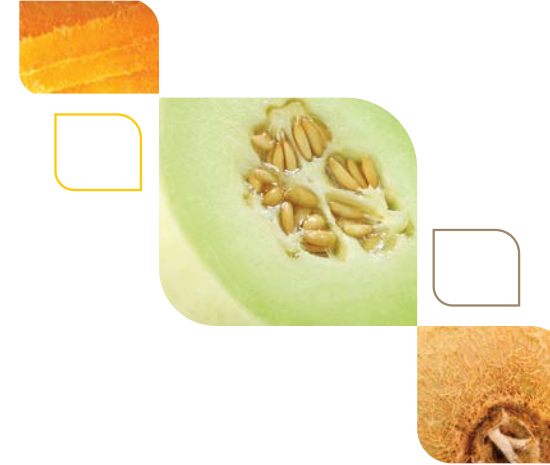


TABLE A11

Direct economic impact of the fresh produce sector on labour income by industry, 2022

(\$ millions, 2019)

	Canada	Prince Edward Island	Nova Scotia	New Brunswick	Quebec	Ontario	British Columbia	Other provinces and territories
Federal personal income taxes	1,069.6	82.1	24.9	26.9	194.5	324.9	124.4	291.9
Provincial personal income taxes	771.0	77.5	23.9	22.7	188.3	201.6	58.2	198.8
Social security	724.9	59.3	20.8	22.3	116.2	219.2	84.5	202.7
Municipal taxes	371.1	8.6	11.7	8.5	59.3	157.3	32.0	93.8
Other taxes	329.7	45.6	3.3	9.9	69.8	64.1	23.3	113.7
Federal corporate taxes	259.6	18.0	6.3	8.8	41.9	87.0	28.4	69.1
Provincial sales tax	233.2	17.8	9.1	9.2	57.9	102.9	18.7	17.6
Provincial corporate taxes	169.7	15.7	4.6	6.7	32.7	57.4	14.8	37.7
Federal sales tax	159.8	8.7	4.7	4.6	22.6	54.3	28.9	35.9
Total	4,088.7	333.3	109.5	119.7	783.1	1,268.8	413.2	1,061.2

Source: Conference Board of Canada.

TABLE A12**Indirect economic impact of the fresh produce sector on labour income by industry, 2022**

(\$ millions, 2019)

	Canada	Prince Edward Island	Nova Scotia	New Brunswick	Quebec	Ontario	British Columbia	Other provinces and territories
Finance, insurance, real estate, rental and leasing and holding companies	391.7	17.4	10.5	9.3	64.2	163.7	38.8	88.0
Professional, scientific and technical services	377.8	22.1	10.4	6.8	68.5	162.0	44.6	63.6
Manufacturing	299.3	16.7	10.0	15.7	59.8	91.5	23.9	81.6
Transportation and warehousing	255.5	16.4	8.4	10.7	38.8	76.4	32.9	71.9
Crop and animal production	195.6	19.0	4.6	6.6	41.2	56.9	16.9	50.3
Wholesale trade	191.9	11.9	4.3	4.9	34.1	69.7	17.4	49.6
Repair construction	160.1	4.0	1.2	3.1	26.7	73.8	15.3	35.9
Administrative and support, waste management and remediation services	155.7	5.6	3.7	6.9	29.1	60.9	15.9	33.7
Support activities for agriculture and forestry	127.9	15.6	5.0	2.8	17.5	29.0	31.9	26.3
Retail trade	112.4	13.4	4.8	4.7	16.2	32.3	11.8	29.1
Utilities	110.1	4.5	1.2	4.8	21.2	42.4	13.1	23.1
Information and cultural industries	74.0	3.3	1.9	1.6	13.8	30.4	9.2	13.9
Mining, quarrying, and oil and gas extraction	60.3	0.2	0.6	0.4	2.0	3.1	2.2	51.7
Accommodation and food services	43.9	3.9	2.5	1.9	6.5	11.2	6.9	11.0
Arts, entertainment and recreation	11.4	0.5	0.3	0.2	2.4	4.0	1.5	2.5
Government education services	9.8	1.3	0.5	0.4	2.1	2.6	1.0	1.9
Government health services	7.3	0.5	0.8	0.4	1.4	1.9	0.6	1.7
Health care and social assistance	4.8	0.2	0.2	0.2	1.0	1.5	0.5	1.2
Educational services	4.6	0.3	0.2	0.1	0.7	2.1	0.5	0.8
Non-profit institutions serving households	4.0	0.3	0.2	0.2	0.7	1.3	0.5	0.9
Forestry and logging	3.1	0.3	0.2	0.2	0.7	0.5	0.7	0.5
Fishing, hunting and trapping	2.5	0.4	0.7	0.2	0.1	0.1	0.1	0.9
Other	100.8	6.9	2.7	3.6	16.7	31.9	12.3	26.8
Total	2,704.6	164.3	75.0	85.5	465.2	949.4	298.2	667.0

Source: Conference Board of Canada.

TABLE A13**Induced economic impact of the fresh produce sector on labour income by industry, 2022**

(\$ millions, 2019)

	Canada	Prince Edward Island	Nova Scotia	New Brunswick	Quebec	Ontario	British Columbia	Other provinces and territories
Owner occupied dwellings	459.4	32.4	11.5	8.7	46.6	151.8	84.8	123.5
Retail trade	289.5	14.0	14.4	12.3	44.5	97.6	41.9	64.9
Finance, insurance, real estate, rental and leasing and holding companies	280.5	12.7	6.9	5.3	41.7	127.3	39.3	47.3
Manufacturing	130.5	7.0	4.3	4.1	30.2	46.2	14.4	24.3
Wholesale trade	106.2	6.3	3.5	3.0	21.8	38.8	13.5	19.2
Transportation and warehousing	97.7	3.6	3.1	3.0	18.6	27.5	7.7	34.2
Professional, scientific and technical services	93.9	3.3	2.7	1.5	15.9	42.9	13.8	13.8
Accommodation and food services	93.6	5.8	3.7	3.2	13.6	31.0	16.0	20.3
Health care and social assistance	60.2	4.5	2.4	1.7	9.3	24.9	7.1	10.4
Administrative and support, waste management and remediation services	57.7	1.5	1.2	2.6	10.2	24.9	8.5	8.8
Repair construction	51.6	1.1	0.6	0.7	6.1	21.4	9.6	12.2
Information and cultural industries	44.8	1.4	1.2	1.2	8.0	18.9	6.4	7.7
Government education services	25.7	2.1	1.4	0.8	3.0	10.1	3.2	5.0
Utilities	24.8	1.1	0.5	2.1	3.9	8.9	1.9	6.4
Crop and animal production	22.8	1.7	1.6	1.4	3.3	7.0	2.3	5.5
Arts, entertainment and recreation	22.0	1.1	0.6	0.4	3.5	8.8	3.4	4.3
Non-profit institutions serving households	20.2	1.1	0.9	0.9	3.3	7.5	2.7	3.9
Government health services	18.5	1.4	1.2	1.0	2.6	5.4	2.2	4.6
Mining, quarrying, and oil and gas extraction	8.9	0.0	0.2	0.1	0.5	0.9	0.5	6.7
Educational services	7.4	0.5	0.1	0.1	0.9	2.9	1.5	1.3
Fishing, hunting and trapping	1.7	0.2	0.3	0.2	0.3	0.2	0.1	0.4
Support activities for agriculture and forestry	1.7	0.1	0.1	0.0	0.3	0.5	0.2	0.4
Forestry and logging	1.0	0.1	0.2	0.1	0.2	0.2	0.2	0.2
Other	102.2	6.5	2.8	2.9	14.5	36.9	15.3	23.3
Total	2,022.4	109.4	65.1	57.2	302.9	742.7	296.6	448.5

Source: Conference Board of Canada.

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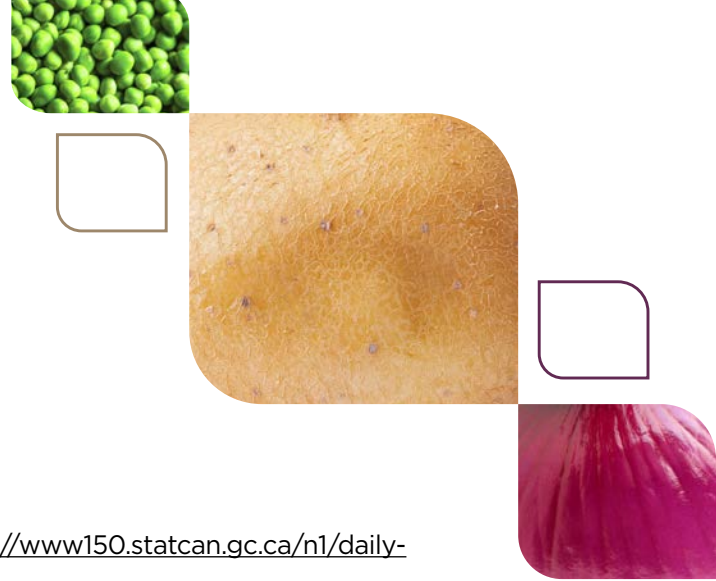
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