

# Overview of Canada's agriculture and agri-food sector

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Specific overviews

- [Red meat and livestock industry](#)
- [Poultry and egg industry](#)
- [Dairy industry](#)
- [Canadian seed sector](#)
- [Food processing industry](#)
- [Horticulture](#)
- [Agri-food system](#)

The agriculture and agri-food sector is a major contributor to the Canadian economy. Agriculture and Agri-Food Canada is mandated to support primary agriculture (farmers) and food and beverage processing, but the sector reaches into the broader agri-food system, which influences other sectors across the food supply-chain.

## On this page

- [The agri-food system](#)
- [Primary agriculture](#)
- [Food and beverage processing](#)
- [International trade and domestic market](#)
- [Sustainable economic growth](#)

## The agri-food system

Canada's food system is resilient and innovative, sustains our environment and supports our economy. In 2023, the whole agriculture and agri-food system:

- employed 2.3 million people
- provided 1 in 9 jobs in Canada

- generated \$150.0 billion (around 7%) of Canada's gross domestic product (GDP)

The system represents an integrated supply chain

**Primary agriculture** is defined as work that is performed within the boundaries of a farm, nursery or greenhouse.

- GDP: \$31.7 billion (1.4%)
- Jobs: 247,200

**Food and beverage processors** transform raw food materials or substances into new products which may be finished, so that they are ready to be used or consumed, or semi-finished, so that they become raw material to be used in further manufacturing.

- GDP: \$35.2 billion (1.6%)
- Jobs: 322,600

### **Food retailers and wholesalers**

- GDP: \$36.9 billion (1.7%)
- Jobs: 659,800

**Foodservice providers**, as well as food retailers and wholesalers, are the link between food production and consumers

- GDP: \$30.5 billion (1.4%)
- Jobs: 971,100

In 2023, the primary agriculture and food and beverage processing sectors:

- employed 569,800 people
- accounted for 3.0% of Canada's GDP
- provided 1 in 35 jobs in Canada

# Primary agriculture

Primary agriculture is defined as work that is performed within the boundaries of a farm, nursery or greenhouse. Canadian primary agriculture is an economic driver highly diversified across the country:

- 189,874 farms
- farms cover 62.2 million hectares or 6.2% of Canada's land area
- concentrated across the Prairies, Quebec and Southern Ontario
- average farm size almost doubled over the last 50 years due to consolidation and technological advances

## Farm market receipts

Farm market receipts represent the farmer's revenues from the sale of agricultural commodities. Farm market receipts are diversified across commodities, led by grains and oilseeds, red meat and dairy. In 2023:

- a record high \$93.0 billion
- 5.8% average annual growth (2013-2023) – grain and oilseed receipts leading the way
- largest 10% of farms generate more than two-thirds of all revenues

Canadian agriculture is evolving over time in response to challenges, opportunities and market developments. The adoption of innovation contributes to increases in output and productivity.

## Sector commodity breakdown

### Crop production

- GDP: \$24.5 billion
- Jobs: 114,800

Principal field crops

Receipts: \$40.0 billion

- Number of reporting farms: 65,135 [1](#)
- Export: \$29.1 billion
- Top export markets:
  - China: 25%
  - United States: 12%
  - Japan: 8%
- Key stakeholders:
  - Canada Grain Council
  - Cereals Canada
  - Grain Growers of Canada

## Horticulture

- Farm market receipts: \$8.6 billion
- Number of reporting farms: 17,433 [1](#)
- Export: \$4.9 billion
- Top export markets:
  - United States: 97%
  - Netherlands: 1.4%
  - Japan: 0.3%
- Key stakeholders:
  - Canadian Horticultural Council
  - Canadian Produce Marketing Association
  - Canadian Ornamental Horticulture Alliance

## Animal production

- GDP: \$7.2 billion
- Jobs: 106,700

## Animal production details

- Receipts: \$37.3 billion

- Number of reporting farms: 76,796 1
- Export: \$3.8 billion
- Top export markets:
  - United States: 94%
  - Hong Kong: 2%
  - Japan: 1%
- Key stakeholders:
  - Supply-managed farmers associations (chicken, turkey, egg, broiler hatching egg, dairy)
  - Canadian Pork Council
  - Canadian Cattlemen's Association

## Food and beverage

- GDP: \$35.2 billion
- Jobs: 322,600

### Processing

- Sales: \$167.5 billion
- Establishments with employees: 8,730
- Export: \$56.4 billion
- Top export markets:
  - United States: 80%
  - China: 6%
  - Japan: 3%
- Key stakeholders:
  - Dairy Processors Association of Canada
  - Canadian Poultry and Egg Processors Council
  - Food and Beverage Canada

Top 3 crop and livestock commodities by average 2019-2023 farm cash receipts

## British Columbia

- Dairy: \$731 million
- Vegetables: \$656 million
- Floriculture, nursery and sod: \$579 million

## Alberta

- Cattle and calves: \$6.3 billion
- Canola: \$3.4 billion
- Wheat: \$2.8 billion

## Saskatchewan

- Canola: \$6.3 billion
- Wheat: \$4.5 billion
- Cattle and calves: \$1.7 billion

## Manitoba

- Canola: \$1.9 billion
- Wheat: \$1.5 billion
- Hogs: \$1.3 billion

## Ontario

- Dairy: \$2.5 billion
- Vegetables: \$2.4 billion
- Soybeans: \$2.1 billion

## Quebec

- Dairy: \$2.8 billion
- Hogs: \$1.7 billion
- Poultry: \$957 million

## New Brunswick

- Cannabis: \$272 million

Potatoes: \$197 million

- Dairy: \$131 million

#### Nova Scotia

- Dairy: \$164 million
- Fruit: \$79 million
- Eggs: \$49 million

#### Prince Edward Island

- Potatoes: \$293 million
- Dairy: \$98 million
- Cattle and calves: \$37 million

#### Newfoundland and Labrador

- Dairy: \$49 million
- Eggs: \$21 million
- Floriculture, nursery, and sod: \$9 million

## Food and beverage processing

Food and beverage processors transform raw food materials or substances into new products, which may be finished, so that they are ready to be used or consumed, or semi-finished, so that they become raw material to be used in further manufacturing.

The food and beverage processing sector is the largest manufacturing sector in Canada in terms of both GDP and employment:

- 16.5% of manufacturing GDP
- 17.8% of manufacturing jobs

Food and beverage processing sales totaled \$167.5 billion in 2023. There are facilities across the country, but most are in Ontario and Quebec.



Main industries (share of different food processing sales in total sales):

- Meat product manufacturing (25.5%) â€" \$42.7 billion
- Grain and oilseed milling (12.7%) â€" \$21.3 billion
- Dairy product manufacturing (10.9%) â€" \$18.2 billion
- Bakeries and tortilla processing (10.6%) â€" \$17.8 billion

## International trade and domestic market

The success of the Canadian agriculture sector depends heavily on our ability to export to other countries and Canada is one of the world's largest food exporters. In 2023, Canada exported nearly \$99.1 billion in agriculture and food products (including raw agricultural materials, fish and seafood, and processed foods). Canada is the worldâ€™s 8th largest exporter of agri-food, fish and seafood products, behind the United States, Brazil, Netherlands, Germany, China, France, and Spain, exporting to over 200 countries in 2023.

The United States is Canada's top trading partner, accounting for about 60% of all our agri-food exports and more than half our imports. China has been Canada's second leading agri-food and seafood export market since 2012 â€" our exports have increased by 112% since then.

The domestic market is critical for the performance of the sector. Canadians spent \$198.0 billion on food, beverage, tobacco and cannabis products in 2023, representing the third-largest household expenditure category after shelter and transportation.

## Sustainable economic growth

Canada has some key advantages that can help make us a leader in food production and processing:

- abundant land and water resources
- access to international markets

- strong research and development capacity
- strong global reputation as a trusted supplier of safe, top-quality food
- strong stewards of the land

Agriculture and agri-food is one of the sectors with the highest economic growth potential in Canada. Canada's key advantages can make us a leader in sustainable food production and processing. Demand is growing for the kinds of food that Canadian farmers and processors can deliver. Canada's reputation for environmental stewardship can lead to increased demand and price for our products.

Taking advantage of key opportunities will ensure the sector is competitive, sustainable, resilient, and prosperous well into the future.

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## Endnotes

[1](#) The latest data on farm numbers are from 2021 and do not capture other and miscellaneous farms.

[2](#) Based on data for 2020-2023. Cannabis is confidential in New Brunswick for 2019.

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