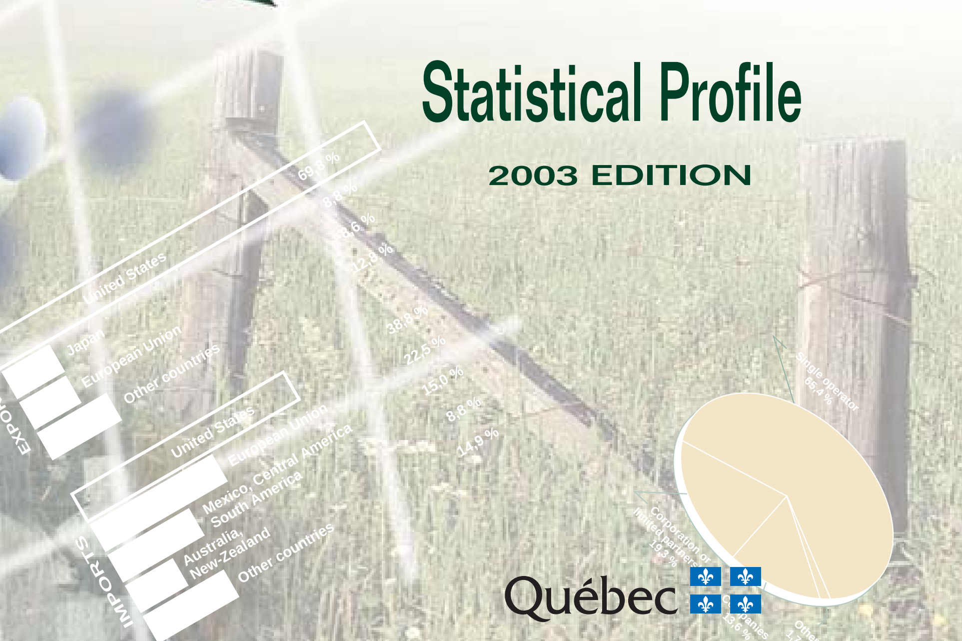
An Overview of the Québec Biofood Industry

Statistical Profile

2003 EDITION



Québec

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2003 Edition

PRODUCTION TEAM

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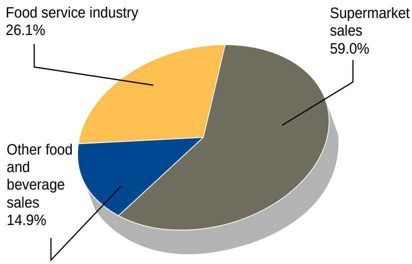
QUÉBEC'S BIOFOOD INDUSTRY AS A WHOLE

Food consumption in Québec involves a wide range of production, processing and marketing activities which generate numerous jobs and require sizeable investment.

DOMESTIC DEMAND

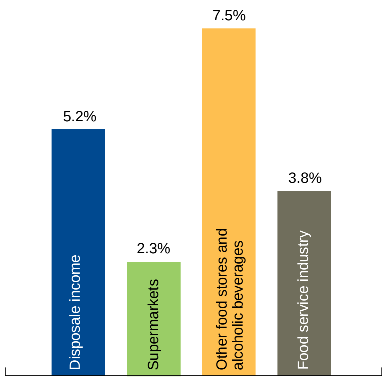
- In 2001, Quebecers spent 12.2% of their disposable income on store-bought food and beverages and 4.3% on restaurant meals.
- These expenditures reached a grand total of nearly $25.3 billion in 2002, the equivalent of roughly $3398 per person.
- In 2002, Quebecers' food expenses increased less quickly than their disposable income (4.5% versus 5.3%). This trend is in line with average growth in the past five years, during which domestic food demand has grown 3.4% per year, while disposable income has increased by 5.2% per year.
- Price trends have followed the same pattern. Between 1998 and 2002, food prices generally increased by an average of 2.4% per year, a pace similar to that of consumer goods in general (2.3%). The price of store-bought food rose 2.4% annually, while restaurant prices grew by 2.6% per year. In 2002, store-bought food prices increased sizeably (2.5%) over prices in 2001.

BREAKDOWN OF DOMESTIC FOOD DEMAND QUÉBEC, 2002



Sources: Statistics Canada and MAPAQ

GROWTH OF DOMESTIC FOOD DEMAND (average annual rate,1998-2002)



Source: Institut de la statistique du Québec

FOREIGN DEMAND

- Food demand changes in the other Canadian provinces also influenced Québec agriculture, fisheries, and food processing and wholesaling. In 2002, demand rose by 5.7% for an average yearly increase of 4.4% since 1998.
- In addition, food demand abroad was a mine of opportunity for the Québec biofood industry. The value of Québec food product exports to countries outside Canada increased by 6.5% in 2002, for average annual growth of 8% since 1998. Québec food product export shipments are currently the most powerful engine of growth for Québec's biofood industry.
- Strong export growth in 2002 can be attributed primarily to the performance of marine products.

ECONOMIC ACTIVITY

- The biofood industry, including tobacco, generated nearly 6.5% of Québec's real gross domestic product (GDP) in 2002, wholesaling excluded, and represented over 21% of Canada's GDP in 2002.

GROSS DOMESTIC PRODUCT IN THE BIOFOOD INDUSTRY [1]

(at basic cost, in millions of 1997 dollars)

	1999	2000	2001	2002
Agriculture and support for agriculture	2 556.2	2 109.6	2 207.0	2 252.8
Fisheries	63.4	67.6	67.1	78.0
Food processing, beverages and tobacco (2)	4 727.2	4 747.0	4 879.7	5 001.9
Food processing	*3 294.5*	*3 275.1*	*3 392.1*	*3 522.3*
Beverages and tobacco	*1 432.7*	*1 471.9*	*1 487.6*	*1 479.6*
Retailing (e)	3 120.5	3 221.3	3 207.8	3 320.7
Food service industry and licensed beverage establishments	2 872.4	2 959.8	3 071.8	3 114.6
BIOFOOD AND TOBACCO TOTAL	13 339.7	13 105.3	13 433.4	13 768.0
Economy as a whole	192 716.8	202 711.5	206 692.9	215 145.0

Source: Statistics Canada

[e] MAPAQ estimate. Food wholesaling figures are not available.

[1] When GDP is measured in constant dollars for a given reference year, the value of real production of goods and services in an economy, without double counting, is measured because changes in price and cost are eliminated.

[2] Given use of the new NAICS, figures on beverage processing are no longer available, only those on beverages and tobacco as a single unit.

- Food processing and retailing, which represent in the vicinity of 50% of biofood GDP, made respectable gains in 2002, with increases of 3.8% and 3.5% respectively.
- From 1999 to 2002, Québec's biofood industry posted real average annual growth of approximately 1.1%, a slower pace than that of the Québec economy as a whole (3.7%).

JOBS

- In Québec, nearly one job in eight was generated by the biofood industry in 2002.

JOBS
(in thousands)

	1998	1999	2000	2001	2002
Agriculture[1]	68.5	62.6	61.7	59.8	62.4
Fisheries	4.1	4.0	4.0	3.3	3.4
Food processing, beverages and tobacco	67.5	64.9	71.2	71.3	74.0
Wholesaling[2]	24.0	23.3	25.3	27.2	29.2
Retailing	90.6	90.8	95.1	103.2	108.2
Food service industry	154.4	150.5	156.7	160.4	161.0
BIOFOOD TOTAL[3]	409.2	396.1	414.0	425.2	438.1
Economy as a whole	3 281.6	3 357.4	3 437.7	3 474.5	3 592.7

Sources: Statistics Canada and MAPAQ, Direction de l'analyse et des politiques (pêches)

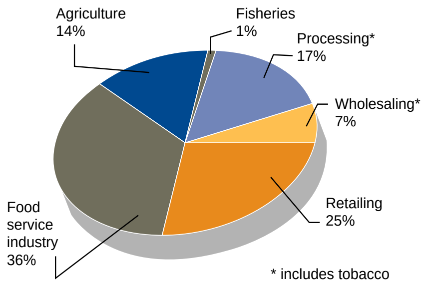
(1) Figures on agricultural jobs have a high margin of error.

(2) Tobacco included.

(3) Data are now given using the North American Industry Classification System (NAICS). This precludes any comparisons with previous editions of the *Overview.*

- From 1998 to 2002, nearly 9% of the 311,142 jobs created in the Québec economy as a whole were in the biofood industry.
- In the same period, the contribution of food processing, processing of beverages and tobacco, retailing and wholesaling to Québec biofood industry jobs was much greater than in the past.
- The food service, retailing and processing sectors accounted for over three quarters of biofood industry jobs in Québec.

BREAKDOWN OF BIOFOOD-SECTOR JOBS QUÉBEC, 2002



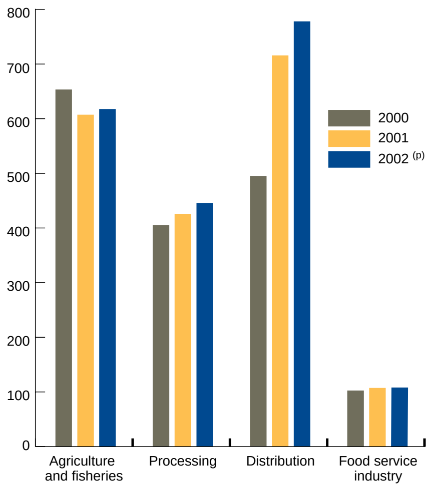
Sources: Statistics Canada and MAPAQ

- Given that the sample group for farm producers is small, data on agricultural jobs contains a wide margin of error. Consequently, the estimate varies greatly from year to year. The number of agricultural jobs (averaged out over 5 years) ranges from 60,000 to 66,000.
- From 1998 to 2002, the food retail and wholesale sectors posted the best job growth, with 20% each. Job growth in the food service industry continued apace, reaching its highest level in ten years.

CAPITAL EXPENDITURES

- The biofood industry's capital expenditures totalled over $1.9 billion in 2002, or 7.3% of all non-residential capital expenditures within the Québec economy. Overall expenditures in this sector have increased by 4% since last year.
- From 2000 to 2002, agriculture was responsible for 34% of biofood industry capital expenditures, while processing and distribution accounted for 23% and 36% respectively.
- In 2002, capital expenditures in agriculture were over $600 million, comparable to those of 2001. Capital expenditures in the food processing sector ($450 million) increased by 3.3%.
- In 2002, capital expenditures in Québec's food retailing sector declined by nearly 1.4%. Capital expenditures in wholesaling rose by over 32%, while those in the food service sector held steady.
- Québec's share of capital expenditures in the Canadian biofood industry has decreased, from 19.4% in 2000 to 18.4% in 2002, a drop from the average levels recorded from 1998 to 2000 (roughly 20%).

CHANGES IN CAPITAL EXPENDITURE (in millions of dollars)



Source: Statistics Canada

P: provisional data

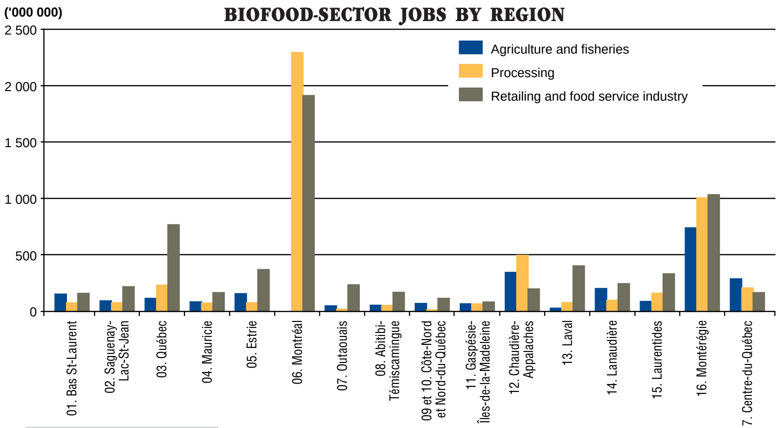
REGIONAL PRESENCE

- The biofood industry in Québec's regions generates substantial economic activity, most of which is the driving force of regional economies. Across Québec, the biofood sector plays a leading role in stabilizing the regional economy and in shaping a chain of activities linking consumers, merchants, processors, and producers, contributing in large part to the economic vitality of many regions of Québec. Proof of this is the growing diversification of the various components of the chain, from production to food services and from processing to retail and wholesale distribution. The regional biofood economy is based primarily on diversified production, niche markets, regional processing, regional product branding, and agri-tourism and gastronomy.
- Year after year, the regional biofood industry creates jobs and generates added value and sizeable investment, thereby contributing to overall regional wealth. Furthermore, it plays a defining role in heritage conservation, land use, and social cohesion.

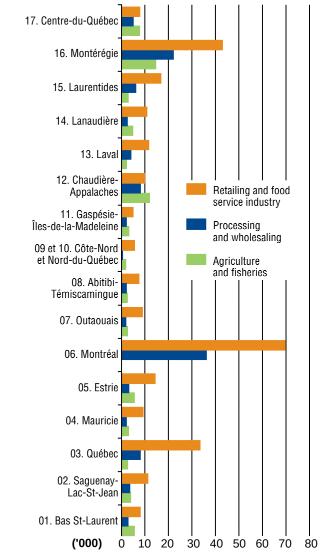
GDP AND JOBS

- Québec's biofood industry accounts for 4% to 12% of the regional GDP of over $400 million in 10 of Québec's 17 administrative regions. Two regions, Montréal and Montérégie, make up 46% of Québec's biofood GDP as a whole.
- The biofood industry represents close to 12% of all jobs in Québec. In at least 7 regions, this percentage is over 15%, excluding indirect jobs. In the Gaspésie–Îles-de-la-Madeleine region and the Centre-du-Québec region, the figures are 29% and 21% respectively. In almost half of the regions of Québec, the food and beverage industry alone is one of the top two manufacturing activities. Twenty-four per cent of Québec's biofood jobs are found in the region of Montréal, where retailing and food services are heavily concentrated.

REGIONAL BIOFOOD GDP
BIOFOOD-SECTOR JOBS BY REGION



BIOFOOD-SECTOR JOBS BY REGION



DISTRIBUTION AND THE FOOD SERVICE INDUSTRY

- In 2002, the some 7,300 food stores across Québec generated receipts of $18.7 billion, and the 13,700 food service establishments, $6.6 billion. With the exception of the Côte-Nord and Nord-du-Québec regions, each region has at least 200 retail establishments and 200 food service establishments. In all 17 regions, retail and food service establishment receipts were above the $200 million level.

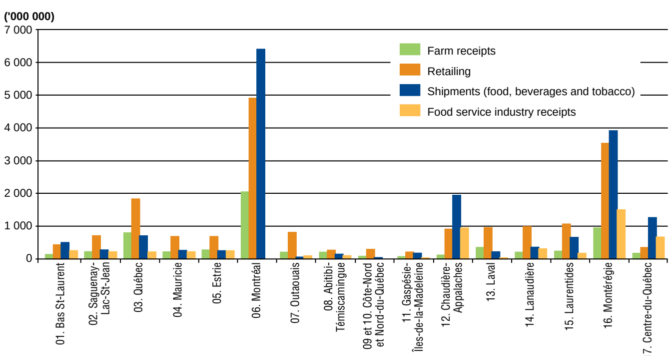
PROCESSING

The value of food and beverage shipments was over $200 million for 12 of the 17 regions. This industry is concentrated mostly in Greater Montréal and the surrounding area and, to a lesser extent, in the regions of Québec and Chaudière-Appalaches. Montréal and Montérégie contribute almost 59% of food, beverage and tobacco shipments.

PRODUCTION

In 2002, Québec's biofood industry generated market receipts of slightly over $5 billion, that is, at least $200 million in 8 of the 17 administrative regions. The Montérégie, Chaudière-Appalaches and Centre-du-Québec regions were responsible for 58% of farm receipts, that is, 28%, 17.8% and 12% respectively.

VALUE OF FOOD-SYSTEM ACTIVITIES BY REGION

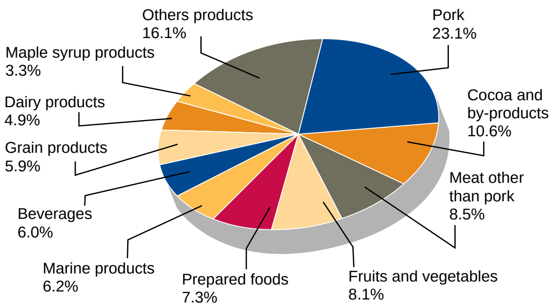


TRADE

EXPORTS

- Québec sold its biofood products in 156 countries.
- 88.1% of Québec's exports go to three trading partners. Québec's main trading partner is the United States, which accounts for 75.2% of its shipments abroad. Next comes Japan, with 7.4%, and the European Union (EU), with 5.5%.
- In 2002, Québec's primary exports were, in descending order, pork and pork products, cocoa by-products (chocolate), meat other than pork, fruits and vegetables, prepared foods, marine products, and beverages.

MAIN EXPORTS - QUÉBEC, 2002

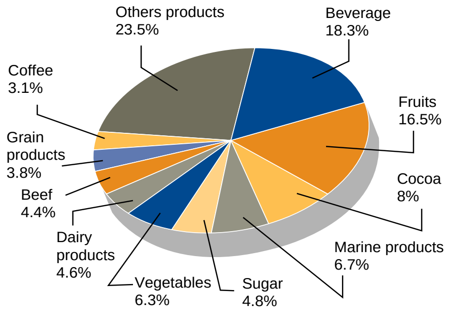


Sources: Institut de la statistique du Québec and MAPAQ

IMPORTS

- On a customs-cleared basis, 74.7% of the biofood products imported by Québec come from eight international partners. The top two sources are the United States (29.7%) and the European Union (28.4%). The other main suppliers are Australia, Brazil, Chile, New Zealand, Thailand, and China.
- In 2002, Québec's main imports were beverages, fruits, cocoa, marine products, vegetables, sugar, dairy products, and beef.
- 168 countries sold biofood products to Québec.

MAIN IMPORTS - QUÉBEC, 2002

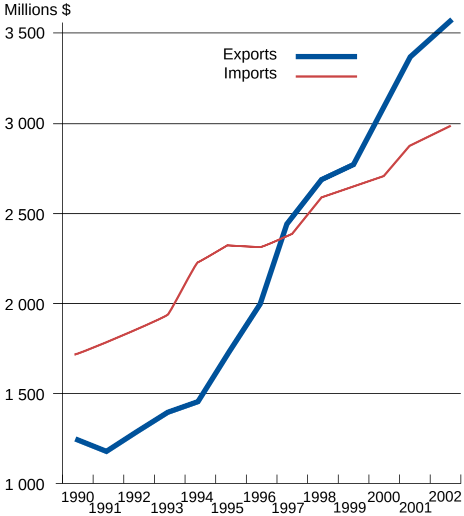


Sources: Institut de la statistique du Québec and MAPAQ

TRENDS IN TRADE

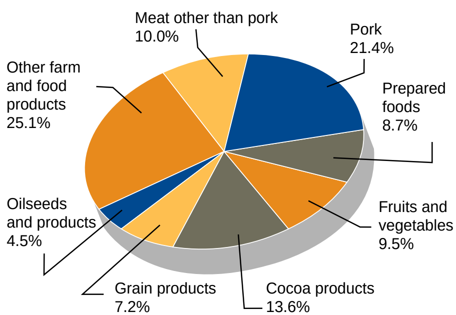
- From 1992 to 2002, the value of Québec exports rose 185% to reach $3.55 billion.
- From 1992 to 2002, the value of Québec imports rose 64% to total $2.99 billion.
- Since 1997, export receipts for biofood products registered in Québec, that is, customs-cleared in Québec, have edged past the value of food products purchased by Québec in international markets.
- From 1992 to 2002, seven product groups accounted for 75% of the growth of Québec's biofood exports ($2.3 billion). Pork-based products, cocoa by-products, meat other than pork, fruits and vegetables, prepared foods, grain products (biscuits, pasta), and oilseeds (soybeans) have enjoyed particularly strong growth over the past decade.

GROWTH OF BIOFOOD IMPORTS AND EXPORTS QUÉBEC, 1992-2002



Sources: Institut de la statistique du Québec and MAPAQ

BREAKDOWN OF EXPORT GROWTH BETWEEN 1992 AND 2002

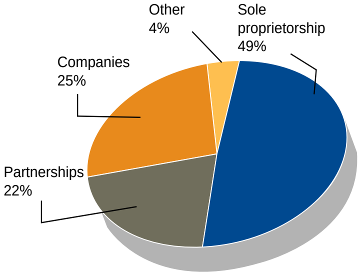


Sources: Institut de la statistique du Québec and MAPAQ

AGRICULTURE IN A NUTSHELL

- In 2002, there were over 31,600 farm operations registered with the ministère de l'Agriculture, des Pêcheries et de l'Alimentation.
- The majority of Québec farms continue to be family-run, and sole proprietorship continues to prevail, slightly ahead of corporate ownership (partnerships or companies).

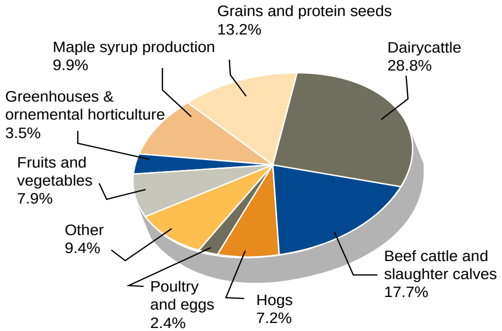
BREAKDOWN OF FARM OPERATIONS BY LEGAL STATUS



Source: Registration form for farm operations, MAPAQ

- Operations specializing in livestock production account for 62% of farms, while the remaining 38% produce crops. Half of all farm operations are highly specialized, with only a single source of income.
- The proportion of women who are full owners of their operations represents 8.7% of farms under sole proprietorship. In addition, 33% of farmers working for companies, partnerships and other corporate structures are women.
- In 2002, agriculture accounted for $2.3 billion of the gross domestic product (at basic cost in 1997 dollars), up by over 2.1% from the previous year, with agriculture representing 16.4% of the GDP of the biofood and the tobacco industries.

BREAKDOWN OF FARM OPERATIONS BY SPECIALIZATION



Source: Registration form for farm operations, MAPAQ

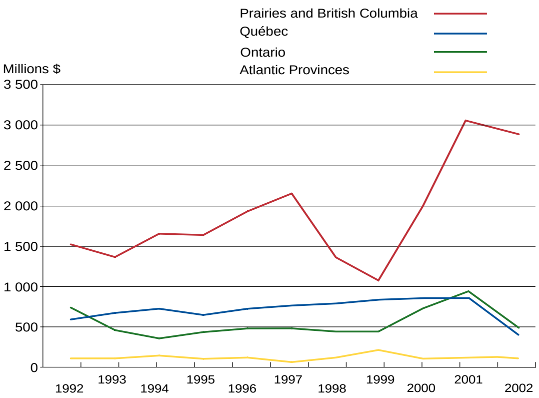
- The number of agricultural jobs is estimated to be nearly 62,350. Statistics Canada puts this figure at an average of 62,988 jobs over the past five years.
- Québec's cash receipts dropped by 3.6% to $5.5 billion in 2002. This represented 15.4% of all cash receipts in Canada, compared to 15.8% in 2001.

◗ In 2002, government program payments ($468 million), representing 13.7% of the Canadian whole, fell by 25% as the result of improved prices for a number of farm products. Government payments for Canada as a whole decreased less dramatically (8.9%) due to the worsening of growth conditions.

◗ The net operating expenditures of Québec farms totalled $4.6 billion in 2002, a 4% increase compared to the figure for the previous year. Canadian expenditures reached $28.8 billion in 2002, up 1.3% from the previous year.

◗ Québec farm operations earned $398 million in net income in 2002 (7.6% of cash receipts), down drastically from $757 million in 2001. In the rest of Canada, the decline was less sharp (27.2%), due in large part to grain and oilseed sales, notably in Saskatchewan and Alberta. Net income for Canadian farm producers was $3.8 billion.

CHANGES IN NET FARM INCOME BY PROVINCE, 1992-2002



Source: Statistics Canada

◗ According to Statistics Canada, in 2002, capital expenditures in agriculture (excluding fisheries) totalled $615.6 million, a 1.3% increase over the previous year's investments.

◗ In 2002, the value of farm capital (excluding quotas) continued to rise to reach $21 billion, up 2.5% from 2001. In the rest of Canada, this value decreased by 0.1%. Québec's farm capital accounts for 11.1% of the Canadian total, a low percentage in light of Québec's cash receipts.

◗ Farm debt continued to rise, increasing by 11.6% in 2002 to reach $9 billion. This represents 43% of Québec farm capital, compared with 23.2% for Canada overall. Québec debt accounts for 20.6% of all farm debt in Canada.

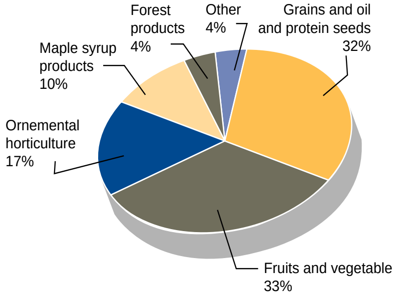
CROP PRODUCTION

- Sales from crop production increased by 13.9% in 2002 to reach $1.5 billion, which represents 30% of farm sales. The increase for Canada as a whole (4.8%) was less pronounced, where crop production reached $14.4 billion, accounting for 44% of farm sales.

- Sixty per cent of the province's grain corn and soybean hectarage, and one third of its wheat hectarage, is in the Montérégie region. Almost half of barley cropland (48%) is in the Bas-Saint-Laurent, Saguenay–Lac-Saint-Jean and Chaudière-Appalaches regions.

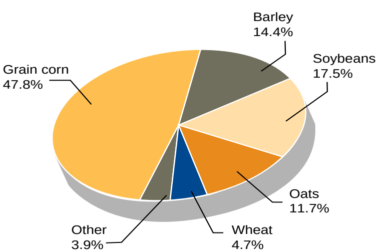
- In 2002, the highest earnings from crop production were from potatoes and ornamental horticulture, with sales totalling $747 million, or nearly 50% of all crop sales, up 6.9% from 2001. Grains and oil and protein seeds, representing 32.1% of total crop production, generated $481 million in sales, up 33.3%. Grain corn sales accounted for two thirds of overall grain and oil and protein seed sales.

RELATIVE SHARE OF CROP SALES IN 2002



Source: Statistics Canada

RELATIVE HECTARAGE OF GRAINS AND OIL AND PROTEIN SEEDS, 2002



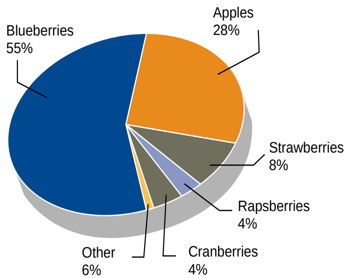
Source: Statistics Canada

- Field crop harvests in 2002 were up 5.5% over 2001 levels, with the exception of forage crops, due to heavier seeding of grain corn, oats, wheat and barley, and higher yields for grain corn, soybeans and wheat. Grain corn increased by 3.3% and wheat, oats and barley, by 22%, 18.3% and 3.4% respectively.

- In 2002, wheat and oat sales posted 45.7% and 40.2% growth respectively as a result of increased volume and better sales prices for wheat and higher prices for oats. Barley sales increased by 13.4%, mostly because of higher prices.

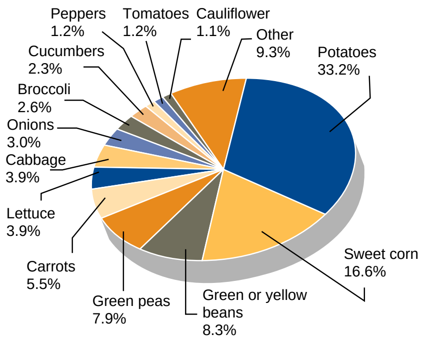
- With sales of $320 million, grain corn alone accounted for 21% of all crop sales, a 43.4% increase, due to negotiated volumes and higher prices. Total grain corn hectarage and production have gained 36.4% and 45.4% respectively since 1997.
- Vegetable sales went up 0.9% in 2002, to $284.4 million. Potatoes aside, the top vegetables were, in descending order, greenhouse tomatoes, lettuce, carrots, sweet corn, onions, broccoli, cabbage, cucumbers, peppers and green beans. Fruit sales decreased by 13.7% to $84.1 million, mostly because of blueberries, cranberries and strawberries. The top sellers, in descending order, were apples, blueberries, strawberries and cranberries.

RELATIVE HECTARAGE FOR CERTAIN FRUITS, 2002



Source: Statistics Canada

RELATIVE HECTARAGE FOR CERTAIN VEGETABLES, 2002



Source: Statistics Canada

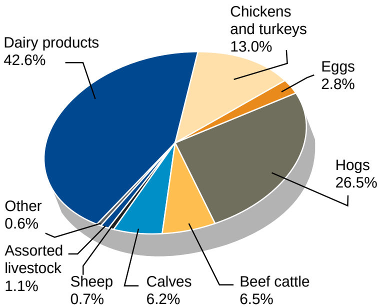
- In 2002, the value of fresh and processed fruit and vegetable exports, including potatoes, but excluding legumes such as dry peas, beans and chickpeas, reached $286 million, 5.6% more than the previous year. The top three sellers in the fresh produce category were lettuce, cabbage and carrots, with sales of $38.6 million. Blueberries (fresh and processed) were the number one fruit, raking in $32 million.
- Ornamental horticulture, flower production, tree nurseries and Christmas tree production generated sales of $255.8 million, or 17% of crop sales. Sales in this sector have increased 14% since last year.
- In 2002, Québec was responsible for 93.5% of maple syrup production in Canada as a whole, with sales reaching $144.4 million, up 10.6%. According to Statistics Canada, the value of Canadian maple sugar and maple syrup exports was $154 million in 2002, up 19.7% from 2001. Seventy seven per cent of this production is exported to the United States.
- Forest product receipts constituted 4.5% of total crop sales, while tobacco receipts weighed in at 1.2%.

LIVESTOCK PRODUCTION

- Despite a 6.8% decease in 2002, livestock production, accounting for 70.3% of all farm receipts, reached $3.5 billion in 2002, 4.3% more than the five-year average. This decrease is higher than that recorded for Canada as a whole (4.6%), where sales reached $18 billion, for 55.6% of farm receipts.

- Over half (55%) of Québec's dairy herd is in the Montérégie, Chaudière-Appalaches and Centre-du-Québec regions, and 20%, in the Estrie and the Bas-Saint-Laurent regions. Three quarters of the province's 7.4 million slaughter hogs are raised in the Montérégie, Chaudière-Appalaches and Centre-du-Québec regions.

RELATIVE SHARE OF LIVESTOCK PRODUCTION SALES IN 2002



Source: Statistics Canada

- The Chaudière-Appalaches, Outaouais and Estrie regions account for 44.4% of Québec's beef cattle production and the Centre-du-Québec, Abitibi-Témiscamingue, Montérégie, Bas-Saint-Laurent and Saguenay–Lac-Saint-Jean regions, slightly over 40%. The Bas-Saint-Laurent and the Estrie regions account for 42% of Québec's sheep herd, and the Montérégie, Centre-du-Québec and Abitibi-Témiscamingue regions, 27%.

- In 2002, the sectors subject to supply management (milk, poultry, eggs) totalled 58.7% of livestock production sales.

- Dairy production kept its number-one spot in terms of livestock production sales, with receipts of $1.5 billion in 2002, that is, 42.6% of sales in that category as a whole. Despite a 2.2% decrease in dairy product sales between 2001 and 2002, overall, milk sales gained 10.1% between 1997 and 2002, a brisker pace than that of livestock production sales in their entirety (7%). However, dairy product exports dipped by 17.1% in 2002.

- Québec milk production in 2002 was down 5.7% from 2001 domestic market levels, compared with Ontario milk production, which decreased by 0.5%. Québec continues to produce the most milk in Canada, with 36.5% of receipts and 36.2% of Canadian shipments, followed by Ontario, with 32.8% and 34.6% of Canadian receipts and shipments respectively.

LIVESTOCK INVENTORY AS AT 1 JULY 2002

Herd type	Number of head	Herd type	Number of head
Dairy cows	408 000	Piglets and feeder hogs	3 934 400
Replacement heifers, dairy	176 500	Sows and bred gilts	411 300
Beef cattle	213 500	Ewes	167 000
Replacement heifers, beef	33 000	Market lambs and breeding stock	106 000
Market steers and heifers	112 000	Laying hens	4 716 000
Calves under 1 year of age	412 000	Annual chicken and turkey production in 2002	167 058 000

Source: Statistics Canada

- In 2002, hog production sales reached $938 million, a 17% decrease from 2001 figures, due to lower market prices despite increased slaughterhouse activity. Hog production represented 26.5% of total livestock production sales.

- In 2002, the value of Québec pork exports (fresh, processed, organ meats) gained 1.5% to reach $821 million.

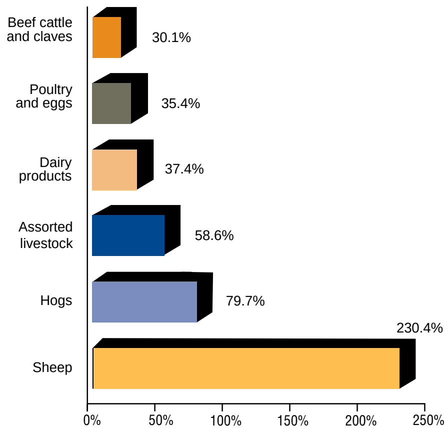
- Poultry production, which totalled $568.6 million, represented 16% of all livestock production sales in 2002. Chicken farming accounted for 71% of these sales, with the balance deriving from turkey, table egg and hatching egg sales. Between 2001 and 2002, table egg sales increased by 5.9%, while poultry sales decreased by 4.4%.

- Cattle sales, notably slaughter cattle (including culled dairy and beef cattle), dipped by by 7% to $231.5 million, accounting for 6.5% of total livestock production sales.

- Calf sales, notably of slaughter calves (milk- and grain-fed), held steady at $219 million, accounting for 6.2% of all livestock production sales.

- In 2002, despite the fact that they account for a very small proportion of livestock sales (0.64%), lamb sales enjoyed the strongest growth overall, with an increase of 11.3%.

GROWTH OF MAIN LIVESTOCK PRODUCTION SALES, 1992 TO 2002



Source: Statistics Canada

COMMERCIAL FISHERIES AND AQUACULTURE

COMMERCIAL FISHERIES, 2002
(in maritime regions)

Jobs	
Fishers and fishers' assistants	3 423p
Seasonal plant workers	4 398p
Fishing operations (no.)	1 108p
Processing operations in maritime regions (no.)	70 operators 74 plants
Landings	
Volume (000 tonnes)	60.9p
Value (millions $)	176.3p
Plant shipments in maritime regions (millions $)	296.9p
Exports registered in Québec (millions $)	221.1
Imports with duty paid in Québec (millions $)	200.6

Sources: Fisheries and Oceans Canada and MAPAQ

p: preliminary data

MAIN MARINE SPECIES
VOLUME AND VALUE OF LANDINGS, 2002p

	Volume ('000 tonnes)	Value (millions $)
Snow crab	17.8	89.2
Lobster	3.1	42.5
Shrimp	16.6	22.0
Scallop	1.2	1.5
Greenland halibut	1.1	2.4

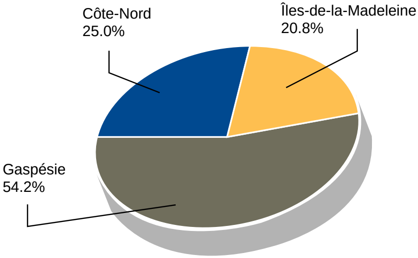
Source: Fisheries and Oceans Canada

p: preliminary data

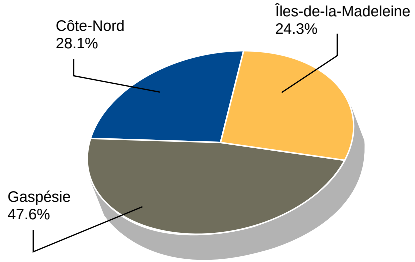
- In 2002, landings totalled 60,955 tonnes, worth $176.3 million.
- The predominance of shellfish has remained steady since the moratoriums placed on cod and redfish in 1992 and 1993 respectively. In 2002, shellfish accounted for 94% of the total value of landings, up from 69% in 1992 and 59% in 1987.
- Lobster and snow crab combined represented 75% of the total value of 2002 landings.
- Québec's maritime regions boast 70 fish processing plants and its urban areas, 62.

BREAKDOWN OF MARITIME LANDINGS BY REGION, 2002ᴾ

VOLUME



VALUE



Source: Fisheries and Oceans Canada

P: preliminary data

- In 2002, Québec exported its fishery products to 44 countries. Over 98% of sales went to three countries: the United States (75%), the European Union (15%) and Japan (7.6%).
- Freshwater aquaculture and mariculture yielded 2,154 tonnes of products in 2002. Speckled and rainbow trout continue to be the main species. Roughly 973 tonnes are used for stocking, with the rest being sold on the consumer market. The value of this production is estimated at $14.2 million.

MAIN FRESHWATER SPECIES LANDINGS, 2002ᴾ

	Tonnes
Common catfish	276
Eel	168
Lake sturgeon	104
Yellow perch	89

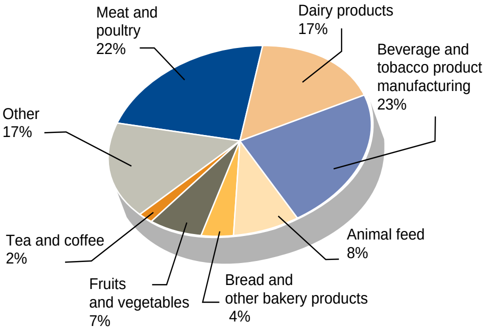
Source: MAPAQ

P: preliminary data

- 166 fishers are involved in commercial freshwater aquaculture.
- Freshwater landings in Québec, nearly 882 tonnes in 2002, worth approximately $3.2 million, are low in relation to the surface area covered by water.

FOOD PROCESSING

BREAKDOWN OF VALUE OF SHIPMENTS QUÉBEC, 2002

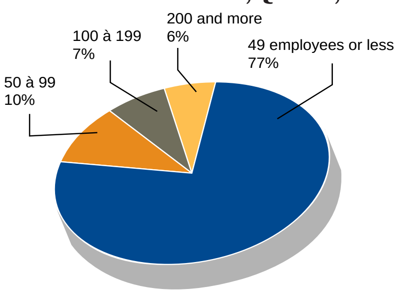


TOTAL = $17.7 billion

Source: Statistics Canada

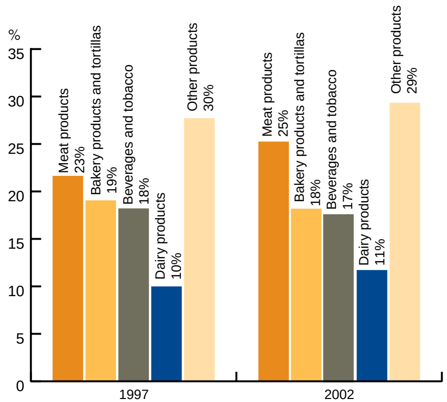
- Statistics Canada has decided to make data on the alcoholic beverage industry confidential. For this reason, our analysis is of food, beverages and tobacco.
- Food processing, often known as the food, beverage and tobacco industry, comprises approximately 1,494 industrial establishments in some 20 distinct sectors in Québec. Meat, dairy products, beverages, tobacco and animal feed are the most important; together they generate more than 70% of the industry's total shipments.
- Some of these sectors are closely connected to Québec agriculture, buying and processing the lion's share of Québec's agricultural products. Most farm cooperatives are among this group. This agri-food network primarily comprises the meat, fruits and vegetable, dairy product, and animal feed sectors, representing, on average, half of the industry's jobs.
- The other food processing sectors have very few links with agriculture in Québec since their main inputs are either imported from other provinces or countries, or are not farm products (water, marine products, etc.).
- SMBs play an important role in Québec's food processing sector. Nearly 87% of its manufacturing concerns have fewer than 100 employees and over three quarters of these have fewer than 50. Conversely, establishments employing 100 people or more account for the vast majority of the industry's jobs and shipments.
- Food processing continues to figure among Québec's largest manufacturing sectors in terms of jobs and shipments, especially since Statistics Canada is now including tobacco processing jobs within the category. With a new total of nearly 74,000 jobs in 2002, food processing outperforms chemical products, transportation equipment, paper, and electrical and electronic products.

BREAKDOWN OF ESTABLISHMENTS BY NUMBER OF EMPLOYEES, QUÉBEC, 2002



Source: Centre de recherché industrielle du Québec (CRIQ)

JOBS BY SUB-SECTOR (%)

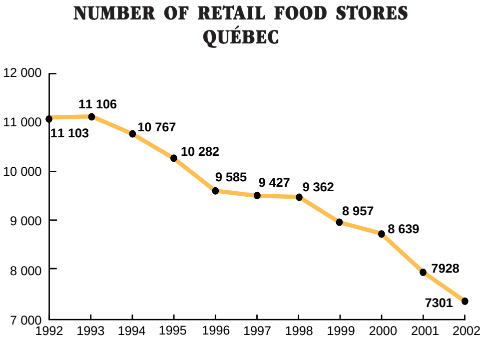


1997 TOTAL= 63 581 jobs
2002 TOTAL= 73 954 jobs

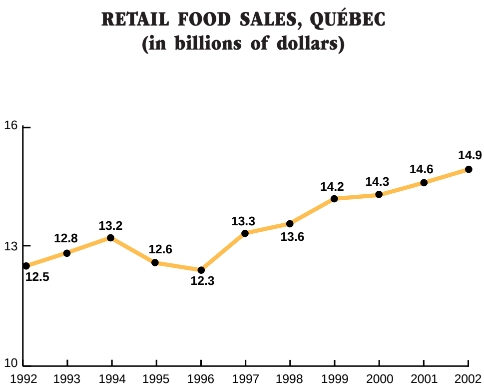
Source: Statistics Canada

- Québec food processing fares well in terms of its slice of the Canadian pie, especially where employment is concerned. Québec now has approximately 25% of Canada's food, beverage and tobacco industry jobs, versus 23% of all Canadian jobs.
- In recent years, the food and beverage industry has posted sizeable growth and has contributed to job creation in Québec. In fact, the number of jobs in the industry (including tobacco) has increased nearly 16% in the past five years, and shipments have also enjoyed substantial real growth of 10%.
- In 2002, the value of international exports of food processed in Québec reached close to $3 billion, a 4% increase over 2001 figures. In the past five years, these exports have gained 7% per year on average. International sales account for nearly 32% of the industry's shipment growth for this period. Nearly 17% of these shipments now occur in international markets, compared to 14% five years ago.
- Food processing capital expenditures, excluding tobacco and beverages, increased in 2002, with levels of nearly $27 million above the average for the past five years, to reach $338 million. For 1998-2002, the industry's average capital expenditures were $5880 per year per job.

RETAIL OUTLETS AND THE FOOD SERVICE INDUSTRY



Source: *Canadian Grocer*

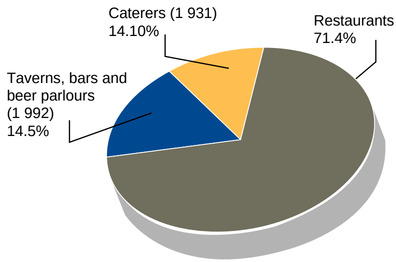


Source: Statistics Canada

- In 2002, Québec's retail food outlet sales (supermarkets and convenience stores) increased to nearly $14.9 billion, divided among 7,301 stores.
- Québec ranks second in Canada after Ontario for retail food sales, accounting for 24.1% of supermarket and retail grocer sales in 2002, compared with 31.6% for Ontario.
- Specialty stores (greengrocers, bakeries), in particular, general merchandise stores (pharmacies, warehouse clubs, discount stores, etc.), are making an increasingly big dent in the food retail market, non-grocery items included. In the early 1990s, the market share of these stores ranged from 10% to 15%. Today, the figure is 20% to 25%.
- Since 1990, supermarket and grocery store receipts have posted practically no real gains. In the past 13 years, they have increased by 27%, while the market basket price index has risen by 24.6%, meaning that, in real terms, supermarket and grocery stores sales declined in 2002. Their dollar value has grown by a mere 9.1% over the levels recorded in 1998, compared to the 10.2% increase in the market basket price index. Competition within the food store and the non-food distributor business has forced grocery stores to keep food prices as low as possible.

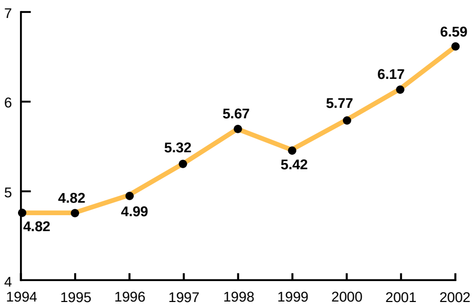
- Québec has the largest number of retail stores in Canada, that is, 30.2% of the Canadian whole. In 2002, these stores provided 108,211 people with jobs, 4.9% more than in 2001.
- In Québec, food distribution occurs primarily (64.2%) through independent retailers as opposed to chains, contrary to the situation in the rest of Canada (42.2%).
- Longer business hours in recent years and increasingly popular superstores have meant a 22% drop in the number of small retail outlets in the past five years.
- Québec's food service industry generated cash receipts of $6.6 billion in 2002, up 7.2% from 2001. This excellent performance is likely the result of the improved spending capacity of consumers. In 2002, full-service restaurants benefited the most, with receipts increasing by 10% from 2001 levels. The situation was good for all food service categories except for licensed beverage establishments, which posted losses of 6% from 2001 receipts.
- In 2002, receipts in the food service industry were divided among full-service restaurants (52.4%), unlicensed restaurants (29.3%), contracted and other caterers (9.1%) and taverns, bars and beer parlours (9.2%).
- The number of food service industry establishments increased by 1% from last year, i.e. 13,592 in 2001 and 13,696 today. This represents 24.9% of such establishments in Canada in 2002. This does not include establishments such as hotel restaurants, whose main activity is not food services.

BREAKDOWN OF FOOD SERVICE ESTABLISHMENTS, 2002



Source: Statistics Canada

CASH RECEIPTS IN QUÉBEC'S FOOD SERVICE INDUSTRY (in billions of dollars)



Source: Statistics Canada

THE BIOFOOD LABOUR FORCE

- Farm labour (full-time, part-time or seasonal) accounted for nearly 121,000 persons in 1999, 71,271 family and 49,445 hired. Men accounted for 68% of family labour and women, 32%. Also, 79% of hired labour was seasonal and women accounted for 33% thereof. Dairy and horticultural operations each accounted for 30% and 28% of the total labour force respectively, while beef cattle and grain operations weighed in at 11% and 9% respectively.

- In 1996, over 180,000 people worked in Québec's food processing and distribution industries. The profile of the food processing and wholesaling labour force is similar; 88% of workers are full time, 59% to 62% are aged 25 to 44, and approximately 30% are women. Proportionally, more women (50%), young people (36%) and part-time workers (40%) make up the labour force in the retail trade.

- According to data from MAPAQ's registration form for farm operations in 2000, 884 enterprises were unable to say who would take over the farm, 323 said they did not know whether anyone would take over the farm and 2,231 were able to say who would. Of the 2,780 people identified as future farm operators, 350 (13%) are women.

- At the Agriculture and Agri-Food Conference held in Saint-Hyacinthe in 1998, it was noted that Québec was considerably behind other regions of Canada in terms of the level of education of farm producers. In 1991, 17% of our farm producers had the required level of education, that is, at least a college diploma. In 1996, the figure was 22%. In order for Québec to be among the top three regions of Canada, the Conference decision-makers targeted the 40% mark by the year 2005.

- Of the 2,780 people slated to take over farm operations, 46% (1,285) have either a college diploma or a university degree or are working towards obtaining one; in 1995 the figure was 34% and in 1997, 38%. Specialized agricultural training for the farmers of tomorrow (DVS, DEC, ACS, BAC) continues to grow steadily: 1,438 people (52%) have either completed or are about to complete specialized agricultural training.

- As for the availability of persons with agricultural diplomas or degrees, a comparison of 2002 data with that of 1999 (see the Table below) shows that the number of graduates from specialized technical programs in agriculture (the target level for owner-operators) and in specialized vocational programs in agriculture has risen, despite the worrisome decrease in the latter between 2000 and 2002. In 2000 there were 908 such graduates, compared with 697 in 2001 and 672 in 2002, a 26% drop in two years. The same applies to unspecialized technical programs, where the decease was 16.7% for the same period.

PRODUCTION - TRENDS IN THE NUMBER OF GRADUATES FROM 1999 TO 2002

		Graduates (Relance 1999)	Graduates (Relance 2001)	Graduates (Relance 2002)	Variation (1999-2002)
Vocational education	(DVS)				
	Specialized	580	697	672	Up 15.9%
	Unspecialized	-	-	-	-
Technical education	(DEC)				
	Specialized	158	207	239	Up 51.3%
	Unspecialized	232	285	259	Up 11.6%

Source: Ministère de l'Éducation du Québec, Direction de la recherche et de l'évaluation, Relances

- In the area of food processing, the overall number of vocational and technical program graduates increased from 1999 to 2002, with the exception of those in specialized vocational programs at the college level. Nonetheless, from 2001 to 2002, there was a 9.3%, 21.7% and 13.1% decrease in the number of graduates from specialized vocational programs, specialized technical programs and unspecialized technical programs respectively.

FOOD PROCESSING - TRENDS IN THE NUMBER OF GRADUATES FROM 1999 TO 2002

Food and beverage industry (processing)		Graduates (Relance 1999)	Graduates (Relance 2001)	Graduates (Relance 2002)	Variation (1999-2002)
Vocational education	(DVS)				
	Specialized	1 817	1 703	1 545	Down 15.0%
	Unspecialized	3 428	3 690	3 851	Up 12.3%
Technical education	(DEC)				
	Specialized	30	46	36	Up 20.0%
	Unspecialized	2 942	4 085	3 548	Up 20.6%

Source: Ministère de l'Éducation du Québec, Direction de la recherche et de l'évaluation, Relances

- Despite the general increase in the number of graduates in food distribution from 1999 to 2002, in the past three years, there has been an unfortunate decrease (28.8% from 2000 to 2002) in the number of graduates in specialized vocational training, at a time when there is a pressing need for specialized manpower in the retail trade. The situation as regards management training should improve in the medium term as a result of Québec's new commercial management program, even though it is not specifically geared to the food industry.
- In wholesaling, renewal of the ageing sales representative, warehouse and transportation employee population is an ongoing concern. Clearly, the industry would benefit from having a well-trained manpower pool familiar with new management methods or new technology.

FOOD DISTRIBUTION - TRENDS IN THE NUMBER OF GRADUADES FROM 1999 TO 2002

Food distribution		Graduates (Relance 1999)	Graduates (Relance 2001)	Graduates (Relance 2002)	Variation (1999-2002)
Vocational education	(DVS)				
	Specialized	2 027	1 888	1 693	Down 16.5%
	Unspecialized	2 557	2 591	2 889	Up 13.0%
Technical education	(DEC)				
	Specialized	-	24	31	-
	Unspecialized	2 093	2 908	2 666	Up 27.4%

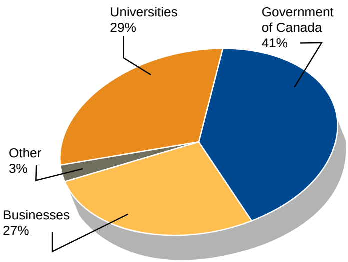
Source: Ministère de l'Éducation du Québec, Direction de la recherche et de l'évaluation, Relances

- In 2000, the 295 farm businesses subject to the *Act to foster the development of manpower training* invested 1.33% of their total payroll in training, down from the 1.45% invested in 1999. However, food processing companies (459) and food distribution companies (3,696) respectively increased their training expenditures from 1.39% and 1.22% in 1999 to 1.56% and 1.58% in 2002, at par with the other businesses subject to the Act, which spent 1.55% of their total payroll on training in 2000.

RESEARCH AND DEVELOPMENT

◗ In 2001-2002, agri-food R&D expenditures in Québec were estimated at $168 million, an increase of 11% from 2000-2001, excluding the general fund for universities, due in large part to university project funding under the programs of the Canadian Foundation for Innovation (CFI).

SHARE OF AGRI-FOOD R&D QUÉBEC, 1999-2000



Source: MAPAQ

◗ For their part, governments provided funds in the vicinity of $99 million - $73 million from the federal government and $26 million from the Québec government. For the private sector (enterprises and PNPs), the figure was $66 million. Government expenditures accounted for 59% of all agri-food R&D spending, and that of enterprises, 39%, with PNPs and individuals accounting for the remaining percentage.

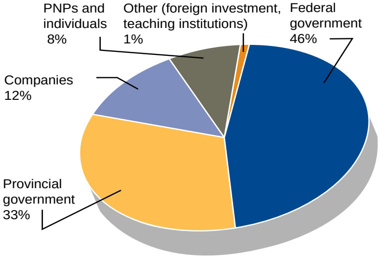
R&D IN UNIVERSITIES

◗ In 2000-2001, total agri-food R&D expenditures reached $47 million[1], including expenditures by faculties other than agriculture and veterinary medicine, for a 27% increase. This may seem considerable, but nearly 30% of the federal contribution and almost 40% of the provincial contribution are earmarked for infrastructure programs through the Canadian Foundation for Innovation (CFI) at the federal level, and Recherche Québec at the provincial level. These programs are slated to expire within a few years. Provisions will therefore have to be made for funding to maintain infrastructure but, more importantly, to train researchers and finance research activities.

[1]: Data from the ministère de l'Éducation

- In 2001-2002, university research funding was as follows:

FUNDING OF UNIVERSITY AGRI-FOOD R & D



CORPORATE R&D

- In 2001-2002, in-house spending on agri-food R&D in Québec was estimated at $49 million, an increase of nearly 14%.
- For 2001, 268 agri-food enterprises claimed a reimbursement of R&D tax credits in Québec. This breaks down to 157 farm businesses, 88% of which are SMBs, and 111 processing firms, 70% of which are SMBs. Tax credit refunds reached $10.5 million, or 2.3% of the credits for the entire Québec economy.

THE QUÉBEC GOVERNMENT'S SHARE

- In 2001-2002, funding of agri-food R&D by the Québec government was estimated at $26 million (up 8%). MAPAQ no longer conducts in-house research as such. Instead it has worked with its partners to establish research companies to do its research, to which it contributes $10 million in basic funding.

ENVIRONMENTALLY SUSTAINABLE AGRICULTURE[1]

OBJECTIVE

- A task force comprising partners in the Québec agriculture and agri-food industry prepared an agri-environmental action plan focusing on environmental sustainability issues. The general objective of the plan is as follows:

  > "By 2005, some 20,000 farms, representing nearly 90% of all agricultural activity in Québec, will have begun adopting environmentally responsible farming practices in the areas of manure storage and spreading, fertilizer management, soil conservation, agricultural stream protection and pesticide use."

- To achieve this objective, the task force identified the production of a status report and assistance in implementing environmentally responsible farming practices as priority actions.

STATUS REPORT

- To ensure optimal resource management, a first agri-environmental portrait of farms was produced in 1998-1999. The data will be updated in 2003-2004 in order to follow-up on the initial situation and to gauge the progress made in adopting environmentally responsible farming practices.

MANURE MANAGEMENT

MANURE STORAGE

- Manure storage entails substantial on-farm investments for the construction, expansion, modification and repair of storage facilities.

MANURE STORAGE FACILITY INVESTMENTS,1999-2003

	Number of projects	Private and public investments ($ million)	Useful volume (000 m^3)
1999-2000	1 082	63	1 700
2000-2001	1 222	80	1 788
2000-2001	1 110	77	1 652
2002-2003	1 236	87	1 669

Source: MAPAQ

[1] : April 2002 to March 2003 government fiscal year

MANURE SPREADING

◗ Manure spreading and the resulting odours have become a concern to citizens and a matter of "good neighbourliness." Under section 32 of the new *Agricultural Operations Regulation*, livestock waste from liquid manure management must be spread with low-ramp equipment as of April 1, 2005, for pig manure and as of April 1, 2007, for other types of manure.

VOLUME OF ADDITIONAL LIQUID MANURE SPREAD USING LOW-RAMP EQUIPMENT

Year	Ramps funded	Additional volume spread annually m^3
1999-2000	66	229 000
2000-2001	78	308 000
2001-2002	78	310 000
2002-2003	70	323 000

*Contracting not included

Source: Prime-Vert Program, MAPAQ, March 2003

MANURE MANAGEMENT GROUPS

◗ Three manure management groups received financial support to ensure that management practices balance agronomic, economic and environmental imperatives.

MANURE MANAGEMENT GROUPS, 2002-2003

Name	Territory (river basin)	Number of member operations	Number of contacts
Cogenor-Lanaudière	L'Assomption	169	8
Fertior	Chaudière	631	24
Ageo	Yamaska	316	10

Source: MAPAQ, as at 31 March 2003

FERTILIZER MANAGEMENT

◗ Under the *Agricultural Operations Regulation*, most farm operations must have an agri-environmental fertilization plan, which optimizes the use of organic fertilizers (manure and compost) and synthetic manure (fertilizer) while reducing environmental risk. This fertilization plan is management by local agronomists (agri-environmental club professionals), private consultants, input suppliers, MAPAQ advisers, and the producers themselves. In 2002-2003, over 7,000 such plans were produced.

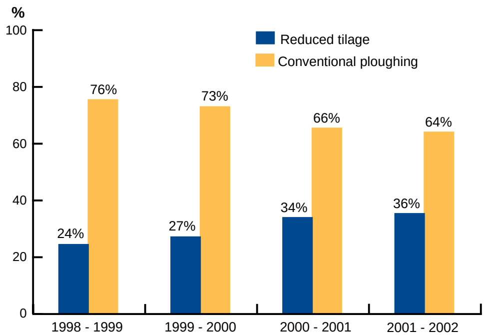
PRODUCER AWARENESS OF ENVIRONMENTALLY SOUND AGRICULTURE

- Agri-environmental clubs, which are gaining ground daily, were formed to empower and make agricultural producers accountable in matters of the environment and to encourage them to farm sustainably (soil conservation, watercourse protection, and pesticide optimization). As at 31 March 2003, there were 79 clubs with 5,910 members, a 19% increase over 2002 numbers.

SOIL CONSERVATION AND WATERCOURSE PROTECTION

- There is growing interest in reduced or zero tillage as a means of conserving soil and water resources. Data from agri-environmental club members show that more than 111,000 hectares of grain corn, grain and soybeans, 36% of all tilled farmland, were seeded this way. Since 1998, reduced tillage hectarage has increased from 24% to 36%.

PROPORTION OF TOTAL HECTARAGE UNDER REDUCED TILLAGE



Source: Compilation of agri-environmental club members' results, September 2002

PHYTOSANITARY STRATEGY

- In 1992, a phytosanitary strategy (available on the Internet at http://www.agr.gouv.qc) was adopted by the agriculture sector. Sustained efforts on this front in 2002-2003 made it possible to transfer technology aimed at reducing pesticide use and increasing the hectarage under integrated pest management.

- The official figures for pesticide sales in Québec for 1998 and 1999 (available at www.menv.gouv.qc.ca), measured in kg of active ingredient, show an 11.5% and a 7.1% decrease from 1992 levels for the farming sector. In 1998, pesticide sales were at a record low since introduction of the phytosanitary strategy in 1992. This 1998 decrease was due to a huge reduction in the quantity of herbicides used for grain, corn, and soybeans. This trend continued in 1999, but more feebly than in 1998. Higher sales in 1999 were the result of brisker sales in fungicides (about 29%) due to adverse growing conditions for several crops.

- The degree to which agricultural environments are under pressure from pesticides is more accurately measured with a pesticide use indicator, or stress index. This indicator fell by 13.5% in 1998 and by 11.8% in 1999.

PESTICIDE, HERBICIDE AND FUNGICIDE SALES AND STRESS INDEX

	1992	1993	1994	1995	1996	1997	1998	1999
Total pesticide sales (000 kg of AI)	2 886.2	2 878.3	2 626.9	2 638.5	2 796.1	2 732.5	2553.4	2682.7
Total herbicide sales (000 kg of AI)	1 734	1 833	1 521	1 654	1 840	1 827	1 678	1 578
Total fungicide sales (000 kg of AI)	487	482	469	352	364	402	410	575
Hectarage under crops, excluding forage(000 ha)	792.6	762.2	758.1	763.7	821.7	848.2	810.0	834.6
Stress index (kg of AI/ha)	3.64	3.78	3.47	3.45	3.40	3.22	3.15	3.21

Source: Last pesticide sale report – 1998 and 1999, ministère de l'Environnement

- For herbicides, the pesticide use indicator (kg AI /ha) for the crops targeted by the phytosanitary strategy (grain, corn, soybeans, apples and potatoes) points to a 9.0% decrease in 1998 from the 1997 level and a 30.8% drop in 1999, when it went from 2.11 to 1.46.

- Members of agri-environmental clubs are using integrated pest management for more and more of their grain-corn-soybean-potato hectarage, the proportion of which jumped from 3% in 1998 to 39% in 2001.

- The strategy also relies on pest scouting networks and bulletins (RAP). RAP (with 8,668 subscribers), 27 technical support clubs (with over 625 member operations and over 12,000 hectares scouted), and 79 agri-environmental clubs (with 5,910 enterprise members) contribute to the adoption of new pest control practices and sound pesticide use.

THE WORLD AT A GLANCE

The figure for world production of goods and services is over $US34,000 billion. The United States and Japan alone are responsible for roughly 43% of this production, over 26% of which is generated by the United States. The European Union (EU) accounts for approximately 24%, while Canada and China contribute 2% and 3% of the world's GDP respectively.

WORLD ECONOMIC GROWTH

- Real world economic growth in 2001 was up 1.1% over 2000 figures. A stagnant American economy (0.3% growth), the situation in Japan (a 0.6% decrease) and the European Union's halting growth (1.4%) largely explains the weak performance of the world economy.
- In 2001, Canada also had relatively modest economic growth, with a mere 1.5% increase in GDP. Québec, with real economic growth of 1.2% in 2001, is in step with world trends.
- China is one of the countries that has made the greatest economic strides in the past few years. In 2001, its real GDP grew by 7.3% compared with the figure for 2000. On the other hand, Mexico had a tougher year in 2001, with a 0.3% decrease in GDP.

REAL GDP GROWTH* IN VARIOUS COUNTRIES
ANNUAL RATE OF GROWTH (%)

	1998	1999	2000	2001
World	2.2	2.9	3.9	1.1
Canada	4.1	5.5	4.6	1.5
United States	4.3	4.1	4.2	0.3
Mexico	5.0	3.6	6.6	-0.3
France	3.4	3.2	3.8	1.8
United Kingdom	3.0	2.1	3.0	2.2
Italy	1.8	1.6	2.9	1.8
China	7.8	7.1	8.0	7.3
Japan	-1.1	0.7	2.4	-0.6
*Québec ***	*3.2*	*5.6*	*5.0*	*1.2*

* in 1995 US$ ** in 1997 CAN$

Sources: World Bank, USDA (Agricultural Outlook), Statistics Canada

CONTRIBUTION OF AGRICULTURE TO THE ECONOMY

- Agriculture is responsible for over 4% of world production, that is, close to US$1400 billion, 12% of which was generated by China. The United States and Japan account for 11% and 6% of this production respectively. The European Union contributes over 14% and Canada, slightly more than 1%, of the world's farm production.
- Even if its economic structure changed radically in the 1990s, China is still heavily agricultural, with 63% of its population in rural regions and nearly 17% of its GDP from farm production. Mexico's farm production is equivalent to 5% of its GDP. Canada, France and Italy have similar industrial structures, in other words, farm production of roughly 3% of their GDP and industrial production of approximately 30% of their GDP. The United States is heavily service-based, with approximately 77% of its GDP in this sector.

- For its part, Québec has an economic structure like that of a number of major industrialized states, especially that of the United Kingdom.

GDP CONTRIBUTION BY SECTOR

	Agriculture (1)		Industry(2)		Services(3)	
	1990	2000	1990	2000	1990	2000
	(%)	(%)	(%)	(%)	(%)	(%)
World	2.9	4.3	32.2	31.0	64.9	64.6
Canada	3.2	2.6	32.0	31.8	64.7	65.5
United States*	1.9	1.4	24.1	21.5	74.0	77.1
Mexico	5.5	4.6	28.8	30.2	65.6	65.2
France	3.4	3.3	27.8	26.7	68.8	70.0
United Kingdom	2.1	1.6	33.4	29.6	64.0	68.8
Italy	3.2	3.3	32.0	30.6	64.8	66.1
China	28.9	16.5	38.0	52.8	33.1	30.7
Japan	2.5	1.6	37.8	33.3	59.6	65.1
*Québec***	*2.1*	*1.9*	*25.7*	*29.1*	*72.3*	*69.0*

(1): Includes agriculture, fisheries, trapping and forestry. (2): Includes mines, manufacturing, construction, electricity, water and gas. (3): Includes wholesaling, retailing, transportation, finance and insurance, personal and professional services, and the government.

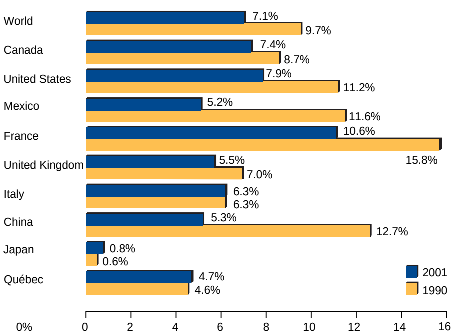
Sources: World Bank (*), USDA (*Agricultural Outlook*) (**), Institut de la statistique du Québec

CONTRIBUTION OF BIOFOOD TO EXPORTS

From 1990 to 2001, the world export of merchandise progressed by close to US$3000 billion. World food exports increased by only $100 billion in the same period. This means that international trade has, to a great extent, developed around goods other than food. Now food exports account for about 7.1% of all world exports, compared to 9.7% in 1990.

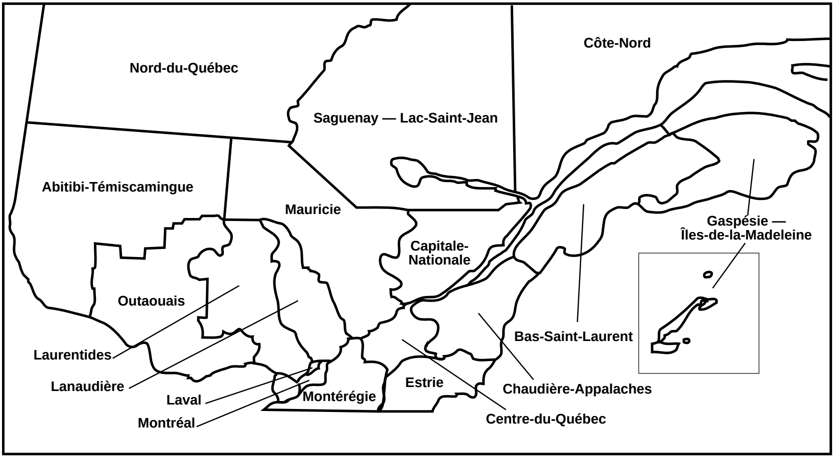
Food exports in Canada, the United States, the United Kingdom, Italy and China represent between 5% and 8% of their exports as a whole. France is slightly different in that 10.6% of its overall exports are food products. Québec's food exports account for roughly 4.7% of its total exports. Japan, on the other hand, is unique in that its food exports represent less than 1% of its exports as a whole.

SHARE OF FOOD EXPORTS IN EXPORTS AS A WHOLE



Sources: World Bank, Institut de la statistique du Québec et MAPAQ

LIST OF QUÉBEC'S ADMINISTRATIVE REGIONS



01. Bas-Saint-Laurent
02. Saguenay — Lac-Saint-Jean
03. Capitale-Nationale
04. Mauricie
05. Estrie
06. Montréal
07. Outaouais
08. Abitibi-Témiscamingue
09. Côte-Nord
10. Nord-du-Québec
11. Gaspésie — Îles-de-la-Madeleine
12. Chaudière-Appalaches
13. Laval
14. Lanaudière
15. Laurentides
16. Montérégie
17. Centre-du-Québec

FOR FURTHER INFORMATION

For further information on the food industry or government programs, visit MAPAQ's Web site at:
http://www.agr.gouv.qc.ca
or contact:

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Fax : (514) 873-2364

OTHER PUBLICATIONS

Other publications on the statistics contained in this document and how to interpret them are also available (in French only).

* Bilan de l'activité bioalimentaire au Québec. Édition 2002.
Bioclips (faxed or e-mailed weekly).
Bioclips + (thematic periodical).
* Profil sectoriel de l'industrie bioalimentaire. Édition 2003
Bottin statistique de l'alimentation Édition 2002
Description géographique du Québec. Édition 2000.
La transformation alimentaire québécoise en chiffres. Édition 2003.
* Profil des exploitations agricoles - Édition 2000
Profil régional de l'industrie bioalimentaire du Québec - Estimations pour 2000.
* To order these publications, contact Distributions Univers by phone at (418) 831-7474 or 1-800-859-7474, or by fax at (418) 831-4021.

The others publications can be downloaded from MAPAQ's Web site at http://www.agr.gouv.qc.ca/publications/publi.htm or contact the Direction des études économiques et d'appui aux filières by phone at (418) 380-2101, extension 3229, or by fax at (418) 380-2164.

NOTES

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