

Alberta Food and Beverage Manufacturing Industries in 2008.....

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# Alberta Food and Beverage Manufacturing Industries in 2008

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## Food and Beverage Manufacturing Sales

In 2008, the value of all goods manufactured in Alberta totalled \$70.1 billion, an increase of 8.4 per cent over 2007 (\$64.7 billion). The province's food and beverage processing industries generated \$11.7 billion in sales, representing the third largest manufacturing sector after petroleum and coal products industries at 24.3 per cent and chemicals industries at 18.9 per cent. On a national basis, three provinces accounted for just over 78.0 per cent of Canadian food and beverage sales of \$87.6 billion: Ontario (40.6 per cent), Quebec (24.3 per cent) and Alberta (13.3 per cent). Alberta remains the top producer of red meat products in Canada at \$4.4 billion or 43.2 per cent of the national total (\$10.1 billion).

In 2008, Canadian manufacturing firms generated \$604.7 billion in goods produced, a moderate increase of 1.1 per cent over 2007. Although manufacturing activity trended higher in recent years, annual increases since 2005 have remained below 2.0 per cent. At \$97.3 billion, transportation equipment industries (includes aerospace and automotive manufacturing), comprised the largest manufacturing sector (16.1 per cent). Food and beverage processing industries ranked second largest at 14.5 per cent. Following a 3.1 per cent gain in 2007, processing sales grew 9.2 per cent in 2008, reaching another record high of \$87.6 billion.

### The 2008 Economy – Food and Beverage Industries and the Consumer

With the onset of a global recession in late 2008, Canadian food and beverage manufacturing industries experienced many of the same challenges as the broader economy. The recession has resulted in rising unemployment, fluctuating commodity prices, declines in international trade, lower real gross domestic product, depressed capital investment levels and decreased domestic demand. Currency exchange rates, energy prices and supply/ingredient prices were even more volatile throughout 2008 than during the previous year. As a consequence, food manufacturers have passed on many increases in their selling prices to consumers. Faced with an uncertain outlook for the future, consumers have cut back on luxury expenses and nonessential purchases in favor of less expensive alternatives. These changing consumer buying habits have translated into shifts in demand for certain products. For example, consumers have begun to spend less at restaurants, choosing to eat meals at home instead. When consumers do dine out, they are more likely to purchase cheaper alternatives such as fast food. On the retail side, supermarket profits are being squeezed as consumers are purchasing less expensive brands and are shopping for bargains. To some degree, this trend is being partially offset with an increased emphasis on healthier alternatives such as natural, organic and ethical foods. Pricier health food products are expanding from niche markets into more mainstream diets.

### Per Capita Food Consumption (based on data that has been adjusted for retail, household, cooking and plate loss).

During the last decade (1999-2008), the Canadian diet has changed to increased consumption of:

- fruits (up 9.1 per cent)
- alcoholic beverages particularly wine (up 3.6 per cent)
- coffee (up 3.5 per cent) and tea (up 37.3 per cent)
- cheeses (up 3.7 per cent)
- poultry (up 12.7 per cent)
- mutton and lamb (up 32.4 per cent)
- rice (up 63.7 per cent)
- breakfast food (up 8.8 per cent)
- pulses and nuts (up 13.2 per cent).

In contrast, per capita consumption of several food items were lower, notably for:

- vegetables (down 7.4 per cent)
- soft drinks (down 26.1 per cent)
- fluid milk (down 6.6 per cent)
- eggs (down 4.6 per cent)
- beef (down 10.0 per cent)
- pork (down 21.9 per cent)
- fats and oils (down 14.6 per cent)
- fish (down 3.7 per cent).

Alberta's food and beverage production activity continues to be dominated by meat product processing (livestock and poultry slaughtering, processing and rendering). This sector generated 48.1 per cent (\$5.6 billion) of food and beverage sales in 2008 (\$11.7 billion). Grain and oilseed milling accounted for 14.8 per cent (\$1.7 billion), animal food including feed manufacturing for 5.1 per cent (\$599.7 million), beverage manufacturing for 6.6 per cent (\$776.8 million) and other food (including snack foods) for 5.3 per cent (\$619.0 million). The remaining 20.1 per cent (\$2.3 billion) was distributed among miscellaneous food manufacturing (dairy products, bakeries and tortilla manufacturing, sugar and confectionery products, fruit and vegetable preserving, seafood products and specialty foods).

Following two consecutive increases, Alberta food and beverage sales rose 17.7 per cent in 2008 to a record \$11.7 billion. This gain was the largest reported since 2000 (15.2 per cent). While sales for food industries were up 20.8 per cent, beverage sales dropped 13.5 per cent, the largest decline in the last decade. Breweries, wineries and distilleries recorded a 10.9 per cent decline and manufacturing of soft drinks fell even more by 16.3 per cent. The improvement in food industries was led by a 54.7 per cent increase in grain and oilseed milling which hit a record \$1.7 billion. This was the second consecutive year of double-digit growth (25.0 per cent in 2007). The majority of growth in milling was attributable to price increases (particularly in the first part of 2008) and the remainder to volume. The province's largest processing sector of meat products (including poultry), reported its best performance in nine years posting an increase of 13.3 per cent to total \$5.6 billion. After decreases in 2006 and 2007, red meat processing sales recovered in 2008 with a gain of 15.8 per cent to total \$4.4 billion. Poultry processing and rendering sales (\$1.3 billion) grew at a slower pace of 5.3 per cent. Other food sectors experienced improved sales in 2008 including animal food including feed manufacturing (3.2 per cent) and other food manufacturing including snack foods (8.4 per cent).

### **Employment in Food and Beverage Manufacturing Industries**

During the last decade (1999-2008), the number of Canadians employed in food and beverage processing industries peaked in 2004 at 306,700. Two successive decreases in 2005 and 2006 were reported totalling a loss of 20,800 jobs. However, in 2007 and 2008, employment improved with gains of 5,500 and 5,100, respectively. The 2008 total of 296,500 employees were mostly concentrated in Ontario at 116,500 (39.3 per cent), followed by Quebec at 76,000 (25.6 per cent), British Columbia at 30,700 (10.4 per cent) and Alberta at 24,500 (8.3 per cent).

Alberta food and beverage processing industries remain the province's largest manufacturing sector. In 2008, 24,500 Albertans were employed in these industries, accounting for 17.0 per cent of provincial manufacturing workers (144,100). During recent years, employment has moved lower from a record 28,000 in 2002 to 24,500 by 2008.

Representing 44.0 per cent of total food manufacturing employees in 2008, meat products industries continue to dominate the food sector. Employment in these industries peaked in 2002 at 13,600. However, during successive years, levels have trended downwards. The most significant job loss occurred in 2007 at 26.3 percent (or 3,500 jobs lost). A further decline of 3.1 per cent was reported in 2008 to total 9,500, the lowest level since 2001. While Alberta's meat processing sector experienced lower employment levels, job gains were recorded in all other food industries. Representing 12,100 Albertans in 2008, employment for all other food industries increased 10.0 per cent, the third consecutive annual increase.

### **Exports of Food and Beverage Products (Including Feed)**

Following three consecutive years of annual declines, Alberta's level of exported food and beverage products (including animal feeds) jumped 23.8 per cent in 2008 to \$2.7 billion. Exports of these products accounted for 33.2 per cent of total 2008 agri-food exports (\$8.1 billion). This was lower than the proportion of 43.4 per cent recorded ten years ago. Much of the gain in 2008 was due to increased exports of beef and veal, the province's largest food export commodity (43.7 per cent of total food exports). Beef and veal exports dropped to \$887.1 million in 2007, the lowest level since 1997. However in 2008, exports recovered with a gain of 20.4 per cent to total \$1.1 billion.

### **Average Weekly Earnings for Food Manufacturing Industries**

In 2008, Albertans continued to experience the highest average weekly earnings (including overtime) in Canada. Alberta wages averaged \$923.41, an increase of 6.0 per cent over 2007 (\$871.27). Ontario ranked second highest at \$837.47 (up 2.2 per cent) followed by British Columbia at \$790.97 (up 2.7 per cent). On a national basis, earnings rose 2.8 per cent to \$810.45.

Albertans working in the manufacturing sector earned an average of \$1,065.87 per week in 2008, 5.8 per cent higher than a year ago. At \$798.10, wages for food manufacturing employees were the second highest in Canada after Ontario at \$812.43. The majority of provinces reported lower average food wages in 2008. Alberta posted a decline of 4.3 per cent following an increase of 7.3 per cent in 2007. Food wages at the Canada level (\$764.14) dropped 4.0 per cent.

Table 20: Alberta Food and Beverage Industries, Selected Activity Indicators, 1999-2008

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008p
<b>Average Household Food Expenditure Per Year (Dollars)</b>										
Total Household Expenditure.....	57,130	60,670	63,903	65,371	65,704	69,817	74,196	85,236	85,912	-
Food Expenditure.....	6,137	6,293	6,522	6,559	6,588	6,939	7,252	7,449	7,491	-
% of Total Household Expenditure.....	10.7	10.4	10.2	10.0	10.0	9.9	9.8	8.7	8.7	-
<b>Average Weekly Earnings (Dollars)</b>										
Industrial Aggregate (All Industries).....	644.07	663.09	676.10	693.40	717.30	741.10	784.15	823.48	871.27	923.41
% Change From Previous Year.....	1.4	3.0	2.0	2.6	3.4	3.3	5.8	5.0	5.8	6.0
Food Manufacturing Industries.....	633.30	653.20	661.22	661.21	707.60	711.99	779.80	777.87	834.29	798.10
% Change From Previous Year.....	4.5	3.1	1.2	0.0	7.0	0.6	9.5	-0.2	7.3	-4.3
<b>Manufacturing Sales (\$ Millions)</b>										
All Manufacturing Industries.....	34,822.8	44,456.4	45,628.8	45,511.3	47,029.5	53,630.4	61,386.1	63,803.3	64,711.5	70,134.1
% Change From Previous Year.....	6.0	27.7	2.6	-0.3	3.3	14.0	14.5	3.9	1.4	8.4
Food and Beverage Mfg. Industries.....	7,877.2	9,070.8	9,293.7	9,814.0	9,517.7	9,927.6	9,424.0	9,667.4	9,930.8	11,690.3
% Change From Previous Year.....	6.8	15.2	2.5	5.6	-3.0	4.3	-5.1	2.6	2.7	17.7
% Share of All Manufacturing.....	22.6	20.4	20.4	21.6	20.2	18.5	15.4	15.2	15.3	16.7
<b>Employed Labour Force (Number of Persons)</b>										
All Manufacturing Industries.....	133,500	137,800	138,900	146,200	146,100	144,300	130,900	137,500	142,900	144,100
% Change From Previous Year.....	6.0	3.2	0.8	5.3	-0.1	-1.2	-9.3	5.0	3.9	0.8
Food and Beverage Mfg. Industries.....	18,200	19,000	21,900	28,000	25,100	26,100	22,300	27,000	23,300	24,500
% Change From Previous Year.....	-10.8	4.4	15.3	27.9	-10.4	4.0	-14.6	21.1	-13.7	5.2
% Share of All Manufacturing.....	13.6	13.8	15.8	19.2	17.2	18.1	17.0	19.6	16.3	17.0
<b>Gross Domestic Product (GDP) in Chained (2002) Dollars (\$ Millions)</b>										
All Industries.....	130,697.5	139,171.5	141,905.0	144,266.2	148,953.0	157,088.1	164,545.3	174,079.8	179,064.1	178,711.3
% Change From Previous Year.....	2.1	6.5	2.0	1.7	3.2	5.5	4.7	5.8	2.9	-0.2
Manufacturing Industries.....	11,654.2	13,684.3	12,963.6	12,616.0	12,387.5	14,077.9	15,317.6	16,372.1	16,832.0	16,472.0
% Change From Previous Year.....	-1.3	17.4	-5.3	-2.7	-1.8	13.6	8.8	6.9	2.8	-2.1
Food Manufacturing Industries (1).....	1,400.3	1,802.4	1,739.7	1,587.3	1,508.7	1,705.1	1,788.8	1,839.9	1,930.7	2,016.2
% Change From Previous Year.....	3.6	28.7	-3.5	-8.8	-5.0	13.0	4.9	2.9	4.9	4.4
% Share of Manufacturing Industries.....	12.0	13.2	13.4	12.6	12.2	12.1	11.7	11.2	11.5	12.2
<b>Capital Investment Expenditures (\$ Millions)</b>										
All Manufacturing Industries.....	2,482.5	2,713.8	1,843.2	1,573.2	1,567.3	1,745.5	2,467.4	2,566.0	2,917.0	3,098.9
% Change From Previous Year.....	0.2	9.3	-32.1	-14.6	-0.4	11.4	41.4	4.0	13.7	6.2
Food and Beverage Mfg. Industries.....	189.1	209.0	140.8	115.9	166.8	174.0	191.3	173.4	145.2	146.5
% Change From Previous Year.....	-16.6	10.5	-32.6	-17.7	43.9	4.3	9.9	-9.4	-16.3	0.9
% Share of All Manufacturing.....	7.6	7.7	7.6	7.4	10.6	10.0	7.8	6.8	5.0	4.7
<b>International Exports (\$ Millions)</b>										
Total Agri-Food Exports.....	4,545.2	5,299.6	5,987.0	5,201.8	4,087.4	5,251.5	5,336.3	5,813.6	6,484.8	8,146.7
% Change From Previous Year.....	-4.1	16.6	13.0	-13.1	-21.4	28.5	1.6	8.9	11.5	25.6
Food and Beverage Products .....	1,830.3	2,243.6	2,693.4	2,571.6	2,034.1	2,627.9	2,574.5	2,161.0	2,036.1	2,504.4
% Change From Previous Year.....	20.0	22.6	20.0	-4.5	-20.9	29.2	-2.0	-16.1	-5.8	23.0
% Share of Agri-Food Exports.....	40.3	42.3	45.0	49.4	49.8	50.0	48.2	37.2	31.4	30.7
Animal Feeds.....	143.7	160.7	182.7	137.2	173.6	206.0	160.9	141.2	146.5	197.3
% Change From Previous Year.....	1.9	11.8	13.7	-24.9	26.5	18.7	-21.9	-12.2	3.8	34.7
% Share of Agri-Food Exports.....	3.2	3.0	3.1	2.6	4.2	3.9	3.0	2.4	2.3	2.4

(1) Data for beverage manufacturing industries are not available for recent years due to confidentiality.

Source: Statistics Canada; and Alberta Agriculture and Rural Development, Statistics and Data Development Branch

Table 21: Employed Labour Force in Alberta Food and Beverage Industries (1),  
1999-2008

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008p
	'000 of Persons									
<b>All Industries.....</b>	<b>1,544.0</b>	<b>1,584.0</b>	<b>1,630.9</b>	<b>1,670.8</b>	<b>1,716.7</b>	<b>1,757.5</b>	<b>1,784.4</b>	<b>1,870.7</b>	<b>1,959.4</b>	<b>2,013.3</b>
<b>Manufacturing Industries.....</b>	<b>133.5</b>	<b>137.8</b>	<b>138.9</b>	<b>146.2</b>	<b>146.1</b>	<b>144.3</b>	<b>130.9</b>	<b>137.5</b>	<b>142.9</b>	<b>144.1</b>
<b>Food and Beverage Industries.....</b>	<b>18.6</b>	<b>19.0</b>	<b>21.9</b>	<b>28.0</b>	<b>25.1</b>	<b>26.1</b>	<b>22.3</b>	<b>27.0</b>	<b>23.3</b>	<b>24.5</b>
% Share of All Manufacturing.....	13.9	13.8	15.8	19.2	17.2	18.1	17.0	19.6	16.3	17.0
<b>Food Industries (2).....</b>	<b>16.2</b>	<b>16.1</b>	<b>20.4</b>	<b>25.0</b>	<b>23.2</b>	<b>23.7</b>	<b>20.0</b>	<b>24.1</b>	<b>20.8</b>	<b>21.6</b>
Meat Products Manufacturing.....	5.2	5.2	8.7	13.6	12.4	11.0	11.4	13.3	9.8	9.5
% Share of Food Industries.....	32.1	32.3	42.6	54.4	53.4	46.4	57.0	55.2	47.1	44.0
Other Food Manufacturing.....	11.0	10.9	11.7	11.4	10.8	12.7	8.6	10.8	11.0	12.1
Dairy Products Manufacturing.....	1.8	2.1	1.8	2.1	x	x	x	x	2.4	x
Bakeries and Tortilla Manufacturing.....	3.3	3.6	2.2	1.8	3.3	5.0	2.8	4.5	3.7	3.4
All Other Food Manufacturing.....	5.9	5.2	7.7	7.5	x	x	x	x	4.9	x
<b>Beverage Industries.....</b>	<b>2.1</b>	<b>2.8</b>	<b>1.5</b>	<b>3.1</b>	<b>1.8</b>	<b>2.4</b>	<b>2.3</b>	<b>2.9</b>	<b>2.5</b>	<b>2.9</b>
<b>Food and Beverages Stores.....</b>	<b>44.8</b>	<b>45.3</b>	<b>46.9</b>	<b>43.5</b>	<b>49.7</b>	<b>55.3</b>	<b>55.6</b>	<b>51.0</b>	<b>52.3</b>	<b>56.8</b>
<b>Food Services and Drinking Places.....</b>	<b>80.2</b>	<b>84.5</b>	<b>82.0</b>	<b>91.4</b>	<b>95.6</b>	<b>100.1</b>	<b>85.3</b>	<b>88.5</b>	<b>89.6</b>	<b>86.6</b>

(1) Annual averages for employed labour force refers to persons 15 years of age and over who (a) did any work during the reference period, or (b) had a job but were not at work due to illness or disability; personal or family responsibilities; bad weather; labour disputes; vacation; or other reasons not specified. Work includes any work for pay or profit. It also includes unpaid family work which contributes directly to the operation of a farm, business or professional practice owned or operated by a related member of the household.

(2) Data shown for food sub-categories should be used with caution due to high sampling variability.

Source: Statistics Canada "Labour Force Survey"

Table 22: Alberta Average Weekly Earnings for Food Related Industries (1),  
1999-2008

	1999	2000	2001r	2002r	2003r	2004r	2005r	2006r	2007r	2008p
	Dollars									
<b>Industrial Aggregate (2).....</b>	<b>644.07</b>	<b>663.09</b>	<b>676.10</b>	<b>693.40</b>	<b>717.30</b>	<b>741.10</b>	<b>784.15</b>	<b>823.48</b>	<b>871.27</b>	<b>923.41</b>
<b>Manufacturing Industries.....</b>	<b>760.33</b>	<b>783.61</b>	<b>803.80</b>	<b>823.75</b>	<b>847.19</b>	<b>878.47</b>	<b>937.83</b>	<b>967.94</b>	<b>1,007.05</b>	<b>1,065.87</b>
<b>Food Manufacturing Industries.....</b>	<b>633.30</b>	<b>653.20</b>	<b>661.22</b>	<b>661.21</b>	<b>707.60</b>	<b>711.99</b>	<b>779.80</b>	<b>777.87</b>	<b>834.29</b>	<b>798.10</b>
Grain and Oilseed Milling.....	901.89	933.47	911.61	862.97	941.57	1,038.48	1,146.93	1,105.87	1,393.27	-
Meat Product Manufacturing.....	646.20	679.04	686.07	671.39	722.07	726.56	781.99	766.88	822.92	787.36
<b>Retail Trade Industries.....</b>	<b>434.64</b>	<b>439.17</b>	<b>437.13</b>	<b>428.31</b>	<b>434.13</b>	<b>446.30</b>	<b>470.98</b>	<b>489.87</b>	<b>500.72</b>	<b>518.45</b>
Food and Beverage Stores (3).....	386.12	374.31	375.75	374.62	370.12	378.35	382.88	380.26	368.46	372.72
Grocery Stores.....	405.38	393.33	391.74	389.88	383.13	388.57	394.74	388.21	372.91	374.72
<b>Accommodation and Food Services.....</b>	<b>248.14</b>	<b>269.87</b>	<b>262.68</b>	<b>272.68</b>	<b>271.92</b>	<b>287.34</b>	<b>297.22</b>	<b>320.81</b>	<b>348.78</b>	<b>372.48</b>
Food Services and Drinking Places.....	224.20	243.77	234.61	250.75	243.73	255.54	260.81	280.43	311.88	340.07
Full-Service Restaurants.....	224.13	247.07	227.86	250.06	244.02	260.91	275.18	292.80	320.50	351.05

(1) The data shown in this table are generated from the enterprise-based Survey of Employment, Payrolls and Hours (SEPH). This survey provides monthly estimates to measure levels and month-to-month trends of payroll employment paid hours and earnings. The target population is composed of all employers in Canada except those involved in agriculture, fishing and trapping, private household services, religious organizations and military personnel of defence services.

(2) The industrial aggregate represents the sum of all the industries included in the SEPH excluding unclassified businesses. Data includes overtime.

(3) Food and beverage stores include grocery stores, specialty food stores and beer/wine/liquor stores.

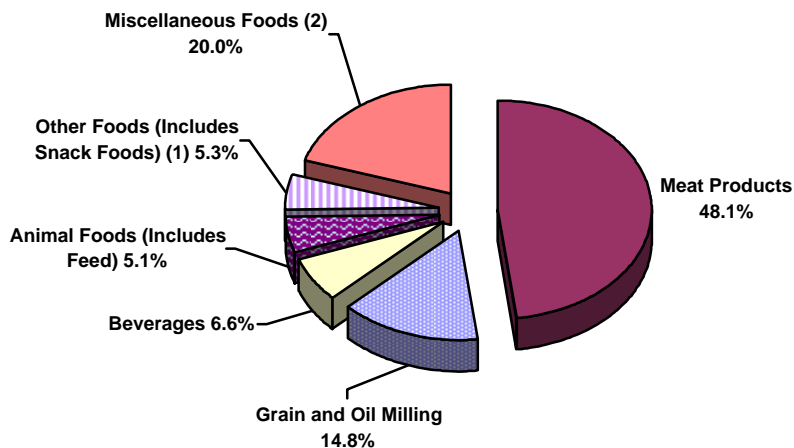
Source: Statistics Canada Cat. No. 72-002-XIB, "Employment, Earnings and Hours"

Table 23: Alberta and Canada Value of Manufacturing Sales for Food and Beverage Industries, 1991-2008

	Food Industries		Beverage Industries		Food and Beverage Industries		All Manufacturing Industries	
	Alberta	Canada	Alberta	Canada	Alberta	Canada	Alberta	Canada
	\$'000							
1991.....	4,367,286	38,638,786	442,825	5,741,133	4,810,111	44,379,919	19,119,683	274,979,110
1992.....	4,316,465	39,290,560	444,003	6,249,036	4,760,468	45,539,596	18,881,278	280,518,017
1993.....	4,801,536	40,631,520	504,647	6,499,216	5,306,183	47,130,736	20,594,754	303,941,745
1994.....	5,268,033	43,075,342	511,753	6,704,312	5,779,786	49,779,654	24,884,682	346,940,787
1995.....	5,815,229	45,170,011	539,210	6,812,942	6,354,439	51,982,953	28,491,088	389,779,314
1996.....	6,293,944	48,245,959	551,564	6,939,587	6,845,508	55,185,546	30,677,029	400,085,020
1997.....	6,687,432	50,513,439	643,575	7,344,261	7,331,007	57,857,700	34,185,450	426,520,823
1998.....	6,660,406	51,465,905	714,097	7,933,655	7,374,503	59,399,560	32,840,925	441,142,237
1999.....	7,184,652	52,938,483	692,503	8,562,122	7,877,155	61,500,605	34,822,759	492,403,669
2000.....	8,297,295	57,305,003	773,497	8,564,038	9,070,792	65,869,041	44,456,417	562,104,039
2001.....	8,421,129	61,640,219	872,592	8,580,262	9,293,721	70,220,481	45,628,751	543,782,481
2002.....	8,889,997	63,716,828	923,985	8,737,741	9,813,982	72,454,569	45,511,341	553,134,106
2003.....	8,630,943	64,983,656	886,709	8,728,610	9,517,652	73,712,266	47,029,508	550,938,829
2004.....	9,113,446	67,836,355	814,132	9,704,729	9,927,578	77,541,084	53,630,439	583,821,421
2005.....	8,588,702	67,158,704	835,268	9,885,421	9,423,970	77,044,125	61,386,080	594,728,711
2006r.....	8,851,625	68,040,495	815,796	9,796,283	9,667,421	77,836,778	63,803,302	598,237,407
2007r.....	9,033,259	70,247,692	897,563	9,986,037	9,930,822	80,233,729	64,711,518	598,198,748
2008p.....	10,913,545	78,108,942	776,800	9,517,357	11,690,345	87,626,299	70,134,120	604,743,779
% Change From Previous Year								
1992.....	-1.2	1.7	0.3	8.8	-1.0	2.6	-1.2	2.0
1993.....	11.2	3.4	13.7	4.0	11.5	3.5	9.1	8.4
1994.....	9.7	6.0	1.4	3.2	8.9	5.6	20.8	14.1
1995.....	10.4	4.9	5.4	1.6	9.9	4.4	14.5	12.3
1996.....	8.2	6.8	2.3	1.9	7.7	6.2	7.7	2.6
1997.....	6.3	4.7	16.7	5.8	7.1	4.8	11.4	6.6
1998.....	-0.4	1.9	11.0	8.0	0.6	2.7	-3.9	3.4
1999.....	7.9	2.9	-3.0	7.9	6.8	3.5	6.0	11.6
2000.....	15.5	8.2	11.7	0.0	15.2	7.1	27.7	14.2
2001.....	1.5	7.6	12.8	0.2	2.5	6.6	2.6	-3.3
2002.....	5.6	3.4	5.9	1.8	5.6	3.2	-0.3	1.7
2003.....	-2.9	2.0	-4.0	-0.1	-3.0	1.7	3.3	-0.4
2004.....	5.6	4.4	-8.2	11.2	4.3	5.2	14.0	6.0
2005.....	-5.8	-1.0	2.6	1.9	-5.1	-0.6	14.5	1.9
2006r.....	3.1	1.3	-2.3	-0.9	2.6	1.0	3.9	0.6
2007r.....	2.1	3.2	10.0	1.9	2.7	3.1	1.4	0.0
2008p.....	20.8	11.2	-13.5	-4.7	17.7	9.2	8.4	1.1

Source: Statistics Canada Annual Survey of Manufactures (1991-2002); Annual Survey of Manufactures and Logging (2003 to 2007); and Monthly Survey of Manufacturing (2008)

Fig. 12 2008 Distribution of Alberta Food and Beverage Manufacturing Sales



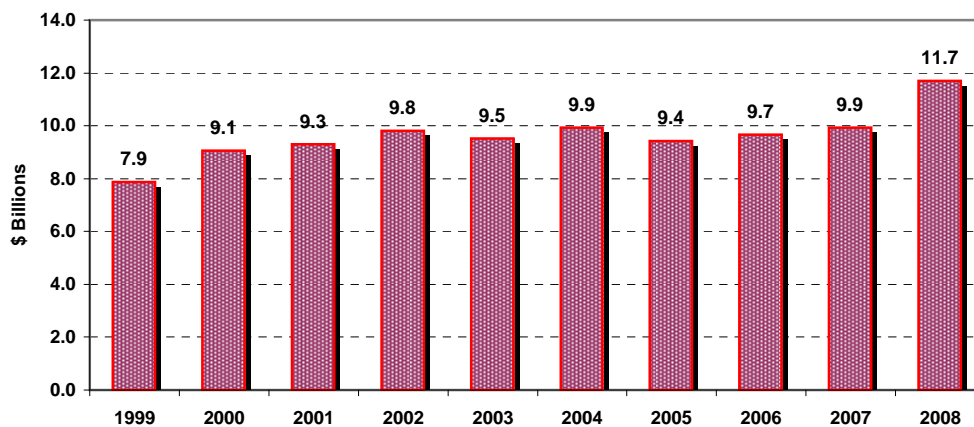
2008 Food and Beverage Manufacturing Sales = \$11.7 Billion

(1) "Other Foods" includes manufacturing of snack foods; tea and coffee; flavouring syrup and concentrates; and seasonings and dressings.

(2) "Miscellaneous Foods" includes manufacturing of sugar and confectionery products; fruit and vegetable preserving; specialty foods; seafood products; dairy products; tortillas and bakery products.

Source: Statistics Canada Monthly Survey of Manufacturing

Fig. 13 Alberta Food and Beverage Manufacturing Sales, 1999-2008



Source: Statistics Canada Annual Survey of Manufactures (1999-2002); Annual Survey of Manufactures and Logging (2003 to 2007); and Monthly Survey of Manufacturing (2008)

Table 24: Alberta Value of Manufacturing Sales for Food and Beverage Industries by Type, 2004-2008

	Number of Establishments in 2007 (1)	Manufacturing Sales					% Share of Food and Beverage Sales, 2008
		2004	2005	2006r	2007r	2008p	
		\$'000					
All Manufacturing Industries.....	8,091	53,630,439	61,386,080	63,803,302	64,711,518	70,134,120	
Food and Beverage Manufacturing Industries.....	805	9,927,578	9,423,970	9,667,421	9,930,822	11,690,345	100.0
% Share of All Manufacturing Industries.....	9.9	18.5	15.4	15.2	15.3	16.7	
Food Manufacturing.....	771	9,113,446	8,588,702	8,851,625	9,033,259	10,913,545	93.4
Meat Product Manufacturing.....	164	5,122,805	5,148,819	5,210,944	4,962,765	5,623,633	48.1
All Other Food Manufacturing.....	607	3,990,641	3,439,883	3,640,681	4,070,494	5,289,912	45.3
Animal Food Manufacturing.....	82	616,130	500,956	502,075	581,227	599,680	5.1
Dog and Cat Food Manufacturing.....	9	x	x	x	49,832	x	-
Other Animal Food Manufacturing.....	73	x	x	x	531,395	x	-
Grain and Oilseed Milling.....	23	1,051,570	931,764	894,671	1,118,678	1,730,127	14.8
Flour Milling and Malt Manufacturing.....	10	x	249,776	x	319,471	x	-
Starch and Vegetable Fat and Oil Manufacturing.....	8	760,824	664,461	x	779,237	x	-
Breakfast Cereal Manufacturing.....	5	x	17,527	15,913	19,970	19,482	0.2
Sugar and Confectionery Product Manufacturing.....	12	x	x	x	x	x	-
Fruit and Vegetable Preserving and Specialty Food Mfg. ....	38	x	267,476	x	x	361,310	3.1
Frozen Food Manufacturing (Incl. Frozen French Fries).....	20	x	x	x	x	x	-
Fruit and Vegetable Canning, Pickling and Drying.....	18	x	x	71,747	60,457	x	-
Dairy Product Manufacturing.....	206	1,067,564	x	x	x	x	-
Dairy Product (Except Frozen) Manufacturing.....	197	x	769,351	973,367	997,357	x	-
Fluid Milk Manufacturing.....	173	x	454,237	651,136	676,967	x	-
Butter, Cheese, Dry and Condensed Dairy Products Mfg. ....	24	x	315,114	322,231	320,390	x	-
Ice Cream and Frozen Dessert Manufacturing.....	9	x	x	x	x	x	-
Meat Product Manufacturing.....	164	5,122,805	5,148,819	5,210,944	4,962,765	5,623,633	48.1
Animal (Except Poultry) Slaughtering.....	59	4,010,706	4,093,618	4,016,217	3,775,791	4,373,363	37.4
Rendering and Poultry Processing.....	105	1,112,099	1,055,201	1,194,727	1,186,974	1,250,270	10.7
Rendering and Meat Processing from Carcasses.....	94	708,133	x	x	x	x	-
Poultry Processing.....	11	403,966	x	x	x	x	-
Seafood Product Preparation and Packaging.....	5	x	x	x	x	1,121	0.0
Bakeries and Tortilla Manufacturing.....	158	312,117	291,409	x	x	x	-
Bread and Bakery Product Manufacturing.....	140	249,561	231,521	261,228	284,439	x	-
Retail Bakeries.....	85	22,072	x	x	36,598	x	-
Commercial Bakeries and Frozen Bakery Product Mfg. ....	55	227,489	209,713	237,804	247,841	x	-
Cookie, Cracker and Pasta Manufacturing.....	18	62,556	59,888	x	x	x	-
Cookie and Cracker Manufacturing.....	11	x	x	x	x	x	-
Dry Pasta Manufacturing.....	7	x	x	x	x	x	-
Other Food Manufacturing.....	83	548,854	556,007	546,474	571,147	619,033	5.3
Snack Food Manufacturing.....	13	x	x	432,642	455,818	459,215	3.9
Coffee and Tea Manufacturing.....	9	x	6,506	x	8,677	5,949	0.1
Seasoning and Dressing Manufacturing.....	12	x	x	39,001	41,749	63,508	0.5
All Other Food Manufacturing.....	49	56,121	x	65,883	64,903	90,294	0.8
Beverage Manufacturing.....	34	814,132	835,268	815,796	897,563	776,800	6.6
Soft Drink and Ice Manufacturing.....	25	435,002	381,109	410,336	420,641	351,883	3.0
Breweries, Wineries and Distilleries.....	9	379,130	454,159	405,460	476,922	424,917	3.6

(1) Data for the 2008 reference year were not available at time of printing of this publication.

Source: Annual Survey of Manufactures and Logging (2004 to 2007); and Monthly Survey of Manufacturing (2008)



Table 25: Value of Manufacturing Sales for Meat Product Industries, Canada and Provinces, 1999-2008

	Canada	Alberta	Ontario	Quebec	Other Provinces
<b>(A. + B.) Total Meat Product Manufacturing Industries (\$'000)</b>					
1999.....	14,760,715	4,240,465	4,549,876	3,332,974	2,637,400
2000.....	17,249,533	4,954,288	5,153,427	3,927,784	3,214,034
2001.....	18,971,895	5,141,174	5,775,263	4,548,702	3,506,756
2002.....	18,880,334	5,274,410	5,887,700	4,265,767	3,452,457
2003.....	18,620,551	4,930,909	5,949,958	4,321,241	3,418,443
2004.....	20,140,774	5,122,805	6,668,042	4,463,264	3,886,663
2005.....	20,576,302	5,148,819	7,201,841	4,404,962	3,820,680
2006r.....	20,920,307	5,210,944	7,261,926	4,536,776	3,910,661
2007r.....	21,425,147	4,962,765	7,600,007	4,621,743	4,240,632
2008p.....	21,484,244	5,623,633	7,310,362	4,111,419	4,438,830
<u>% Share of Canada in 2008</u>	100.0	26.2	34.0	19.1	20.7
<b>A. Animal (Except Poultry) Slaughtering Industries (\$'000)</b>					
1999.....	8,029,559	3,234,801	1,743,418	1,811,571	1,239,769
2000.....	9,607,587	3,780,444	1,928,298	2,190,031	1,708,814
2001.....	10,270,706	3,690,678	2,338,588	2,449,847	1,791,593
2002.....	9,736,471	4,068,158	1,655,166	2,304,621	1,708,526
2003.....	9,587,264	3,904,644	1,680,610	2,192,160	1,809,850
2004.....	10,483,600	4,010,706	2,173,183	2,349,839	1,949,872
2005.....	10,087,226	4,093,618	1,944,764	2,199,308	1,849,536
2006r.....	10,280,637	4,016,217	2,034,265	2,350,262	1,879,893
2007r.....	10,076,934	3,775,791	1,944,293	2,441,648	1,915,202
2008p.....	10,127,110	4,373,363	1,844,475	2,052,978	1,856,294
<u>% Share of Canada in 2008</u>	100.0	43.2	18.2	20.3	18.3
<b>B. Rendering, Meat Processing From Carcasses and Poultry Processing Industries (\$'000)</b>					
1999.....	6,731,156	1,005,664	2,806,458	1,521,403	1,397,631
2000.....	7,641,946	1,173,844	3,225,129	1,737,753	1,505,220
2001.....	8,701,189	1,450,496	3,436,675	2,098,855	1,715,163
2002.....	9,143,863	1,206,252	4,232,534	1,961,146	1,743,931
2003.....	9,033,287	1,026,265	4,269,348	2,129,081	1,608,593
2004.....	9,657,174	1,112,099	4,494,859	2,113,425	1,936,791
2005.....	10,489,076	1,055,201	5,257,077	2,205,654	1,971,144
2006r.....	10,639,670	1,194,727	5,227,661	2,186,514	2,030,768
2007r.....	11,348,213	1,186,974	5,655,714	2,180,095	2,325,430
2008p.....	11,357,134	1,250,270	5,465,887	2,058,441	2,582,536
<u>% Share of Canada in 2008</u>	100.0	11.0	48.1	18.1	22.7

Source: Statistics Canada Annual Survey of Manufactures (1999-2002); Annual Survey of Manufactures and Logging (2003 to 2007); and Monthly Survey of Manufacturing (2008)

Table 26: Alberta Food and Beverage Exports to Other Countries, 1999-2008

	1999	2000	2001	2002	2003	2004	2005r	2006r	2007r	2008p
<b>Agri-Food Exports (\$'000)</b>										
<b>Total Agri-Food Exports.....</b>	<b>4,545,235</b>	<b>5,299,579</b>	<b>5,986,981</b>	<b>5,201,774</b>	<b>4,087,357</b>	<b>5,251,513</b>	<b>5,336,306</b>	<b>5,813,647</b>	<b>6,484,775</b>	<b>8,146,715</b>
<b>Animals and Crops.....</b>	<b>2,313,902</b>	<b>2,644,253</b>	<b>2,852,223</b>	<b>2,220,033</b>	<b>1,587,847</b>	<b>1,958,886</b>	<b>2,072,385</b>	<b>3,039,603</b>	<b>3,616,063</b>	<b>4,831,254</b>
% Share of Total Exports.....	50.9	49.9	47.6	42.7	38.8	37.3	38.8	52.3	55.8	59.3
<b>Value Added Products .....</b>	<b>2,231,333</b>	<b>2,655,326</b>	<b>3,134,758</b>	<b>2,981,742</b>	<b>2,499,511</b>	<b>3,292,628</b>	<b>3,263,921</b>	<b>2,774,044</b>	<b>2,868,713</b>	<b>3,315,461</b>
% Share of Total Exports.....	49.1	50.1	52.4	57.3	61.2	62.7	61.2	47.7	44.2	40.7
Animal and Plant Products (1).....	257,341	251,020	258,649	272,871	291,786	458,774	528,487	471,887	686,089	613,791
Food, Beverage and Animal Feeds.....	1,973,991	2,404,307	2,876,109	2,708,871	2,207,725	2,833,854	2,735,434	2,302,158	2,182,624	2,701,670
Food and Beverage Products.....	1,830,269	2,243,620	2,693,394	2,571,637	2,034,086	2,627,866	2,574,546	2,160,973	2,036,108	2,504,361
Animal Feeds.....	143,722	160,686	182,715	137,234	173,639	205,988	160,887	141,185	146,517	197,309
<b>Food and Beverage Products (\$'000)</b>										
Food and Beverage Products.....	1,830,269	2,243,620	2,693,394	2,571,637	2,034,086	2,627,866	2,574,546	2,160,973	2,036,108	2,504,361
% Share of Total Exports.....	40.3	42.3	45.0	49.4	49.8	50.0	48.2	37.2	31.4	30.7
Food Products.....	1,774,699	2,179,186	2,619,100	2,505,974	1,967,634	2,565,402	2,517,660	2,106,273	1,983,440	2,442,870
Beef and Veal.....	1,225,634	1,425,513	1,715,399	1,642,559	1,088,445	1,525,043	1,416,014	914,233	887,059	1,068,081
% Share of Food Products.....	69.1	65.4	65.5	65.5	55.3	59.4	56.2	43.4	44.7	43.7
Other Food Products.....	549,065	753,673	903,701	863,415	879,188	1,040,359	1,101,646	1,192,040	1,096,381	1,374,789
Beverage Products.....	55,570	64,435	74,294	65,663	66,452	62,464	56,886	54,699	52,668	61,491
<b>Meats</b>										
Fresh/Chilled/Frozen Meats (2) and Processed Meats	1,397,899	1,670,533	2,023,615	1,918,608	1,408,664	1,958,495	1,956,991	1,400,430	1,298,253	1,481,699
% Share of Food Products.....	78.8	76.7	77.3	76.6	71.6	76.3	77.7	66.5	65.5	60.7
Fresh/Chilled/Frozen Meats (2).....	1,392,276	1,661,093	2,008,914	1,896,109	1,394,849	1,947,585	1,951,783	1,397,645	1,292,860	1,479,047
Beef and Veal.....	1,225,634	1,425,513	1,715,399	1,642,559	1,088,445	1,525,043	1,416,014	914,233	887,059	1,068,081
Pork.....	106,387	177,324	218,253	191,833	253,047	357,728	465,417	423,681	345,751	342,119
Horse.....	58,422	51,677	65,450	51,639	44,568	47,866	48,307	44,069	47,711	52,685
Other (Sheep, Poultry, Bison).....	1,833	6,579	9,813	10,078	8,789	16,948	19,153	15,661	12,335	16,163
Processed Meats.....	5,622	9,440	14,702	22,499	13,815	10,910	5,208	2,785	5,393	2,652
<b>Other Food Products</b>										
Dairy Products.....	10,277	7,005	11,593	10,867	10,200	5,312	3,113	2,844	8,370	4,031
Eggs.....	8	189	42	44	391	283	900	1,711	4,566	130
Honey.....	8,772	6,030	5,186	16,567	17,851	12,802	8,336	4,919	6,994	18,523
Wheat or Meslin Flour.....	6,011	8,154	7,945	13,537	9,888	12,198	9,830	8,449	10,901	18,985
Malt Roasted or Not Roasted.....	70,852	95,394	129,548	118,116	107,741	106,238	94,476	96,460	136,709	244,021
Other Cereals Milled.....	15,635	18,020	19,373	23,355	22,239	19,389	21,824	41,641	25,944	32,675
Cereal Preparations (3).....	24,903	37,077	62,895	64,223	54,560	35,292	37,972	39,779	37,842	40,179
Fruit and Vegetable Preparations.....	1,180	1,870	3,084	3,982	3,138	2,233	2,626	3,474	7,929	9,680
Fruit and Vegetable Juices.....	92	1,121	1,366	1,481	4,871	9,404	10,136	8,059	8,777	9,498
Processed Potatoes.....	72,546	157,789	163,530	173,554	147,640	231,159	204,074	234,277	239,069	235,223
Sugar and Sugar Preparations.....	6,279	7,742	4,598	10,296	7,572	16,145	25,724	38,732	14,459	31,882
Foods and Food Materials (4).....	35,956	39,021	37,684	46,869	47,302	38,785	39,769	35,774	35,871	37,593
Canola/Mustard Oil, Refined.....	84,645	98,127	113,852	66,740	91,064	77,294	76,453	157,117	122,741	231,957
Other Oils and Fats.....	39,406	30,691	34,302	37,299	34,512	40,229	28,328	32,608	24,992	46,794
Other Products.....	237	423	485	436	0	144	-	-	26	-
<b>Beverage Products</b>										
Beverage Products.....	55,570	64,435	74,294	65,663	66,452	62,464	56,886	54,699	52,668	61,491
Whisky.....	38,116	38,195	39,969	37,571	41,349	39,023	36,881	36,178	34,528	39,194
Beer.....	471	353	275	6,020	4,707	2,179	2,052	1,238	1,050	1,536
Other Beverages (5).....	16,984	25,887	34,050	22,073	20,396	21,263	17,954	17,283	17,089	20,761

0 - (zero) refers to value less than \$500.

(1) Refers to inedible crude animal and plant products such as raw hides/skins, fur skins, seeds for sowing, nursery stock, bovine semen and peat moss. Also includes tallow, crude canola oil and tobacco.

(2) Includes edible offal.

(3) Cereal preparations include bakery products and pasta products.

(4) Foods and food materials includes such items as spices, condiments, ice cream, soups, sauces, etc.

(5) Other beverages include alcoholic and non-alcoholic beverages, wines, cider, soft drinks and bottled water.

Source: Statistics Canada; Alberta Agriculture and Rural Development, Statistics and Data Development Branch

Table 27: Food Available Per Person for Selected Commodities (1), Canada, 1999-2008

		1999r	2000r	2001r	2002r	2003r	2004r	2005r	2006r	2007r	2008p
<b>Total Fruit (2).....</b>	<b>kg</b>	<b>82.64</b>	<b>85.48</b>	<b>83.65</b>	<b>87.35</b>	<b>88.07</b>	<b>89.35</b>	<b>89.56</b>	<b>91.45</b>	<b>92.13</b>	<b>90.12</b>
Fresh Fruit.....	kg	32.93	33.70	33.60	34.42	35.40	35.94	37.49	38.54	38.63	38.75
Canned Fruit.....	kg	4.33	4.21	4.25	4.34	4.34	4.49	4.33	4.43	4.51	5.02
Frozen Fruit.....	kg	1.67	1.58	1.64	1.67	1.87	1.86	2.06	2.26	2.40	2.42
Dried Fruit.....	kg	1.19	1.28	1.25	1.26	1.34	1.39	1.25	1.35	1.32	1.33
Fruit Juice.....	litres	21.64	22.55	21.50	23.21	22.62	22.63	22.27	22.34	22.69	21.30
<b>Total Vegetables (2).....</b>	<b>kg</b>	<b>105.71</b>	<b>106.26</b>	<b>108.99</b>	<b>105.19</b>	<b>102.23</b>	<b>100.82</b>	<b>101.23</b>	<b>101.35</b>	<b>100.58</b>	<b>97.92</b>
Fresh Vegetables.....	kg	72.52	72.54	74.08	71.05	69.07	68.17	69.13	67.94	66.82	64.47
Canned Vegetables.....	kg	10.99	10.68	11.24	11.10	10.43	10.19	9.93	10.56	10.77	10.62
Frozen Vegetables.....	kg	4.20	4.41	4.61	4.53	4.51	4.57	4.47	4.40	4.50	4.40
Vegetable Juice.....	litres	1.28	1.25	1.25	1.22	1.24	1.14	1.16	1.13	1.13	1.06
<b>Beverages</b>											
Alcoholic, Total Pop. ....	litres	77.19	76.55	78.27	78.23	79.08	78.86	80.63	81.70	82.05	82.60
Alcoholic, Pop. 15 Yrs.+ .....	litres	95.85	94.71	96.48	96.10	96.81	96.19	97.94	98.84	98.92	99.29
Soft Drinks.....	litres	98.98	95.72	96.08	95.12	93.48	90.18	87.20	84.89	76.37	73.15
Coffee.....	litres	83.97	85.71	86.02	88.00	89.76	89.50	86.42	85.57	88.03	86.88
Tea.....	litres	57.79	59.12	61.75	60.38	62.17	63.20	56.81	52.49	72.58	79.37
Total Juices.....	litres	22.92	23.80	22.75	24.43	23.85	23.78	23.43	23.46	23.81	22.36
<b>Total Dairy Products (3).....</b>	<b>kg</b>	<b>16.94</b>	<b>17.18</b>	<b>17.31</b>	<b>17.05</b>	<b>16.84</b>	<b>17.05</b>	<b>16.91</b>	<b>16.87</b>	<b>16.97</b>	<b>16.72</b>
Fluid Milk.....	litres	61.76	62.10	61.27	60.25	60.04	60.26	59.11	58.81	58.47	57.70
Total Cheeses.....	kg	9.72	9.88	9.71	9.65	9.61	9.94	9.89	10.03	10.13	10.08
Total Creams.....	litres	4.48	4.81	5.02	5.12	5.60	5.81	5.89	6.05	6.20	6.01
Other Dairy Products.....	kg	16.60	17.07	17.75	18.06	18.01	18.59	19.12	19.12	19.27	19.03
<b>Eggs.....</b>	<b>dozens</b>	<b>12.10</b>	<b>12.44</b>	<b>12.58</b>	<b>12.25</b>	<b>12.29</b>	<b>11.82</b>	<b>12.10</b>	<b>12.16</b>	<b>11.57</b>	<b>11.54</b>
<b>Red Meat (4).....</b>	<b>kg</b>	<b>28.07</b>	<b>26.92</b>	<b>26.38</b>	<b>25.96</b>	<b>25.81</b>	<b>25.82</b>	<b>23.81</b>	<b>23.90</b>	<b>24.56</b>	<b>23.30</b>
Pork.....	kg	12.44	11.86	11.97	11.49	10.37	11.02	9.52	9.69	10.27	9.72
Beef.....	kg	13.79	13.54	13.01	12.89	13.69	13.04	12.82	12.64	12.95	12.41
Beef and Veal.....	kg	14.33	14.09	13.53	13.41	14.20	13.52	13.25	13.07	13.40	12.82
Mutton and Lamb.....	kg	0.34	0.37	0.41	0.40	0.42	0.43	0.44	0.46	0.48	0.45
Offal (5).....	kg	0.96	0.59	0.48	0.59	0.79	0.85	0.60	0.68	0.41	0.30
<b>Poultry (4) (6).....</b>	<b>kg</b>	<b>12.03</b>	<b>12.55</b>	<b>12.94</b>	<b>13.04</b>	<b>12.71</b>	<b>13.08</b>	<b>13.28</b>	<b>13.39</b>	<b>13.41</b>	<b>13.56</b>
<b>Fish (7).....</b>	<b>kg</b>	<b>6.81</b>	<b>6.42</b>	<b>6.60</b>	<b>6.62</b>	<b>6.74</b>	<b>6.42</b>	<b>6.46</b>	<b>6.43</b>	<b>6.27</b>	<b>6.56</b>
<b>Oils and Fats.....</b>	<b>kg</b>	<b>21.19</b>	<b>21.01</b>	<b>21.16</b>	<b>20.58</b>	<b>20.19</b>	<b>19.60</b>	<b>19.32</b>	<b>18.61</b>	<b>18.27</b>	<b>18.09</b>
Butter.....	kg	2.23	2.17	2.22	2.28	2.28	2.40	2.21	2.14	2.05	2.02
Margarine.....	kg	4.11	3.97	3.87	3.73	3.56	3.40	3.26	3.13	3.08	3.05
<b>Cereal Products.....</b>	<b>kg</b>	<b>58.26</b>	<b>58.48</b>	<b>58.82</b>	<b>58.34</b>	<b>57.33</b>	<b>58.56</b>	<b>58.55</b>	<b>57.91</b>	<b>57.52</b>	<b>57.12</b>
Rice.....	kg	4.30	4.25	4.30	4.04	4.19	5.06	4.97	5.19	5.21	7.04
Breakfast Food.....	kg	3.75	3.72	3.62	3.70	3.79	3.84	3.99	3.97	4.06	4.08
<b>Pulses and Nuts.....</b>	<b>kg</b>	<b>7.36</b>	<b>7.64</b>	<b>7.79</b>	<b>8.06</b>	<b>7.78</b>	<b>8.08</b>	<b>7.94</b>	<b>7.99</b>	<b>8.26</b>	<b>8.33</b>
<b>Sugars and Syrups.....</b>	<b>kg</b>	<b>24.79</b>	<b>25.58</b>	<b>25.19</b>	<b>25.11</b>	<b>25.07</b>	<b>25.01</b>	<b>23.98</b>	<b>23.11</b>	<b>22.85</b>	<b>23.83</b>
Honey.....	kg	0.59	0.45	0.64	0.53	0.64	0.65	0.70	0.66	0.68	0.64

(1) The data in this table have been adjusted for retail, household, cooking and plate loss.

(2) In fresh equivalent weight.

(3) In milk solid equivalent.

(4) In boneless weight.

(5) Offal includes variety meats such as liver, kidney, heart, tongue, sweetbreads, oxtail and edible tripe.

(6) Includes chickens, stewing hens and turkeys.

(7) In edible weight equivalent.

Source: Statistics Canada Cat. No. 21-020-X, "Food Statistics"

Table 28: Alberta Restaurant, Caterer and Tavern Receipts, 1999-2008

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008p
\$'000										
<b>Total Receipts.....</b>	<b>3,680,711</b>	<b>4,063,538</b>	<b>4,501,884</b>	<b>4,643,506</b>	<b>4,761,507</b>	<b>5,067,417</b>	<b>5,492,217</b>	<b>6,098,987</b>	<b>6,467,190</b>	<b>6,647,854</b>
Full Service Restaurants.....	1,784,129	1,984,303	2,164,400	2,251,441	2,290,490	2,437,390	2,647,427	2,747,569	2,926,483	2,968,038
Limited Service Restaurants.....	1,371,538	1,506,566	1,693,653	1,761,191	1,832,076	1,959,717	2,087,106	2,437,432	2,597,833	2,767,456
Special Food Services (1).....	226,476	249,845	276,890	271,276	287,676	306,531	380,728	474,466	542,864	564,639
Drinking Places.....	298,568	322,824	366,941	359,598	351,265	363,779	376,956	439,520	400,010	347,721

(1) Special food services include contractors, social caterers and mobile food services.

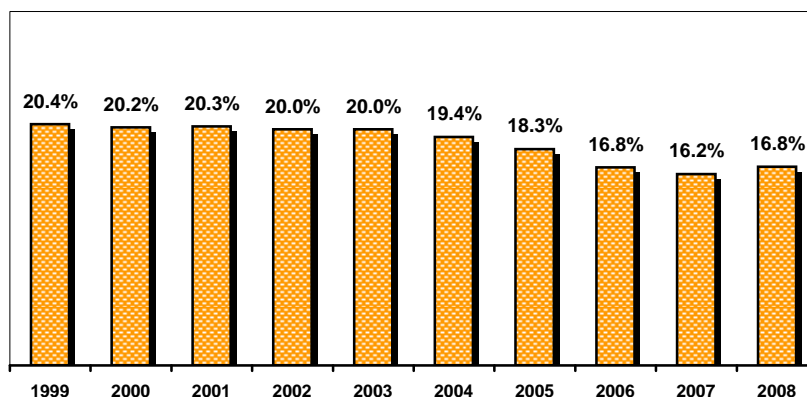
Source: Statistics Canada Monthly Survey of Food Services and Drinking Places

Table 29: Alberta Retail Sales For Food and Beverage Stores, 1999-2008

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008p
\$'000										
<b>Total Retail Sales.....</b>	<b>29,453,955</b>	<b>31,738,138</b>	<b>34,559,603</b>	<b>37,662,652</b>	<b>39,317,750</b>	<b>43,371,625</b>	<b>48,493,041</b>	<b>55,941,810</b>	<b>61,159,773</b>	<b>61,069,197</b>
<b>Food and Beverage Stores.....</b>	<b>6,924,533</b>	<b>7,375,518</b>	<b>8,064,810</b>	<b>8,720,944</b>	<b>9,139,019</b>	<b>9,725,654</b>	<b>10,233,055</b>	<b>10,912,370</b>	<b>11,548,066</b>	<b>11,991,770</b>
Supermarkets.....	5,566,701	5,919,442	6,489,580	6,957,245	7,251,103	7,637,406	8,041,012	8,494,708	8,891,142	9,206,659
Convenience and Specialty										
Food Stores.....	454,275	488,775	512,363	586,746	617,018	761,529	847,328	903,770	1,024,114	1,082,883
Sub-Total.....	6,020,976	6,408,217	7,001,943	7,543,991	7,868,121	8,398,935	8,888,340	9,398,478	9,915,256	10,289,542
% Share of Total Sales.....	20.4	20.2	20.3	20.0	20.0	19.4	18.3	16.8	16.2	16.8
Beer/Wine/Liquor Stores.....	903,557	967,301	1,062,867	1,176,953	1,270,898	1,326,719	1,344,715	1,513,892	1,632,810	1,702,228

Source: Statistics Canada Monthly Retail Trade Survey

Fig. 14 Alberta Retail Sales for Supermarkets, Convenience and Specialty Food Stores - Per Cent Share of Total Retail Sales, 1999-2008



Source: Statistics Canada Monthly Retail Trade Survey

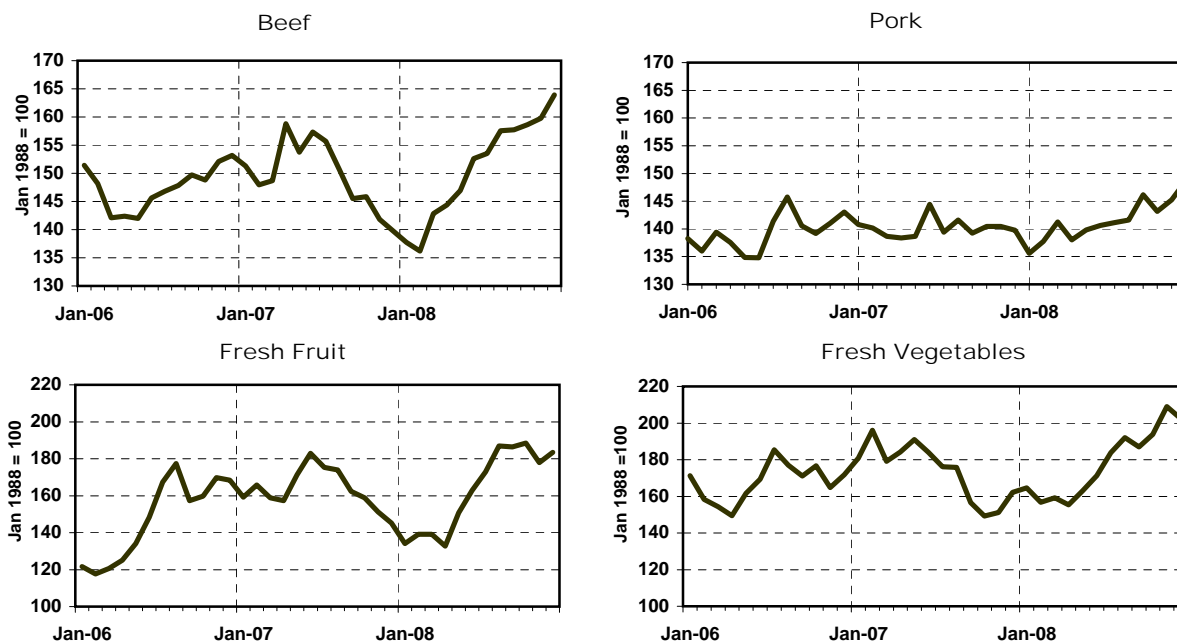
Table 30: Edmonton Monthly Retail Food Price Indices (1), 2007  
and 2008

		Beef	Pork	Fresh Fruit	Vegetables
		Jan 1988=100			
2007	Jan.....	151.29	140.79	159.30	180.96
	Feb.....	147.98	140.15	165.83	196.00
	Mar.....	148.71	138.69	158.79	179.04
	Apr.....	158.79	138.36	157.29	184.16
	May.....	153.75	138.69	171.36	191.04
	Jun.....	157.32	144.44	182.91	184.00
	Jul.....	155.70	139.42	175.38	176.16
	Aug.....	150.71	141.61	173.87	175.84
	Sep.....	145.51	139.25	162.31	156.64
	Oct.....	145.83	140.47	158.79	149.28
	Nov.....	141.84	140.47	151.26	151.20
	Dec.....	139.79	139.74	145.23	162.24
	Average	149.77	140.17	163.53	173.88
2008	Jan.....	137.74	135.60	134.17	164.63
	Feb.....	136.22	137.71	139.20	156.84
	Mar.....	142.83	141.28	139.20	159.16
	Apr.....	144.36	138.04	132.66	155.43
	May.....	146.93	139.82	150.75	163.02
	Jun.....	152.60	140.63	162.81	171.31
	Jul.....	153.54	141.12	172.86	183.86
	Aug.....	157.53	141.61	186.93	192.00
	Sep.....	157.74	146.15	186.43	186.93
	Oct.....	158.64	143.15	188.44	193.81
	Nov.....	159.79	145.26	177.89	208.98
	Dec.....	163.94	148.66	183.42	202.41
	Average	150.99	141.59	162.90	178.20

(1) Retail prices of over 70 food items are collected each week at representative stores of the major food chains in Edmonton. The prices are weighted to account for estimated market share held by each chain.

Source: Alberta Agriculture and Rural Development, Statistics and Data Development Branch

Fig. 15 Edmonton Monthly Retail Food Price Indices (Jan 1988 = 100), 2006-2008



Source: Alberta Agriculture and Rural Development, Statistics and Data Development Branch

Table 31: Edmonton Nutritious Food Basket - Weekly Average Cost  
for a Family of Four (1), 2008

	Dairy Products	Eggs	Meat, Poultry & Fish	Meat Alternatives	Cereal & Bakery Products	Citrus Fruit & Tomatoes
Dollars						
Jan.....	27.01	2.09	35.11	3.02	29.48	6.92
Feb.....	26.92	2.13	35.06	2.97	28.53	7.30
Mar.....	26.98	2.12	35.87	3.03	29.19	6.97
Apr.....	27.53	2.12	35.77	2.96	30.90	7.56
May.....	27.84	2.14	36.85	3.10	32.19	7.74
Jun.....	27.61	2.18	37.17	3.30	32.07	8.20
Jul.....	28.52	2.17	37.73	3.15	33.46	8.18
Aug.....	29.27	2.23	38.67	3.35	33.66	8.49
Sep.....	29.25	2.24	38.72	3.26	33.28	7.90
Oct.....	28.58	2.25	39.01	3.31	33.14	8.70
Nov.....	28.24	2.27	38.33	3.20	34.26	9.40
Dec.....	28.36	2.28	39.94	3.43	34.15	9.51
<b>Average</b>	<b>28.01</b>	<b>2.18</b>	<b>37.35</b>	<b>3.17</b>	<b>32.03</b>	<b>8.07</b>

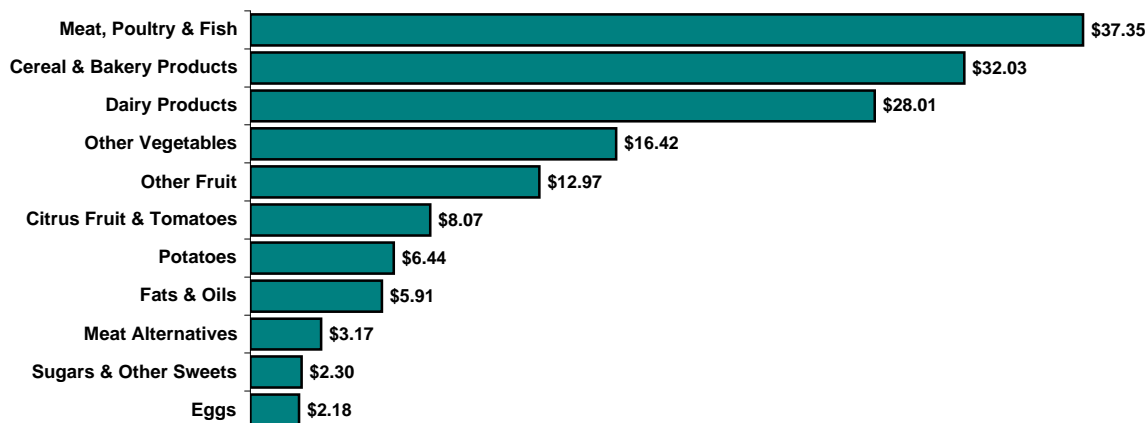
	Other Fruit	Potatoes	Other Vegetables	Fats & Oils	Sugars & Other Sweets	Total Weekly Cost (2)
Dollars						
Jan.....	11.41	5.36	15.15	5.59	2.23	<b>143.37</b>
Feb.....	10.88	5.24	14.09	5.59	2.26	<b>140.98</b>
Mar.....	12.18	5.24	14.66	5.80	2.23	<b>144.26</b>
Apr.....	11.67	5.19	15.36	5.84	2.26	<b>147.16</b>
May.....	12.85	5.43	16.51	5.95	2.35	<b>152.96</b>
Jun.....	12.86	5.74	16.90	5.62	2.27	<b>153.92</b>
Jul.....	13.62	7.20	16.68	5.90	2.31	<b>158.92</b>
Aug.....	14.55	8.28	16.26	5.88	2.30	<b>162.94</b>
Sep.....	15.17	7.81	16.81	6.01	2.30	<b>162.76</b>
Oct.....	13.71	7.43	17.77	6.28	2.31	<b>162.50</b>
Nov.....	12.95	7.24	18.90	6.18	2.39	<b>163.37</b>
Dec.....	13.74	7.09	17.92	6.22	2.40	<b>165.05</b>
<b>Average</b>	<b>12.97</b>	<b>6.44</b>	<b>16.42</b>	<b>5.91</b>	<b>2.30</b>	<b>154.85</b>

(1) The family of four is composed of a man and a woman (ages 25 to 49 years), a boy (age 13 to 15 years) and a girl (age 7 to 9 years).

(2) Add 10 per cent to the total cost of the basket to cover condiments, baking supplies, tea, coffee, soft drinks, etc., and iron supplement for pregnant women.

Source: Alberta Agriculture and Rural Development, Statistics and Data Development Branch

Fig. 16 Edmonton Nutritious Food Basket - Weekly Average Cost for a Family of Four  
in 2008



Source: Alberta Agriculture and Rural Development, Statistics and Data Development Branch

Table 32: Per Capita Consumption of Meats in Canada and United States, 1979-2008

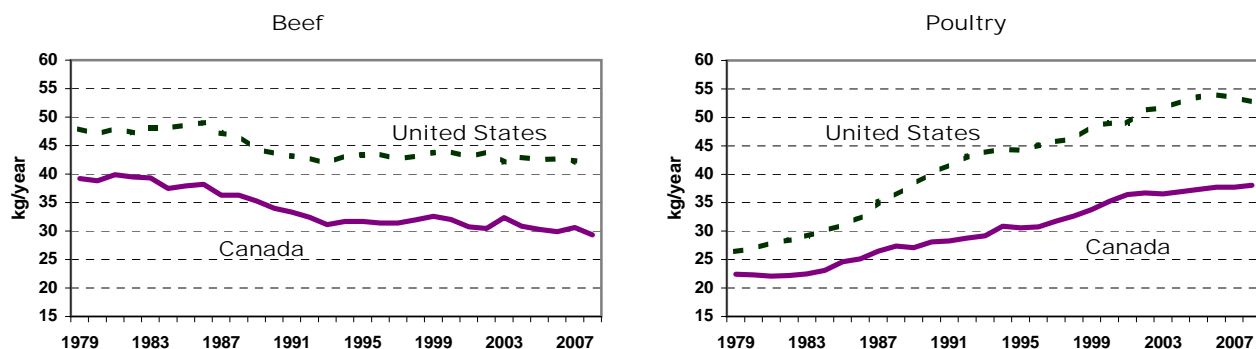
	Beef		Veal		Mutton/Lamb		Pork		Poultry (1)	
	Canada	U.S.	Canada	U.S.	Canada	U.S.	Canada	U.S.	Canada	U.S.
	kg/year									
1979.....	39.2	47.9	1.4	0.9	1.0	0.7	30.2	31.5	22.4	26.4
1980.....	38.8	47.0	1.4	0.8	0.8	0.7	32.2	33.6	22.3	26.9
1981.....	39.9	48.0	1.5	0.9	0.7	0.7	31.2	32.0	22.1	27.9
1982.....	39.5	47.2	1.6	0.9	0.7	0.8	28.5	28.7	22.2	28.4
1983.....	39.3	48.2	1.6	0.9	0.8	0.7	29.4	30.2	22.5	29.1
1984.....	37.5	48.1	1.7	0.9	0.8	0.8	28.5	30.0	23.1	30.0
1985.....	37.9	48.6	1.7	1.0	0.7	0.7	29.2	30.2	24.6	31.1
1986.....	38.2	49.0	1.6	1.0	0.9	0.7	27.9	28.5	25.1	32.5
1987.....	36.3	47.2	1.5	0.8	0.9	0.7	27.5	28.7	26.5	35.1
1988.....	36.3	46.8	1.3	0.7	0.8	0.7	28.0	30.6	27.4	36.3
1989.....	35.3	44.4	1.4	0.7	0.8	0.7	28.7	30.4	27.1	38.2
1990.....	34.0	43.6	1.5	0.6	0.8	0.7	26.1	29.1	28.1	40.1
1991.....	33.3	43.2	1.5	0.5	0.9	0.7	25.9	29.3	28.3	41.6
1992.....	32.4	42.9	1.5	0.6	0.8	0.7	28.4	30.8	28.8	43.1
1993.....	31.1	41.8	1.4	0.5	0.9	0.7	27.6	30.3	29.2	43.7
1994.....	31.7	43.3	1.3	0.5	0.8	0.6	28.4	30.7	30.9	44.4
1995.....	31.7	43.4	1.4	0.5	0.8	0.6	27.8	30.2	30.6	44.1
1996.....	31.4	43.5	1.3	0.6	0.8	0.5	25.9	28.3	30.8	45.0
1997.....	31.4	42.6	1.4	0.6	0.7	0.5	25.4	27.9	31.8	45.7
1998.....	31.9	43.2	1.3	0.4	0.8	0.6	28.7	30.1	32.6	46.2
1999.....	32.6	43.7	1.3	0.4	0.9	0.6	30.1	30.8	33.8	48.5
2000.....	32.0	43.9	1.3	0.4	0.9	0.6	28.7	29.9	35.3	49.0
2001.....	30.8	43.0	1.3	0.3	1.0	0.6	28.9	29.4	36.5	49.0
2002.....	30.5	43.9	1.2	0.3	1.0	0.6	27.8	30.1	36.7	51.3
2003r.....	32.4	42.1	1.2	0.3	1.1	0.6	25.1	30.3	36.5	51.8
2004r.....	30.8	42.9	1.2	0.3	1.1	0.6	26.6	30.1	36.9	52.8
2005r.....	30.3	42.5	1.1	0.3	1.1	0.5	23.0	29.3	37.3	53.6
2006r.....	29.9	42.7	1.0	0.2	1.2	0.5	23.4	28.9	37.7	54.0
2007r.....	30.6	42.3	1.1	0.2	1.2	0.6	24.8	29.7	37.7	53.5
2008p.....	29.3	40.7	1.0	0.2	1.2	0.5	23.5	28.9	38.1	52.7

Note: Carcass weight figures for beef, veal, mutton/lamb and pork. Eviscerated (carcass) weight figures for total poultry.

(1) Total poultry includes stewing hens, chickens and turkeys.

Source: Statistics Canada Cat. No. 32-229, "Apparent Per Capita Food Consumption in Canada", Cat. No. 23-603-XPE, "Livestock Statistics" and Cat. No. 21-020-X, "Food Statistics"; and Livestock Market Information Center

Fig. 17 Beef and Poultry Consumption in Canada and United States, 1979-2008



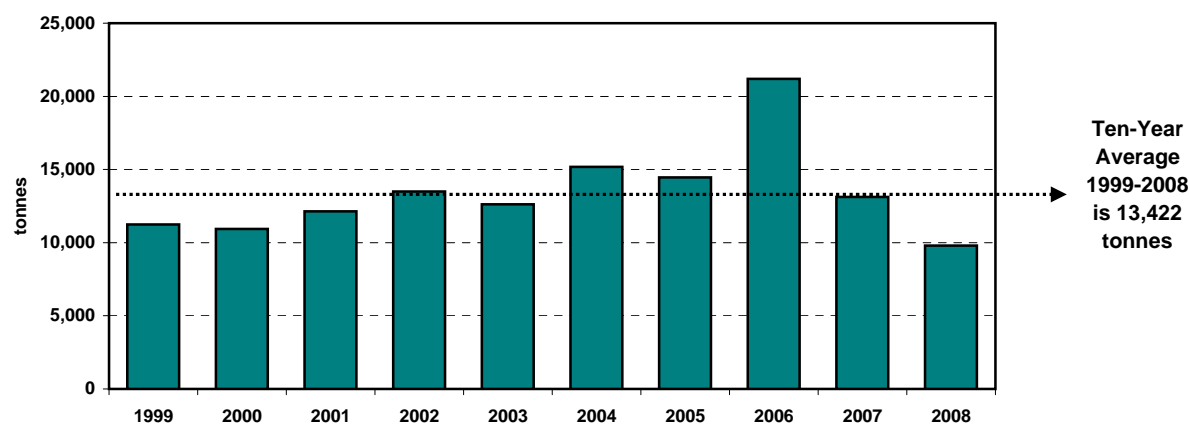
Source: Statistics Canada Cat. No. 32-229, "Apparent Per Capita Food Consumption in Canada", Cat. No. 23-603-XPE, "Livestock Statistics" and Cat. No. 21-020-X, "Food Statistics"; and Livestock Market Information Center

Table 33: Alberta Honey Statistics, 1990-2008

	Colonies			Honey			
	Beekeepers	Colonies	Per	Yield per Colony	Production	Price	Value
			Beekeeper				
		Number		kg	tonnes	\$/kg	\$'000
1990.....	840	152,000	181	70	10,566	1.28	13,552.0
1991.....	830	147,000	177	65	9,540	1.27	12,150.0
1992.....	800	148,000	185	71	10,473	1.30	13,544.0
1993.....	761	148,000	194	73	10,771	1.51	16,275.0
1994.....	750	159,000	212	88	14,064	1.50	21,139.6
1995.....	750	175,000	233	55	9,664	1.84	17,747.0
1996.....	750	175,000	233	53	9,169	2.76	25,337.0
1997.....	725	175,000	241	61	10,716	2.43	26,039.0
1998.....	730	205,000	281	85	17,389	1.96	34,000.0
1999.....	725	205,000	283	55	11,251	1.79	20,157.5
2000.....	747	217,000	290	50	10,926	1.81	19,741.4
2001.....	739	227,000	307	54	12,150	2.26	27,488.0
2002.....	700	227,000	324	59	13,488	4.32	58,320.0
2003.....	755	221,000	293	57	12,630	4.50	56,845.0
2004.....	695	248,000	357	61	15,187	3.32	50,455.0
2005.....	728	251,000	345	58	14,463	2.17	31,428.0
2006r.....	733	254,000	347	83	21,205	2.19	46,375.0
2007r.....	726	237,000	326	55	13,119	2.26	29,627.0
2008p.....	700	240,000	343	41	9,800	-	-

Source: Alberta Agriculture and Rural Development, Statistics and Data Development Branch

Fig. 18 Honey Production in Alberta, 1997-2008



Source: Alberta Agriculture and Rural Development, Statistics and Data Development Branch