

The Future of Agriculture and Food Sustainability in New Brunswick

AN INDUSTRY PERSPECTIVE
ON SECTOR GROWTH



THE AGRICULTURAL ALLIANCE
OF NEW BRUNSWICK

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A MESSAGE FROM THE AGRICULTURE ALLIANCE OF NEW BRUNSWICK

The Agricultural Alliance of New Brunswick (AANB) is pleased to present ***The Future of Agriculture and Food Sustainability in New Brunswick: An Industry Perspective on Sector Growth***. Within this growth strategy, we share the hopes, aspirations and challenges of the people working within the food production sector and outline the opportunities for and benefits agriculture sector growth to all New Brunswickers.

Agriculture is the backbone of rural economies and a fundamental pillar of our province's food security and economic resilience. Over the next decade, agriculture has the potential to expand significantly—creating jobs, strengthening local food systems, and positioning New Brunswick as a leader in climate-smart farming. However, to realize this potential, we must act with urgency and determination.

We have listened and heard the voices of industry. If this agriculture growth strategy is to be relevant and successful, it must address the key issues of *profitability, quality of life, and environmental stewardship*. We firmly believe *The Future of Agriculture and Food Sustainability in New Brunswick* will help meet these industry aspirations.

Although AANB offers programs and services that will be aligned with this strategy, the primary role of AANB is one of *advocacy* – promoting industry priorities to those with agriculture mandates and responsibilities. Clearly, collaboration and partnership will be prerequisites to achieving collective success, and AANB is committed to being a leadership force and positive collaborator in the interests of all involved.

This agriculture growth strategy is the culmination of extensive consultations with industry and government officials undertaken by AANB, Portfolio Consulting, and the Community of Creative Citizens. AANB extends a warm appreciation to those organizations who showed vision and leadership during this entire process.

The Future of Agriculture and Food Sustainability in New Brunswick is a “living document” open to evolving in response to new information, shifting market circumstances and ongoing discussions with industry representatives and government officials.

New Brunswickers are resilient, resourceful, and deeply connected to the land. With the right investments and a collective commitment to progress, we will grow a stronger, more sustainable agricultural sector—one that feeds our province, drives economic growth, protects our environment, and secures a thriving future for all.

Joel Lamarche
Chair
Agriculture Alliance of New Brunswick



INTRODUCTION

The potential for New Brunswick to benefit from growth in the agriculture sector is real and attainable. These benefits will permeate all of society and are economic, social and environmental in nature.

The success of this growth strategy is highly dependent on strong industry leadership in partnership and collaboration with provincial and federal governments, local communities, and affiliated organizations. Wise and strengthened investment commitments coupled with sound legislative, regulatory and policy frameworks are all key success factors. In the interests of all New Brunswickers, AANB urges both industry and government to embrace a spirit of collaboration in identifying the strategic policies, programs, services and investments that are required to attain the available returns on investment.

While the potential for substantive growth in the sector is real, the challenges facing industry and governments are also considerable. The rising cost of living, shifting market conditions, and increasing consumer demands relating to environmental protection and climate change are all challenges needing to be addressed. The recent imposition of U.S. tariffs on Canadian goods impacts up to 92% of New Brunswick's exports, valued at approximately \$17 billion annually. All of these challenges highlight the pressing need to invest in local production, build domestic processing capacity, and diversify our export markets. New Brunswick's agricultural future depends on our collective ability to reduce risk, strengthen self-sufficiency, and grow our economy from the ground up.

New Brunswick's agricultural sector is at a crossroads. Despite having a \$2 billion local food economy, we produce only 8% of the fruit and vegetables we consume. It's time for bold action to secure our food system, empower our producers, and prioritize local production.

The Future of Agriculture and Food Sustainability in New Brunswick is a results-driven roadmap to revitalize our province by investing in agriculture. It is the result of months of collaboration with farmers, industry leaders, researchers, and stakeholders—all united by a common goal: to build a thriving, resilient agricultural sector for generations to come.

AGRICULTURE SECTOR GROWTH TO DATE

Over the past five years, farm cash receipts (FCR) in New Brunswick have grown by 69%— the second-fastest rate among provinces. Even amid shifting market conditions, the province continued to see FCR growth of 5% in 2024, despite a national decline of 5%.

New Brunswick's agricultural sector is a key pillar of economic resilience, generating \$1.7 billion in GDP, supporting over 17,000 full-time equivalent jobs, and strengthening communities across the province. However, to sustain this momentum, we must build on recent gains while addressing emerging challenges.

To date, growth in the agriculture sector has been driven by diversification and resilience in key agricultural sectors, with notable gains in:



- Maple syrup production, which saw a 150% revenue increase year-over-year.
- Cattle farming, where revenues rose 17% in 2024 alone.
- Greenhouse and controlled-environment agriculture, which continue to expand in response to rising demand for local, year-round food production.

Christmas trees are a recognized agricultural commodity in New Brunswick, actively supported under NBDAAF programs. With strong domestic demand and a well-established export market—particularly to the U.S.— they represent a valuable non-timber crop contributing to rural economic development and land stewardship.

However, not all areas of agriculture are seeing the same level of expansion. Fresh potato and fruit revenues have declined, and processing capacity limitations prevent many producers from fully capitalizing on their market potential. Additionally, rising input costs—fuel, fertilizers, labor, and veterinary expenses—are putting pressure on farm profitability.

Grain also represents a significant but underdeveloped growth opportunity. Based on 2021 figures, New Brunswick consumed approximately 294,689 tonnes of grain annually, including 204,626 tonnes specifically for livestock feed. However, the province produced only 112,626 tonnes—leaving a shortfall of more than 180,000 tonnes that had to be imported. With strategic investments in land development, grain handling, and storage infrastructure, New Brunswick could close this gap over the next 10 to 15 years. Achieving self-sufficiency in livestock feed alone could contribute between \$35 million and \$45 million annually to the provincial economy, while enhancing food system resilience and reducing reliance on imports.

Beyond direct farm revenue, agriculture's broader economic impact is significant, with value-added processing playing a critical role. New Brunswick's food and beverage production sector has seen 13% real GDP growth over the past five years, outpacing most provinces.

Despite this momentum, long-term growth is not guaranteed. Shifting trade partners, rising production costs, reduction in farmland, workforce shortages, and limited financial support compared to other provinces threaten the sector's stability. With farm debt levels twice the national average, many farmers struggle to invest in the infrastructure, technology, and sustainability measures needed to remain competitive.

David Campbell, a well-respected New Brunswick economist, recently reaffirmed his position to AANB that the agriculture sector has significant growth potential and can be an important economic driver for the province.

An ambitious but realistic target is to increase the sectors real GDP contribution from 2% per year to an annual average of 5% per year from 2022 to 2032. The level of growth would boost GNB municipal taxes generated each year from \$200 million to nearly \$350 million by 2032.”
(David Campbell – December 2025)

Clearly, the potential for substantive growth in the agriculture sector is real and attainable. The key to realizing this potential is to act decisively and strategically. Wise investment in targeted high return areas will be important. At the same time, failure to invest in the agriculture industry will have significant consequences for all New Brunswickers in the years ahead.

Appendices 1 and 2 provide background statistics related to the New Brunswick agriculture sector.

THE STRATEGY FOR GROWTH

AANB has consulted widely with industry leaders and government officials to identify the opportunities for and benefits of agriculture growth in New Brunswick. *The Future of Agriculture and Food Sustainability: An Industry Perspective on Sector Growth* is the culmination of these consultations.

New Brunswick has a once-in-a-generation opportunity to redefine the future of its agricultural economy. By investing wisely and working together, we can grow our economy, secure our food supply, and ensure long-term prosperity for our rural communities. The time to act is now. We can grow what we eat and eat what we grow, right here in New Brunswick. We simply need to have a vision, set our goals and objectives, target key action areas, and take unified action.

The recent imposition of U.S. tariffs on Canadian goods and their ongoing fluctuations adds costs and creates a high degree of market uncertainty, which reinforces the urgency of advancing self-sufficiency and market diversification.

Following is what the agriculture industry in New Brunswick believes to be the essential elements of ensuring sustainable agriculture growth in New Brunswick.

The **Vision** guiding this growth strategy is to **Grow Local, Process Local, Feed Local and Export Global**.

The **Goals** underpinning this strategy are predicated on the priorities of the industry and are threefold in nature:

Profitable food production enterprises and agriculture sector,
High Quality of life for owners, families and workers, and
Sound Environmental Stewardship.

The Primary **Objectives** of this strategy are to:

Improve the investment climate and profitability of food production companies,
Guarantee owners access to a highly skilled workforce,
Ensure that government programs, services, and activities are aligned with industry priorities,
Ensure the agriculture sector has access to best management practices and modern technologies,
Protect the environment and promote climate change resiliency,
Foster positive collaboration and alignment of purpose between industry, governments and key partners, and
Positively brand the agriculture sector and build public awareness of its value and needs.

KEY PRIORITIES

To achieve the vision, goals and objectives, five key priority areas for action are identified: ***Fair and Competitive Investment, Accessible Farmland, Skilled and Healthy Workforce, Sustainable Energy and Resources, and Local Market First***. Addressing these priority areas is deemed fundamental to success. Each is described briefly below, with additional details provided later in this document.

Fair and Competitive Investment: - Align existing investment levels and programs with the Vision and Goals of the strategy, and ensure they are competitive with other jurisdictions.

Accessible Farmland - DNRE to DAAF for lease to qualified producers ready to scale.

Skilled and Healthy Workforce – Attract, train, retain and support skilled agricultural professionals and technical experts to meet evolving sector demands.

Environmental Sustainability and Energy Efficiency – Ensure best management practices for environmental stewardship and energy efficiency.

Local Market First - Prioritize expanding local markets while diversifying global markets.

CROSS-CUTTING ENABLERS

The strategy also identifies five Cross-Cutting Enablers which are those program areas that have the potential to positively impact on the five priority areas noted above. They are: ***Technology and Innovation, Research and Knowledge Mobilization, Education and Training, and Collaboration and Partnerships***. Each is described briefly below. More details on actions required are offered later in this document.

Technology and Innovation – Driving productivity, efficiency, and climate-smart practices.

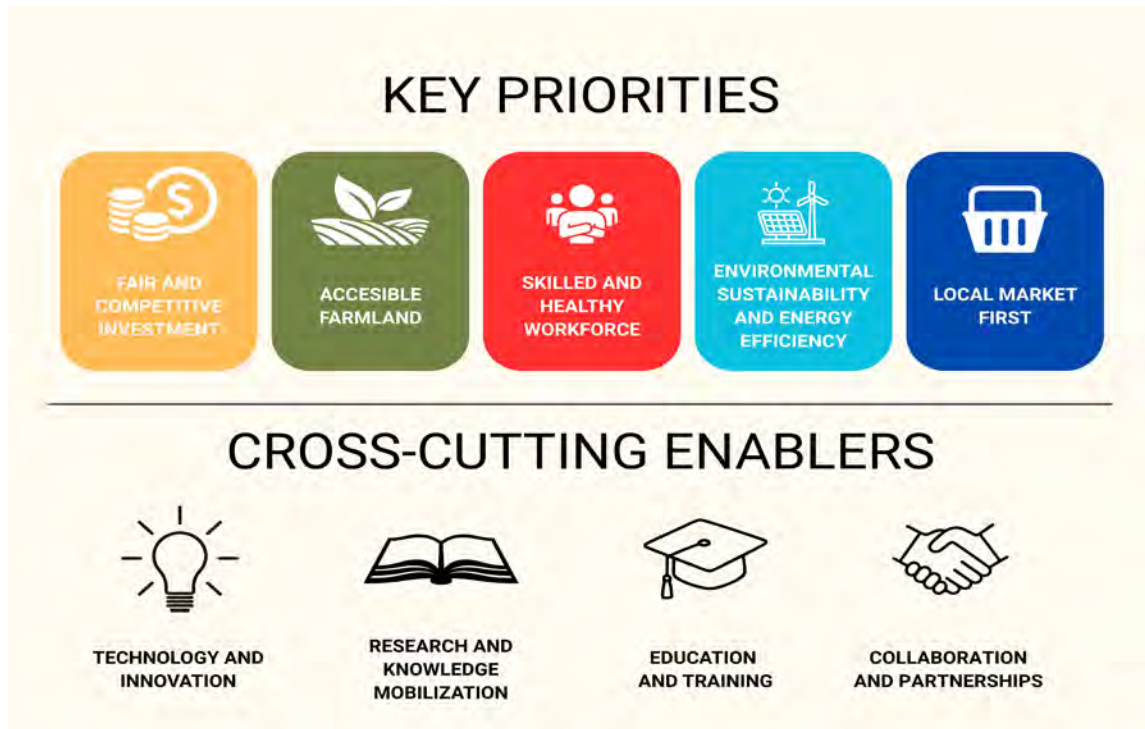
Research and Knowledge Mobilization – Ensuring decisions are evidence-based and locally relevant.

Skilled and Healthy Workforce – Attract, train, retain and support skilled agricultural professionals and technical experts to meet evolving sector demands.

Education and Training – Building the capacity of current and future farmers, entrepreneurs, and agri-food leaders.

Collaboration and Partnerships – Engaging producers, government, researchers, and communities to accelerate impact.

The graphic below shows the relationship between the Key Priority Areas and the Cross Cutting Enablers. The remainder of this document will highlight the specific actions that have been identified to address the Key Priority Areas and the Cross-Cutting Enablers.



ACTIONING THE KEY PRIORITY AREAS

In the days, weeks, months and years ahead, AANB will be advocating for all involved to focus and concentrate their time, energy and resources on the aforementioned five priority areas and four key enablers. The specific actions required for each are outlined below.

FAIR AND COMPETITIVE INVESTMENT CLIMATE

A key to achieving the vision of this strategy is to ensure the New Brunswick agriculture sector is operating within a fair and competitive investment climate, particularly with respect to other jurisdictions. This means ensuring access to funding support programs is streamlined, strategic in nature and readily accessible. Many within the sector find the process of accessing funding from the banks and government a daunting task. There is an urgent need to streamline application processes and provide applicants with assistance as they navigate the system.

A level playing field is also important. For example, in comparison to other provincial jurisdictions, New Brunswick received only 1.4 % of the national average in Government payments to agriculture producers, net of premiums. (See appendix 1). If New Brunswick farmers received the national average in government support in 2023, it would be equivalent to \$41 million more during the year. The first step in closing this gap is better understanding the root causes of this discrepancy. There is likely a myriad of reasons for the gap; the key is understanding why it exists and how best to close it in the interests of the industry.



A fair investment climate also involves trade policy and access to global markets. Shifting consumer demands and market conditions are always a constant challenge for food production enterprises and they must be adaptable to meet changing circumstances. However, the newly imposed and ever fluctuating U.S. tariffs create an immediate threat to New Brunswick's agricultural exports, underscoring the urgency for increased domestic investment and market diversification. For agriculture to continue driving New Brunswick's economy, we must take a targeted approach to investment and innovation. By expanding processing capacity, leveraging new technologies, improving market access and ensuring financial stability for farmers, New Brunswick can unlock its full agricultural potential and strengthen the sector as a key driver of food security, economic prosperity and environmental sustainability.

Key actions required are as follows:

Establish a one-window portal for applicants to simplify access to financial programs and provide navigation assistance.

Conduct feasibility studies for market diversification including export to Europe, Asia, and the Middle East.

Develop a public awareness campaign on the value and needs of the agriculture sector.

Expand local processing infrastructure to improve capacity to serve both local and diversified global markets.

Develop regional cold storage and food processing hubs to strengthen local supply chains.

Ensure inter-departmental policy alignment to eliminate duplication and improve efficiency.

Support cooperative farming models and shared processing facilities to lower barriers for small and medium-sized farms.

Promote branding initiatives like "Saveur NB" to increase consumer awareness and demand for local agricultural products.

Strengthen export market development to reduce reliance on the U.S. and expand global market access, especially critical with the new US tariffs.

Support agriculture business diversification opportunities, such as agri-tourism.

Introduce multi-year funding models that allow for long-term planning, investment, and growth.

ACCESSIBLE FARMLAND

A key to realizing the growth potential of the agriculture sector is for food production enterprises to have access to land for production. As growers scale up and expand their production, they often require access to additional and suitable lands. This is particularly true for the producers of high-potential export crops, such as maple sugar, blueberries and cranberries. In such cases, the producer needs to either purchase privately owned land or lease Crown lands from the government.

If purchasing additional lands, they often require financing support from banks and government. When such financing is required, it is essential that lending institutions are fully supportive of New Brunswick's efforts to grow the agriculture sector and the associated economic and social benefits.

Financial programs available to those willing to invest in growing their food production enterprises must be adaptable to the needs of each individual grower and the process involved streamlined to enhance accessibility and ensure timely responses. The terms and conditions associated with the financing must also be reasonable in the context of the vagaries of agriculture growth cycles, and cognizant of the impacts of weather and climate.

A further opportunity to support the growth of the agriculture sector is for the province to make additional Crown owned lands available to producers when they are ready to expand operations. In order to ensure land is available in a timely fashion and managed in accordance with an agriculture mandate, a key step is to transfer suitable lands from DNRE to DAAF. This will ensure the lands are readily available to lease by qualified producers.

It is also important for local municipalities to prioritize agricultural land-use protection in planning frameworks to reduce urban encroachment. Identifying and prioritizing farmland in proximity to existing or planned regional processing and storage infrastructure will help build localized value chains and reduce transportation costs for processors.

Accessibility to land for increased agriculture production will also be supported by the establishment of a Farmland Bank and Lease-to-Own Program.

Key actions required are as follows:

Advocate for the transfer of suitable Crown agricultural lands to DAAF for lease to producers.

Establish a Farmland Bank & Lease-to-Own Program.

Advocate for farmland transition incentives for retiring farmers.

Strengthen farmland protection policies.

Optimize lands for agriculture development.

SKILLED AND HEALTHY WORKFORCE

In order to ensure the long-term growth and sustainability of the agriculture sector it is essential that New Brunswick as a whole support both the owners of food production enterprises and their workers.

A key to supporting owners of food production enterprises is to ensure they have access to fair and competitive financial programs. Access to financing is a top priority of owners, although mentioned earlier in this document, it is worthy of repetition. It is also important for owners to have access to information relating to evolving best practices and new technologies designed to improve profitability, enhance quality of life and heighten their level of environmental stewardship.

Given the high levels of stress associated with ownership, it is also critical to ensure owners and their families have access to supportive mental health programs, when required.

A skilled, stable and healthy workforce is essential to long term agricultural growth and viability. It is essential that education and training programs be aligned with this agriculture growth strategy. In order to ensure the existing workforce remains current with evolving agriculture best practices and technologies, training programs must be made available and offered at suitable times during the agriculture growth and processing cycles. Training programs need to be modernized to ensure they address topics such as regenerative agriculture practices and digital and AI applications in agriculture.

Targeted immigration pathways are required to facilitate access to people with the prerequisite agriculture skills. This need is of particular relevance for industry access to agrologists, veterinarians, and food processing specialists.

The creation of on-farm housing solutions, including modular housing units, will support worker attraction and retention while also helping to foster rural labour stability.

AANB will also advocate for the provincial government to provide sufficient resources to NBDAAF to allow the department to be fully staffed with professional agrologists to provide technical advice and leadership to industry.

Encourage investment in automation and mechanization to improve productivity while maintaining workforce stability. AANB needs to ensure its workforce programs continue to help attract and retain skilled agricultural workers.

Key actions required are as follows:

Secure continued funding for AANB's workforce development program.

Develop a comprehensive agricultural workforce strategy.

Establish agricultural immigration pathways.

Advocate for enhanced onsite training courses and knowledge transfer opportunities for existing agriculture owners and workers.

ENVIRONMENTAL SUSTAINABILITY AND ENERGY EFFICIENCY

Pursuing the growth of the agriculture sector must be undertaken in the context of ensuring protection of the environment and overall long-term sustainability of operations. While those in the industry are proud of their commitment to environmental stewardship, they should not be required to bear the entire financial burden of meeting this essential society-wide interest. Increasing consumer demands for food production enterprises to demonstrate their products meet stricter and stricter environmental requirements translate into additional post production, delivery and marketing costs for the industry.

At the same time, the steady rise of energy costs is leading to higher production and transportation costs, which in turn lead to higher food costs for consumers. A number of specific actions are identified below to address the above-noted concerns.

Governments need to ensure that the costs to industry associated with environmental protection related legislation and regulation are fully understood prior to enactment and implementation. Post-implementation, the public must be prepared to subsidize the costs industry has to bear to meet society's interest in environmental matters. This means government financial support programs for industry must reflect this reality.

The agriculture industry also needs to ensure the general public and consumers are aware of the substantive environmental sustainability, regeneration, and protection practices already underway within the agriculture sector.

An important step in improving energy efficiencies in the agriculture sector is to ensure the industry has access to information on best energy management practices and on new, more energy efficient technologies. Financially supporting industry to integrate this knowledge and adopt more energy efficient technologies will promote improvements in energy efficiency throughout the food production and delivery cycle.

Currently, New Brunswick's Electricity from Renewable Resources Regulation (NB Reg. 2015-60) limits participation in NB Power's Net Metering Program to renewable energy systems of 100 kilowatts (kW) or less. While the cap itself is not explicitly stated in the Act, it is enforced through NB Power's program guidelines under the authority of this regulation. By contrast, Nova Scotia recently increased its cap to 1 megawatt (1,000 kW), opening the door to greater on-farm renewable energy adoption. To replicate this model in New Brunswick, the regulation would need to be amended to either explicitly raise the allowable capacity for net metering (e.g., to 1 MW), or remove the cap altogether, leaving it to NB Power to set based on infrastructure capacity and policy priorities. Such a change would enable farms to generate more of their own clean energy, lower operating costs, and contribute to New Brunswick's climate and energy goals.

Listed below are the actions industry believe are required to position the agriculture sector for environmental sustainability and energy efficiency.

Key actions required are as follows:

Increase investment in precision agriculture and digital farming to improve productivity while reducing environmental impact.

Remove NB Power's 100 KW cap and adopt Nova Scotia's model for on-farm renewable energy.

Advocate for farm-specific energy efficiency programs and financial incentives for renewable energy adoption.

Implement best management practices in energy efficiency through-out food production enterprises.

Improve the climate resiliency of food production systems by expanding climate-resilient infrastructure funding.

Support the development of a carbon credit framework to reward farms for emission reductions and regenerative practices.

Ensure and support affordability for industry of new environmental legislation and regulations.

Design public awareness programs on environmental practices already underway.

Prepare industry for meeting consumer inspired reporting requirements.

Implement best management practices in energy efficiency within food production enterprises.

LOCAL MARKETS FIRST

The agriculture sector must be resilient and adaptable to shifting market conditions. The U.S. tariffs on Canadian goods entering the United States create an urgent challenge for New Brunswick's agricultural sector. With 92% of New Brunswick's exports (worth approximately \$17 billion annually) going to the US, tariffs represent an existential threat to many producers and processors.

In 2024, New Brunswick exported nearly \$2.3 billion worth of food-related products to the United States. By way of example a 25% across-the-board tariff represents a \$568 million 'tax' that would need to be paid either by exporters or importers. Based on profit margins in the impacted industries, almost none would be able to continue exporting to the United States if required to bear a large share of this cost.

There is both urgency and benefits in responding to the shifts in international trade policies and global markets. Two priority actions have been identified by industry. First, local markets need to be developed. A secure, self-sustaining food system starts by feeding our own communities. This includes supporting producers in scaling up to meet local retail and institutional demand, simplifying direct-to-market access, and helping farms meet CFIA and major retailer standards.

By focusing on local markets, over time New Brunswick will build its food self-sufficiency and security. Second, the industry needs to diversify its global market, with a view toward limiting its reliance on the US market.

Key actions required are as follows:

Expand institutional procurement programs that prioritize New Brunswick-grown products in schools, hospitals, and government facilities.

Promote local food hubs, direct-to-consumer models, and regional supply networks that keep more food dollars circulating in the province.

Support the development of Controlled Environment Agriculture facilities to grow high-demand produce that is typically imported, improving food self-sufficiency and supply chain stability.

Incentivize market planning and logistics solutions that connect rural producers to urban consumers, improving access to fresh local food across the province.

Increase production of high-demand items like vegetables, grains, and livestock to meet local demand, with the added potential to scale surplus for export.

Invest in processing capacity to capture more value within the province and develop products that can command premium prices in diverse markets.

Invest in infrastructure that supports flexible and efficient distribution—both within New Brunswick and to diverse global markets—ensuring producers can respond quickly to market disruptions.

CROSS-CUTTING ENABLERS

The four programs and activities that have the potential to positively impact on the entire agriculture sector are: ***Technology and Innovation, Research and Knowledge Mobilization, Education and Training, and Collaboration and Partnerships.***

TECHNOLOGY AND INNOVATION

In order to remain competitive, New Brunswick must foster a culture of innovation in and for the agriculture sector. This means investing in research and development of new ideas and technologies and accelerating their availability to and adoption within the entire food production sector. Digital and AI technologies are key economic drivers and when adopted systemically into the business of food production will transform all areas of the agriculture sector.

AANB recognizes the need for the industry to adopt digital tools to stay competitive. In this context, AANB is also releasing *Harnessing Innovation: A Digital Agriculture Strategy for New Brunswick*. AANB's digital strategy underscores the importance of incorporating digital tools into every stage of the food production sector.

New Brunswick must not be left behind; in fact, by investing strategically the province has an opportunity to lead in many areas. By strengthening partnerships between producers, research institutions, innovation hubs, and funding organizations, the province can accelerate the adoption of emerging technologies, improve productivity, and build more sustainable and resilient food systems tailored to both local needs and global markets.

Key actions required are as follows:

Support the adoption of AANB's digital agriculture strategy and prioritize access to digital agriculture tools and infrastructure, including connectivity, data systems, and technical support, across all regions and farm sizes.

Proactively support the new Chair of Digital Agriculture at UNB.

Expand funding for smart farming technologies, automation, and AI-driven agriculture to help growers improve productivity and profitability and environmental stewardship.

Invest in accelerating the adoption of precision and regenerative farming.

Advocate for a smart farm network in Atlantic Canada.

Enhance farm-level data collection and analysis through precision agriculture.

Provide administrative-level data to the New Brunswick Institute for Research, Data and Training for analysis and subsequent dissemination of results.

Invest in building climate change resilience in food production systems.

Invest in environment-controlled food production systems.

Strengthen partnerships with and between research institutions to fast-track innovation.

RESEARCH AND KNOWLEDGE MOBILIZATION

Advancements in agriculture best management practices arise out of both experience, dedicated research and development programs, and knowledge transfer. Sustainable agriculture is dependent on ensuring New Brunswick food production enterprises have access to the latest information. Every commodity group benefits from having robust research and development programs coupled with events and activities designed to effectively disseminate the knowledge throughout the entire sector.

Much of the current research and development focus is on field testing of different growing methodologies (e.g., Living Labs), regenerative farming practices, environmentally controlled grow-out systems, environmental protection and mitigation, and the application of digital tools. AI is also beginning to show promise with respect to food production, processing and transportation.

The key actions required are as follows:

Seek partnerships including with AAFC to develop Living Labs and producer-led innovation projects to test and scale emerging tools and technologies.

Strengthen partnerships between producers, research institutions, and innovation hubs to accelerate the adoption of climate-smart practices and productivity-enhancing innovations.

Develop an entrepreneurial farm training initiative, modeled after the Wallace McCain Institute, to support business growth and succession planning.

Implement risk reduction financial support programs for early adopters of new food production methodologies and technologies.

EDUCATION AND TRAINING

In order to ensure a steady pipeline of skilled workers, the agriculture sector needs to strengthen its partnerships with public schools, colleges, universities and training institutions. Working closely with these entities will help ensure both public and private education and training programs foster interest in agriculture careers and are relevant to the needs of industry, on an ongoing basis.

The key actions required are as follows:

Establishing an agri-business leadership development program to build capacity among future farm and food system leaders.

Creating a mentorship network to support intergenerational knowledge transfer of best management practices in the agriculture sector.

Improving in the public education system related to enhancing agriculture related curricula, expanding coop opportunities in agriculture, improved counselling on the range of agriculture career opportunities.

Creating a Centre of Excellence for Agriculture in public education.

Enhancing agriculture education programs and apprenticeship opportunities at the post-secondary level in New Brunswick.

Supporting NB 4-H as it seeks to expand within both the Anglophone and Francophone areas of the province.

COLLABORATION AND STRATEGIC ALIGNMENT

New Brunswick's agriculture sector cannot advance in isolation. Ongoing collaboration and consultations are essential to ensure the strategy and actions undertaken by both industry and government leaders remain relevant to the entire sector. By working closely together, AANB and its partners can ensure that the province's agricultural sector remains competitive, resilient, and responsive to the opportunities and challenges of the future. A viable and sustainable food production sector is imperative to all New Brunswickers.

The sector will also gain significantly from positive public support. It is therefore critical that the industry invest in branding initiatives and in building public awareness of its value and needs.

The key actions required are as follows:

Build public awareness of the value of the industry and its growth requirements.

Establish an Agriculture Sector Advisory Committee to foster industry collaboration.

Establish a scheduled series of meetings between the Agriculture Sector Advisory Committee and DAAF to foster industry-government collaboration.

Establish a scheduled series of meetings between the Agriculture Sector Advisory Committee and Indigenous leader to identify partnership opportunities.

Establish a scheduled series of meetings between Agriculture Sector Advisory Committee and UNB, ResearchNB and other key stakeholder organizations to share priorities and build partnerships.

Work closely with Agriculture and Agri-Food Canada (AAFC) to ensure NB priorities are represented in federal agriculture policy and national funding programs.

Strengthen partnerships across the sector—linking farmers, Indigenous leaders, researchers, financial institutions, and government—to align investments, remove silos, and drive collective action.

Encourage the government to develop a provincial agricultural action plan that integrates land-use, energy, workforce, and economic development strategies—aligned with the needs of key commodities such as blueberries, maple, cranberries, and Christmas trees.

THE PATH FORWARD FOR NEW BRUNSWICK AGRICULTURE

New Brunswick stands at a defining moment. Agriculture—already a pillar of our provincial economy—can become the foundation for long-term prosperity, food security, and global competitiveness. But realizing this potential requires more than ambition. It demands bold collaborative leadership, aggressive industry and public investment, integrated policies and programs.

In the face of rising farm debt, workforce shortages, and the imposed and fluctuating U.S. tariffs on exports, the urgency for action has never been greater. New Brunswick cannot afford to lag behind while other provinces scale up their agri-food sectors with stronger investments and coordinated strategies.

The Future of Agriculture and Food Sustainability in New Brunswick: An Industry Perspective on Sector Growth articulates a way forward. The growth strategy's clear vision of **Grow Local, Process Local, Feed Local, and Export Global** is anchored in five well defined strategic priorities and supported by four powerful enablers. It is an industry inspired blueprint for a modern, resilient agricultural system capable of:

- ✓ Securing food for New Brunswickers.
- ✓ Capturing more value through local processing.
- ✓ Addressing rising production costs.
- ✓ Creating new jobs and revitalizing rural communities.
- ✓ Protecting the environment and responding to climate change
- ✓ Competing globally by opening new export markets.

THE CALL TO ACTION

The Future of Agriculture and Food Sustainability in New Brunswick: An Industry Perspective on Sector Growth offers a clear and concise roadmap, a model for collaboration and shared commitment, and a pragmatic set of actions. The next 12 months are critical. With the right support, we can collectively begin turning the strategy's vision into reality and move swiftly from planning to implementation.



APPENDICES

APPENDIX 1: Economic Review of New Brunswick's Agricultural Sector

Farm Cash Receipts

Farm cash receipts (FCR) in New Brunswick have been growing strongly in recent years. Over a five-year period (2018 to 2023), New Brunswick farmers had the second fastest growth rate among the 10 provinces at 69 percent. Adjusted for population size, New Brunswick farmers generate more revenue than Nova Scotia, Newfoundland and Labrador, and British Columbia.

Value of farm cash receipts through Q3 2024, selected sources, New Brunswick

All dollar figures shown in \$Millions	Q1-Q3 2023	Q1-Q3 2024	% Change
Total farm cash receipts	\$823.0	\$860.4	5%
Total farm cash receipts (excl. cannabis)	\$643.6	\$666.5	4%
Total crop receipts	\$503.2	\$536.8	7%
Fresh potatoes	\$198.1	\$194.1	-2%
Total fresh fruit	\$25.9	\$23.5	-9%
Floriculture and nursery products and sod	\$42.6	\$44.7	5%
Maple syrup and other maple production	\$20.7	\$51.9	150%
Total livestock and livestock product receipts	\$308.8	\$310.2	0%
Cattle	\$42.1	\$49.1	17%
Unprocessed milk from bovine	\$110.1	\$113.3	3%
Eggs in Shell	\$31.2	\$31.4	1%

Real GDP Contribution

Over the past five years, agriculture and food production sector GDP in New Brunswick rose 13 percent in real terms, the third best growth rate among the 10 provinces. This growth demonstrates the resilience and potential of the sector, even in challenging economic times.

Economic Impact Assessment

The agriculture and food production sector in New Brunswick contributed an estimated:

- \$1.7 billion to provincial GDP
- \$890 million worth of labour income and 17,060 full-time equivalent jobs.

To put this in perspective, the sector contributed an amount of GDP equivalent to 7.5 percent of business sector GDP.

Trends Impacting Competitiveness - Growth in Farm Expenditures

New Brunswick farmers are facing significant cost pressures. In just three years (2020- 2023), expenses increased dramatically:

- Net fuel for machinery and vehicles: +72%
- Veterinary fees, medicine, and breeding: +48%
- Fertilizers and lime: +47%
- Heating fuel: +45%
- Feed, supplements, and bedding: +33%

Trends in Farm Indebtedness

New Brunswick farmers had \$1.32 billion worth of outstanding farm debt in 2023.

Outstanding farm debt is equivalent to 37 percent of the value of land, buildings, machinery and equipment (\$3.58 billion in 2023).

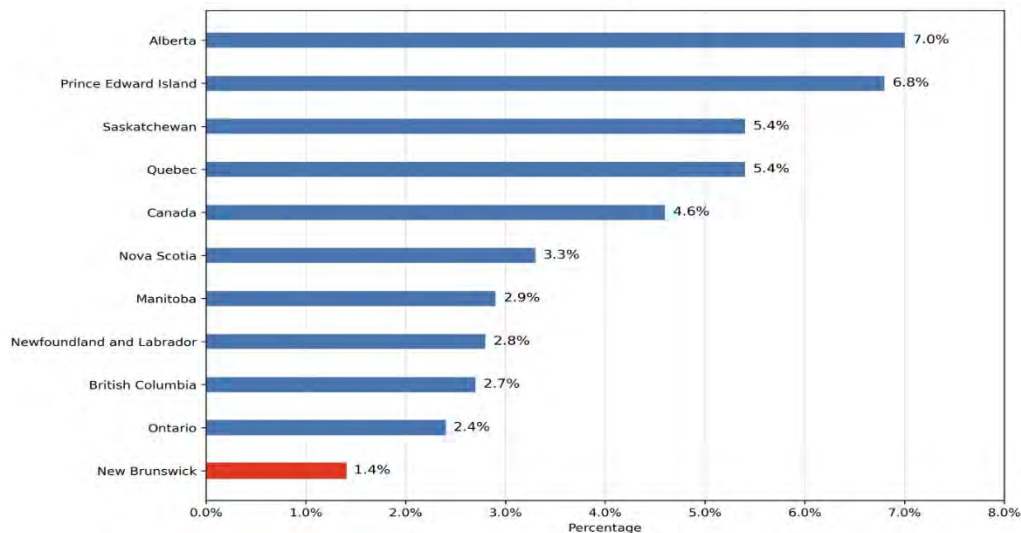
Across Canada, farm debt is only 18 percent of the value of these assets. This higher level of debt makes it more challenging to invest in new technology or productivity initiatives.

Trends in Government Payments

New Brunswick agricultural producers receive very little from government support programs compared to other provinces.

In 2023, payments were equivalent to 1.4 percent of farm cash receipts in New Brunswick compared to 4.6 percent across the country.

If New Brunswick farmers received the national average in 2023, it would have meant an additional \$41 million during the year. This funding gap severely limits the sector's competitiveness and ability to invest in growth.



APPENDIX 2: Economic contribution of agriculture and food production in New Brunswick, 2023 (direct, indirect and induced effects)

All dollar figures shown in \$Millions

	Direct Effects			Total Effects		
	GDP (\$)	Labour income (\$)	Jobs	GDP(\$)	Labour income (\$)	Jobs
Crop production	\$178	\$61	1,600	\$259	\$98	2,330
Value-added crop - based manufacturing	\$247	\$143	1,520	\$379	\$200	2,750
Animal production	\$121	\$40	1,550	\$186	\$122	2,620
Greenhouse farming	\$40	\$24	1,240	\$57	\$31	1,385
Dairy product manufacturing	\$49	\$43	440	\$124	\$73	1,215
Meat product manufacturing	\$68	\$49	680	\$151	\$82	1,520
Other food production*	\$123	\$55	1,010	\$197	\$89	1,755
Beverage Manufacturing	\$131	\$48	825	\$194	\$79	1,480
Head offices and related	\$107	\$80	1,310	\$175	\$115	2,005
Total	\$1,063	\$543	10,175	\$1,722	\$890	17,060

*Includes bakeries, confectionary and other food production.



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THE AGRICULTURAL ALLIANCE
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