## Deloitte.



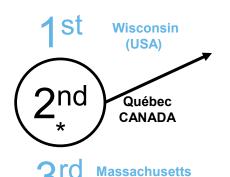


# Estimate of the economic impact 2019 of the Québec cranberry industry

A wealth-creating industry in terms of employment (2,168 total jobs), GDP (\$149 M contributed), and public administration revenue (\$36 M)

Québec is the world's 2<sup>nd</sup> largest cranberry-producing region, thanks notably to the performance of the

Centre-du-Québec and its leadership in organic production.



(USA)

Québec is also the

world leader in the production of

organic cranberries and

this growth will only consolidate its leadership.

Québec's organic cranberry production area has more than doubled between 2016 and 2019.

Organic cranberry production thus represents

nearly

40%

of Québec's production



Organic 18,500 lbs/acre +6% vs. 2015 Conventional 27,000 lbs/acre +10% vs. 2015

 $^{1}$  Productivity (or yield) is based on a moving average from the last 6 years.

Nearly 3/4 of production is processed locally
Exported Production Processed locally

55 M lbs

72% As a % of total production

The part of the production not shown includes the fresh market and product provided to smaller processors who weren't surveyed in this study

## The industry generates an important number of jobs in Québec, of which 2/3 are based in the Centre-du-Québec

Total amount of jobs generated in Québec (FTE)

Comparison for information purpos

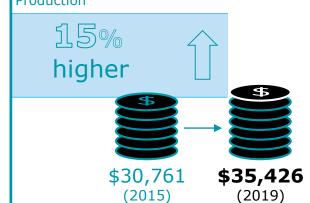
Share of the Centre-du-Québec in the Québec total

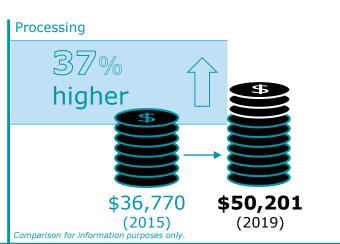
2015 67% 47%

1,673 ———

**2,168** (2019)

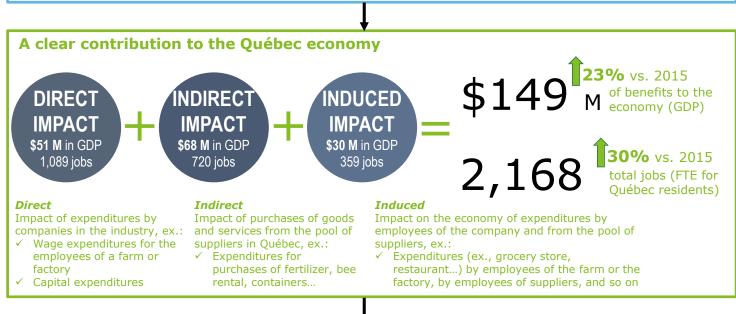






#### Economic impact of the industry in Québec in 2019

A considerable impact on public administration revenue, of which, on average, \$3 out of every \$5 are attributable to activities in the Centre-du-Québec \$1.6 M Share of the Centre-du-Québec in the \$8.5 M Québec total \$34.2 M Provincial and \$25.7 M federal This representation is similar for the provincial and federal levels taken individually



contributed to the GDP /100 acres of indirect contribution of induced contribution /\$10 M of direct contribution to the GDP

100

Per \$10 M of direct contribution

k in salaries

**O** k in public administration revenue /100 acres

.6 indirect jobs 3 induced jobs

The cranberry is distinguishing itself from other small fruits (according to the Québec government's Profil sectoriel de l'industrie bioalimentaire - 2019 Edition\*)

#### Cranberries in 1st place and Cranberries are capturing an increasingly growing quickly large share of the Québec diet Evolution of sales for Québec-grown Share of the apparent consumption of Base small fruits \* small fruits in Québec 100 \$ k 2015 2018 2015 2016 2018 2016 2017 2017 Fresh cranberries Blueberries Cranberries Blueberries Fozen raspberries Fresh grapes Raspberrise Grapes

Methodology of the study:

\* Market revenues, for a crop year

Survey of producers and processors

Companies' operating expenses

Investment expenditures

Intersectoral model (Institut de la statistique du Québec) Statistics Canada

\* Apparent consumption = Deliveries - exports + imports