



PEOPLE
INNOVATION
CAPITAL
INFRASTRUCTURE
AGILITY

New Brunswick Growth Opportunity

Maple syrup sector



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Province of New Brunswick
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Message from the Minister

The competitive landscape facing New Brunswick has fundamentally changed over the past decade and the number of jurisdictions competing with New Brunswick for global investment has increased. Although New Brunswick has made great progress, it is imperative that our growth not only continues but accelerates as we strive to provide the highest standard of living for our citizens.

The New Brunswick economic growth plan was created in consultations with many New Brunswickers from around the province and has set the framework for driving the province's economy forward. During our conversation with New Brunswickers, many opportunities for growth were identified, one of which was the growing maple syrup industry, which has seen continued, stable and incremental growth for over two decades. In recent years, the maple syrup sector in New Brunswick has emerged onto the global stage as the world's third largest producer, with an estimated 2 million kilograms of maple syrup being produced each year here in the province and then exported to 60 countries worldwide.

Today, New Brunswick's maple syrup industry employs 2,300 seasonal and part-time workers, with new opportunities for production and employment added each year. The recent expansion of the industry has set the table for investment and further growth. As the industry develops and reaches a critical point in its expansion, our focus is to ensure the maple syrup industry has the opportunity to realize its full potential. The Department of Energy and Resource Development has allotted an additional 4,400 hectares of land for maple sugar production bringing the total Crown land allocation to 13,500 hectares. By designating the amount of Crown land now available for production, we believe maple syrup will grow strongly in the coming years.

In addition to being an agricultural product, the maple syrup industry possesses significant market versatility regarding tourism, additional products and spin-off industries, which is why the maple syrup sector was selected as an opportunity within the New Brunswick Economic Growth Plan.

The Department of Agriculture, Aquaculture and Fisheries is leading this opportunity with the support of multiple other government departments including Energy and Resources Development, Tourism, Culture and Heritage and Opportunities New Brunswick. The industry association will also be an important partner as well as other community groups across the province. We look forward to working together to accelerate a dynamic maple syrup industry that is creating economic opportunity in all regions of the province.

Hon. Rick Doucet
Minister of Agriculture, Aquaculture and Fisheries
Minister of Energy and Resource Development



The New Brunswick Economic Growth Plan

Focusing our economic development efforts

The New Brunswick Economic Growth Plan is the result of valuable consultation with hundreds of community and business leaders from across the province. It provides the framework for the provincial government to improve and increase economic growth in New Brunswick.

The Economic Growth Plan is a directional plan outlining how government – across all of its departments, agencies and related organizations will mobilize to ensure there is a co-ordinated, complementary effort to improve New Brunswick's economy and establish a strong foundation for the future.

The New Brunswick Economic Growth Plan is based on five key focus areas:

- **PEOPLE** – We will grow our workforce by providing more targeted training and skills alignment efforts; and by significantly expanding the number of new and returning New Brunswickers building their careers in the province.
- **INNOVATION** – We will foster an innovative economy by investing more in research and development, supporting high growth potential entrepreneurs and by transforming government through new and innovative technologies.
- **CAPITAL** – We will boost private-sector investment by strengthening our business climate and addressing key challenges that are holding back growth.
- **INFRASTRUCTURE** – We will expand investment into economic infrastructure that ensures industries continue to invest here and talent from around the world will come to call our province home.
- **AGILITY** – We will increase the speed at which government interacts with the business community and we will strive to build a stronger partnership with industries to move the province ahead within a sustainable fiscal framework.

Pursuing Growth Opportunities

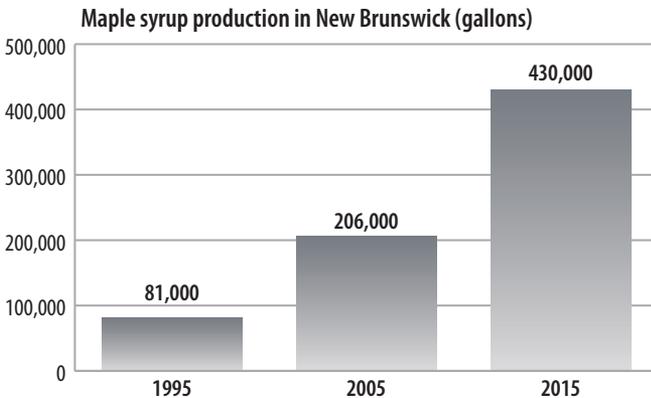
The New Brunswick Economic Growth Plan is focused on leveraging key industries, assets and attributes to create a strong value proposition for business investment. The global competition for business investment and talent has never been more pronounced and New Brunswick needs to focus its efforts to be able to compete and win.

Government will start by using the subject-matter experts in departments and working with the private sector and community-based partners to uncover potential opportunities. A growth opportunity is one that will lead to incremental business investment and jobs, leading to a sustained boost in economic activity (GDP) and tax revenue. Opportunities will be assessed based on:

1. the scope and scale of the opportunity (we need to boost the economy);
2. the time to impact (we need growth in the short term to stimulate the economy);
3. a clearly defined and relevant role for government and the resources required (not all opportunities for business investment require government involvement– some may require just a nudge); and
4. a defined return on taxpayer investment (we need to show that public investment in opportunities will increase tax revenues).

Growth Opportunity: Maple syrup

New Brunswick is one of the world's most forested jurisdictions, with 80 percent of the province's land covered in forest, and densely populated by maple trees. As a result, an established and burgeoning market in maple syrup has emerged over the last decade, providing the province with unique opportunities for growth.



Source: Statistics Canada.

New Brunswick is the world's third largest producer of maple syrup, witnessing steady increases in industry demand for over two decades. From 2000 to 2015, the sector's revenues grew exponentially (approximately 30 million dollars), powered by New Brunswick's vast forests, entrepreneurial spirit and well-equipped labour force.

New Brunswick's maple syrup industry employs 2,300 seasonal and part-time workers in New Brunswick, predominantly through the production process. The recent expansion of the industry sets the table for further growth, and as the industry develops, additional employment for production will be created, along with job creation through indirect services, value-added opportunities and spin-off industries.

In addition to being an agricultural product, the maple syrup industry and its spin-off products have substantial versatility for market place investment. Maple products possess significant cultural value not only in New Brunswick, but globally, and play a unique role in Canada's heritage and the east coast tourism industry. Developing opportunities for New Brunswick's tourism industry and the maple syrup industry to connect and build cross-sector opportunities is another reason why the maple syrup industry has been identified and selected as part of the New Brunswick Economic Growth Plan.

Given the right conditions and support, the maple syrup industry is anticipated to grow exponentially, yielding significant results for the province's economy, boosting the provincial GDP by approximately \$25 million over a short increment of time. Making the recently allotted Crown land available to the industry was the first step. Now we are looking for further opportunities in value added processing and tourism. We will work with key industry and government organizations to assess various opportunities and work together to pursue the ones that hold potential. We will also look at the potential of attracting more value added products firms into the industry.

Investing in the maple syrup sector will enable the industry to accelerate its positive economic trends, creating hundreds of new jobs and pivoting New Brunswick closer to its goal of prosperity by driving the economy forward.

We have identified actions under the five pillars of the New Brunswick Economic Growth Plan that will help us strengthen and grow the maple syrup sector in the years ahead.

People – Strengthen the Workforce

- The maple syrup industry currently employs 2300 people annually, with its epicenter located in Northern New Brunswick.
- Provide investment to entrepreneurial spin-off organizations and consolidate epicenter for maximum impact.
- Create opportunities for k-12 to learn and be exposed to industry, as well as family oriented activities and events.

Innovation

- Act as catalyst for merging the tourism industry with the maple syrup industry to create cross pollination and consolidation of industry.
- Evaluate potential research opportunities related to the maple syrup sector.
- Research complementary economic opportunities.
- Compliment marketing with social media and digital best practices.

Capital – more private investment

- Invest in private sector-led marketing initiatives to promote New Brunswick maple products outside our borders.
- Explore opportunities for private investment regarding the indirect services and economic benefits resulting from industry.

Investing in strategic infrastructure

- Ensure appropriate investment in road, air and port transportation infrastructure is in place for distribution.
- Promote New Brunswick's strategic location and transportation infrastructure (rail, road, ports) as a key competitive advantage as to why this industry is thriving in the province.
- Investigate red tape barriers to businesses and seek out bottle necks in distribution chains.

Foster agility and nimbleness in the public sector and across the economy

- Complete comprehensive scan of the province (using LiDAR technology) to identify areas of private land that may have potential for further development by the industry.