



UPDATE ON THE ECONOMIC IMPACTS OF THE CANADIAN DAIRY INDUSTRY IN 2015

Prepared for Dairy Farmers of Canada

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TABLE OF CONTENTS

1. INTRODUCTION	2
2. THE CANADIAN DAIRY INDUSTRY IN 2015: A BRIEF OVERVIEW	3
3. ECONOMIC IMPACTS OF THE DAIRY INDUSTRY	6
3.1 THE IMPACTS OF THE DAIRY INDUSTRY IN 2015	6
3.2 CHANGE IN THE DAIRY INDUSTRY'S IMPACTS SINCE 2009	8
4. CONCLUSION	11
APPENDICES	12
APPENDIX 1. DEFINITIONS.....	13
APPENDIX 2. METHODOLOGY	15
APPENDIX 3. TOTAL IMPACTS OF THE DAIRY INDUSTRY IN THE CANADIAN PROVINCES IN 2013 AND 2015	16
APPENDIX 4. CHANGE IN THE DAIRY INDUSTRY'S IMPACTS FROM 2009 TO 2015	19

LIST OF TABLES

TABLE 1. NUMBER OF DAIRY FARMS BY PROVINCE, 2015	3
TABLE 2. NUMBER OF DAIRY PROCESSING PLANTS BY PROVINCE, 2015	5
TABLE 3. TOTAL IMPACTS OF THE DAIRY INDUSTRY, CANADA, 2013 AND 2015	6
TABLE 4. TOTAL IMPACTS OF DAIRY PRODUCTION, BY PROVINCE, 2013 AND 2015	16
TABLE 5. TOTAL IMPACTS OF DAIRY PROCESSING, BY PROVINCE, 2013 AND 2015	17
TABLE 6. TOTAL IMPACTS OF THE DAIRY INDUSTRY, BY PROVINCE, 2013 AND 2015	18
TABLE 7. CHANGE IN THE DAIRY INDUSTRY'S IMPACTS IN CANADA FROM 2009 TO 2015	19
TABLE 8. CHANGE IN THE DAIRY INDUSTRY'S IMPACTS IN WESTERN CANADA¹ FROM 2009 TO 2015	20
TABLE 9. CHANGE IN THE DAIRY INDUSTRY'S IMPACTS IN ONTARIO FROM 2009 TO 2015	21
TABLE 10. CHANGE IN THE DAIRY INDUSTRY'S IMPACTS IN QUEBEC FROM 2009 TO 2015	22
TABLE 11. CHANGE IN THE DAIRY INDUSTRY'S IMPACTS IN THE MARITIMES¹ FROM 2009 TO 2015	23

LIST OF FIGURES

FIGURE 1. MILK PRODUCTION AT THE FARM AND CASH RECEIPTS, CANADA, 2009-2015	4
FIGURE 2. TOTAL IMPACTS OF THE DAIRY INDUSTRY, CANADA AND REGIONS, 2015	7
FIGURE 3. CHANGE IN TOTAL GDP FROM THE CANADIAN DAIRY INDUSTRY, 2009-2015¹	8
FIGURE 4. CHANGE IN TOTAL TAX REVENUES FROM THE CANADIAN DAIRY INDUSTRY, 2009-2015	9
FIGURE 5. CHANGE IN TOTAL JOBS GENERATED BY THE CANADIAN DAIRY INDUSTRY, 2009-2015, IN FTE	10

1. INTRODUCTION

The objective of this study is to estimate the economic impacts of the Canadian dairy industry in 2015 for the dairy production and processing sectors. This study is part of a series of similar studies conducted by ÉcoRessources covering the years 2009, 2011 and 2013, thereby making it possible to track changes in the sector and its impacts over the years.

The impacts assessed consist of jobs, gross domestic product (GDP) and tax revenues for the different levels of government that are generated by the dairy industry's activities. Only total impacts are assessed, that is, the sum of direct, indirect and induced impacts. The definitions of these terms are provided in an appendix. The methodology used to estimate the industry's impacts in 2015 is also provided in an appendix.

The next section first provides a brief overview of the Canadian dairy industry in 2015 to highlight its recent changes. Then the impacts of the industry in 2015 are provided, followed by a comparison with the results of previous studies, thereby providing a historical perspective of the period from 2009 to 2015.

2. THE CANADIAN DAIRY INDUSTRY IN 2015: A BRIEF OVERVIEW

The dairy industry is active in all Canadian provinces and is a mainstay of the economy in several regions. In 2015, Canada had roughly 11,700 dairy farms (-4.5% since 2013), the majority of which were located in Quebec and Ontario (see Table 1).

TABLE 1. NUMBER OF DAIRY FARMS BY PROVINCE, 2015

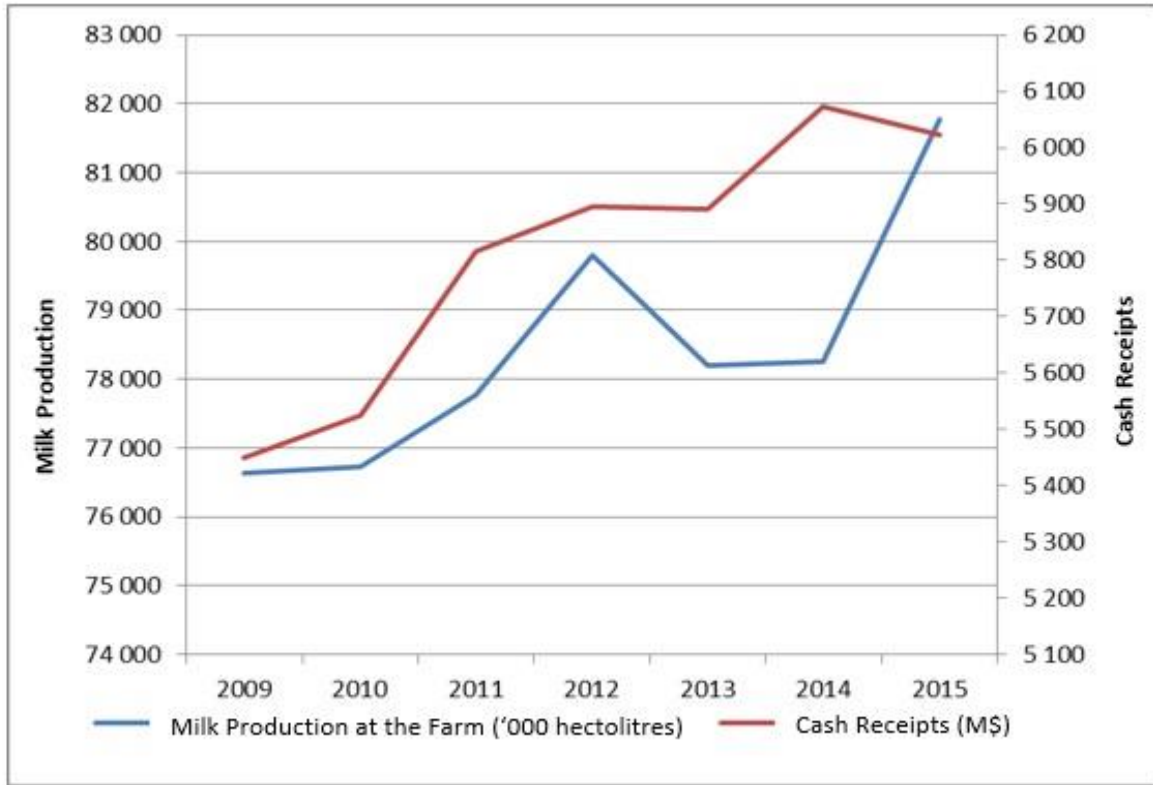
Province	Number of farms (share of Canadian total)
British Columbia	427 (3.7%)
Alberta	547 (4.7%)
Saskatchewan	163 (1.4%)
Manitoba	299 (2.6%)
Ontario	3,834 (32.8%)
Quebec	5,766 (49.4%)
New Brunswick	206 (1.8%)
Nova Scotia	225 (1.9%)
Prince Edward Island	174 (1.5%)
Newfoundland and Labrador	32 (0.3%)
CANADA	11,683 (100.0%)

Source: CDIC (2016)¹

Despite the decline in the number of farms since 2013, total milk production continued to grow, with nearly 82 million hectolitres of milk produced in 2015 (+5% since 2013). Consequently, Canadian dairy farms generated more than \$6 billion in cash receipts from milk and cream (+2% since 2013) (see Figure 1).

¹ CDIC [Canadian Dairy Information Centre] (2016). *Dairy Facts and Figures*. [online] http://www.dairyinfo.gc.ca/index_e.php?s1=dff-fcil.

FIGURE 1. MILK PRODUCTION AT THE FARM AND CASH RECEIPTS, CANADA, 2009-2015



Source: CDIC (2016)²

At the processing level, there were 444 dairy processing plants in Canada in 2014³ (-4.5% since 2013). Like the farms, the processing plants are mainly located in Quebec and Ontario (see Table 2).

² *Ibid.*

³ Data for 2015 were not available at the time of writing this report.

TABLE 2. NUMBER OF DAIRY PROCESSING PLANTS BY PROVINCE, 2015

Province	Number of plants (share of the Canadian total)
British Columbia	59 (13.3%)
Alberta	29 (6.5%)
Saskatchewan	1 (0.2%)
Manitoba	12 (2.7%)
Ontario	141 (31.8%)
Quebec	165 (37.2%)
New Brunswick	10 (2.3%)
Nova Scotia	15 (3.4%)
Prince Edward Island	9 (2.0%)
Newfoundland and Labrador	3 (0.7%)
CANADA	444 (100.0%)

Source: CDIC (2016)⁴

These plants generated manufacturing shipments with a total value of \$17.0 billion in 2015, a 7.3% increase since 2013 (Statistics Canada, 2016).⁵

⁴ *Ibid.*⁵ Statistics Canada (2016). *Table 304-0014 - Manufacturers' sales, inventories, orders and inventory to sales ratios, by North American Industry Classification System (NAICS), Canada, monthly (dollars unless otherwise noted)* (site visited on June 3, 2016).

3. ECONOMIC IMPACTS OF THE DAIRY INDUSTRY

3.1 The impacts of the dairy industry in 2015

Table 3 shows the total GDP, tax revenues and number of jobs generated by the Canadian dairy industry in 2013 and 2015. Jobs are given in full-time equivalent (FTE), that is, in number of jobs representing 2,000 hours of work/year.

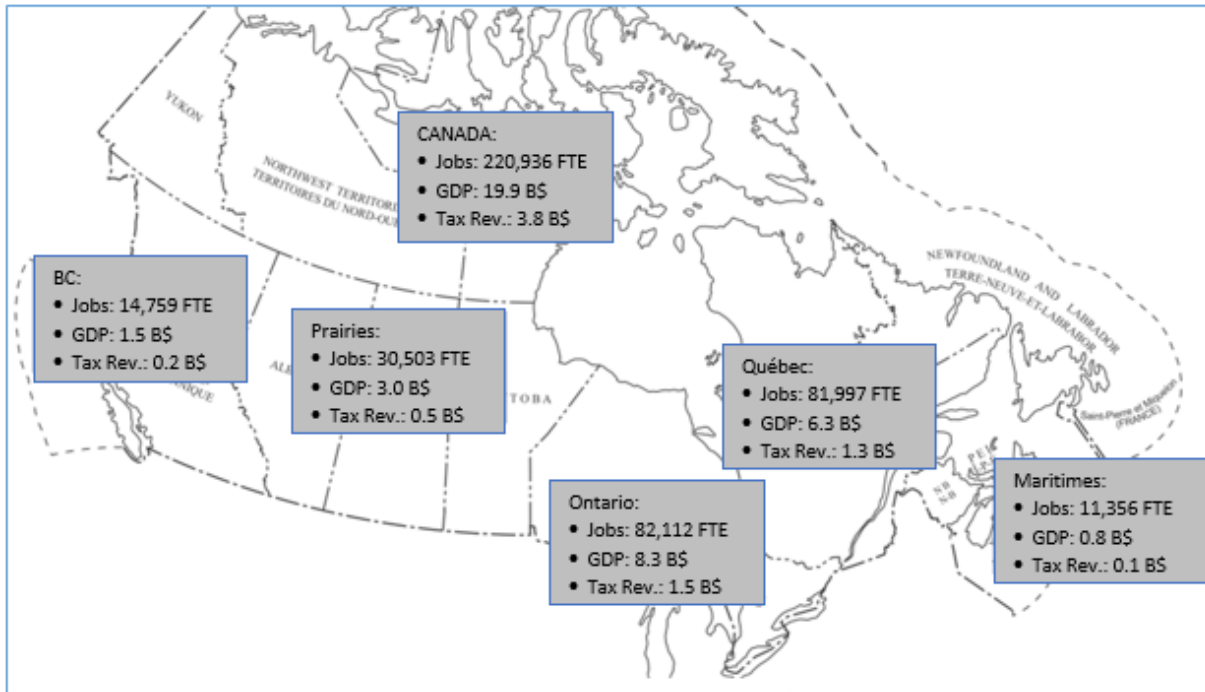
TABLE 3. TOTAL IMPACTS OF THE DAIRY INDUSTRY, CANADA, 2013 AND 2015

	Total GDP (\$M)		Total tax revenues (\$M)		Total jobs (FTE)	
	2013	2015	2013	2015	2013	2015
Production	8,079	8,675	1,526	1,638	112,601	115,793
Processing	10,798	11,211	2,057	2,136	102,244	105,143
Dairy industry	18,877	19,886	3,583	3,774	214,845	220,936

By taking into account the direct, indirect (supplier) and induced (employee) impacts, the Canadian dairy industry was able to create or maintain nearly 221,000 FTE jobs in 2015, an increase of roughly 3% since 2013. The industry also generated a total GDP of \$19.9 billion (+5% since 2013), as well as \$3.8 billion in tax revenues for the various levels of government (+5% since 2013). These impacts are distributed fairly equally between the production and processing sectors.

From a geographical perspective, a significant share of these impacts are found in Ontario and Quebec, where the majority of Canada’s dairy farms and processing plants are located. Figure 2 shows the distribution of the Canadian dairy industry’s impacts among the major regions of the country. The impacts generated in each Canadian province are provided in Appendix 3.

FIGURE 2. TOTAL IMPACTS OF THE DAIRY INDUSTRY, CANADA AND REGIONS, 2015



Source: Adapted from Natural Resources Canada (2007)⁶

It is interesting to note that the importance of each region of the country depends on the sector. In particular, Ontario stands out primarily for its concentration of dairy processing. As a result, roughly 46% of the impacts from dairy processing are found in this province, compared to 32% of the impacts generated by production. The opposite is found in Quebec, where 40% of the impacts from production are generated, compared to 30% of the impacts from processing. This is primarily due to the concentration of the manufacturing sector and, in particular, the dairy processing sector in Ontario. For instance, sales by dairy processing companies in Ontario reached \$7.6 billion in 2015, compared to \$5.4 billion in Quebec (Statistics Canada, 2016a).⁷ In the other regions, the respective production and processing shares are similar to one another.

⁶ Natural Resources Canada (2007). Reference maps. [online] <http://atlas.gc.ca/site/francais/maps/reference/>.

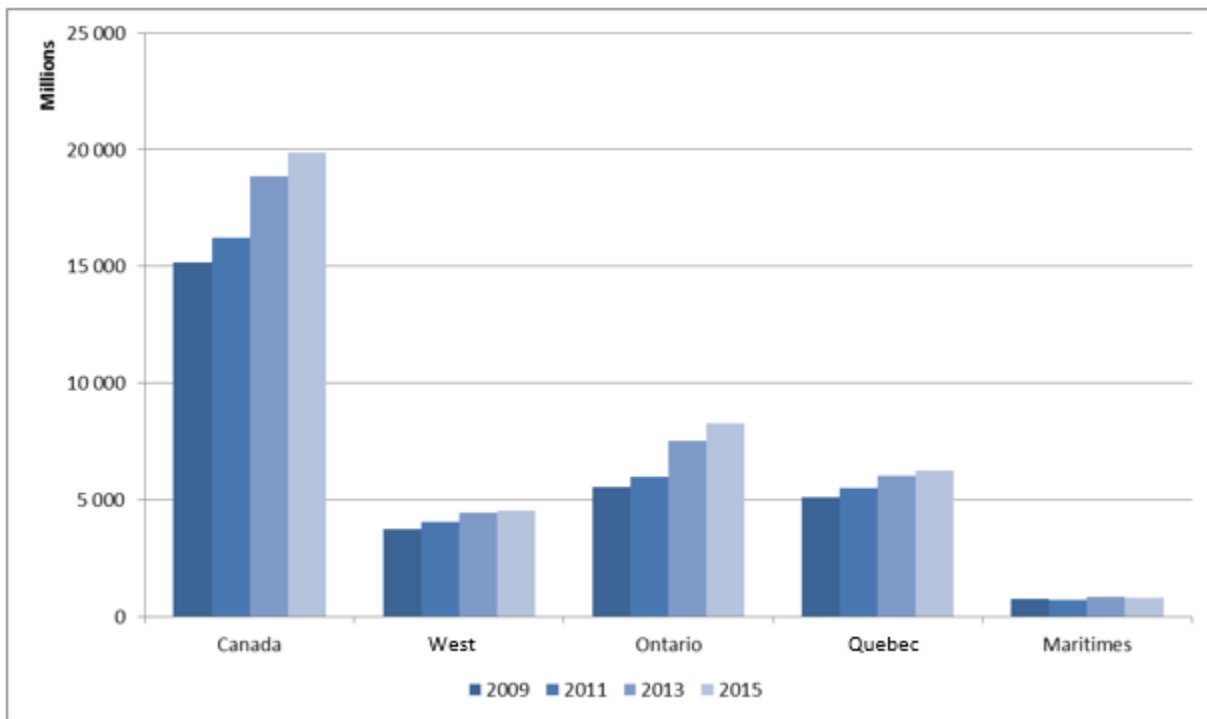
⁷ Statistics Canada (2016a). *Table 304-0015 - Manufacturing sales, by North American Industry Classification System (NAICS) and province, monthly (dollars)* (site visited on May 3, 2016).

3.2 Change in the dairy industry's impacts since 2009

From 2009 to 2015, the Canadian dairy industry experienced a growth in its activities, resulting in a 26% increase in sales (29% for production and 24% for processing)⁸ (Statistics Canada, 2016a, 2016b).⁹ This growth led to an increase in the impacts generated by the industry during the 2009-2015 period: 31% for GDP, 25% for tax revenues and 3% for jobs (in FTE).

This growth is seen across the country, with a few exceptions. The following figures show the change in impacts in the main regions of Canada since 2009 for the dairy industry as a whole.

FIGURE 3. CHANGE IN TOTAL GDP FROM THE CANADIAN DAIRY INDUSTRY, 2009-2015¹



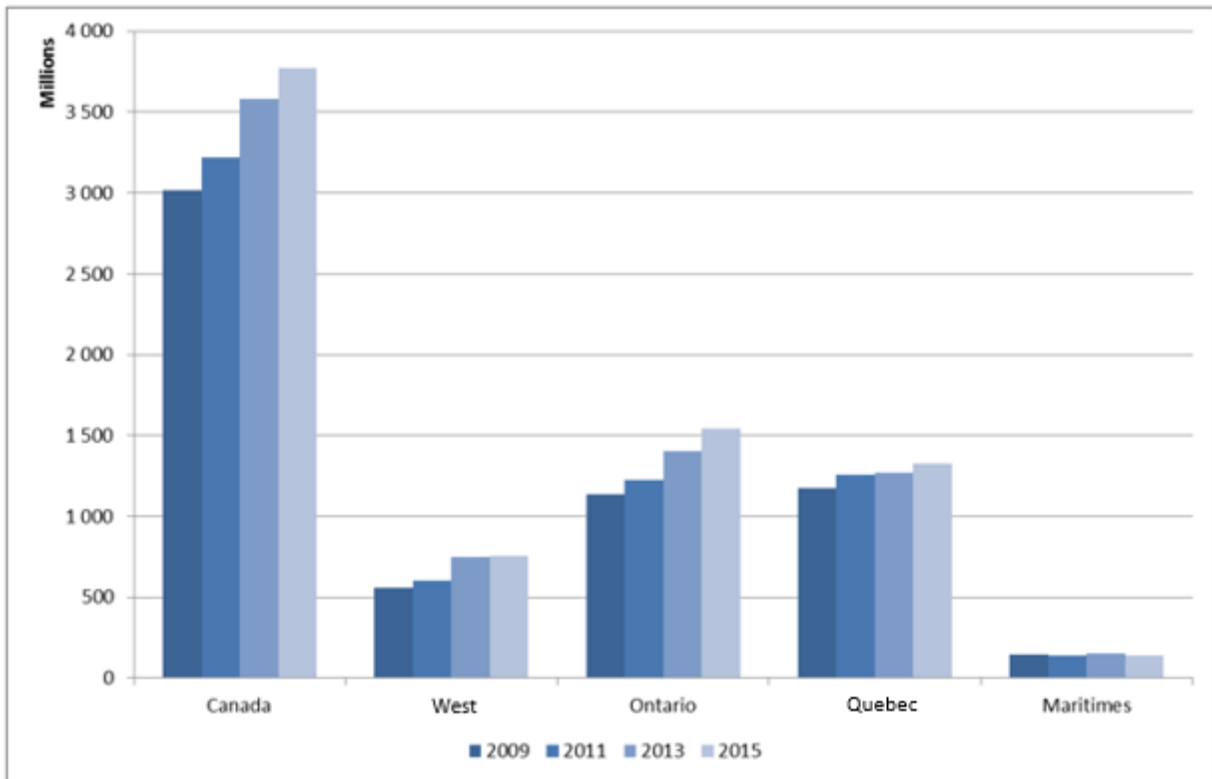
Note 1: Western Canada includes British Columbia, Alberta, Saskatchewan and Manitoba. The Maritimes include New Brunswick, Nova Scotia, Prince Edward Island, and Newfoundland and Labrador.

⁸ In this section, all amounts are in current dollars. The amounts in constant dollars from 2009 are provided in Appendix 4 to exclude the effect of inflation.

⁹ Statistics Canada (2016a). *Table 304-0015 - Manufacturing sales, by North American Industry Classification System (NAICS) and province, monthly (dollars)* (site visited on May 3, 2016); and Statistics Canada (2016b). *Table 002-0001 - Farm cash receipts, annual (dollars)* (site visited on May 31, 2016).

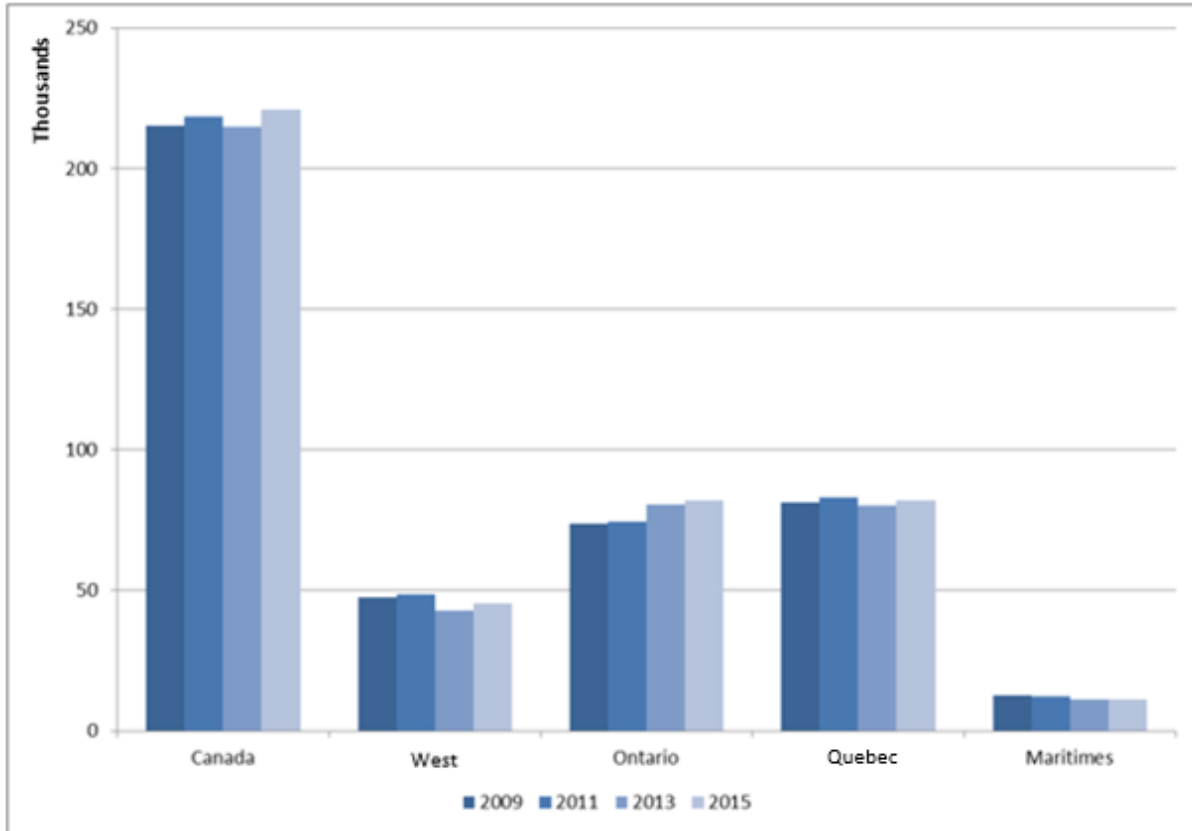
GDP growth reached 21% in Western Canada, 49% in Ontario, 22% in Quebec and 5% in the Maritimes.

FIGURE 4. CHANGE IN TOTAL TAX REVENUES FROM THE CANADIAN DAIRY INDUSTRY, 2009-2015



In terms of tax impacts, the 2009-2015 period saw a 35% increase in Western Canada, 36% in Ontario and 13% in Quebec. In the Maritimes, tax revenues generated by the industry dropped by 2%.

FIGURE 5. CHANGE IN TOTAL JOBS GENERATED BY THE CANADIAN DAIRY INDUSTRY, 2009-2015, IN FTE



Between 2009 and 2015, Western Canada experienced a 4.7% decrease in the total number of jobs. Ontario and Quebec rose by 11.4% and 0.9%, respectively. Lastly, the Maritimes dropped by 10.2%.

Along with the overall changes in dairy industry impacts, the geographic distribution of these impacts also changed over time, with different provinces experiencing increases and decreases in the number of farms and plants. As a result, the share of impacts generated in Ontario has increased since 2009, for all impacts, whereas it has decreased in Quebec and the Maritimes. In Western Canada, there has been a decrease in the share of GDP and an increase in the share of tax impacts and jobs.

Appendix 4 shows the impacts by major region for the four years studied, namely 2009, 2011, 2013 and 2015. These impacts are indicated in current dollars as well as in constant dollars from 2009 to exclude the effect of inflation.

4. CONCLUSION

This report provides an update on the economic impacts of the Canadian dairy industry for the year 2015. This study is part of a series of similar studies conducted by ÉcoRessources covering the years 2009, 2011 and 2013, thereby making it possible to track changes in the sector and its impacts over the years.

This report shows that, over the past few years, the industry has grown in terms of production and sales (a 2% increase in farm receipts and a 7% increase in manufacturing shipments between 2013 and 2015). As a result, there has been an increase in its impacts. In 2015, the dairy industry was responsible for the creation of \$19.9 billion in GDP, \$3.8 billion in tax revenues for the governments and nearly 221,000 jobs (in FTE). These impacts are spread across the country, with a concentration in Ontario and Quebec, where the majority of Canada's dairy farms and processing plants are located. This growth in industry activity also led to an increase in impacts during the 2009-2015 period. Accordingly, GDP rose by 31% and tax revenues by 25%, whereas jobs climbed by roughly 3% during this period.

In conclusion, the dairy industry is a mainstay of the Canadian and provincial economies, generating significant impacts. With its continued growth, the sector creates new jobs and helps stimulate the economy of all the provinces as well as numerous rural communities.

APPENDICES

APPENDIX 1. DEFINITIONS

- Jobs: In this study, jobs are given in full-time equivalent (FTE), that is, in number of jobs representing 2,000 hours of work/year. Thus, two seasonal jobs of 1,000 hours of work per year equal one FTE.
- Gross domestic product (GDP): GDP is the value added generated by companies and other organizations during a production process. It includes salaries and pre-tax pay, benefits, sole proprietorship revenues, profits and depreciation, as well as indirect taxes on goods and services, minus commodity subsidies.
- Tax revenues: The tax revenues of the federal and provincial governments are estimated as the amount of receipts from personal income tax, sales taxes, and other indirect taxes and tax on company profits. These tax revenues are net revenues, with subsidies and other government contributions having been subtracted from gross revenues.
- Direct impacts: Direct impacts are those that arise from the activities of the two sectors looked at in this study, namely production and processing. For example, direct jobs are those held by hired labour and dairy farm operators, as well as the work force in processing plants. Therefore, the level of direct impacts of an industry sector will depend first on its production level, operating expenses and necessary investments (Weisbrod and Weisbrod, 1997). The labour intensity of the sectors studied will also influence the significance of the jobs created (Pollin et al., 2008).
- Indirect impacts: Indirect impacts are those that result from the goods and services purchases by dairy production and processing companies. For example, by buying fertilizer, dairy farms help farm input suppliers create jobs and value added. Also, indirect impacts are calculated on the entire supply chain. As such, purchases by input suppliers to enable them to operate, such as purchasing fuel, insurance, etc., are also indirect impacts of the dairy sector. The quantities of goods and services purchased by the dairy sector from its suppliers, as well as the location of those purchases (e.g., local purchases or imports), will therefore affect the sector's level of indirect impacts. Moreover, the interactions of dairy sector suppliers with their own suppliers will also play a major role (Pollin et al., 2008).

- Induced impacts: Induced economic impacts result from spending by consumers (farmers, farm workers, processing plant workers, truck drivers, etc.) whose income depends on the spending of the Canadian dairy industry. Thus, a dairy farm worker who spends part of his or her salary at the local grocery store will result in impacts (e.g., jobs) at that grocery store. Since consumer spending represents over 60% of the Canadian economy, factoring in induced impacts helps provide a comprehensive view of all economic impacts. Therefore, the labour intensity of the sectors and the salary levels of the sectors studied are the main factors influencing the level of induced impacts (Pollin et al., 2008).
- Total impacts: Total impacts are the sum of direct, indirect and induced impacts. Those statistics provide a complete picture of the impacts generated by the industry.

APPENDIX 2. METHODOLOGY

The industry's impacts are assessed at both the Canadian and the provincial levels. The results given are an update on the 2013 results. More precisely, GDP and tax revenues for the year 2015 are estimated by taking into account the industry's sales trends between 2013 and 2015, and by using ratios calculated in the previous study, called multipliers. For example, the gross domestic product (GDP) generated by the industry in 2015 is estimated by multiplying 2015 industry sales by the GDP multiplier, calculated in 2013:

$$GDP_{2015} = Sales_{2015} \times GDP \text{ Multiplier}$$

$$\text{(where } GDP \text{ Multiplier} = \frac{GDP_{2013}}{Sales_{2013}})$$

An alternative methodology was employed to calculate jobs. As such, the increase in jobs in the dairy processing sector, estimated at 2.8% (CDIC, 2016),¹⁰ was used to develop an assumption that the total jobs in the industry increased by a similar proportion. The increase thus measured (6,091 additional jobs) was then broken down among the regions based on the changing milk volumes used in the processing sector and the distribution of jobs among the provinces in 2013.

This approach makes it possible to approximate the industry's impacts. The complete methodology used to measure the impacts in 2013, and from which the multipliers were calculated, can be found in ÉcoRessources (2015).¹¹

¹⁰ *Ibid.*

¹¹ ÉcoRessources (2015). *The Economic Impacts of the Canadian Dairy Industry in 2013. Final Report.* Prepared for Dairy Farmers of Canada.

APPENDIX 3. TOTAL IMPACTS OF THE DAIRY INDUSTRY IN THE CANADIAN PROVINCES IN 2013 AND 2015

Tables 4, 5 and 6 show the total impacts (total GDP, tax revenues and jobs) generated by production, processing and the dairy industry in the Canadian provinces in 2013 and 2015.

TABLE 4. TOTAL IMPACTS OF DAIRY PRODUCTION, BY PROVINCE, 2013 AND 2015

Province	Total GDP (\$M)		Total tax revenues (\$M)		Total jobs (FTE)	
	2013	2015	2013	2015	2013	2015
British Columbia	574	678	88	104	7,015	7,391
Alberta	783	910	133	155	7,566	7,971
Saskatchewan	231	262	34	39	2,542	2,678
Manitoba	292	342	40	46	4,041	4,257
Ontario	2,593	2,822	480	523	37,029	37,847
Quebec	3,188	3,198	678	680	48,238	49,303
New Brunswick	126	135	23	25	1,872	1,913
Nova Scotia	163	188	29	33	2,356	2,408
Prince Edward Island	71	76	11	12	1,286	1,314
Newfoundland and Labrador	52	56	8	9	587	600
CANADA	8,079	8,675	1,526	1,638	112,601	115,793

TABLE 5. TOTAL IMPACTS OF DAIRY PROCESSING, BY PROVINCE, 2013 AND 2015

Province	Total GDP (\$M)		Total tax revenues (\$M)		Total jobs (FTE)	
	2013	2015	2013	2015	2013	2015
British Columbia	741	831	123	138	6,994	7,368
Alberta	1,280	1,120	239	209	9,275	9,772
Saskatchewan	198	151	35	27	2,019	2,127
Manitoba	351	240	60	41	3,510	3,698
Ontario	4,942	5,453	923	1,019	43,309	44,265
Quebec	2,826	3,072	595	647	31,987	32,693
New Brunswick	1,257	95	22	17	1,469	1,501
Nova Scotia	225	172	40	31	2,418	2,471
Prince Edward Island	52	40	9	7	614	628
Newfoundland and Labrador	46	35	8	6	509	520
CANADA	10,798	11,211	2,057	2,136	102,244	105,143

TABLE 6. TOTAL IMPACTS OF THE DAIRY INDUSTRY, BY PROVINCE, 2013 AND 2015

Province	Total GDP (\$M)		Total tax revenues (\$M)		Total jobs (FTE)	
	2013	2015	2013	2015	2013	2015
British Columbia	1,316	1,509	211	241	14,009	14,759
Alberta	2,063	2,030	372	364	16,841	17,743
Saskatchewan	429	413	70	66	4,561	4,805
Manitoba	642	582	100	88	7,551	7,955
Ontario	7,534	8,275	1,403	1,541	80,338	82,112
Quebec	6,013	6,270	1,273	1,327	80,224	81,997
New Brunswick	250	230	45	42	3,340	3,415
Nova Scotia	389	360	69	64	4,774	4,879
Prince Edward Island	123	116	20	19	1,899	1,942
Newfoundland and Labrador	99	92	17	15	1,096	1,120
CANADA	18,877	19,886	3,583	3,774	214,845	220,936

APPENDIX 4. CHANGE IN THE DAIRY INDUSTRY'S IMPACTS FROM 2009 TO 2015

TABLE 7. CHANGE IN THE DAIRY INDUSTRY'S IMPACTS IN CANADA FROM 2009 TO 2015

	2009	2011	2013	2015	2009-2015 (%)
Total GDP (\$M)					
Production	7,257	7,825	8,079	8,675	19.5%
Processing	7,926	8,420	10,798	11,211	41.4%
Industry	15,183	16,204	18,877	19,886	31.0%
Total GDP (\$M, in constant dollars from 2009)					
Production	7,257	7,466	7,527	7,839	8.0%
Processing	7,926	8,034	10,059	10,131	27.8%
Industry	15,183	15,460	17,586	17,970	18.4%
Tax revenues (\$M)					
Production	1,396	1,505	1,526	1,638	17.4%
Processing	1,620	1,721	2,057	2,136	31.8%
Industry	3,016	3,219	3,583	3,774	25.1%
Tax revenues (\$M, in constant dollars from 2009)					
Production	1,396	1,436	1,421	1,480	6.1%
Processing	1,620	1,642	1,916	1,930	19.1%
Industry	3,016	3,071	3,338	3,410	13.1%
Jobs (FTE)					
Production	127,363	129,273	112,601	115,793	-9.1%
Processing	87,741	89,057	102,244	105,143	19.8%
Industry	215,103	218,330	214,845	220,936	2.7%

TABLE 8. CHANGE IN THE DAIRY INDUSTRY'S IMPACTS IN WESTERN CANADA¹ FROM 2009 TO 2015

	2009	2011	2013	2015	2009-2015 (%)
Total GDP (\$M)					
Production	1,802	1,965	1,881	2,191	21.6%
Processing	1,942	2,077	2,567	2,343	20.7%
Industry	3,744	4,042	4,450	4,534	21.1%
Total GDP (\$M, in constant dollars from 2009)					
Production	1,802	1,875	1,752	1,980	9.9%
Processing	1,942	1,981	2,394	2,117	9.0%
Industry	3,744	3,856	4,146	4,097	9.4%
Tax revenues (\$M)					
Production	236	257	295	344	45.3%
Processing	324	347	457	415	28.0%
Industry	561	604	752	759	35.3%
Tax revenues (\$M, in constant dollars from 2009)					
Production	236	245	275	310	31.3%
Processing	324	331	426	375	15.7%
Industry	561	576	701	685	22.3%
Jobs (FTE)					
Production	27,608	28,121	21,164	22,297	-19.2%
Processing	19,881	20,251	21,798	22,965	15.5%
Industry	47,489	48,372	42,962	45,262	-4.7%

Note 1: Western Canada includes British Columbia, Alberta, Saskatchewan and Manitoba.

TABLE 9. CHANGE IN THE DAIRY INDUSTRY'S IMPACTS IN ONTARIO FROM 2009 TO 2015

	2009	2011	2013	2015	2009-2015 (%)
Total GDP (\$M)					
Production	2,584	2,794	2,593	2,822	9.2%
Processing	2,963	3,181	4,942	5,453	84.0%
Industry	5,547	5,968	7,534	8,275	49.2%
Total GDP (\$M, in constant dollars from 2009)					
Production	2,584	2,645	2,397	2,519	-2.5%
Processing	2,963	3,012	4,568	4,866	64.2%
Industry	5,547	5,650	6,965	7,385	33.1%
Tax revenues (\$M)					
Production	523	566	480	523	-0.1%
Processing	615	670	923	1,019	65.7%
Industry	1,138	1,224	1,403	1,541	35.5%
Tax revenues (\$M, in constant dollars from 2009)					
Production	523	536	444	467	-10.8%
Processing	615	625	853	909	47.9%
Industry	1,138	1,159	1,297	1,376	20.9%
Jobs (FTE)					
Production	42,158	42,575	37,029	37,847	-10.2%
Processing	31,536	31,849	43,309	44,265	40.4%
Industry	73,694	74,423	80,338	82,112	11.4%

TABLE 10. CHANGE IN THE DAIRY INDUSTRY'S IMPACTS IN QUEBEC FROM 2009 TO 2015

	2009	2011	2013	2015	2009-2015 (%)
Total GDP (\$M)					
Production	2,530	2,718	3,188	3,198	26.4%
Processing	2,600	2,774	2,826	3,072	18.2%
Industry	5,130	5,485	6,013	6,270	22.2%
Total GDP (\$M, in constant dollars from 2009)					
Production	2,530	2,605	2,970	2,908	15.0%
Processing	2,600	2,659	2,633	2,794	7.5%
Industry	5,130	5,258	5,603	5,702	11.2%
Tax revenues (\$M)					
Production	571	613	678	680	19.2%
Processing	604	644	595	647	7.1%
Industry	1,175	1,256	1,273	1,327	13.0%
Tax revenues (\$M, in constant dollars from 2009)					
Production	571	588	632	619	8.4%
Processing	604	618	554	588	-2.6%
Industry	1,175	1,204	1,186	1,207	2.7%
Jobs (FTE)					
Production	50,257	51,381	48,238	49,303	-1.9%
Processing	31,022	31,715	31,987	32,693	5.4%
Industry	81,279	83,096	80,225	81,997	0.9%

TABLE 11. CHANGE IN THE DAIRY INDUSTRY'S IMPACTS IN THE MARITIMES¹ FROM 2009 TO 2015

	2009	2011	2013	2015	2009-2015 (%)
Total GDP (\$M)					
Production	342	356	412	455	33.1%
Processing	421	388	449	343	-18.5%
Industry	763	731	861	798	4.6%
Total GDP (\$M, in constant dollars from 2009)					
Production	342	340	384	411	20.3%
Processing	421	370	418	310	-26.3%
Industry	763	697	802	721	-5.5%
Tax revenues (\$M)					
Production	65	68	71	79	20.7%
Processing	78	72	80	61	-21.2%
Industry	143	137	151	140	-2.1%
Tax revenues (\$M, in constant dollars from 2009)					
Production	65	65	66	71	9.1%
Processing	78	68	75	55	-28.8%
Industry	143	131	141	126	-11.5%
Jobs (FTE)					
Production	7,339	7,222	6,101	6,236	-15.0%
Processing	5,301	5,217	5,010	5,121	-3.4%
Industry	12,641	12,439	11,111	11,356	-10.2%

Note 1: New Brunswick, Nova Scotia, Prince Edward Island, and Newfoundland and Labrador