
Supply and Use of Agricultural Production in Manitoba



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LIVESTOCK PRODUCTION IN MANITOBA

Cattle

As shown in Table 1, farm cash receipts for cattle and calves were \$588.20 million in 2019. This was 1.7 per cent lower than in 2018, mainly due to a slight decrease in marketings.

Manitoba producers reported one million beef and dairy cattle on farms on January 1, 2020. This is 2.9 per cent lower than January 2019. Compared to last year, beef cow numbers at 400,200 head, and dairy cow numbers at 36,800 head, were down 2.6 per cent and 7.8 per cent respectively.

Marketing of cattle and calves were 425,200 head for 2019, similar to last year. However, this was nine per cent higher than in 2015. For the last two years, producers reduced their herds, increasing marketings due to poor pastures and expensive or lack of feed supplies. Marketings include processing in Canada (22.6 per cent), international exports (22.5 per cent) and interprovincial exports (55 per cent).

The number of cattle and calves exported internationally from Manitoba was 95,600 head for 2019, very similar to 2018. The value of the international exports increased less than one per cent to \$138.03 million. Interprovincial exports for 2019 were 233,700 head. Producers shipped cattle and calves to Alberta, Saskatchewan and Ontario. International imports of 8,933 head totalled \$7.82 million in 2019, which was 29.7 per cent higher than in 2018.

Manitoba Agriculture's Cost of Production Guidelines showed negative returns of \$1.77 per calf, for cow-calf operations in 2019. Feed costs per cow were estimated 42 per cent higher in 2019, compared to 2018. The lack of profitability for cattle producers is a major deterrent to expansion.

Manitoba 2019 prices for market cattle were very similar to last year, with less than one per cent change in most categories. However, prices for breeding beef cows were significantly lower, by 26 per cent, compared to 2018. Note that the breeding cow prices are spot prices on July 1, whereas the market prices are annual averages. COVID-19 has created volatile markets for cattle. Current prices for most classes of cattle are lower than last year, with the exception of cow and bull prices, which are in high demand for grinding meat. Heavy feeder steers were 19 per cent lower, while 500-600 lb feeder steers were eight per cent lower (Table 2).

The number of cattle and calves processed in Manitoba's provincial abattoirs in 2019 was 23,583 head, up 27.5 per cent compared to 2018, and 2.4 times higher than the 9,726 head processed in 2015. Manitoba processing represents 24.6 per cent of the total Manitoba cattle killed in Canada.

Manitoba origin slaughter in Canada was 95,900 head in 2019, 5.7 per cent lower than in 2018. The slaughter mix was comprised of more culled breeding stock and less finished cattle, as producers did not have feed supplies to profitably grow their animals to finished weights.

Manitoba cattle producers have less marketing opportunities for processing in Ontario with the closing of the Ryding Regency meat packing plant last fall, and with the temporary reduced processing at Cargill in Alberta. Options to process in the United States (U.S.) are less, as some beef plants close or reduce processing due to COVID-19 issues.

Manitoba beef processors produced 9.1 million kg of meat, and exported 1.1 million kg. There were international imports of 10.1 million kg of beef and interprovincial imports were estimated at 23.5 million kg, so consumers could have 33.4 million kg available for consumption, or 25.4 kg per person. The total number of cattle needed to meet this consumption was 86,696 head. Manitoba processors would have to utilize an additional 63,113 head to supply current consumer demand.

Global demand for beef is large and getting larger, creating opportunities for producers and processors, particularly in niche markets for beef, such as grass fed beef. Retailers, restaurants and consumers are looking for sustainable sources of beef. Manitoba beef producers that are enrolled in national industry-led programs that verify standards for safety, consistency and sustainability, such as the Verified Beef Production–Plus (VBP+) program and the Certified Sustainable Beef Framework, have the opportunity to leverage this certification and reach the sustainable beef market. In 2018, 440 Manitoba beef producers were enrolled in VBP, accounting for 11.3 per cent of the provincial beef herd. The number of producers participating in VBP/VBP+ is higher in Manitoba than in any other province.

There are opportunities to tap into markets such as Asia that have been hit by the African swine fever, creating a massive protein deficit.

Hog

As shown in Table 3, farm cash receipts for hogs were \$1.09 billion in 2019, up 9.3 per cent from the previous year, mainly due to higher prices.

Manitoba is the largest producer of pigs in Canada with 7.71 million head in 2019. This is 1.7 per cent higher than 2018, but 1.8 per cent lower than in 2017. Manitoba producers reported 3.31 million hogs on farms on January 1, 2020, 1.9 per cent lower than January 2019. Sow and gilt numbers, at 341,000 head, were up 0.6 per cent.

Marketings include processing in Canada (56.9 per cent), international exports (39.7 per cent) and interprovincial exports (0.5 per cent). The number of hogs exported internationally from Manitoba was 2.99 million head for 2019, 2.1 per cent lower than in 2018. The value of the international exports increased 3.6 per cent to \$2.26 million in 2019.

Manitoba Agriculture's Cost of Production Guidelines showed positive returns for hog operations in 2019. Feed costs were relatively low and hog prices were good in 2019.

Manitoba 2019 prices for market hogs were nine per cent higher compared to 2018. However, current prices are 9.2 per cent lower than the 2019 average. Hog prices are primary based off the U.S. prices, which have been extremely volatile and declining recently. COVID-19 has caused shutdowns at the Olymel plant in Quebec and Smithfield's in the U.S. The disruptions in marketings has had a large effect on U.S. futures prices. Weanling pig prices have been most negatively impacted by the futures prices, with prices for isoweans down 49 per cent and feeder pigs down 43 per cent compared to 2019. Cash bids for isoweans were as low as US\$1/pig last week (Table 4).

The number of hogs processed in Manitoba's 27 abattoirs in 2019 was 5.53 million head, up 3.3 per cent compared to 2018. Manitoba origin slaughter in Canada was 4.69 million head in 2019, 2.8 per cent higher than in 2018. In 2019, Manitoba received hogs from Alberta (211,068), Saskatchewan (595,670), Ontario

(26,321) and Quebec (984) for processing, and sent hogs for processing to Saskatchewan (14,603) and Alberta (18,090).

Manitoba has two major pork processors, Maple Leaf Foods and HyLife Foods, and 25 smaller processors that produced 546.9 million kg of pork in 2019. Although processing capacity in Manitoba has recently increased in 3.9 per cent, there is still approximately 30 per cent of available processing capacity. Pork imports were 20.7 million kg valued at \$126.7 million. Processors exported 322.3 million kg of pork internationally, valued at \$1.2 billion. Interprovincial exports are estimated at 216.9 million kg. Consumers had 28.5 million kg available for consumption, or 21.67 kg per person.

Growing demand for protein and the African swine fever in Asia created opportunities for pork products in general, and niche products such as Berkshire pork and whole hog barbeque.

Poultry

Please see the following tables for reference Tables 5, 6 and 7.

Supply management is a uniquely Canadian approach to agricultural production of dairy, poultry and eggs that benefits Canadian consumers, farmers and processors. Under this system, regulated farmers get a fair return for their products from the marketplace, processors get a reliable supply of product, and Canadians are provided with a consistent choice of safe, nutritious and high-quality products at reasonable prices.

Chicken

There are 23 registered broiler breeder and 118 registered broiler (meat) chicken farms in Manitoba, raising approximately 35.3 million broiler chickens in 2018. Broiler farms in the province typically produce seven flocks per year. The average broiler chicken farm in Manitoba raises approximately 43,000 broiler chickens per flock.

As shown in Table 5, farm cash receipts for chicken grew by 16.7 per cent, from \$104.32 million in 2015 to \$121.7 million in 2019. Manitoba producers reported 35,296 chickens on farms in 2018, one per cent higher than in 2017 and 13.5 per cent higher than in 2015. These birds produced 53.67 million kg of meat in 2018, which was 9.6 per cent higher than in 2015.

In 2019, Manitoba imported from international sources 1.17 million birds, resulting in a 49.4 per cent increase compared to 2018, and 67.0 per cent higher than in 2015. There are no direct international exports of birds in the last four years.

In 2018, Manitoba was the fifth largest chicken producer in Canada with six poultry abattoirs, including two federally-registered facilities (Dunn-Rite Food Products and Granny's Poultry Co-op Ltd), one provincially-permitted facility that processes year round (Waldner Meats), and three colony-based abattoirs that process only seasonally.

Availability of chicken for consumption per capita has increased 8.3 per cent to 34.62 kg from 2015 to 2018. Chicken is the number one meat protein of choice for Canadians. Canadians purchased 59 per cent of their chicken at retail in 2017, followed by 24 per cent through fast food restaurants, 12 per cent through full service restaurants and five per cent through hotels and institutions. The sector is currently experiencing a decline in demand of fresh chicken, as consumption shifts from food service to retail.

Turkey

There are 56 turkey farms in Manitoba that typically produce three to five flocks per year. The average turkey farm raised 5,500 turkeys per flock. Manitoba has one federally-inspected turkey processor, Granny's Poultry Co-op, which processes turkey primarily for the whole turkey market.

Over the past four years, farm cash receipts for turkeys have declined by 8.6 per cent, from \$24.1 million in 2015 to \$22 million in 2019. As prices have hardly changed, a drop in volumes has led to lower cash receipts. Production fell 6.2 per cent to 1.4 million birds from 2015 to 2018. Please see Table 6.

With respect to international trade, there has been strong growth in the import of live turkeys at 33 per cent per year, to 1,352,300 head, valued at just over \$2 million in 2019. Exports have also been growing well at 10.9 per cent each year, from 3.1 million heads valued at \$8.5 million in 2015 to 3.3 million heads valued at \$12.8 million in 2019.

As for the international import of turkey meat, quantities declined from 127,325 kg to 49,046 kg over the five-year period, a drop of 22 per cent per year. Exports of turkey meats also appear to be changing, declining by 5.8 per cent annually, from 452,972 kg in 2015 to 355,996 kg in 2019. Availability of turkey for consumption per capita increased 2.6 per cent to 4.28 kg in 2018.

Eggs

There are currently 170 egg layer producers in Manitoba.

From 2015 to 2019, farm cash receipts from the production of eggs have grown steadily by 3 per cent per year, from \$113.4 million to \$127.6 million. As production has decreased marginally by 1.8 per cent per year, from 79.2 million cartons to 75.1 million cartons, the increase in cash receipts is resulting from slight higher prices for a dozen eggs, an increase of 2.7 per cent per year during this period.

With respect to international trade, egg values are down. Imports have decreased 12 per cent per year, from \$19.8 million in 2015 to \$11.8 million in 2019, whereas exports have drastically dropped by 60 per cent annually, from \$15 million to \$402,251. Availability of eggs for consumption per capita has increased 8.4 per cent to 21.12 dozen in 2018.

Dairy

As shown in Table 8, farm cash receipts for dairy have grown annually at 5.2 per cent, from \$259 million in 2015 to \$317 million in 2019.

Dairy product manufacturing in Manitoba is the third largest food manufacturing sector in the province, with over \$750 million in sales in 2018, up 35 per cent compared to the previous year. Such strong growth is largely due to added processing capacity at MDI and Parmalat.

Over the past five years, milk production in Manitoba has been growing at a steady 4.5 per cent per year, with over 4.1 million hectolitres supplied. However, the number of milk producing farms has declined by 2.6 per cent each year, to 269 farms in 2019. In terms of fluid milk product sales, consumer demand continues to be robust for 3.25 per cent and two per cent milk, growing 12.5 per cent and five per cent per year respectively, to 19.8 million and 57.3 million litres in 2019. Consumer preference for one per cent and skim

milk appear to be waning, as they have been declining by three per cent and 8.8 per cent, to 24 million and 7 million litres. As for cream products, half and half cereal cream and whipping cream are experiencing steady growth at four per cent and 15.9 per cent per year respectively. The restaurant and hoteling industry are large consumers of fluid milk and cream products.

With respect to international trade, the growth of Manitoba dairy products has been exceptional, with \$13.6 million in exports, an annual growth rate of 66.6 per cent over the past five years. Imports have also been strong, growing over 11 per cent per year, to \$11 million in 2019.

Manitoba's dairy sector has experienced its share of difficulties. With the hospitality industry being very large consumers of dairy products, the shutdown of restaurants and food services at hotels due to COVID-19 has affected the sales of most dairy goods, especially cream products. Inventories in warehouses are found to be full and expect to remain this way until social distancing measures reduce and customers are able once again to frequent these establishments.

The drop in consumer demand from this pandemic has led some food processors in Alberta, Newfoundland and Ontario to shut down their plants in order to reduce their operating costs. At the onset of the pandemic, there were occasional shortages of dairy products in some Manitoba grocery stores, and supplies had to be purchased from Saskatchewan and Alberta. In other instances, the inability of farm producers to sell milk product has led to their dumping in the lagoons of large dairies. As the dumping of milk has been occurring worldwide, it is not likely an option to sell the excess supply in world markets.

Bison

The bison industry in Manitoba is small, consisting of 86 farms and 14,025 animals (2016 Census)¹. This industry has been relatively stable in the last few years. Manitoba's bison production includes cow/calf, backgrounding, finishing operations and breeding stock. Bison producers from Manitoba are recognized for their high quality breeding stock across North America.

The bison industry in Manitoba is export-driven, currently focusing on exports of live animals valued at \$76.7 million per year. Most Manitoba bison producers market their calves to finisher operations in Manitoba, Saskatchewan, Colorado, North Dakota, South Dakota and Wisconsin. Those that finish their animals also market to these regions as well as to processors in Alberta.

As shown in Table 9, Manitoba exported bison meat valued at \$17 million in 2019, a decrease of 10 per cent compared to 2018. The average export value over the last five years is \$14.5 million per year. Manitoba also imports a small amount of bison meat, about \$3.5 million per year.

The international market, particularly the European Union², presents opportunities to increase Manitoba bison exports. However, this may require an increased processing capacity. Currently, Manitoba has only one federally-licensed plant (True North Foods), which processes both beef and bison.

¹ Data not available for the period 2017-2020.

² Canada-European Union Comprehensive Economic and Trade Agreement allows tariff-free exports of up to 3,000 tonnes of Canadian bison to the European Union, according to the European Commission in its document about the economic impact of the new trade agreement.

Sheep

Manitoba's sheep industry is small but expanding. In January 2019, the total sheep and lamb population in the province was estimated at 105,000 heads. This is an increase of 12 per cent compared to 2018. As of the last census, Manitoba is Canada's fifth largest sheep and lamb producing province with 7.9 per cent (42,032 ewes) of the total 526,286 ewes in Canada. There are approximately 520 sheep producers throughout Manitoba.

Farm cash receipts for sheep and lambs were \$11.4 million in 2019, 2.3 per cent lower compared to the previous year. The province marketed 66,500 sheep and lambs in 2019 compared to 62,600 in 2018.

Manitoba 2019 prices for ewe and lamb were \$130/head and \$185/head, respectively. COVID-19 has created volatile markets for sheep and lambs where current prices have dropped 38 per cent for ewe and 12 per cent for lambs (Table 11).

Manitoba does not import or export sheep. Typically, lambs go east or west to other provinces for finishing or slaughter. As shown in Table 10, Manitoba harvested a total of 2,385 animals in 2019. Artisanal wool crafting is a recent industry development as producers realize the value of this underutilized product.

The demand for lamb remains consistent and is not losing any market share to other meats. Retailers, restaurants and consumers continue to look for sustainable, year-round sources of lamb. Per capita consumption is lower, relative to other red meats. However, lamb may see the largest growth in a speciality meat market.

Retailers are differentiating the types of lamb products offered to consumers. The selection ranges from pre-marinated, ground lamb, quality cuts, and smaller barbeque packs, compared to traditional whole leg and shoulder roasts.

Consumer surveys indicate lamb is typically bought by individuals with high disposable incomes, and suggests that fresh, locally sourced lamb is in high demand.

Opportunities identified in this industry include attraction of new entrants to this industry through mentorship support, as well as capitalization on value-added market growth, by expanding processing capacity in the province and supporting commercialization efforts.

CROP PRODUCTION IN MANITOBA

As is the case for many of Manitoba's crops, available supply for processing depends not only on Manitoba acreage and growing conditions, but also on those in Saskatchewan and Alberta. More importantly, all of Manitoba's crops and the products made from Manitoba's crops are dominantly sold into export markets. This means it is essential that access to export markets remains unfettered and the operation of the supply chains to reach those markets continues without disruption. The Agrifood Transportation section provides additional commentary on the opportunities and challenges in this area.

In very general terms, the primary crop production sector of Manitoba is relatively well-positioned to weather the challenges created by the COVID-19 pandemic. Production units are primarily family-operated, with only

a small number of workers and employees per operation. Most crop-farming operations are very highly mechanized, allowing one individual to operate independently and free of significant contact with others. In normal times, this isolation is a negative characteristic and the lack of access to help remains a negative, but the reduced exposure to the coronavirus is now an advantage.

Planting of the 2020 crop went relatively smoothly with the main delays being record cold temperatures in early May, pockets of excess moisture and dealing with unharvested crops and rutted fields.. In general, all inputs, supplies and services continued to be available without problem, since all are regarded as essential, and all of these input providers are able to continue near-normal business operations, while satisfying the worker separation requirements.

Labour for crop production is generally provided by family members and local workers, so the temporary foreign worker challenge is not a significant issue for field crop farming in Manitoba. Sectors with higher labour requirements, such as fruit and vegetable production, greenhouse production and mushroom production, face greater challenges in ensuring adequate spacing between workers. Some operations, such as u-pick berry farms, are likely to face serious challenges to their normal operations, assuming physical distancing measures remain in place at the time these fruit crops are harvested. To some degree, this may be partially mitigated by scheduling customers or moving to a worker harvest model, but doing so requires more labour, as well as changes to marketing and distribution.

Turning again to Manitoba's field crop production, the next question after production is transport and marketing of the grains, oilseeds and pulses that are produced. As of May 2020, grain handling and marketing, trucking, rail and port operations have all continued to operate at capacity, while taking extra cleaning and spacing precautions. Assuming this will continue, there is no reason to expect any material disruption to the marketing and transport of field crops.

The processing of crops in Manitoba is highly-automated, with few workers. As a result, meeting spacing and cleaning requirements are generally not overly burdensome. No material disruption has been noted in Manitoba's processing sector for grains and oilseeds, including canola crushing, wheat milling, oat milling, barley malting or distilling.

In summary, Manitoba's field crop production, processing and marketing is not expected to see dramatic impacts due to COVID-19, with the exception of ethanol production and the related general view that prices are likely to drift lower during the course of this pandemic. The challenges of spacing workers will be more significant for producers of fruits and vegetables, as well as greenhouse operators. At this time, it is believed this will be manageable, and although greenhouse operations have included a large foot-traffic retail aspect, they are equipped to shift to delivery and parking lot pick-up operations. It would also be expected that demand for general landscaping will be reduced, along with the general drop in economic activity.

The following is a summary review, crop by crop, for several of Manitoba's most significant field crops. Please refer to Table 12 for reference.

Canola

Canola has been Manitoba's largest revenue generator for many years, typically generating fully one-fifth of all of Manitoba's farm cash receipts. For 2019, canola generated \$1.31 billion of farm cash receipts, down slightly from \$1.34 billion in 2019. In terms of seeded acres, each year canola is planted on 3.2 to 3.4 million

acres, with production ranging from 2.6 to 3.3 million tonnes since 2015. Canola is a shorter season crop that is well suited to Manitoba's production climate, although it is susceptible to early season frost and excess moisture. Manitoba's canola crushing sector consumes close to half of annual production to produce canola oil and meal. China is the largest export market for Manitoba canola seed, while the U.S. is the primary market for oil and meal.

The most pressing issue for the canola sector since March 2019 has been the loss of export demand for canola seed from China. This has been negative for the value of canola seed, which in turn is positive for canola crush margins, as the input cost of the raw seed shrank. Canola production, crushing and export is a relatively mature industry, integrated across Western Canada.

There is potential for additional crush capacity in the future, as the production of canola continues to trend upwards, mainly thanks to yield improvements. The profitability of additional crush capacity is dependent on the relative strength of export demand for the raw canola seed, versus the meal and oil. Another opportunity would be the resumption of more normal trade flows to China, as that would reposition canola again as the most profitable crop for Manitoba farmers.

Wheat

Wheat has a long and successful history in Manitoba. Wheat is usually Manitoba's third largest generator of farm cash receipts, after canola and hogs. However, in 2019, it was second at \$1.13 billion, which provided 17 per cent of total farm cash receipts. This was a decrease from 2018 receipts of \$1.15 billion. Wheat has been planted on 2.7 to 3.2 million acres over the past five seasons in Manitoba, with production ranging from 4.2 to five million tonnes. The primary use of wheat is for flour to produce bread and bakery products, although off-grade wheat is commonly used in livestock rations. Manitoba uses roughly one-tenth of the wheat produced for flour, bread and bakery products for Manitoba consumption, with the rest split between exports and livestock feed, depending on the harvest quality and relative prices. The wheat and wheat milling sector is long-established, and because flour and bakery products have relatively short shelf lives, wheat milling is most commonly located near demand centres around the world. For this reason, Manitoba's wheat exports are likely to remain primarily in unprocessed form.

Wheat continues to be a very attractive export crop for Manitoba. It is very well-suited to Manitoba's climate, and the high quality wheat produced finds healthy demand around the world. As wheat is grown and consumed in almost all parts of the world, it has the most diverse and stable export market of all Manitoba's crops. Wheat has realized increases in yield thanks to genetic and agronomic advances, and these offer future promise for wheat.

Soybeans

Soybeans are Manitoba's third largest crop, with seeded acres ranging from 1.4 to 2.3 million acres since 2015, and production between 1.1 and 2.3 million tonnes. Farm cash receipts for soybeans were \$720 million in 2018 and \$434 million in 2019. Soybeans are a relatively new crop to Manitoba, with only 20 years of history. They are a longer season crop that tend to flourish in long, warm summers with ample rainfall, especially in the month of August. The past three seasons have been challenging and disappointing for soybean producers, so acreage has been declining. However, longer term, soybeans continue to show great potential for Manitoba.

At this time, there is relatively little processing of soybeans in Manitoba, since the supply has only recently become large enough to entice crushing interest. If Manitoba soybean production resumes an upward trajectory, a processing plant may make sense in a few years. Manitoba's hog industry would be keen to consume the soy meal from crushing, as currently imported soy meal from the U.S. is added into rations.

Corn

Grain corn has steadily increased to become the fourth biggest field crop produced in Manitoba, reaching 460,000 acres in 2019 and producing an average of 1.2 million tonnes from 2016-19. Farm cash receipts from grain corn grew from \$160 million in 2018 to \$1730 million in 2019. Corn is a long season crop that does best with lots of heat and lots of moisture during the growing season. Some Manitoba summers are not as long, hot and wet as corn needs for optimal production, but many years are very good for corn. Corn is primarily livestock feed for hogs, dairy and beef cattle, and in poultry rations. A second large consumer of corn in Manitoba is ethanol production. The Husky plant in Minnedosa is estimated to consume roughly 300,000 tonnes per year to produce ethanol for blending into gasoline. It has also been estimated that the distillery in Gimli consumes about 60,000 tonnes of corn per year. Manitoba has been importing corn from the U.S. for many years, as our livestock and ethanol demand outstrips our production, despite production steadily rising.

One sector that has taken a sharp hit due to the combined impact of COVID-19 and the oil price war is the ethanol production sector. In the present situation, where gasoline prices are extremely low, the production of ethanol from grains (typically corn and wheat) isn't economically feasible, so these plants (Husky in Minnedosa, as well as plants in other provinces and states) are in the process of reducing or outright halting production. The expected impacts of this include a sharp decline in demand for corn, as well as a drop in the availability of dried distillers grains (DDGs), which are commonly used as a feed ingredient for Manitoba's hog production. This would be expected to cause imports of corn to shrink or cease entirely, and shift the feed ingredient mix to adapt to greater availability of corn and lower availability of DDGs (corn and DDGs are not direct substitutes, so rations will require rebalancing that could affect other ingredients).

To the degree that the North American ethanol industry shrinks or shuts down, even temporarily, the price of corn will reflect the drop in demand. Manitoba corn prices have already declined about 10 per cent between March and April 2020. Since corn is the largest worldwide-traded crop, it serves as a foundation for the entire complex of grains. Thus, it would be anticipated that prices for wheat, oats, barley, etc., will also see declines, though possibly not as large, since those grains have larger human consumption demand.

Oats

Manitoba typically produces between 600,000 and 800,000 tonnes of oats per year, on roughly 500,000 seeded acres. Farm cash receipts for oats were \$118 million and \$186 million for 2018 and 2019, respectively. Oats have a long history in Manitoba and are a short season crop that tends to prefer slightly cooler summers. Oats and oat products are usually Manitoba's sixth most significant agricultural export, valued at between \$200 million and \$250 million annually. This is a steady and established sector, and because oats are not as large a crop, there is plenty of ability for additional acres to be planted to meet increased processing demand. Oats were one of the best crops to grow in 2019, as they performed very well in terms of yield and early harvest. They also achieved strong prices, so it is expected that 2020 will see higher acreage of oats.

Oats are valued for human consumption, with health benefits in addition to serving as a convenient staple food source. The market for oats is expected to continue steady growth, so there may be potential for increased acreage and growth in processing capacity into the future.

Barley

Barley production in Manitoba has ranged between 400,000 and 600,000 tonnes between 2015 and 2019 with planted acres around 400,000. Barley cash receipts were \$63 million in 2018 and \$70 million in 2019. Similar to oats, barley is a shorter season crop that prefers cooler summers with sufficient moisture. Barley has two main uses, malting and livestock feed. Barley for malting is used to produce malt, which is an ingredient in beer. The malting process requires strict quality specifications, so only some barley makes the cut. Barley is also a valued component of livestock rations, particularly because it produces white-coloured fat in pork and beef, whereas corn tends to produce a yellow colour that is less desired. The available supply of malting barley is usually sufficient, but it is highly dependent on weather conditions during the growing season and harvest. Manitoba's maltsters select barley from Manitoba and Saskatchewan, as this industry is integrated across the Prairies.

Barley remains a steady and low risk crop to grow in Manitoba. While there are no great growth opportunities on the horizon, both malting demand and feed demand for barley are expected to remain solid and rise slowly with population and income growth.

Dry Peas

Dry pea production in Manitoba is growing, having reached 163,9000 tonnes on 122,000 acres in 2019. A significant part of the growth is due to the construction of new pea processing capacity in Manitoba. This is expected to drive pea acreage and production higher in coming years to fill this demand. It is also anticipated that processors will draw supplies from Saskatchewan, but Manitoba peas will have an advantage, being closer. Peas tend to grow best in relatively dry seasons, which Manitoba sees some of the time, and certainly during the last three years.

Dry peas are the key ingredient to the plant-based meat segment that is presently growing very rapidly. It is expected this will continue, as consumers continue to seek alternative protein sources. Pea protein is inherently very digestible and high quality, so it is very well-positioned to serve as both human consumption and livestock feed.

Hemp

Manitoba has played a central role in developing the Canadian hemp industry through early research in the agronomic practices and processing technologies that have been integral to the ongoing success of the hemp industry in Manitoba.

While Manitoba is the third largest producer of hemp in Canada, hemp acres in Manitoba have fluctuated over the last few years (Table 13). In 2019, following the increasing demand for organic hemp products, Manitoba had 12,184 seeded acres and organic hemp production accounted for about 18 per cent of the total hemp acres. On average, Manitoba has exported about \$71.3 million worth of hemp products each year since 2016.

Manitoba Harvest is the largest hemp processing company in the world, helping the hemp industry to take root in Manitoba. They are currently selling their products in more than 16,000 stores in North America. As the demand for hemp-based products, including organic hemp products, is increasing, Manitoba producers and processors have a big opportunity to tap into this emerging market.

Potatoes

Although potato seeded acreage increased by two per cent in 2018 and nine per cent in 2019, compared to the previous years, harvested acreage decreased by six per cent in 2018 and three per cent in 2019 (Table 14). This is because, for two consecutive years, Manitoba received heavy rainfall and early snow during harvest times that forced potato producers to leave about 5,000 and 13,000 acres potatoes unharvested, in 2018 and 2019, respectively. Toward the end of 2019, it was feared that the challenges with potato harvesting may force Manitoba potato processors to run below their full capacity.

Since COVID-19 has led to lockdowns and closure of businesses, potato processors are now concerned with dropping demand from restaurants and other food services. McCain's has already closed several of its potato processing plants across Canada, resulting in over 400 million pounds of excess potatoes in Canada (including up to 100 million pounds in Manitoba). While there is a logistical challenge, there is a potential to remarket processing potatoes to the table potato market. The low demand for processed potatoes is expected to decrease contracted potato acres by up to 16 per cent in the 2020 planting season. Allocating some of the potato acres to other crops will increase farmer's production cost because of the high fixed costs of potato farms. It is anticipated that this temporary disruption of supply and demand will be resolved once the virus becomes under control and businesses reopens. Land under potato acres is also expected to bounce back in the 2021 production season.

There is an emerging market opportunity for the use of potato starch in food processing, such gluten-free products, confectionery and shredded cheese. The fact that Canada's only starch processing company is located in Manitoba would help the potato sector benefit from this emerging market opportunity.

SUPPLY AND USE OF AGRIFOODS IN MANITOBA

The information presented in this section is based on the 2016 Statistics Canada's Supply and Use Table, released in November 2019³. A summary of the supply and use table for primary commodities and processed food products is shown in Table 15 to 18 in this document.

Although the Supply and Use Table is lagging behind other annual data sources by three to four years, it provides very useful and detailed information on the supply and uses of all goods and services in the economy at the provincial and national levels. It also provides useful information on the interprovincial trade flows. This table, for example, shows how much of the Manitoba-produced commodity is used locally as intermediate inputs (e.g., seeds and processing input) and how much is exported to other provinces and internationally. Additional information related to the supply and use tables can be found in Appendix 1.

³The 2017 Supply and Use Table will be released in November 2020.

Livestock

Manitoba supplies 90 per cent of its cattle and calves from local production, and the remaining 10 per cent is imported from other Canadian provinces. International cattle and calve import is negligible, only 0.4 per cent. In terms of use, 14 per cent is used as breeding stock and by meat manufacturing industries, 25 per cent exported to international markets, and 59 per cent exported to other Canadian provinces.

Three-fourths (75 per cent) of Manitoba's hog supply comes from local production, while the remaining 25 per cent is imported from other provinces. Out of the total hog supply, 50 per cent is processed locally, while 35 per cent and 15 per cent go to interprovincial and international markets, respectively.

Manitoba dairy producers supply 90 per cent of Manitoba's unprocessed fluid milk. The balance is imported from other provinces. About 57 per cent of the unprocessed fluid milk supply is used by the dairy product manufacturing industry as an input, and the remaining 47 per cent is exported to other Canadian provinces.

About 71 per cent of poultry and 92 per cent of egg supply in Manitoba comes from local production. From the total supply of eggs, 21 per cent is locally processed, 13 per cent is used by households and businesses, while 66 per cent is exported to other provinces. For poultry, 61 per cent is locally processed, seven per cent goes to the international market, and the other 34 per cent is exported to other provinces.

Crops

About 83 per cent of Manitoba's canola supply comes from local production, 14 per cent from interprovincial imports, and the remaining three per cent from international imports. Out of the total canola supply, 43 per cent is locally used as an input by the processing and seed industries, and 50 per cent is internationally exported. The remaining balance went to interprovincial export, inventory change or international re-export.

The supply of other oilseeds, such as soybean, sunflower and flax, almost entirely (99 per cent) comes from Manitoba's local production. However, only 10 per cent of the total supply is used as an input by local industries (seed, animal food manufacturing and oilseed milling). The vast majority of these oilseeds are exported in raw forms, 70 per cent internationally and 15 per cent interprovincially.

While Manitoba produces almost 100 per cent of its wheat supply, only about 11 per cent is used by local industries as an input. About two-thirds (66 per cent) of the wheat produced in Manitoba is destined for the international market, while 13 per cent is exported to other provinces in Canada.

About 93 per cent of Manitoba's fresh potatoes supply comes from local production. Currently, this percentage might be lower because of the increasing demand due to the recent expansion at Simplot, as well as the harvest challenges (due to the heavy rainfall at harvesting time) over the past two years.

Regarding the use of Manitoba's potato production, 14 per cent is used by local industries as an input, seven per cent of used as table potato by households and businesses, and 15 per cent and 59 per cent are exported internationally and to other provinces in Canada, respectively. Since there is a four years lag in the Supply and Use table data (the most recent Supply and Use table is from 2016), the percentage of local processing could be higher than the one indicated here because of the recent expansions within the potato processing sector.

Manitoba produces less than two per cent of its fruit and nuts supply, and 43 per cent of its fresh vegetables. About 91 per cent of fruit and nuts, and 54 per cent of the fresh vegetable supply, comes from international import.

AGRIFOOD TRANSPORTATION

As a trading province, Manitoba relies on a smooth flowing transport system for getting our agricultural products to global markets in a timely and reliable manner at a reasonable cost. The role of the Canadian transportation network is paramount, as international trade is critical to our economic development and for generating good paying jobs in Manitoba.

Manitoba's international agrifood trade in 2018 was \$7.5 billion, with exports valued at \$6.0 billion and imports at \$1.5 billion. Though the U.S. remains our largest trading partner, with 45 per cent of Manitoba exports destined for southern markets, nearly 30 per cent of Manitoba products – valued at \$1.8 billion – are going to our other main customers in China and Japan. Notably, the Asia-Pacific region is where Manitoba is experiencing the greatest trade growth. Manitoba sells a variety of agricultural products to the world, ranging from wheat, canola, pork and soybeans, to frozen vegetables and meat products.

The Port of Thunder Bay and the St. Lawrence Seaway system is the main export route for commodities going to Europe-Atlantic markets, and the Western Canadian rail corridors to the Ports of Vancouver and Prince Rupert are the main route for commodities for Asia-Pacific markets. The bulk and break bulk facilities at Thunder Bay, Vancouver and Prince Rupert serve the international export needs of Manitoba's primary agriculture and agri-processing sectors. More specifically, each of these respective ports receive 46 per cent, 18 per cent and two per cent of Manitoba's grain exports. Vancouver and Prince Rupert also provide container facilities to handle the imports of many of the agrifood products demanded by households and businesses in Manitoba. Over the past five years, the overall movements of grain from Manitoba has grown by nearly nine per cent per year. More specifically, the tonnes of grain shipped by rail to the ports on the west coast is growing by 30 per cent each year, which compares with seven per cent to eastern Canadian ports. Southbound traffic to the U.S. and Mexico remains relatively constant over this period (Table 19).

Manitoba's primary interest is to ensure that the commodity supply chains linking to and through these ports offer sufficient capacity and quality services at competitive prices, when seeking access for Manitoba products in overseas markets. To enable the seamless movement of commodities and goods, the Port of Vancouver plans to make about \$280 million in infrastructure investments along its North Shore, which aligns with recent grain terminal expansions made by Richardson International and G3 Canada. Furthermore, changes to the federal Transportation Modernization Act in 2018 incentivized Canadian National Railway to announce \$3.9 billion in capital investments in 2019. This includes \$120 million dedicated to Manitoba for assets such as tracks and sidings, as well as the addition of new hopper cars, locomotives and train crews. Canadian Pacific Railway is making similar investments, with \$1.6 billion in capital expenditures. These improvements to port and rail capacity are to better facilitate expected increases in demand for Manitoba's agricultural goods from consumers in international markets.

Even though new investments are being made to improve capacity and services, challenges remain in the near term. There are concerns from other resource sectors across western Canada, such as potash, oil, forestry and containers, that their supply chains have to compete with the agrifood sector for limited capacity across the entire network, making it difficult to get products to markets in a timely manner. Further, there will be challenges in the lower mainland in British Columbia, when trains have to wait to use lift and swing bridges.

As well, the St. Lawrence Seaway system cannot handle larger ocean-going vessels, requiring more transshipments and handling, leading to more congestion and delays. Finally, changes to the federal Impact Assessment Act may make the environmental review process for infrastructure projects more complex, time consuming and uncertain, which may negatively impact private investment decisions, economic development and trade in Manitoba.

COVID-19 Impact

In fall 2019, environmental and aboriginal protests disrupted the operations of the railways and ports, which severely hampered the ability of the grain sector to move its product to markets. Since then, the Western Canadian Grain Handling and Transportation System (GHTS) has managed to rebound quite well. So far, with the onset of the coronavirus pandemic in March 2020, railways have been able to move grain relatively well from country elevators to ports, with no significant delays. At the ports, loading and wait times are back to normal levels, and vessels are once again moving Manitoba goods to international markets. Looking ahead, shippers from Manitoba's agricultural commodity sector are not anticipating any further delays as COVID-19 unfolds through the summer 2020. Of course, this could change if issues arise where employees in Manitoba's food processing sector contract the coronavirus, forcing a plant to stop operating and leading to delays in the firm's supply chain.

Table 1 Supply and Disposition Of Cattle

	2015	2016	2017	2018	2019
Supply and disposition of cattle (head)					
Total supply	1,469,500	1,494,700	1,492,600	1,502,100	1,470,700
Beginning inventory	1,035,000	1,035,000	1,050,000	1,060,000	1,030,000
Calves born	378,100	368,600	379,000	362,800	356,500
Interprovincial imports	55,900	90,400	60,300	76,400	75,200
International imports	500	700	3,300	2,900	9,000
Total disposition	434,500	444,700	432,600	472,100	470,700
Slaughter	58,100	69,600	87,600	101,700	95,900
Interprovincial exports	230,200	227,900	238,500	230,000	233,700
International exports	101,200	101,900	61,100	95,800	95,600
Deaths and condemnations	45,000	45,300	45,400	44,600	45,500
Ending inventory	1,035,000	1,050,000	1,060,000	1,030,000	1,000,000
					<i>Source: Statistics Canada</i>
Marketings					
Marketings (head)	389,500	399,400	387,200	427,500	425,200
Slaughter	15%	17%	23%	24%	23%
Interprovincial exports	59%	57%	62%	54%	55%
International exports	26%	26%	16%	22%	22%
					<i>Source: Statistics Canada, calculations ARD</i>
Farm Cash Receipts					
Farm Cash Receipts	\$713,490,000	\$552,329,000	\$547,190,000	\$598,853,000	\$588,202,000
					<i>Source: Statistics Canada</i>
Per Capita Disappearance (kg) carcass weight					
Per Capita Disappearance (kg) carcass weight	24.42	25.42	25.29	25.40	NA
					<i>Source: Statistics Canada</i>
International Trade					
Cattle					
International Imports quantity (head)	514	630	3,332	2,947	8,933
International Imports value \$	\$1,570,974	\$1,781,386	\$6,942,059	\$6,032,464	\$7,823,204
International Exports quantity (head)	101,132	101,899	61,221	95,757	95,630
International Exports value \$	\$196,464,089	\$157,092,064	\$89,403,517	\$136,760,903	\$138,028,997
Beef					
International Imports quantity (kg)	1,404,882	1,627,071	1,643,334	895,156	1,059,828
International Imports value \$	\$15,421,921	\$14,810,093	\$15,478,295	\$7,945,228	\$9,708,998
International Exports quantity (kg)	77,056	279,960	481,990	443,802	310,990
International Exports value \$	\$217,872	\$1,050,138	\$865,198	\$1,478,071	\$431,789
					<i>Source: AAFC, Catsnet</i>

Table 2 Cattle Prices

Manitoba Cattle Prices \$/cwt	2015	2016	2017	2018	2019	Current ¹	Current/2019
Feeder Steer Calves 500-600lbs	\$301.40	\$215.64	\$220.16	\$219.34	\$218.95	\$201.00	-8%
Feeder Steers 700-800lbs	\$253.03	\$190.24	\$197.60	\$192.29	\$192.15	\$172.25	-10%
Feeder Steers 800-900lbs	\$235.80	\$178.55	\$184.00	\$180.68	\$181.65	\$147.25	-19%
Cows D1, D2	\$124.26	\$90.27	\$89.28	\$79.97	\$79.34	\$81.00	2%
Beef Cows* \$/ head, July 1	\$2,550.00	\$2,100.00	\$1,800.00	\$1,900.00	\$1,400.00	\$1,400.00	0%

Source: Canfax, Manitoba Markets

¹ April 10, 2020

Table 3 Supply and Disposition of Hogs

	2015	2016	2017	2018	2019
Supply and disposition of Hogs (head)					
Total supply	11,572,800	11,554,200	11,716,800	11,493,000	11,487,400
Beginning inventory	3,190,000	3,250,000	3,340,000	3,400,000	3,375,000
Pig crop	8,330,700	8,297,700	8,370,000	8,086,400	8,106,400
Interprovincial imports	49,000	6,000	6,400	6,300	5,200
International imports	3,100	500	400	300	800
Total disposition	8,322,800	8,214,200	8,316,800	8,118,000	8,177,400
Interprovincial exports	77,300	58,000	30,500	36,000	40,300
International exports	3,292,000	3,158,900	3,173,600	3,060,900	2,995,900
Deaths and condemnations	411,400	407,400	414,100	404,100	407,300
MB origin slaughter	4,542,100	4,589,900	4,698,600	4,617,000	4,733,900
Ending inventory	3,250,000	3,340,000	3,400,000	3,375,000	3,310,000
<i>Source: Statistics Canada</i>					
Marketings					
Marketings (head)	7,911,400	7,806,800	7,902,700	7,713,900	7,770,100
Slaughter	55%	56%	56%	57%	58%
Interprovincial exports	1%	1%	0%	0%	1%
International exports	42%	40%	40%	40%	39%
<i>Source: Statistics Canada, calculations ARD</i>					
Farm Cash Receipts					
Farm Cash Receipts	\$1,018,730,000	\$990,307,000	\$1,078,784,000	\$994,251,000	NA
<i>Source: Statistics Canada</i>					
Per Capita Disappearance (kg) carcass weight					
Per Capita Disappearance (kg) carcass weight	23.23	20.76	20.79	21.67	NA
<i>Source: Statistics Canada</i>					
International Trade					
Hogs					
International Imports quantity (head)	3,088	574	373	287	767
International Imports value \$	\$1,560,017	\$346,303	\$234,836	\$215,783	\$744,898
International Exports quantity (head)	3,291,952	3,158,837	3,173,660	3,060,919	2,995,265
International Exports value \$	\$244,338,901	\$229,287,885	\$241,553,899	\$218,012,340	\$225,756,584
Pork					
International Imports quantity (kg)	13,849,927	13,874,771	14,164,666	16,735,209	20,757,334
International Imports value \$	\$92,683,036	\$108,156,113	\$95,014,859	\$110,789,856	\$126,744,349
International Exports quantity (kg)	259,669,114	286,452,634	325,330,035	324,343,315	322,289,903
International Exports value \$	\$799,391,269	\$917,568,463	\$1,037,266,568	\$1,023,228,104	\$1,199,086,298
<i>Source: AAFC, Catsnet</i>					

Table 4 Hog Prices

	2015	2016	2017	2018	2019	Current ¹	Current/2019
Index 100 (\$/100kg)	\$163.19	\$157.58	\$167.18	\$156.01	\$170.31	\$154.69	-9%
Isowean Pig (\$/hd)	\$48.06	\$48.17	\$49.86	\$51.93	\$56.84	\$28.85	-49%
Feeder Pig (\$/hd)	\$70.37	\$70.55	\$76.03	\$68.56	\$80.73	\$45.88	-43%

Source: Manitoba Markets

¹April 10, 2020

Table 5 Supply and Disposition of Chicken

	2015	2016	2017	2018	2019
Chicken Production / Disposition					
Total supply of chicken (birds)	32,480,000	33,670,000	34,390,000	35,296,000	NA
weight (kilograms)	48,981,000	51,011,000	52,201,000	53,672,000	NA
value (dollars)	\$104,577,000	\$108,520,000	\$112,629,000	\$118,643,000	NA

Source: Statistics Canada

Farm Cash Receipts					
Farm Cash Receipts	\$104,324,000	\$108,272,000	\$112,374,000	\$118,384,000	NA

Source: Statistics Canada

Chicken Prices (\$/kg)					
Chicken Prices - Less than 1.4 kg	\$1.64	\$1.64	\$1.64	\$1.68	\$1.72
Chicken Prices - 1.4 kg - 2.7 kg	\$1.58	\$1.57	\$1.60	\$1.63	\$1.66
Chicken Prices More than 2.7 kg	-	-	-	-	-

Source: Agriculture and Agri-Food Canada Monthly and Annual Poultry Producer Prices

Per capita available for consumption eviscerated weight, kg					
Chicken	31.96	32.67	33.21	34.62	NA
Fowl	3.15	3.09	2.67	2.82	NA

Source: Statistics Canada

International Trade					
Chicken (live)					
International Imports quantity (head)	701,755	760,577	837,135	784,196	1,171,582
International Imports value \$	\$1,823,152	\$2,492,884	\$3,091,426	\$3,980,889	\$4,525,363
International Exports quantity (head)	45,400	0	0	0	0
International Exports value \$	\$104,152	\$0	\$0	\$0	\$0
Chicken (meat)					
International Imports quantity (kg)	834,187	648,843	995,292	632,131	928,446
International Imports value \$	\$4,821,502	\$4,793,246	\$5,230,795	\$2,913,253	\$4,392,757
International Exports quantity (kg)	4,055,018	4,018,939	5,070,099	4,025,036	3,816,518
International Exports value \$	\$3,916,112	\$3,819,426	\$4,295,650	\$3,557,211	\$3,236,909

Source: AAFC, Catsnet

Table 6 Supply and Disposition of Turkey

	2015	2016	2017	2018	2019
Turkey Production / Disposition					
Total supply of turkey (birds)	1,493,000	1,453,000	1,407,000	1,400,000	NA
weight (kilograms)	10,718,000	10,358,000	10,207,000	9,752,000	NA
value (dollars)	\$24,093,000	\$22,962,000	\$22,622,000	\$22,260,000	NA
					<i>Source: Statistics Canada</i>
Farm Cash Receipts					
Farm Cash Receipts	\$24,069,000	\$22,948,000	\$22,608,000	\$22,246,000	NA
					<i>Source: Statistics Canada</i>
Turkey Prices (\$/kg)					
Turkey Prices - 6.2 kg and under	\$1.96	\$1.93	\$1.92	\$1.96	\$1.97
Turkey Prices - 6.2 kg but not more than 8.5 kg	\$1.94	\$1.92	\$1.90	\$1.95	\$1.96
Turkey Prices Over 8.5 kg but not more than 10.8 kg	\$1.94	\$1.92	\$1.90	\$1.95	\$1.96
Turkey Prices Over 10.8 kg but not more than 13.3 kg	\$1.90	\$1.88	\$1.89	\$1.94	\$1.94
Turkey Prices Over 13.3 kg	\$1.90	\$1.88	\$1.89	\$1.94	\$1.94
					<i>Source: Agriculture and Agri-Food Canada Monthly and Annual Average Poultry Producer Prices</i>
Per capita available for consumption eviscerated weight, kg					
Per capita available for consumption eviscerated weight, kg	4.17	4.27	4.19	4.28	NA
					<i>Source: Statistics Canada</i>
International Trade					
Turkey (live)					
International Imports quantity (head)	433,767	899,499	1,178,116	1,186,364	1,352,300
International Imports value \$	\$654,647	\$1,218,774	\$1,605,831	\$1,592,769	\$2,053,098
International Exports quantity (head)	3,198,742	3,373,172	3,313,898	3,449,113	3,307,796
International Exports value \$	\$8,461,133	\$10,644,384	\$10,747,248	\$12,534,747	\$12,794,579
Turkey (meat)					
International Imports quantity (kg)	127,325	71,319	40,366	19,417	49,046
International Imports value \$	\$704,332	\$451,152	\$283,203	\$74,470	\$190,253
International Exports quantity (kg)	452,972	299,284	207,860	398,760	355,996
International Exports value \$	\$495,404	\$251,327	\$277,613	\$514,705	\$580,188
					<i>Source: AAFC, Catsnet</i>

Table 7 Supply and Disposition of Eggs

	2015	2016	2017	2018	2019
Supply and Disposition of Eggs					
Average number of layers	3,103,000	3,226,000	2,926,000	2,942,000	NA
Eggs per 100 layers	30,630	30,623	30,386	30,626	NA
Production / disposition of eggs in shell, dozen	79,203,000	82,324,000	74,091,000	75,084,000	NA
Disposition of eggs in shell sold for consumption, dozen	74,164,000	76,984,000	68,998,000	69,739,000	NA
Disposition of eggs in shell for hatcheries, dozen	3,327,000	3,566,000	3,491,000	3,725,000	NA
Disposition of eggs, home consumption, dozen	168,000	168,000	156,000	156,000	NA
Disposition of eggs in shell, leakers and rejects, dozen	1,544,000	1,606,000	1,446,000	1,463,000	NA
Value of production / disposition of eggs in shell, total	\$125,081,000	\$128,658,000	\$127,114,000	\$137,087,000	NA
Value of disposition of eggs in shell sold for consumption	\$108,189,000	\$110,191,000	\$109,031,000	\$116,853,000	NA
Value of disposition of eggs in shell for hatcheries	\$16,638,000	\$18,215,000	\$17,822,000	\$19,965,000	NA
Value of disposition of eggs, home consumption	\$254,000	\$252,000	\$261,000	\$269,000	NA
					<i>Source: Statistics Canada</i>
Farm Cash Receipts					
Farm Cash Receipts	\$113,337,000	\$115,238,000	\$113,770,000	\$120,644,000	NA
					<i>Source: Statistics Canada</i>
Egg Prices \$/dozen					
Egg Prices - Grade A Large at Selected Markets	\$1.95	\$1.94	\$2.05	\$2.10	\$2.17
					<i>Agriculture and Agri-Food Canada: Monthly and Annual Average Egg Prices</i>
Per capita available for consumption, dozen					
Per capita available for consumption	19.49	20.12	20.29	21.12	NA
					<i>Source: Statistics Canada</i>
International Trade					
International Imports value \$	\$19,812,829	\$13,786,345	\$12,250,275	\$11,781,700	\$11,830,889
International Exports value \$	\$15,001,926	\$6,636,411	\$2,398,871	\$406,170	\$402,251
					<i>Source: AAFC, Catsnet</i>

Table 8 Dairy

	2015	2016	2017	2018	2019
Milk Production at the Farm					
Total supply (kilolitres)	345,072	341,205	378,958	409,134	412,007
Number of dairy cows	40,100	39,700	38,500	41,200	39,900
Number of heifers	19,100	19,900	19,900	21,500	20,800
Number of farms with shipments of milk	299	285	282	277	269
<i>Source: Canadian Dairy Information Centre: Milk Production at the Farm by Province</i>					
Sales					
Fluid Milk Products (kilolitres)					
3.25% milk	12,407	13,476	13,384e	17,617e	19,844
2% milk	47,218	49,516	48,230e	52,012e	57,299
1% Milk	27,010	29,169	23,015	25,905e	23,965
Skim milk	11,210	11,270	8,834	9,101e	7,740
Cream Products (kilolitres)					
Light cream 5% - 9.9%	x	x	x	x	x
Half and half (cream) 10% - 15.9%	3,134	3,349	3,700e	4,075e	3,679e
Whipping cream 32% - 35%	2,172	2,510	2,374e	3,921e	x
<i>Source: Canadian Dairy Information Centre: Sales of Fluid Milk and Cream - Manitoba</i>					
Farm Cash Receipts	\$258,770,000	\$252,249,000	\$279,722,000	\$300,272,000	NA
Farm product price milk (bovine) \$/kilolitre	\$801.93	\$792.61	\$791.07	\$783.71	\$781.59
<i>Source: Statistics Canada</i>					
Per capita consumption of fluid milk or cream products (litre)					
3.25% milk	9.60	10.25	10.03e	13.02e	NA
2% milk	36.54	37.68	36.13e	38.43e	NA
1% Milk	20.90	22.20	17.24	19.14e	NA
Skim milk	8.67	8.58	6.62	6.72e	NA
<i>Source: Statistics Canada</i>					
International Trade					
International Imports value \$	\$7,220,355	\$8,056,145	\$9,568,634	\$9,548,035	\$11,023,528
International Exports value \$	\$1,766,400	\$2,386,793	\$4,940,912	\$16,389,540	\$13,590,471
<i>Source: AAFC, Catsnet</i>					

Table 9 Bison Trade

	2015	2016	2017	2018	2019
Live Bison					
International Imports quantity (head)	0	0	0	0	0
International Imports value \$	\$0	\$0	\$0	\$0	\$0
International Exports quantity (head)	27,957	22,526	21,577	19,047	21,354
International Exports value \$	\$76,721,309	\$70,621,310	\$73,680,439	\$69,346,471	\$70,957,833
Bison Meat					
International Imports quantity (kg)	77,413	54,411	43,659	27,690	68,411
International Imports value \$	\$936,595	\$656,248	\$641,985	\$455,705	\$783,917
International Exports quantity (kg)	601,312	767,618	831,471	1,237,088	1,144,864
International Exports value \$	\$10,735,881	\$13,444,578	\$12,255,055	\$19,041,964	\$17,082,582

Source: AAFC, Catsnet

Table 10 Supply and Disposition of Sheep and Lambs

	2015	2016	2017	2018	2019
Supply and disposition of sheep and lambs					
Total supply of sheep and lambs	131,800	152,600	166,800	169,300	162,200
Beginning inventory of sheep and lambs	63,000	69,000	81,000	97,000	94,000
Lambs born	46,600	61,600	65,900	57,400	55,700
Interprovincial imports of sheep and lambs	22,200	22,000	19,900	14,900	12,500
International imports of sheep and lambs	0	0	0	0	0
Total disposition of sheep and lambs	62,800	71,600	69,800	75,300	79,200
Deaths and condemnations of sheep and lambs	8,600	11,000	12,200	12,700	12,700
Interprovincial exports of sheep and lambs	34,100	40,600	37,200	41,800	45,600
International exports of sheep and lambs	0	0	0	0	0
Total slaughter of sheep and lambs	20,100	20,000	20,400	20,800	20,900
Ending inventory of sheep and lambs	69,000	81,000	97,000	94,000	83,000
Marketings					
Marketings	54,200	60,600	57,600	62,600	66,500
Slaughter	37%	33%	35%	33%	31%
Interprovincial exports of sheep and lambs	63%	67%	65%	67%	69%
International exports of sheep and lambs	0%	0%	0%	0%	0%
<i>Source: Statistics Canada, calculations ARD</i>					
Farm Cash Receipts					
Farm Cash Receipts	\$9,010,000	\$9,904,000	\$10,578,000	\$11,618,000	NA
<i>Source: Statistics Canada</i>					
Per Capita Disappearance (kg) carcass weight					
Per Capita Disappearance carcass weight	1.05	1.06	1.11	1.07	NA
<i>Source: Statistics Canada</i>					
International Trade					
Live Sheep and Lamb					
International Imports quantity (head)	0	0	0	0	19
International Imports value \$	\$0	\$0	\$0	\$0	\$5,633
International Exports quantity (head)	0	0	0	0	0
International Exports value \$	\$0	\$0	\$0	\$0	\$0
Lamb meat					
International Imports quantity (kg)	34,679	13,750	13,254	31,158	16,500
International Imports value \$	\$65,364	\$36,359	\$39,741	\$50,458	\$45,952
International Exports quantity (kg)	0	111,735	191,200	315,316	0
International Exports value \$	\$0	\$102,036	\$79,313	\$104,236	\$0
<i>Source: AAFC, Catsnet</i>					

Table 11 Sheep and Lamb Prices

	2015	2016	2017	2018	2019	Current ¹	Current/2019
Ewe \$/head	\$98.00	\$92.00	\$104.00	\$104.00	\$130.00	\$80.00	-38%
Lamb 95-109 lb \$/head	\$189.00	\$176.00	\$198.00	\$195.00	\$185.00	\$162.50	-12%
<i>Source: Manitoba Markets</i>							

¹ April 10, 2020

Table 12 Supply and Disposition of Grains

Farm supply and disposition of grains (metric tonnes) ^{1,2}	2015	2016	2017	2018	2019
All wheat ³					
Total supplies	4,418,300	4,382,400	4,605,900	5,151,600	5,119,400
Beginning stocks	200,000	165,000	130,000	360,000	150,000
Production	4,218,300	4,217,400	4,475,900	4,791,600	4,969,400
Total disposition	4,418,300	4,382,400	4,605,900	5,151,600	5,119,400
Deliveries ^{4,5,6}	1,968,300	1,700,100	1,844,900	2,371,300	2,290,900
Seed requirements	7,600	6,000	3,000	2,000	1,300
Ending stocks ⁷	2,430,000	2,670,000	2,745,000	2,755,000	2,810,000
Animal feed, waste and dockage	12,400	6,300	13,000	23,300	17,200
Oats ³					
Total supplies	675,300	649,100	850,500	809,000	793,800
Beginning stocks	80,000	80,000	30,000	100,000	80,000
Production	595,300	569,100	820,500	709,000	713,800
Total disposition	675,300	649,100	850,500	809,000	793,800
Deliveries ^{4,5,6}	316,200	341,000	417,600	347,800	413,800
Seed requirements	0	0	0	0	0
Ending stocks ⁷	322,000	290,000	400,000	400,000	320,000
Animal feed, waste and dockage	37,100	18,100	32,900	61,200	60,000
Barley ³					
Total supplies	688,700	737,900	672,600	595,900	618,900
Beginning stocks	90,000	150,000	235,000	95,000	90,000
Production	598,700	587,900	437,600	500,900	528,900
Total disposition	688,700	737,900	672,600	595,900	618,900
Deliveries ^{4,5,6}	132,400	141,500	124,500	119,100	121,400
Seed requirements	0	0	0	0	0
Ending stocks ⁷	435,000	475,000	400,000	320,000	331,300
Animal feed, waste and dockage	121,300	121,400	148,100	156,800	166,200
Rye ³					
Total supplies	80,700	141,700	131,800	69,900	132,600
Beginning stocks	2,000	2,000	0	0	0
Production	78,700	139,700	131,800	69,900	132,600
Total disposition	80,700	141,700	131,800	69,900	132,600
Deliveries ^{4,5,6}	43,300	73,500	60,600	34,400	77,200
Seed requirements	3,100	2,500	1,700	3,200	3,700
Ending stocks ⁷	32,000	64,000	68,000	31,000	50,000
Animal feed, waste and dockage	2,400	1,700	1,500	1,400	1,800
Canola ^{3,5,8}					
Total supplies	2,957,600	2,773,200	3,197,900	3,468,400	3,606,300
Beginning stocks	100,000	165,000	50,000	150,000	550,000
Production	2,857,600	2,608,200	3,147,900	3,318,400	3,056,300
Total disposition	2,957,600	2,773,200	3,197,900	3,468,400	3,606,300
Deliveries ^{4,5,6}	1,105,200	1,326,200	1,438,800	1,283,200	1,406,600
Seed requirements	0	0	0	0	0
Ending stocks ⁷	1,800,000	1,440,000	1,650,000	2,080,000	2,165,000
Animal feed, waste and dockage	52,400	7,000	109,100	105,200	34,700

Table 12 Supply and disposition of grains (continued)

Farm supply and disposition of grains (metric tonnes) ^{1,2}	2015	2016	2017	2018	2019
Soybeans ^{2,3,9}					
Total supplies	1,408,700	1,804,740	2,290,921	1,767,144	1,145,457
Beginning stocks	18,000	35,740	45,621	35,544	23,157
Production	1,390,700	1,769,000	2,245,300	1,731,600	1,122,300
Total disposition	1,408,700	1,804,740	2,290,921	1,767,144	1,145,457
Deliveries ^{4,5,6}	563,480	721,896	916,368	706,858	458,183
Seed requirements	13,907	17,690	22,453	17,316	11,223
Ending stocks ⁷	823,553	1,009,174	1,320,799	1,030,231	615,571
Animal feed, waste and dockage	7,760	55,980	31,300	12,740	60,480
Dry Peas					
Total supplies	78,200	167,200	83,300	110,800	164,900
Beginning stocks	0	3,000	3,000	6,000	1,000
Production	78,200	164,200	80,300	104,800	163,900
Total disposition	78,200	167,200	83,300	110,800	164,900
Deliveries ^{4,5,6}	33,900	84,300	27,600	41,000	65,000
Seed requirements	0	0	0	0	0
Ending stocks ⁷	42,000	80,000	50,000	62,000	90,900
Animal feed, waste and dockage	2,300	2,900	5,700	7,800	9,000

¹ All grains except soybeans are based on the crop year August to July. The data for the periods are cumulative over the crop year (March 20XX = August to March; July 20XX = August to July; and December 20XX = August to December).

² Soybeans are based on the crop year September to August. The data for the periods are cumulative over the crop year (March 20XX = September to March; July 20XX = September to August; and December 20XX = September to December).

³ Animal feed, waste and dockage calculated residually.

⁴ Excludes flaxseed deliveries to process elevators.

⁵ Includes only licensed canola deliveries in Ontario.

⁶ Data in this table are updated three times a year. For the most updated data on grain deliveries, see table 32-10-0351.

⁷ Also known as carryover.

⁸ Historical data may include some rapeseed.

⁹ StatsCan data is suppressed to meet the confidentiality requirements of the Statistics Act. MB Ag estimates provided instead.

Table 13 Hemp Production (Area)

	2015	2016	2017	2018	2019
Area planted (Acres)	21,220	14,496	27,296	10,126	12,184

Source: MASC

Table 14 Potatoes Production (Area and Volumes)

	2015	2016	2017	2018	2019
Seeded area (acres)	67,300	65,914	62,900	64,100	70,000
Harvested area (acres)	67,000	64,000	62,800	58,800	57,000
Production, kilograms	1,098,853,749	1,137,971,520	1,127,811,060	1,031,286,690	100,080,531
Farm Cash Receipts					
Farm Cash Receipts	\$204,518,000	\$244,792,000	\$270,658,000	\$256,437,000	\$233,777,000

Source: Statistics Canada

Table 15 Supply Table of Domestic Primary Commodities, 2016

Commodity/Product type	Supply (value in 1,000 dollars, at basic prices)				Supply (per cent)			
	Total supply	Domestic output/production	International import	Interprovincial import	Total supply	Domestic output/production	International import	Interprovincial import
Canola (including rapeseed)	\$1,426,822	\$1,188,220	\$36,721	\$201,881	100.0%	83.3%	2.6%	14.1%
Oilseeds (except canola)	\$491,611	\$486,493	\$4,917	\$201	100.0%	99.0%	1.0%	0.0%
Wheat	\$887,122	\$885,604	\$656	\$862	100.0%	99.8%	0.1%	0.1%
Grains (except wheat)	\$512,729	\$426,884	\$10,183	\$75,662	100.0%	83.3%	2.0%	14.8%
Fresh potatoes	\$271,742	\$251,462	\$11,784	\$8,496	100.0%	92.5%	4.3%	3.1%
Fresh fruits and nuts	\$156,805	\$2,300	\$143,218	\$11,287	100.0%	1.5%	91.3%	7.2%
Other miscellaneous crop products	\$105,703	\$76,066	\$22,188	\$7,449	100.0%	72.0%	21.0%	7.0%
Fresh vegetables (except potatoes)	\$356,228	\$152,852	\$193,340	\$10,036	100.0%	42.9%	54.3%	2.8%
Imputed feed (animal feed produced for own consumption)	\$349,173	\$349,173	\$0	\$0	100.0%	100.0%	0.0%	0.0%
Nursery and floriculture products (except cannabis)	\$123,437	\$46,493	\$65,747	\$11,197	100.0%	37.7%	53.3%	9.1%
Cannabis plants, seeds and flowering tops	\$144,333	\$45,006	\$24,710	\$74,617	100.0%	31.2%	17.1%	51.7%
Cattle and calves	\$631,238	\$567,553	\$2,790	\$60,895	100.0%	89.9%	0.4%	9.6%
Unprocessed fluid milk	\$281,824	\$252,311	\$0	\$29,513	100.0%	89.5%	0.0%	10.5%
Hogs	\$1,328,023	\$1,002,306	\$226	\$325,491	100.0%	75.5%	0.0%	24.5%
Eggs in shell	\$125,830	\$115,490	\$4,172	\$6,168	100.0%	91.8%	3.3%	4.9%
Poultry	\$198,387	\$140,124	\$906	\$57,357	100.0%	70.6%	0.5%	28.9%
Other live animals	\$60,074	\$41,354	\$11,330	\$7,390	100.0%	68.8%	18.9%	12.3%

Table 16 Supply Table of Domestic Processed Products, 2016

Commodity/Product type	Supply (value in 1,000 dollars, at basic prices)				Supply (per cent)			
	Total supply	Domestic output/production	International import	Interprovincial import	Total supply	Domestic output/production	International import	Interprovincial import
Dog and cat food	\$77,391	\$1,721	\$44,502	\$31,168	100.0%	2.2%	57.5%	40.3%
Other animal feed	\$759,740	\$328,389	\$25,475	\$405,876	100.0%	43.2%	3.4%	53.4%
Flour and other grain mill products	\$236,840	\$202,508	\$24,844	\$9,488	100.0%	85.5%	10.5%	4.0%
Margarine and cooking oils	\$516,720	\$472,373	\$33,590	\$10,757	100.0%	91.4%	6.5%	2.1%
Breakfast cereal and other cereal products	\$34,878	\$13,727	\$14,840	\$6,311	100.0%	39.4%	42.5%	18.1%
Grain and oilseed products, n.e.c.	\$589,469	\$477,047	\$33,399	\$79,023	100.0%	80.9%	5.7%	13.4%
Sugar and sugar mill by-products	\$27,712	\$0	\$8,238	\$19,474	100.0%	0.0%	29.7%	70.3%
Chocolate (except confectionery)	\$17,652	\$0	\$17,095	\$557	100.0%	0.0%	96.8%	3.2%
Confectionery products	\$112,774	\$13,332	\$93,302	\$6,140	100.0%	11.8%	82.7%	5.4%
Fresh, frozen and canned fruit and vegetable juices	\$76,424	\$1,773	\$33,906	\$40,745	100.0%	2.3%	44.4%	53.3%
Preserved fruit and vegetables and frozen foods	\$712,363	\$519,653	\$121,131	\$71,579	100.0%	72.9%	17.0%	10.0%
Processed fluid milk and milk products	\$285,078	\$141,914	\$5,032	\$138,132	100.0%	49.8%	1.8%	48.5%
Cheese and cheese products	\$195,331	\$86,280	\$8,930	\$100,121	100.0%	44.2%	4.6%	51.3%
Butter and dry and canned dairy products	\$93,918	\$31,770	\$36,691	\$25,457	100.0%	33.8%	39.1%	27.1%
Ice cream, sherbet and similar frozen desserts	\$33,186	\$11,297	\$1,065	\$20,824	100.0%	34.0%	3.2%	62.7%
Fresh and frozen beef and veal	\$251,194	\$54,097	\$74,888	\$122,209	100.0%	21.5%	29.8%	48.7%
Fresh and frozen pork	\$1,524,210	\$1,483,605	\$6,770	\$33,835	100.0%	97.3%	0.4%	2.2%
Fresh and frozen poultry of all types	\$310,784	\$192,362	\$13,046	\$105,376	100.0%	61.9%	4.2%	33.9%
Processed meat products, other miscellaneous meats and animal by-products	\$346,499	\$101,245	\$110,854	\$134,400	100.0%	29.2%	32.0%	38.8%
Prepared and packaged seafood products	\$123,823	\$65,998	\$56,293	\$1,532	100.0%	53.3%	45.5%	1.2%
Bread, rolls and flatbreads	\$150,166	\$94,937	\$8,710	\$46,519	100.0%	63.2%	5.8%	31.0%
Cookies, crackers and baked sweet goods	\$169,586	\$60,733	\$53,655	\$55,198	100.0%	35.8%	31.6%	32.5%
Flour mixes, dough and dry pasta	\$42,781	\$12,953	\$14,784	\$15,044	100.0%	30.3%	34.6%	35.2%
Snack food products	\$154,397	\$70,332	\$16,976	\$67,089	100.0%	45.6%	11.0%	43.5%
Coffee and tea	\$97,251	\$151	\$76,398	\$20,702	100.0%	0.2%	78.6%	21.3%
Flavouring syrups, seasonings and dressings	\$84,471	\$6,736	\$39,173	\$38,562	100.0%	8.0%	46.4%	45.7%
Other food products, n.e.c.	\$209,531	\$76,871	\$75,065	\$57,595	100.0%	36.7%	35.8%	27.5%
Bottled water, soft drinks and ice	\$233,370	\$88,863	\$33,561	\$110,946	100.0%	38.1%	14.4%	47.5%
Beer	\$206,232	\$7,288	\$39,647	\$159,297	100.0%	3.5%	19.2%	77.2%
Wine and brandy	\$117,526	\$0	\$91,337	\$26,189	100.0%	0.0%	77.7%	22.3%
Distilled liquor	\$78,048	\$45,191	\$25,086	\$7,771	100.0%	57.9%	32.1%	10.0%

Table 17 Use Table of Domestic Primary Commodities, 2016

Commodity/Product type	Use (Value in \$1,000, at basic prices)							Use (per cent)						
	Total Use	Inputs	Final Use	International Export	Interprovincial Export	Change in Inventory	International Re-export	Total Use	Inputs	Final Use	International Export	Interprovincial Export	Change in Inventory	International Re-export
Canola (including rapeseed)	\$1,426,822	\$645,940	\$0	\$718,659	\$195,800	-\$147,291	\$13,714	100%	45%	0%	50%	14%	-10%	1%
Oilseeds (except canola)	\$491,611	\$50,584	\$0	\$346,103	\$74,352	\$20,004	\$568	100%	10%	0%	70%	15%	4%	0%
Wheat	\$887,122	\$94,452	\$0	\$580,871	\$99,717	\$112,059	\$23	100%	11%	0%	65%	11%	13%	0%
Grains (except wheat)	\$512,729	\$282,215	\$0	\$128,429	\$68,770	\$33,198	\$117	100%	55%	0%	25%	13%	6%	0%
Fresh potatoes	\$271,742	\$38,908	\$19,271	\$39,429	\$160,719	\$13,415	\$0	100%	14%	7%	15%	59%	5%	0%
Fresh fruits and nuts	\$156,805	\$16,965	\$137,694	\$212	\$105	\$1,829	\$0	100%	11%	88%	0%	0%	1%	0%
Other miscellaneous crop products	\$105,703	\$27,585	\$6,210	\$72,216	\$213	-\$521	\$0	100%	26%	6%	68%	0%	0%	0%
Fresh vegetables (except potatoes)	\$356,228	\$167,130	\$60,210	\$107,630	\$2,336	\$13,208	\$5,714	100%	47%	17%	30%	1%	4%	2%
Imputed feed (animal feed produced for own consumption)	\$349,173	\$349,173	\$0	\$0	\$0	\$0	\$0	100%	100%	0%	0%	0%	0%	0%
Nursery and floriculture products (except cannabis)	\$123,437	\$82,101	\$36,601	\$1,286	\$0	\$3,075	\$374	100%	67%	30%	1%	0%	2%	0%
Cannabis plants, seeds and flowering tops	\$144,333	\$0	\$144,333	\$0	\$0	\$0	\$0	100%	0%	100%	0%	0%	0%	0%
Cattle and calves	\$631,238	\$114,616	\$2,412	\$158,490	\$342,320	\$13,400	\$0	100%	18%	0%	25%	54%	2%	0%
Unprocessed fluid milk	\$281,824	\$159,498	\$84	\$0	\$122,242	\$0	\$0	100%	57%	0%	0%	43%	0%	0%
Hogs	\$1,328,023	\$670,745	\$1,521	\$198,466	\$459,988	-\$2,697	\$0	100%	51%	0%	15%	35%	0%	0%
Eggs in shell	\$125,830	\$26,210	\$16,856	\$55	\$82,508	\$201	\$0	100%	21%	13%	0%	66%	0%	0%
Poultry	\$198,387	\$120,069	\$300	\$14,453	\$67,648	-\$4,083	\$0	100%	61%	0%	7%	34%	-2%	0%
Other live animals	\$60,074	\$4,009	\$14,415	\$15,958	\$21,533	\$1,794	\$2,365	100%	7%	24%	27%	36%	3%	4%

Table 18 Use Table of Domestic Processed Foods, 2016

Commodity/Product type	Use (Value in \$1,000, at basic prices)							Use (per cent)						
	Total Use	Inputs	Final Use	International Export	Interprovincial Export	Change in Inventory	International Re-export	Total Use	Inputs	Final Use	International Export	Interprovincial Export	Change in Inventory	International Re-export
Dog and cat food	\$77,391	\$1,424	\$74,419	\$0	\$1,406	-\$23	\$165	100%	2%	96%	0%	2%	0%	0%
Other animal feed	\$759,740	\$572,454	\$23,877	\$4,114	\$170,732	-\$11,619	\$182	100%	75%	3%	1%	22%	-2%	0%
Flour and other grain mill products	\$236,840	\$67,707	\$3,294	\$86,730	\$77,671	\$1,438	\$0	100%	29%	1%	37%	33%	1%	0%
Margarine and cooking oils	\$516,720	\$77,160	\$28,784	\$241,905	\$166,956	-\$382	\$2,297	100%	15%	6%	47%	32%	0%	0%
Breakfast cereal and other cereal products	\$34,878	\$6,575	\$18,451	\$77	\$9,490	\$252	\$33	100%	19%	53%	0%	27%	1%	0%
Grain and oilseed products, n.e.c.	\$589,469	\$156,882	\$23,584	\$160,797	\$254,323	-\$6,117	\$0	100%	27%	4%	27%	43%	-1%	0%
Sugar and sugar mill by-products	\$27,712	\$16,170	\$11,357	\$0	\$0	\$22	\$163	100%	58%	41%	0%	0%	0%	1%
Chocolate (except confectionery)	\$17,652	\$4,047	\$12,630	\$0	\$0	\$421	\$554	100%	23%	72%	0%	0%	2%	3%
Confectionery products	\$112,774	\$4,418	\$94,736	\$9,090	\$4,012	-\$726	\$1,244	100%	4%	84%	8%	4%	-1%	1%
Fresh, frozen and canned fruit and vegetable juices	\$76,424	\$18,967	\$52,948	\$345	\$1,369	\$2,211	\$584	100%	25%	69%	0%	2%	3%	1%
Preserved fruit and vegetables and frozen foods	\$712,363	\$25,009	\$178,950	\$308,129	\$197,593	\$1,248	\$1,434	100%	4%	25%	43%	28%	0%	0%
Processed fluid milk and milk products	\$285,078	\$62,481	\$88,690	\$8,089	\$124,211	\$1,607	\$0	100%	22%	31%	3%	44%	1%	0%
Cheese and cheese products	\$195,331	\$23,585	\$108,046	\$103	\$58,783	\$4,692	\$122	100%	12%	55%	0%	30%	2%	0%
Butter and dry and canned dairy products	\$93,918	\$28,364	\$33,971	\$140	\$30,979	\$440	\$24	100%	30%	36%	0%	33%	0%	0%
Ice cream, sherbet and similar frozen desserts	\$33,186	\$8,542	\$13,801	\$3	\$10,054	\$786	\$0	100%	26%	42%	0%	30%	2%	0%
Fresh and frozen beef and veal	\$251,194	\$153,977	\$66,569	\$1,116	\$33,482	-\$3,959	\$9	100%	61%	27%	0%	13%	-2%	0%
Fresh and frozen pork	\$1,524,210	\$187,980	\$72,216	\$680,463	\$604,257	-\$20,871	\$165	100%	12%	5%	45%	40%	-1%	0%
Fresh and frozen poultry of all types	\$310,784	\$53,901	\$103,787	\$1,797	\$156,924	-\$5,625	\$0	100%	17%	33%	1%	50%	-2%	0%
Processed meat products, other miscellaneous meats and animal by-products	\$346,499	\$106,874	\$151,590	\$10,219	\$77,447	-\$245	\$614	100%	31%	44%	3%	22%	0%	0%
Prepared and packaged seafood products	\$123,823	\$39,697	\$31,104	\$49,122	\$3,250	-\$803	\$1,453	100%	32%	25%	40%	3%	-1%	1%
Bread, rolls and flatbreads	\$150,166	\$30,793	\$93,667	\$7	\$24,521	\$1,178	\$0	100%	21%	62%	0%	16%	1%	0%
Cookies, crackers and baked sweet goods	\$169,586	\$13,466	\$98,756	\$16,447	\$36,994	\$2,847	\$1,076	100%	8%	58%	10%	22%	2%	1%
Flour mixes, dough and dry pasta	\$42,781	\$10,776	\$27,950	\$0	\$3,869	\$36	\$150	100%	25%	65%	0%	9%	0%	0%
Snack food products	\$154,397	\$7,157	\$86,164	\$57	\$60,649	-\$64	\$434	100%	5%	56%	0%	39%	0%	0%
Coffee and tea	\$97,251	\$19,154	\$74,418	\$90	\$7	\$2,558	\$1,024	100%	20%	77%	0%	0%	3%	1%

Table 18 Use Table of Domestic Processed Foods (continued)

Commodity/Product type	Use (Value in \$1,000, at basic prices)							Use (per cent)						
	Total Use	Inputs	Final Use	International Export	Interprovincial Export	Change in Inventory	International Re-export	Total Use	Inputs	Final Use	International Export	Interprovincial Export	Change in Inventory	International Re-export
Flavouring syrups, seasonings and dressings	\$84,471	\$27,646	\$51,323	\$145	\$5,864	-\$2,612	\$2,105	100%	33%	61%	0%	7%	-3%	2%
Other food products, n.e.c.	\$209,531	\$58,300	\$93,684	\$25,090	\$28,463	\$2,010	\$1,984	100%	28%	45%	12%	14%	1%	1%
Bottled water, soft drinks and ice	\$233,370	\$47,432	\$98,424	\$227	\$84,714	\$2,323	\$250	100%	20%	42%	0%	36%	1%	0%
Beer	\$206,232	\$67,751	\$131,575	\$710	\$1,510	\$4,681	\$5	100%	33%	64%	0%	1%	2%	0%
Wine and brandy	\$117,526	\$21,836	\$95,338	\$0	\$0	\$153	\$199	100%	19%	81%	0%	0%	0%	0%
Distilled liquor	\$78,048	\$27,651	\$23,359	\$18,762	\$6,014	\$2,050	\$212	100%	35%	30%	24%	8%	3%	0%

Table 19 Main Destination for Manitoba Grains

Destination	2014/15 ¹		2015/16		2016/17		2017/18		2018/19	
	Kilo Tonne s	Percentage	Kilo Tonne s	Percentage	Kilo Tonne s	Percentage	Kilo Tonne s	Percentage	Kilo Tonne s	Percentage
Thunder Bay	3,316	54.9%	3,403	47.9%	3,258	50.5%	3,591	43.3%	3,913	46.3%
Vancouver	537	8.9%	979	13.8%	843	13.1%	1,257	15.2%	1,533	18.1%
United States	1,277	21.2%	1,495	21.0%	1,171	18.1%	1,846	22.3%	1,294	15.3%
St. Lawrence Seaway/Great Lakes	515	8.5%	717	10.1%	702	10.9%	770	9.3%	954	11.3%
Eastern Domestic	272	4.5%	291	4.1%	232	3.6%	441	5.3%	516	6.1%
Prince Rupert	60	1.0%	99	1.4%	171	2.6%	155	1.9%	207	2.4%
Mexico	25	0.4%	98	1.4%	60	0.9%	32	0.4%	19	0.2%
Western Domestic	15	0.3%	17	0.2%	17	0.3%	202	2.4%	16	0.2%
Churchill	21	0.4%	9	0.1%				0.0%		0.0%
Total	6,039	100.0 %	7,107	100.0 %	6,454	100.0 %	8,295	100.0 %	8,452	100.0 %
Direction										
East	4,103	67.9%	4,410	62.1%	4,192	65.0%	4,803	57.9%	5,383	63.7%
West	613	10.1%	1,095	15.4%	1,031	16.0%	1,614	19.5%	1,756	20.8%
South	1,302	21.6%	1,592	22.4%	1,231	19.1%	1,878	22.6%	1,313	15.5%
North	21	0.4%	9	0.1%	0	0.0%	0	0.0%	0	0.0%
Total	6,039	100.0 %	7,107	100.0 %	6,454	100.0 %	8,295	100.0 %	8,452	100.0 %

Source: Grain Monitor: <http://grainmonitor.ca/Downloads/MonthlyReports/MonthlyReport201812DataTables.xlsx>

¹ Each year reflects a crop year, beginning on August 1 in the first year and ending on July 31 in the following year.

APPENDIX 1 SUPPLY AND USE TABLES – ADDITIONAL INFORMATION

The Supply and Use Table is the valuation of goods and services as they are produced or imported. The goods and services in the *Supply and Use Table* can be valued either at basic (producer) prices or at purchaser prices. Total supply at basic price is the sum of outputs (of all domestic production) and imports (both international and interprovincial). This excludes any product taxes and distribution margins for trade and transportation.

The fundamental identity of the *Supply and Use Table* is that the total value of goods and services **supplied** in the economy must be equal to the total value of all goods and services **used** in the economy. For instance, the **total value of canola supply** in Manitoba must be equal to the **total value of canola use** in Manitoba.

Total value of canola supply (at basic price) = total value canola output (from domestic production) + total value of canola imports (interprovincial import + international import).

Total value of canola use (at basic price) = the total value of intermediate consumption (inputs) + final consumption + capital formation + inventory changes + exports (interprovincial export + international export).

Changes in inventories are measured by the value of the entries into inventories less the value of withdrawals and less the value of any recurrent losses of goods held in inventories during the accounting period.

An important point to note is that the total supply in the *Supply and Use Table* incorporates farm cash receipts as well as change in on-farm inventory and in-kind income. Thus, for example, the total value of canola output (supply) in the supply and use table, might slightly higher than the total canola farm cash receipts for the same year.

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