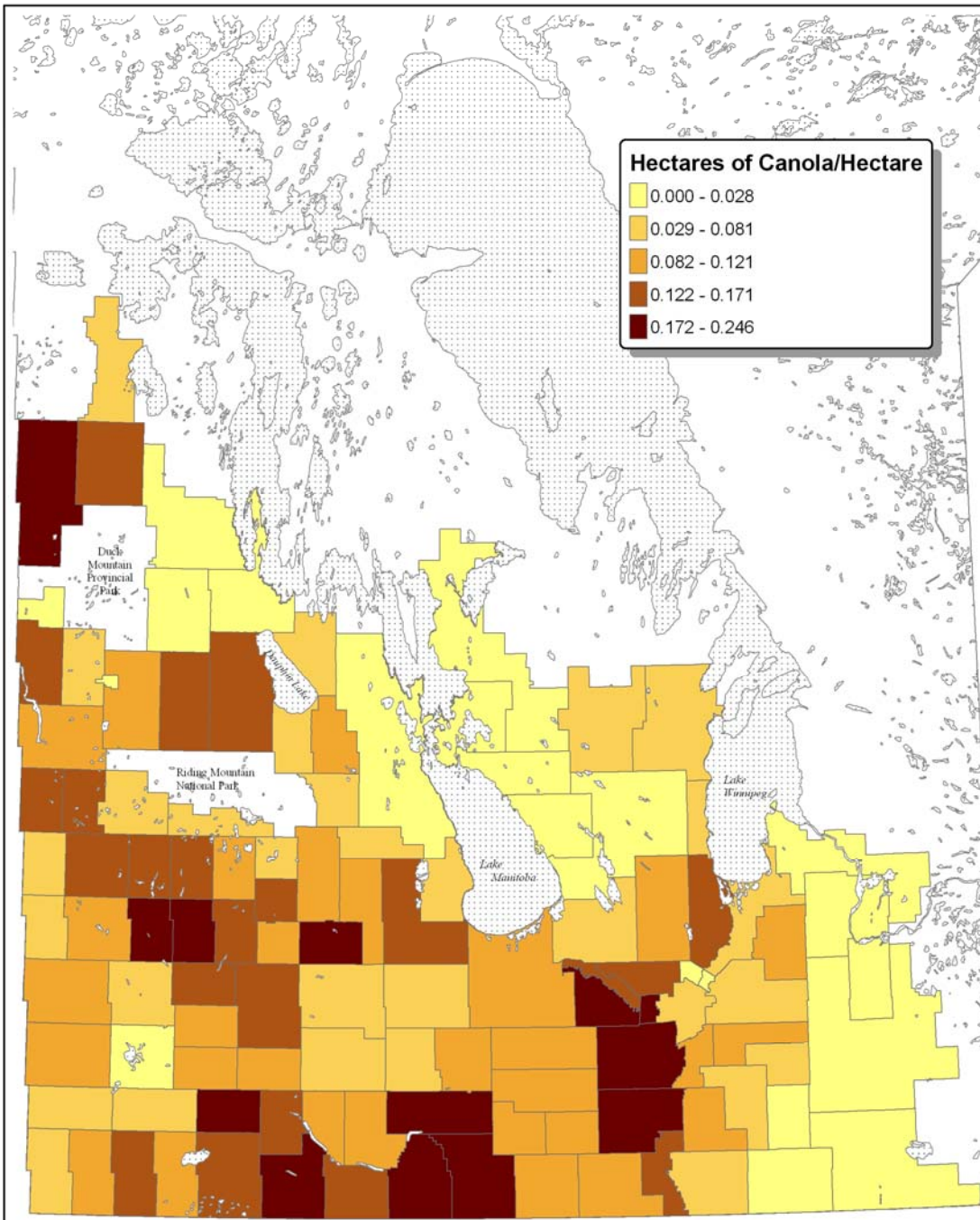


OATS SECTOR



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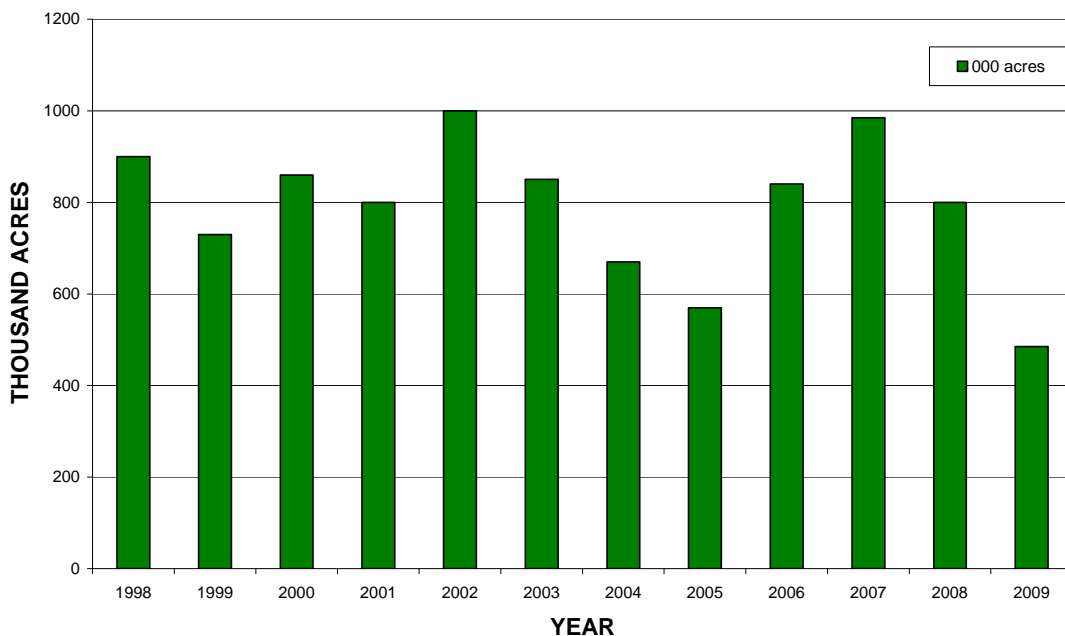
Source: Statistics Canada - 2006 Census of Agriculture



OAT SECTOR IN MANITOBA

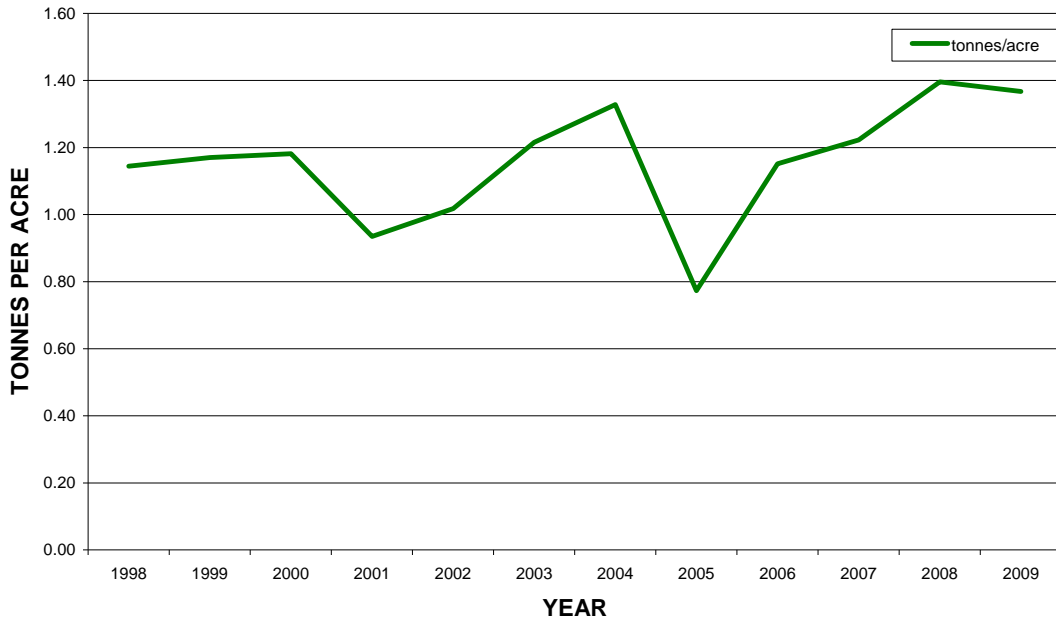
- From the time Manitoba was first settled until the early 1900s, the production of oats was extremely important to producers of the area.
- Since horses were used extensively in their agricultural operations throughout this period, the oats provided their horses with an excellent source of feed.
- Oat production reached its pinnacle in Manitoba in 1921 when over 2 million acres were harvested.
- With the advent of machinery and mechanized farming procedures, the importance of the horse as an agricultural labourer declined and with it the area seeded for oats decreased as well, and by the late 1980s, Manitoba's production of oats had declined to less than 400,000 acres.
- The 1990s saw resurgence in the area seeded to oats, as oats gained popularity as a healthy product for human consumption.
- Currently, Manitoba producers harvest over 800,000 acres of oats each year, which is greater than 25% of Canada's annual production.

Area of Oats in Manitoba, 1998 - 2009



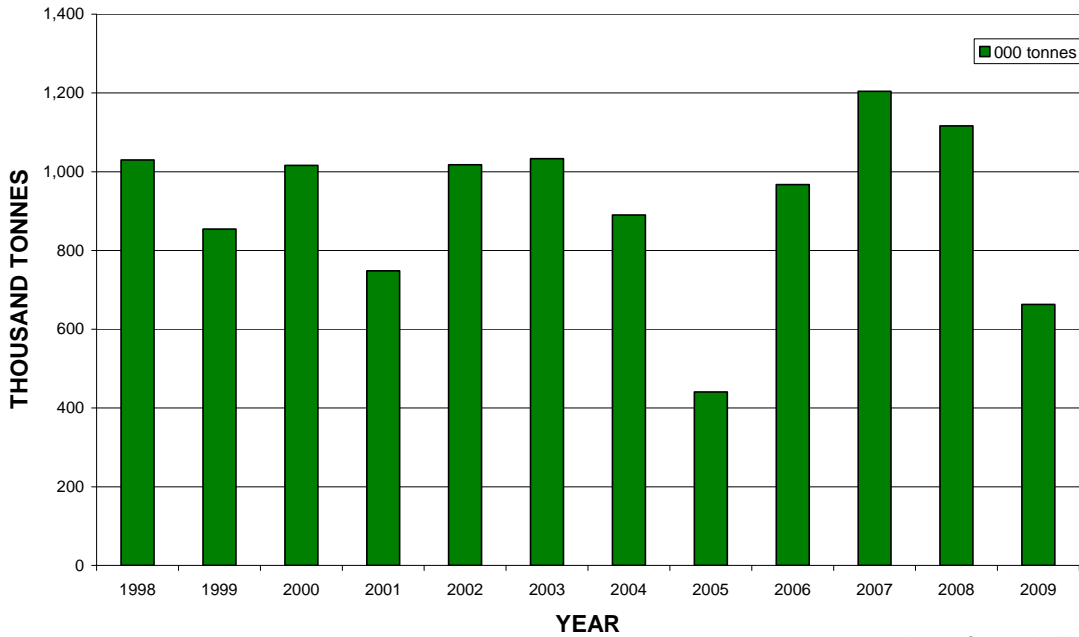
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Yield of Oats in Manitoba, 1998 – 2009



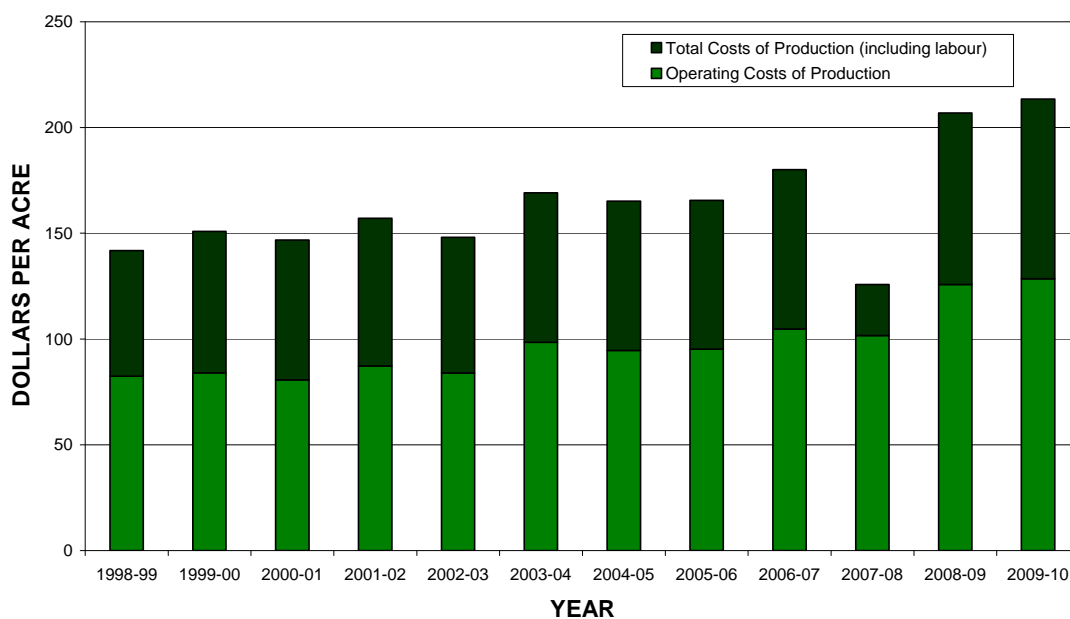
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Production of Oats in Manitoba, 1998 – 2009



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Cost of Oat Production in Manitoba, 1998 – 2009



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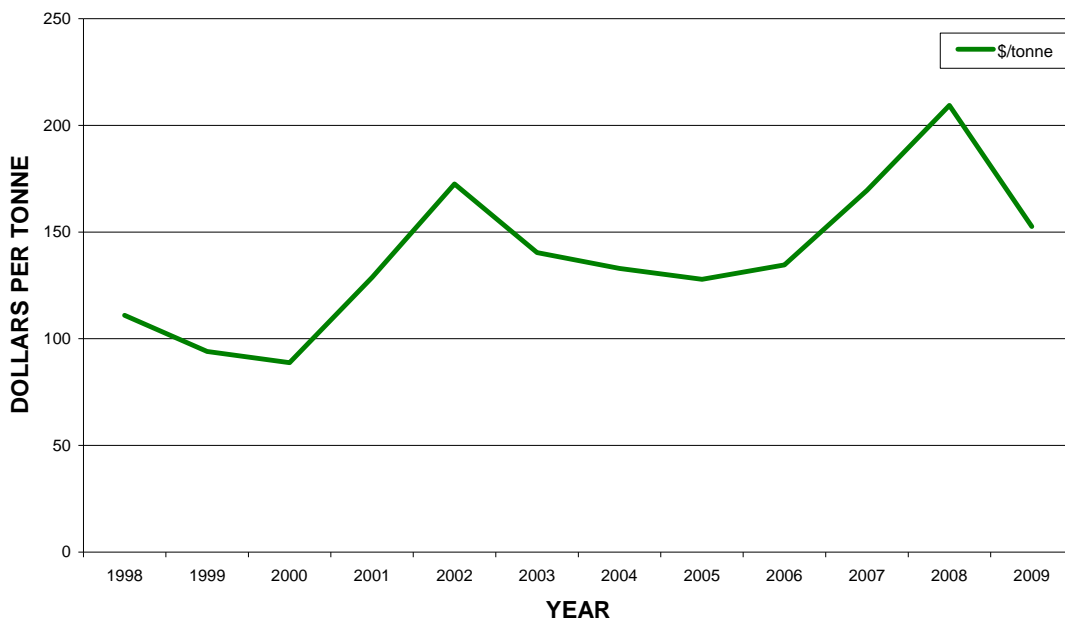
Farm Supply and Disposition of Manitoba Oats Crop, 1998/99 to 2009/10

<i>000 tonnes</i>	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	2006-07	2007-08	2008-09	2009-10
Opening Stocks Aug 1	70	150	100	120	50	70	100	120	75	55	100	250
Production	1,030	854	1,016	748	1,018	1,033	890	441	967	1,205	1,117	663
Total Supply	1,100	1,004	1,116	868	1,068	1,103	990	561	1,042	1,260	1,217	913
Marketings	612	716	790	640	789	839	811	448	867	1,104	784	550
Seed	23	27	26	33	28	24	20	27	30	25	18	25
Carryover	150	100	120	50	70	100	120	75	55	100	250	165
Feed/ Waste/ Dockage	315	161	180	145	181	141	39	11	90	30	165	173
Total Disposition	1,100	1,004	1,116	868	1,068	1,103	990	561	1,042	1,260	1,217	913

Processing Oats in Manitoba

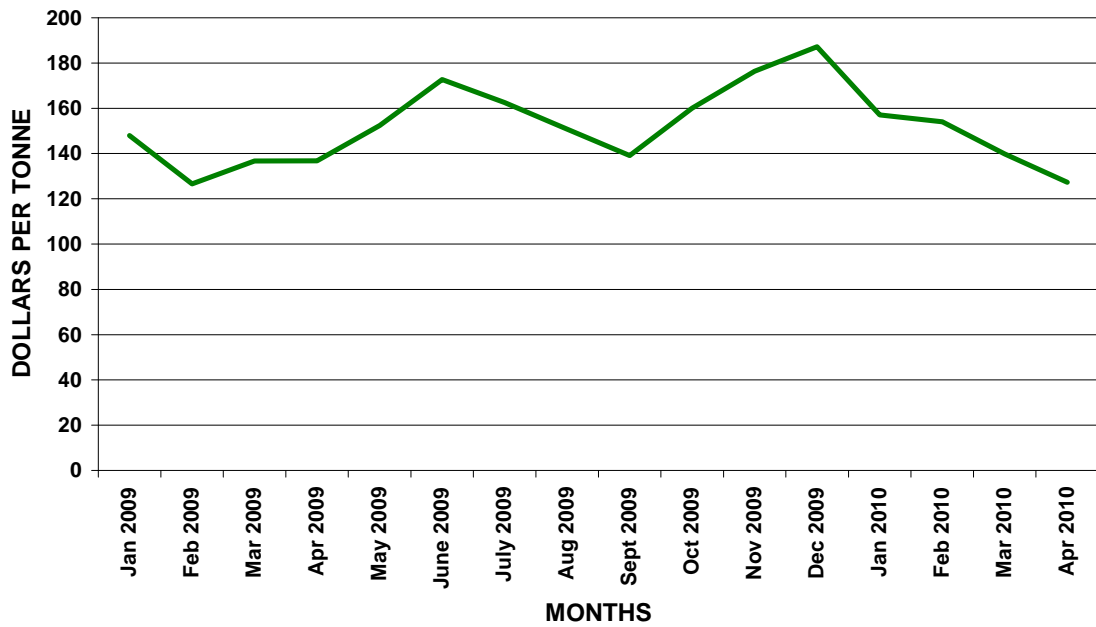
- Oats grown in Manitoba, especially the Red River Valley, are renowned for their high milling quality.
- The Red River Valley has some of the highest concentrations of oats grown per square kilometre in all of North America.
- Manitoba has two major facilities that process oats as well as several smaller facilities. Can-Oat Milling Products, in Portage la Prairie and Manitoba's largest oat processor, processes oats into various products for human consumption including flour, groats, rolled oats and oat bran, as well as producing oats for animal feed rations.
- Emerson Milling, located in Emerson near the Canadian/American border, processes oats for the use in animal feed, including feed for domestic pets, birds and horses.

Oat Prices in Manitoba, 1998 – 2009



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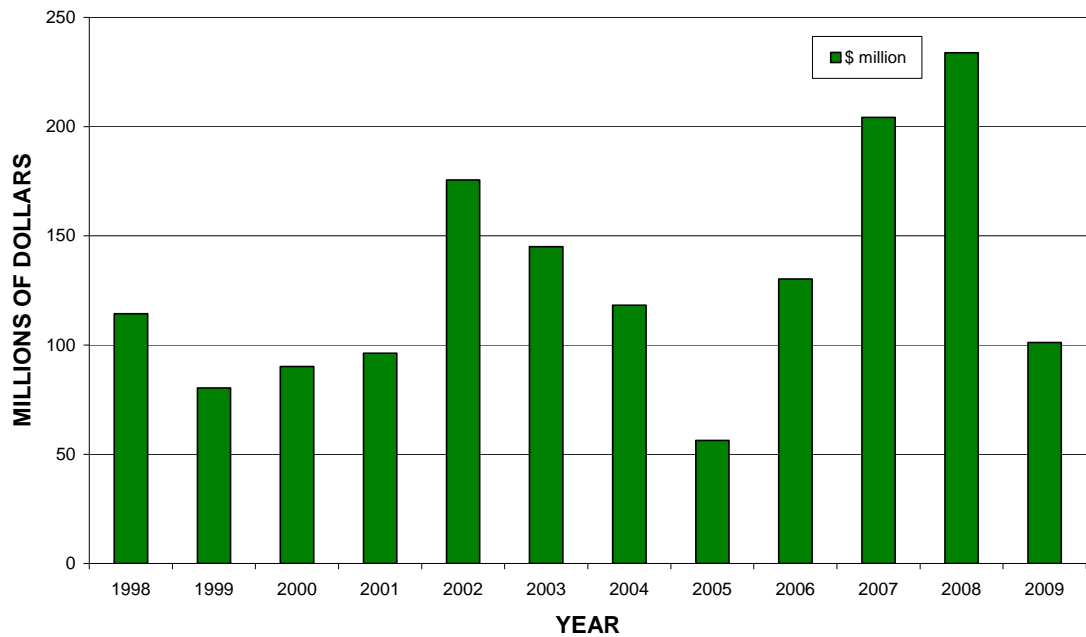
MONTHLY OATS PRICES Manitoba 2009-2010



Prices are farmers net cash return at the Winnipeg Elevator

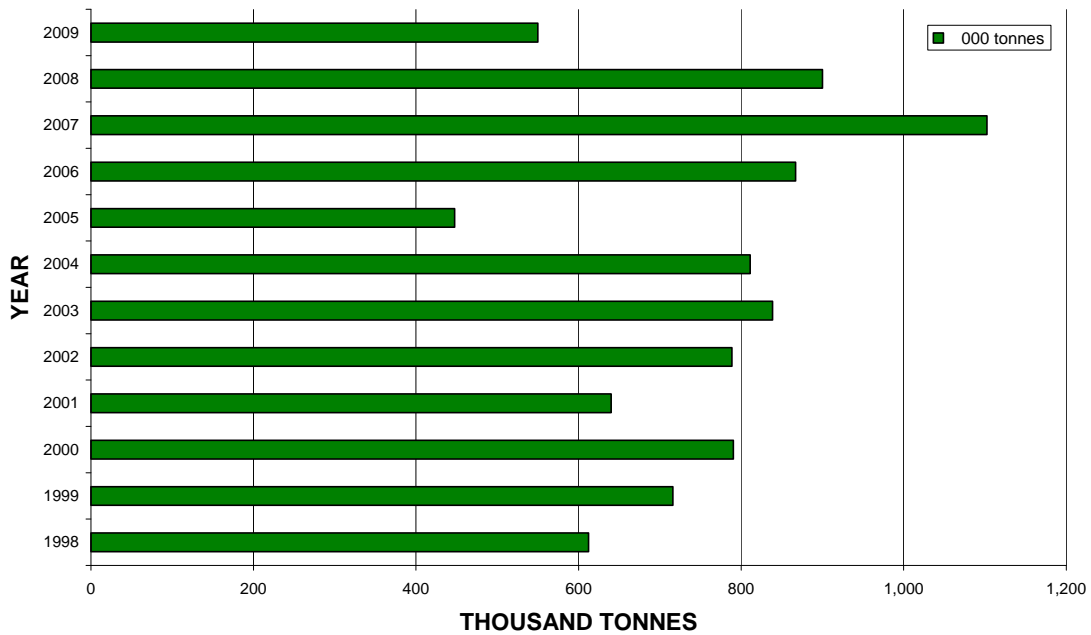
Industry Intelligence Section, MAFRI

Value of Oat Production in Manitoba, 1998 - 2009



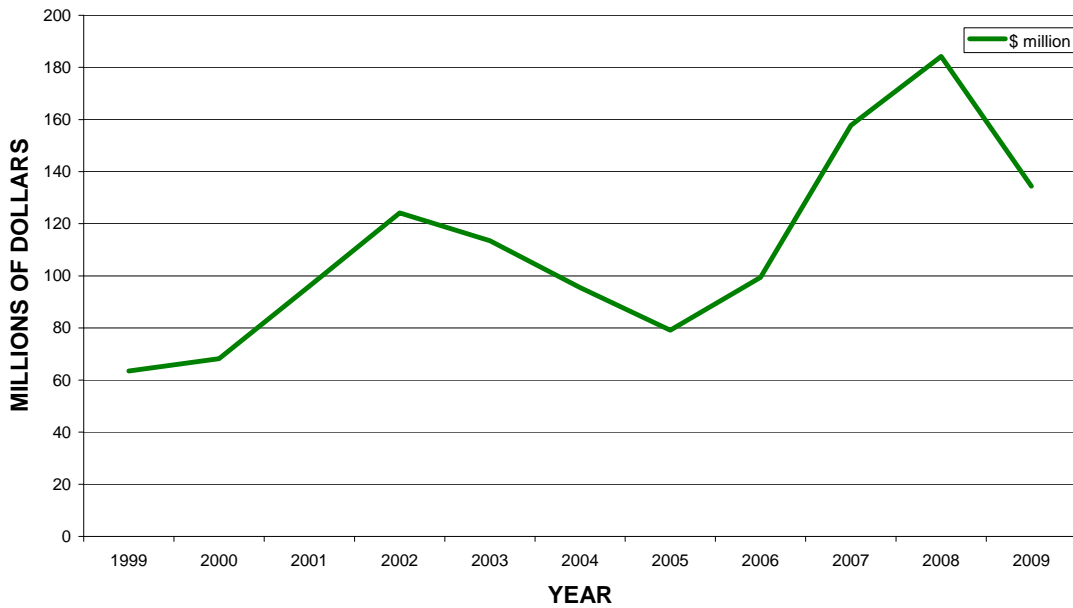
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Marketings of Manitoba Oats, 1998 - 2009



Industry Intelligence Section, MAFRI

Farm Cash Receipts for Oats in Manitoba, 1998 – 2009

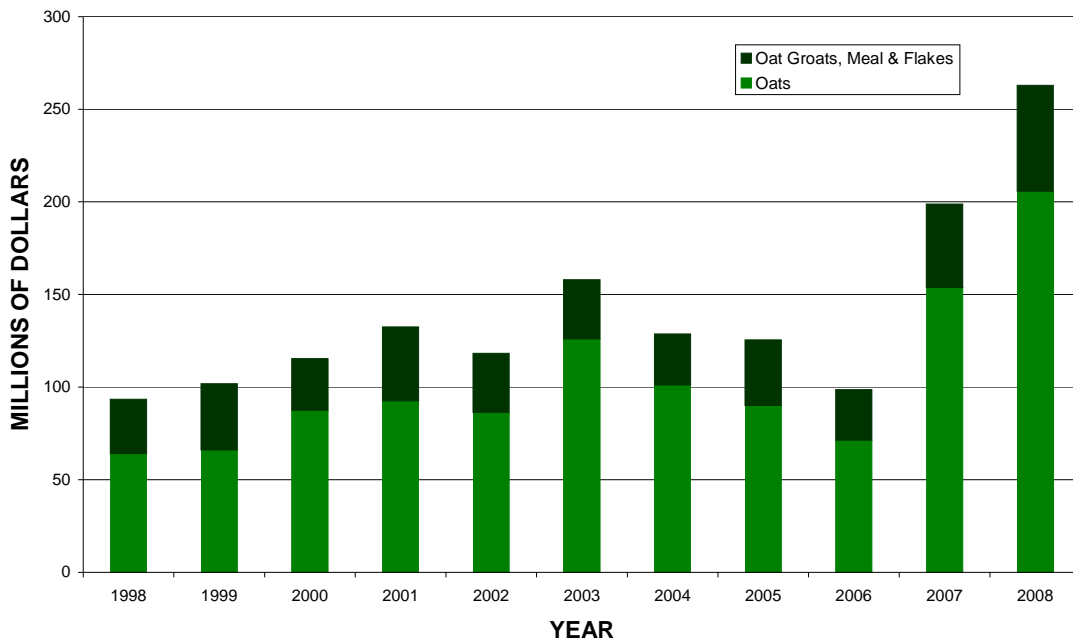


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Trade

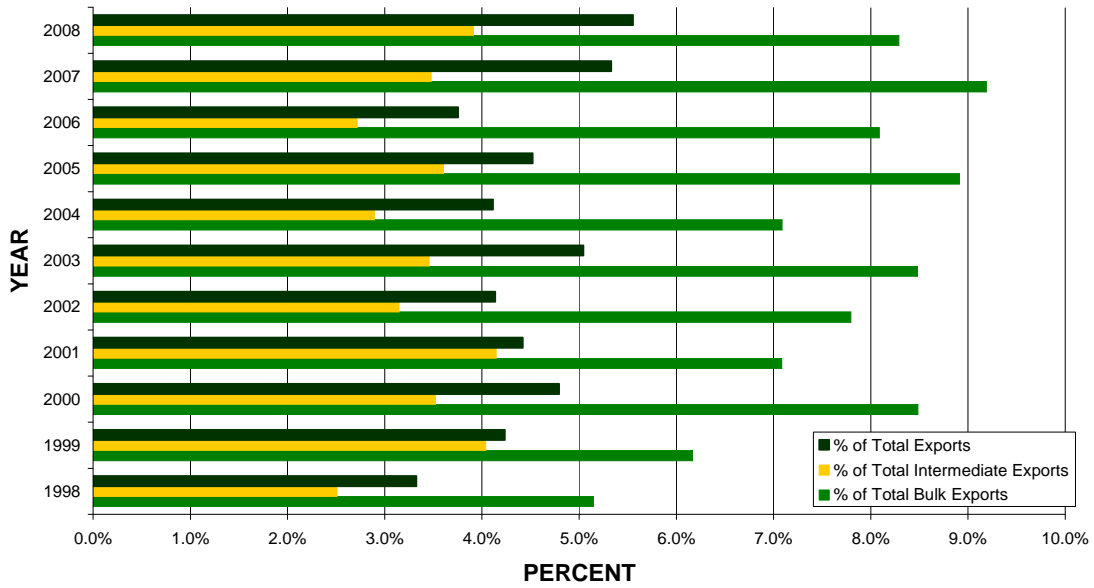
- Manitoba exports both the unprocessed oats and those oats that have been processed into various products.
- Over the last few years, the level of unprocessed oats exported has been declining, while the processed oats products being exported is on the rise.
- The unprocessed oats have long been a popular choice for racehorse feed and more recently for milling and cereal products in the United States. Oat bran, rolled oats and oat flour are a few of the processed oat products that Manitoba exports around the world.
- While the bulk of our oats and processed oat products are destined for the United States, other destinations for our oats include Japan and several other countries in the Far East, and Colombia, Chile and several other nations in Latin and South America.
- Manitoba producers have a long tradition of growing and producing top quality oats and processed oat products.

Manitoba Oats Exports, 1998 - 2008



Industry Intelligence Section, MAFRI

Value of Oats Exports as a Percentage of Total Manitoba Agri-Food Exports, 1998 - 2008



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