Ag Statistics 101 Series

Industry and Market Highlights

Webinar
March 22, 2018, 9:00AM-10:30AM
Industry Highlights
Eric Liu, Manitoba Agriculture
Eric is Manager of Foresight and Analysis in the Department’s Transformation branch. Since joining the department in 2006, he has played instrumental roles in developing strategies, programs and policies that boost Manitoba’s low-carbon economy. Eric has Ph.D. degree in bioproduct processing and Project Management Professional (PMP) designation.

New Models and Methods for Using Market Intelligence
Bruce Burnett, Glacier Farm Media
Currently the Director of Weather and Markets for Glacier Farm media, Bruce has been living and breathing Western Canadian agriculture for over 30 years. The combination of practical experience gained by growing up on a farm in western Manitoba and years of monitoring global weather and markets for the Canadian Wheat Board gives Bruce a unique perspective on the agricultural markets. His specialty is the analysis of weather conditions and their impact on global agricultural markets.

Market Microstructure Dynamics in Agricultural Commodities
Julieta Frank, University of Manitoba.
Dr. Frank is Associate Professor with the Department of Agribusiness and Agricultural Economics. Her research are in the areas of price analysis, agricultural marketing, and risk management, specifically focused on futures markets, market microstructure and dynamics, and forecast evaluation. She has Ph.D. degree in Agricultural Economics from University of Illinois.
Industry Highlights

Eric Liu, Manager, Foresight and Analysis (F&A)  
Transformation Branch, Manitoba Agriculture

F&A Team
  Marni Donetz, Intelligence Specialist - Livestock  
  David Simonot, Intelligence Specialist – Crops  
  Mengistu Wendimu, Intelligence Specialist – Food and Agriproduct Processing  
  Joe Chen, Junior Market Intelligence Specialist  
  Mindy Tucker, Information Coordinator  
  Meghan Kozuska, student  
  Fariba Rad, student  
  Jane Donetz, student (UofM collaborative)
Farm and Land in MB, 2016

- 14,791 farms in MB
- 18M acres of farm land in MB:
  - 12.8M acres crop land
  - 929K acres forages
  - 3.3M acres native pasture
  - 1.2M acres in other purposes (e.g. Christmas trees)
- $40B farm land and buildings
### Economic Impacts of Ag in MB

<table>
<thead>
<tr>
<th>Category</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Primary</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GDP</td>
<td>Dec 2016</td>
<td>$1.92B</td>
<td>3.4% MB</td>
</tr>
<tr>
<td>Employment</td>
<td>Dec 2017</td>
<td>24,000</td>
<td>3.7% MB</td>
</tr>
<tr>
<td>FCR</td>
<td>Dec 2017</td>
<td>$6.47B</td>
<td>9% YTY</td>
</tr>
<tr>
<td>Exports</td>
<td>Dec 2017</td>
<td>$3.24B</td>
<td>23.2% MB</td>
</tr>
<tr>
<td><strong>Processing</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GDP</td>
<td>Dec 2016</td>
<td>$1.14B</td>
<td>2.1% MB</td>
</tr>
<tr>
<td>Employment</td>
<td>Dec 2017</td>
<td>12,800</td>
<td>2.0% MB</td>
</tr>
<tr>
<td>Sales</td>
<td>Dec 2017</td>
<td>$4.35B</td>
<td>23.8% MB</td>
</tr>
<tr>
<td>Exports</td>
<td>Dec 2017</td>
<td>$2.70B</td>
<td>19.3% MB</td>
</tr>
</tbody>
</table>
Agriculture in MB - Highlights

- 20,140 farm operators in Manitoba in 2016, with 23.8% women and average age of 53.8 years
- Farm cash receipts set record in 2017, surpassing $6B.
- Canola remained the leading field crop in Manitoba, followed by spring wheat and soybeans
- Canada’s second largest potato-producing province
- The nation’s largest producer of sunflower seed
- The largest pig producing province in Canada. The value of pig production in Manitoba is expected to surpass $1B in 2017 and 2018
- Canada’s third largest beef cow population
- The sheep flock grew 15% to 93,000 animals, the largest increase in Canada in 2017
Canola, $1,344,143, 23%
Wheat ex durum, $866,829, 14%
Soybeans, $544,949, 9%
Potatoes, $233,087, 4%
Corn, $123,536, 2%
Oats, $110,507, 2%

Hogs, $988,131, 17%
Cattle, $480,169, 8%
Dairy products, $252,249, 4%

Total eggs, $115,140, 2%
Hens and chickens, $108,261, 2%
Other livestock, $184,208, 3%
Direct payments, $221,804, 4%

Other crops, $375,257, 6%

Crops: $3.60b
Livestock: $2.13b
Direct payments: $0.22b
Total FCR: $5.95b

Source: Statistics Canada, CANSIM 002-0001
Manitoba Agriculture, Foresight and Analysis, 2018-01-16
MANITOBA FARM CASH RECEIPTS - TOP SIX CROPS BY FCR 2011-2017 (EST)

Canola
Wheat
Soybeans
Potatoes
Corn
Oats

Source: Statistics Canada, CANSIM 002-0001
Manitoba Agriculture, Foresight and Analysis, 2018-03-15
New Forage Price Survey

MANITOBA MARKETS FORAGE PRICES

January 31, 2018

Manitoba Agriculture initiated a survey of Manitoba forage buyers and sellers to improve the availability of pricing information. The survey is conducted at intervals in fall, winter and spring to track prices during the periods of most active trade. Forage prices will vary depending on quality as well as local supply and demand conditions, so these survey prices aim to show the average value and track movement in overall price levels in Manitoba.

<table>
<thead>
<tr>
<th>Seeded area (acres)</th>
<th>Harvested area (acres)</th>
<th>Average yield (metric tonnes per acre)</th>
<th>Production (metric tonnes)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>2,170,000</td>
<td>1.38</td>
<td>2,857,600</td>
</tr>
<tr>
<td>2001</td>
<td>2,300,000</td>
<td>1.41</td>
<td>3,129,800</td>
</tr>
<tr>
<td>2002</td>
<td>2,325,000</td>
<td>1.48</td>
<td>2,772,200</td>
</tr>
<tr>
<td>2003</td>
<td>2,375,000</td>
<td>1.00</td>
<td>2,268,000</td>
</tr>
<tr>
<td>2004</td>
<td>2,400,000</td>
<td>1.55</td>
<td>3,492,700</td>
</tr>
<tr>
<td>2005</td>
<td>2,450,000</td>
<td>1.51</td>
<td>3,424,600</td>
</tr>
<tr>
<td>2006</td>
<td>2,466,146</td>
<td>1.49</td>
<td>3,492,700</td>
</tr>
<tr>
<td>2007</td>
<td>2,255,000</td>
<td>1.50</td>
<td>3,374,700</td>
</tr>
<tr>
<td>2008</td>
<td>2,240,000</td>
<td>1.68</td>
<td>3,166,100</td>
</tr>
<tr>
<td>2009</td>
<td>2,160,000</td>
<td>1.56</td>
<td>3,039,100</td>
</tr>
<tr>
<td>2010</td>
<td>2,040,000</td>
<td>1.73</td>
<td>3,039,100</td>
</tr>
<tr>
<td>2011</td>
<td>1,959,468</td>
<td>1.72</td>
<td>2,946,400</td>
</tr>
<tr>
<td>2012</td>
<td>1,945,000</td>
<td>1.50</td>
<td>2,617,200</td>
</tr>
<tr>
<td>2013</td>
<td>1,900,000</td>
<td>1.50</td>
<td>2,676,200</td>
</tr>
<tr>
<td>2014</td>
<td>1,930,000</td>
<td>1.64</td>
<td>2,903,000</td>
</tr>
<tr>
<td>2015</td>
<td>1,950,000</td>
<td>1.61</td>
<td>2,984,600</td>
</tr>
<tr>
<td>2016</td>
<td>1,935,000</td>
<td>1.84</td>
<td>3,302,200</td>
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<tr>
<td>2017</td>
<td>1,620,000</td>
<td>1.90</td>
<td>2,993,700</td>
</tr>
</tbody>
</table>

Source: Statistics Canada CANSIM 001-001

MANITOBA EXPORTS OF ALFALFA AND HAY

<table>
<thead>
<tr>
<th>Product</th>
<th>2017 (Through Nov)</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Price ($/metric tonne)</td>
<td>Quantity (metric tonnes)</td>
</tr>
<tr>
<td>Alfalfa</td>
<td>208</td>
<td>7860</td>
</tr>
<tr>
<td>Hay</td>
<td>167</td>
<td>1540</td>
</tr>
</tbody>
</table>

Source: Agriculture and Agri-Food Canada, CATSNET

Other publications are available on the Agriculture Markets and Statistics page of Manitoba Agriculture.
Growth in Livestock Industries in Manitoba

CHANGES IN HOG INVENTORIES BY PROVINCE, JANUARY 2017-2018

Source: Statistics Canada, CANSIM 003-0100
Manitoba Agriculture, Foresight and Analysis, 2018-03-09
# Growth in Livestock Industries in Manitoba

## Changes in Cattle Inventories, January 2017-2018

### Total Cattle

<table>
<thead>
<tr>
<th>Province</th>
<th>Total Cattle</th>
<th>Dairy Cows</th>
<th>Beef Cows</th>
</tr>
</thead>
<tbody>
<tr>
<td>Atlantic Prov.</td>
<td>9.4</td>
<td>2.3</td>
<td>2.2</td>
</tr>
<tr>
<td>QC</td>
<td>10.1</td>
<td>0.7</td>
<td>5.2</td>
</tr>
<tr>
<td>ON</td>
<td>20.6</td>
<td>23.4</td>
<td>1.4</td>
</tr>
<tr>
<td>MB</td>
<td>10.0</td>
<td>10.0</td>
<td>1.0</td>
</tr>
<tr>
<td>SK</td>
<td>10.0</td>
<td>10.0</td>
<td>1.0</td>
</tr>
<tr>
<td>AB</td>
<td>25.0</td>
<td>0.5</td>
<td>0.5</td>
</tr>
<tr>
<td>BC</td>
<td>15.0</td>
<td>5.5</td>
<td>4.2</td>
</tr>
</tbody>
</table>

### Source

- Statistics Canada, CANSIM 003-0032
- Manitoba Agriculture, Foresight and Analysis, 2018-03-09
Agriculture and Agrifood Exports

2016 ($million)

- Agriculture: $2,967 (22%)
- Food & beverage manufacturing: $2,446 (18%)
- Petroleum & chemicals manufacturing: $1,756 (13%)
- Transportation manufacturing: $1,724 (13%)
- Other: $852 (6%)
- Utilities: $387 (3%)
- Mining: $384 (3%)
- Wood products, paper, furniture: $604 (4%)
- Metal manufacturing: $1,010 (7%)
- Computer & Appliance: $365 (3%)
- Printing: $112 (1%)

Source: Industry Canada Trade Data Online
Manitoba Agriculture, Foresight and Analysis, 2017-12-06
MANITOBA EXPORTS BY INDUSTRY, MILLION DOLLARS, 2017

- Agriculture, $3,238, 23%
- Manufacturing, $9,325, 67%
- Mining (except Oil and Gas), $265, 2%
- Utilities, $420, 3%
- Others, $755, 5%

Total Exports = $14B
Food and beverages, $2.7B, 19% (or 29% of Manufacturing)

Source: Trade Data Online
Manitoba Agriculture, Foresight and Analysis, 2018-03-21
1. Canola and Products: 1,719,026,820 (29%)
2. Pork and Products: 1,034,190,966 (18%)
3. Wheat and Flour: 990,841,407 (17%)
4. Potatoes and Products: 459,580,224 (8%)
5. Soybeans and Products: 447,531,617 (8%)
6. Live Swine: 241,394,666 (4%)
7. Oats and Products: 207,506,751 (4%)
8. Total Live Cattle: 89,457,085 (1%)
9. Barley and Malt: 83,200,896 (1%)
10. Dried Peas: 78,877,151 (1%)

Other Products: 543,375,558 (9%)

Source: Statistics Canada, CATSNET
Key Export Markets

- US
- China
- Japan
- Mexico
- EU
- ...and more!
What’s new and upcoming?

- Emerging crops and livestock
  - Hemp, quinoa, hydroponics, cannabis, and cricket
- Booming agrifood manufacturing
  - Dairy, meat, potato, and pea processing
- Clean and advanced tech on farm
  - Biofuels, solar, wind, geothermal
  - Precision ag, drones
- Public trust
Contact Foresight and Analysis

Manitoba Agriculture
Markets and Statistics Online:

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