

INVEST. BUILD. GROW



MANITOBA

The Manitoba Protein Advantage

Consultation Paper

FEBRUARY 1, 2019

Manitoba 

There is a lot of buzz about opportunities to supply a growing appetite for protein here at home and globally. Many factors are driving increased global demand for protein. These include a growing world population, changing dietary habits, growing incomes in emerging markets and increasing demand for protein ingredients.

The demand for animal and plant protein can be met by creating opportunities for farmers and processors, leading to new value and economic growth. We want to capture more value; in fact a much larger portion than many would have ever imagined was possible just a few short years ago.

Why protein in Manitoba? **Why not Manitoba!**

Manitoba has the right attitude and the right team to build its protein capacity. We have strong industry leadership, great processors, access to top talent and leading research and innovation assets that collectively form an environment that will position Manitoba for success.

We also have a business environment that is attracting investment. In fact, business is telling us that Manitoba is a great place for investment and here's the proof - we've seen in excess of \$1.4 billion of agri-food industry investment completed or in progress since 2016.

Manitoba's Economic Growth Action Plan has identified agriculture and food as a key industry to build on. The impact is big today, but there is so much more we can aspire to achieve. The Manitoba Protein Advantage Strategy will provide a roadmap for Manitoba to accelerate growth and unlock economic potential.

Principles and Assumptions for the Strategy

A number of principles and assumptions have guided the draft framework for the strategy:

- There is a place for both animal and plant protein in the strategy;
- Industry engagement, leadership and investment in the protein sector is critical to the success of the strategy;
- Development must be sustainable. Manitoba's industry can gain both economic advantage and substitute less sustainably produced animal and plant protein. This approach benefits the environment and the economy;
- An enabling business environment that encourages investment, innovation and sustainable development will support long-term economic growth.

Vision for the Manitoba Protein Advantage

Manitoba will be North America's protein supplier of choice, leading Canada in sustainable protein industry growth that benefits the profitability and competitiveness of Manitoba producers, processors and the provincial economy.

Desired Future State by 2025

Plant Protein

- ⊗ \$1 billion in new plant protein processing investment attracted, resulting in 850 new jobs
- ⊗ Manitoba is recognized globally as the leading research and development centre in North America for plant protein extraction technology
- ⊗ New value for producers as a result of crop innovation that meets the needs of processors and value chain collaboration

Animal Protein

- ⊗ \$500 million in new primary production and processing investment, resulting in 700 direct and indirect jobs
- ⊗ 35 per cent increase in animal protein production in 2025, compared with the 2017 baseline
- ⊗ 35 per cent increase in animal protein processing in 2025, compared with the 2017 baseline (expressed as kilograms of dressed weight for livestock and increased value of processed milk protein for dairy)

Sustainability

- ⊗ 15 per cent reduction in carbon intensity per kilogram of animal protein produced in Manitoba
- ⊗ 15 per cent increase in productivity of agricultural Crown lands and privately-owned grassland and forages
- ⊗ Increase in public trust of protein production and processing (indicator to be determined)

Areas of Focus

Research, Innovation and Commercialization

- ⊗ Mobilize investments in equipment, protein innovation and partnerships at the Food Development Centre.
- ⊗ Focus 33 per cent of department research and innovation resources toward protein development and the enhancement of production and processing.
- ⊗ Target protein ingredients, co-product value and spin-off opportunities.
- ⊗ Leverage opportunities through initiatives such as Protein Industries Canada and Protein Highway.
- ⊗ Facilitate collaboration between academic and innovation institutions to align research priorities with sustainable protein targets.
- ⊗ Establish a research chair in protein innovation.

Investment Attraction and Growth

- ⊗ Enhance Manitoba's business environment through red tape reduction, reducing unnecessary regulation and policy development.
- ⊗ Coordinate resources with external economic development agencies and the MPNP to target investment attraction and growth.
- ⊗ Align protein innovation attraction to Manitoba with processing investment attraction.
- ⊗ Promote Manitoba's research and innovation capabilities and assets to prospective companies.

Sustainability

- ⊗ Facilitate research and innovation to:
 - reduce greenhouse gas emissions per kilogram of animal protein
 - reduce water usage, energy use and waste in production and processing
- ⊗ Increase public trust and market acceptance through science-based regulatory decisions and strong assurance systems (e.g., production systems, food safety, environmental sustainability and consumer misperceptions).
- ⊗ Industry-government partnerships to identify and manage disease and pest threats to production.
- ⊗ Support early adoption of innovative beneficial management practices to enhance water quality, biodiversity and increase carbon sequestration.

Profitability and Competitiveness

- ⊗ Increase sustainable use and productivity of agricultural Crown lands through range management innovation.
- ⊗ Develop a skilled labour force that aligns education and training institution programming with labour and skills needs.
- ⊗ Work with industry to develop a labour force growth strategy to strengthen global competitiveness for international skills.
- ⊗ Align industry sector council skills and training strategies with protein industry needs.
- ⊗ Connect protein opportunities with traditional and non-traditional capital sources.
- ⊗ Develop resources and tools to enable protein producers and processors to capitalize on market opportunities.

Industry and Market Development

- ⊗ Enhance protein market intelligence and sharing among industry groups and stakeholders.
- ⊗ Develop crop and animal-specific protein development plans.
- ⊗ Develop value chain approaches with specific commodities to create efficiencies and greater value to producers, processors and service providers.
- ⊗ Facilitate cooperative marketing groups for niche protein opportunities.
- ⊗ Develop industry and processor-led initiatives to expand market opportunities for protein.
- ⊗ Support industry-led market development capacity and targeted missions.

Share Your Views. Shape Your Industry.

This strategy will not succeed without broad input, advice, alignment of efforts and commitment to action of stakeholders in the agri-food industry. Ultimately, the Manitoba Protein Advantage will be a multi-stakeholder strategy with calls to action to stakeholders leading or influencing agri-food development. Manitoba Agriculture will be consulting with stakeholders on the paper in the following ways:

- The document will be shared broadly
- Feedback on the strategy will be sought through focussed discussions with stakeholders
- Written submissions will be encouraged

Stakeholder Consultations February 19 through April 30, 2019

Written Submissions Deadline May 15, 2019

Strategy Release Third week of September 2019
at the Manitoba Protein Summit

Sharing the document is encouraged to get new perspectives and approaches to protein industry development.

Provide Your Ideas

- Will the areas of focus and actions in the strategy accelerate protein industry development and create the growth identified by 2025? What specific changes would you recommend to reach these goals?
- What barriers are limiting animal and plant protein development in Manitoba? What needs to change to overcome these barriers?
- What Manitoba advantages or underdeveloped assets can we build on to become the preferred protein provider in North America?
- Does Manitoba have the talent and skilled workforce needed to support sustainable growth in the sector? What is working and where are the gaps?
- What new partnerships or areas of collaboration not yet developed, would support innovation that leads to protein opportunities and increased farmer and processor value?

Submit Your Written Feedback

Written submissions will be accepted until May 15, 2019 by:

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Available in alternate formats upon request.