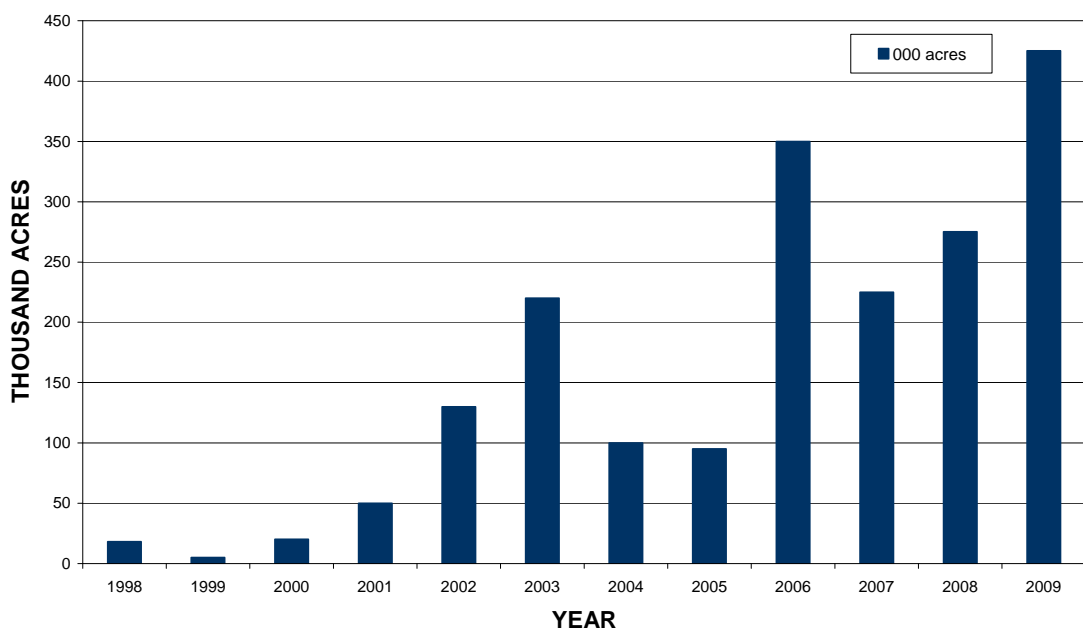


## OVERVIEW OF THE SOYBEAN SECTOR IN MANITOBA

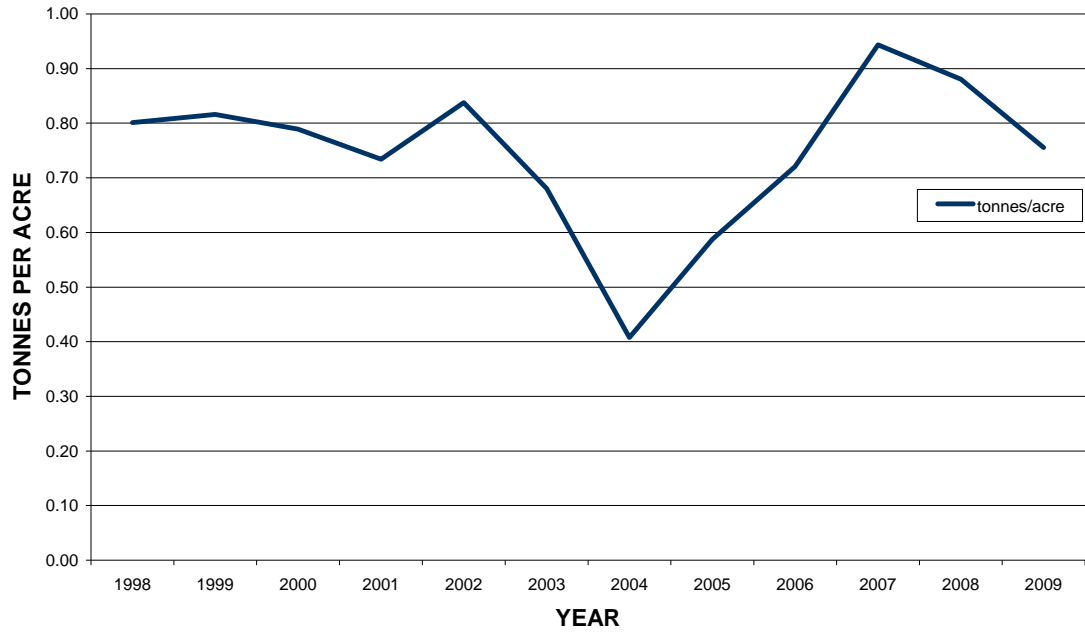
- Soybeans were first introduced in Manitoba in the early 1900s when they were brought up from the United States.
- Due to the soybean's satisfactory palatability and relatively good yields, early production was used both for human consumption and as a fodder crop for livestock.
- In the 1950s, research at the University of Manitoba began to develop breeds more suitable to Manitoba's growing conditions.
- However, the research achieved limited success due to the emergence of oilseeds and the importance of other crops that competed for acres in Manitoba farmers' fields.
- From the 1970s until today, further soybean research and development at the University of Manitoba, eastern Canada and in the United States led to the introduction of early-maturing, high-yielding soybeans with high protein levels that were better suited for Manitoba's climate.
- This research, in combination with Manitoba farmers continued search for diversification opportunities, led to a significant increase in soybean acres over the last decade.
- In 1996, Manitoba soybean production was less than 800 acres, in 2003, soybean acres reached 220,000 acrs and soybean production for 2009 was a record 425,000 acres.

**Area of Soybeans in Manitoba, 1998 - 2009**



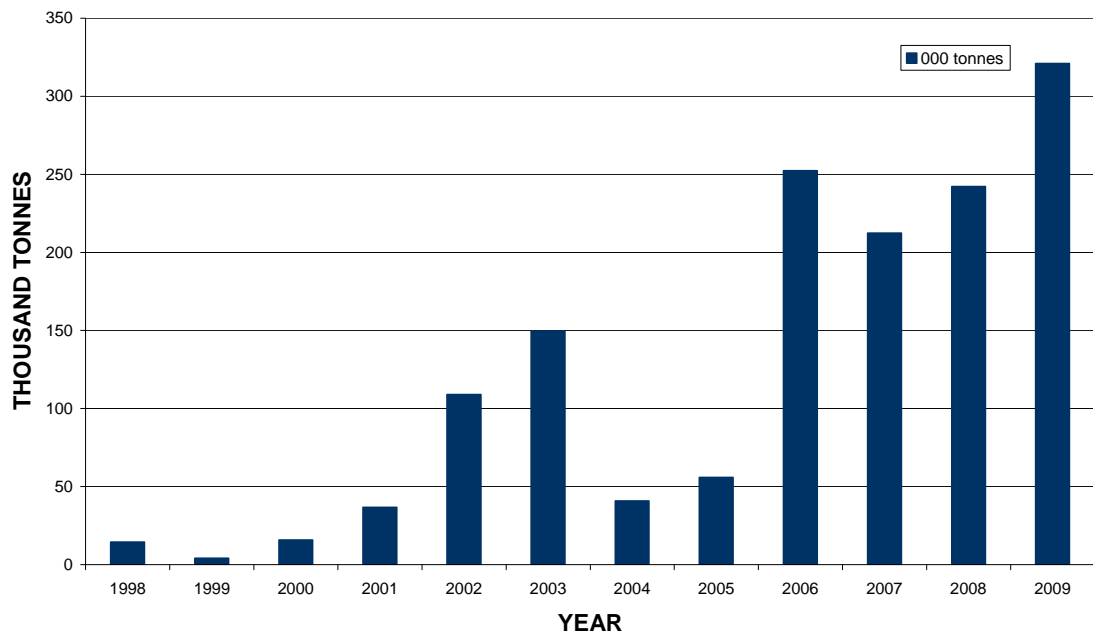
Industry Intelligence Section, MAFRI

## Yield of Soybeans in Manitoba, 1998 – 2009



Industry Intelligence Section, MAFRI

## Production of Soybeans in Manitoba, 1998 – 2009



Industry Intelligence Section, MAFRI

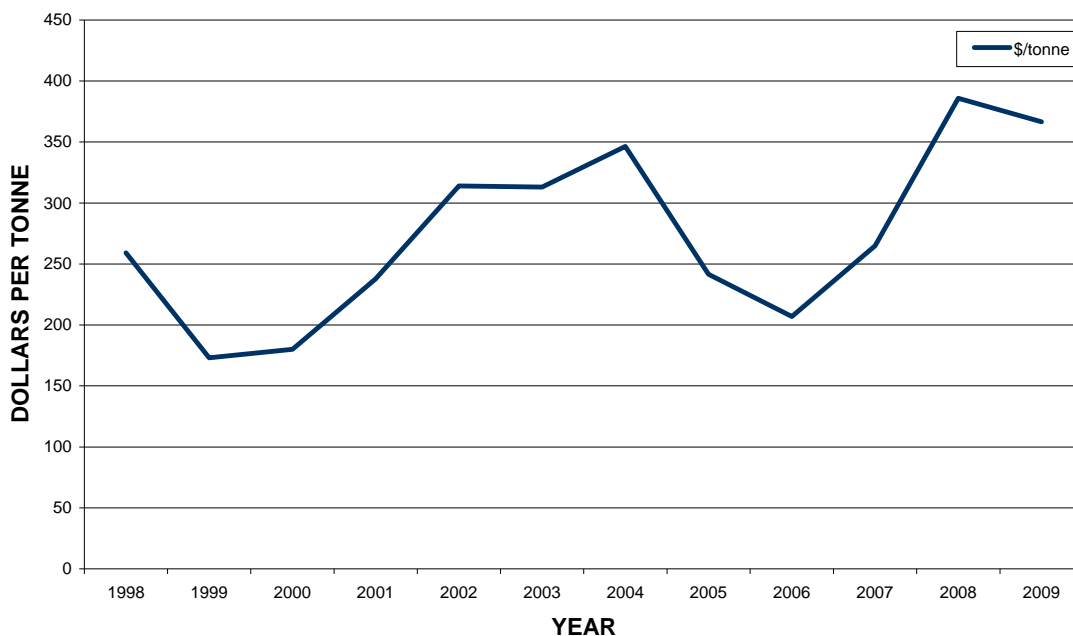
## Farm Supply and Disposition of Manitoba Soybean Crop, 1998/99 to 2009/10

<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 Aug1	0	0	0	0	0	10	5	2	15	35	20	9
Production	14	4	16	37	109	150	41	56	252	212	242	321
<b>Total Supply</b>	<b>14</b>	<b>4</b>	<b>16</b>	<b>37</b>	<b>109</b>	<b>160</b>	<b>46</b>	<b>58</b>	<b>267</b>	<b>247</b>	<b>262</b>	<b>330</b>
Marketings	0	0	0	13	87	120	9	37	200	170	170	210
Seed	0	0	0	0	0	0	0	0	0	0	0	0
Carryover	14	4	16	0	10	5	2	15	35	20	9	35
Feed/ Waste/ Dockage	0	0	0	24	12	35	35	6	32	57	83	85
<b>Total Disposition</b>	<b>14</b>	<b>4</b>	<b>16</b>	<b>37</b>	<b>109</b>	<b>160</b>	<b>46</b>	<b>58</b>	<b>267</b>	<b>247</b>	<b>262</b>	<b>330</b>

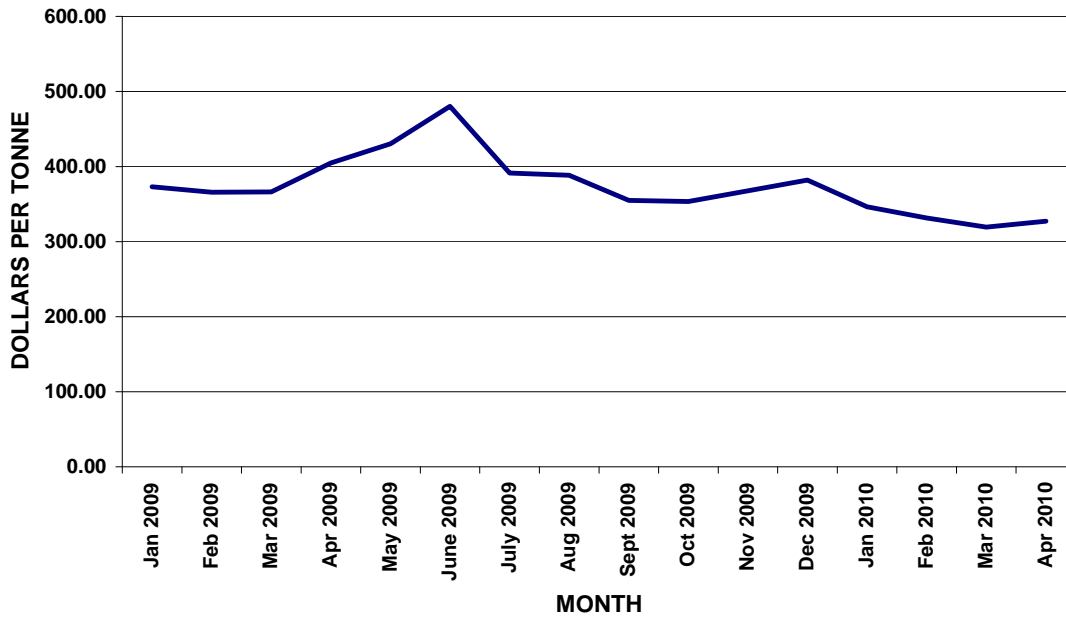
### Processing Soybeans in Manitoba

- As Manitoba's climate suits the early soybean maturity varieties, our soybean producers grow 2350 to 2650 heat unit beans with both dark and yellow (white) hilums.
- While the most common variety grown in Manitoba in 2001 was the Gentleman, a 2400 heat unit dark hilum bean, the industry trend is moving toward greater acres of yellow (white) hilum beans for the high value human food market.
- Manitoba can also boast that roughly 90 percent of all the soybeans grown in our province are non-GMO, an important point for those markets requiring non-GMO soybeans for import.

### Soybean Prices in Manitoba, 1998 – 2009



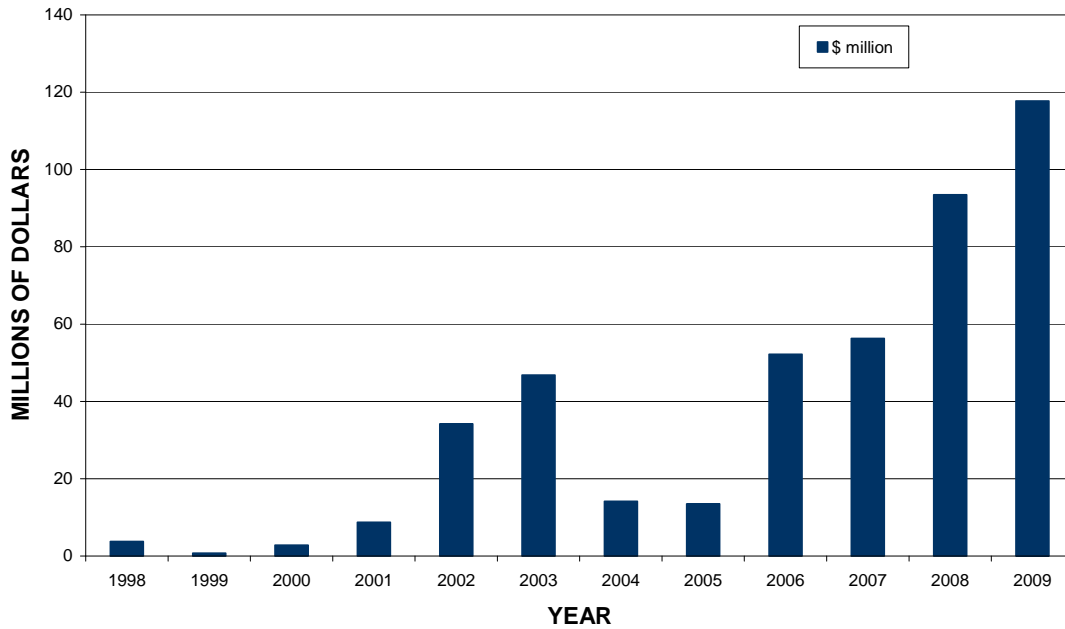
## Monthly Soybean Prices, Manitoba 2009 - 2010



Prices are farmers net cash return at the Winnipeg Elevator

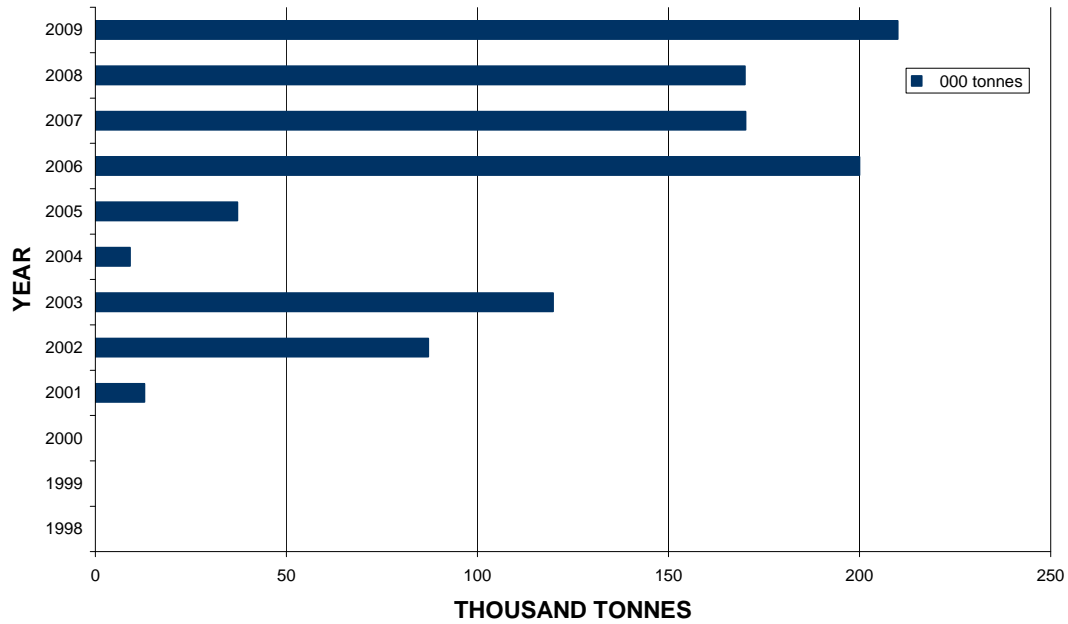
Industry Intelligence Section, MAFRI

## Value of Soybean Production in Manitoba, 1998 - 2009



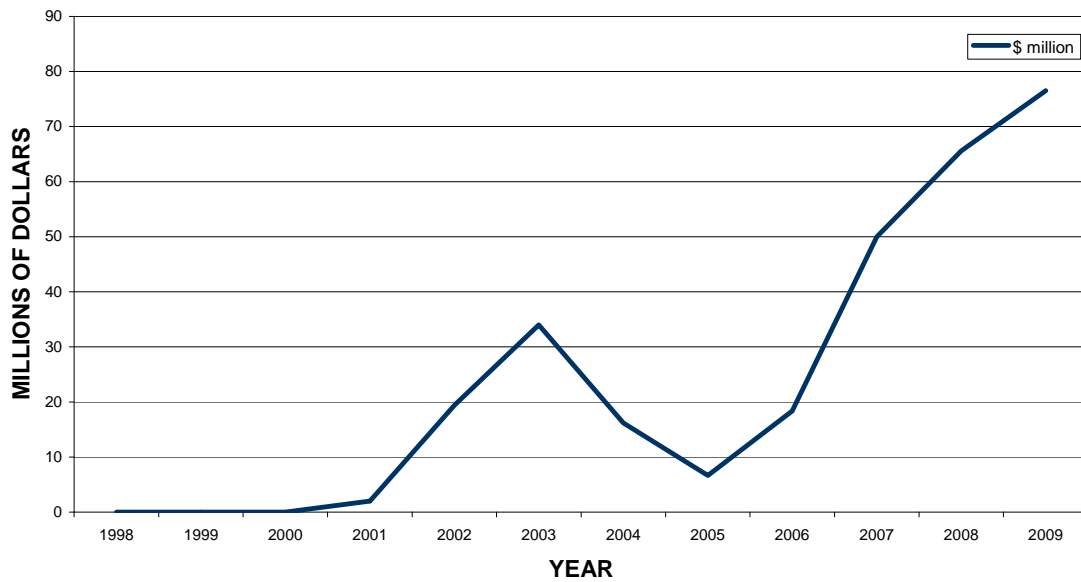
Industry Intelligence Section, MAFRI

## Marketings of Manitoba Soybeans, 1998 - 2009



Industry Intelligence Section, MAFRI

## Farm Cash Receipts for Soybeans in Manitoba 1998 - 2009



Industry Intelligence Section, MAFRI

## Trade

- Currently Manitoba exports to the United States, Japan, and several other countries in both Asia and Europe. Prior to shipping, the beans are cleaned to export standard and either bagged or shipped in bulk via railcar.
- Shipments into Japan, Asia and Europe are shipped via Identity Preserved systems for future value added production.
- In 2001, the majority of Manitoba's exports went to the non-GMO crush markets in Japan and Europe, with a smaller amount exported to the non-GMO tofu/miso market.
- Future expectations of the Manitoba soybean industry include a new sizing and cleaning facility, greater production for the high-value human food market and further value-added bean processing in the province.
- Local developments may include Manitoba livestock producers purchasing roasters to roast soybeans for use in their livestock operations.