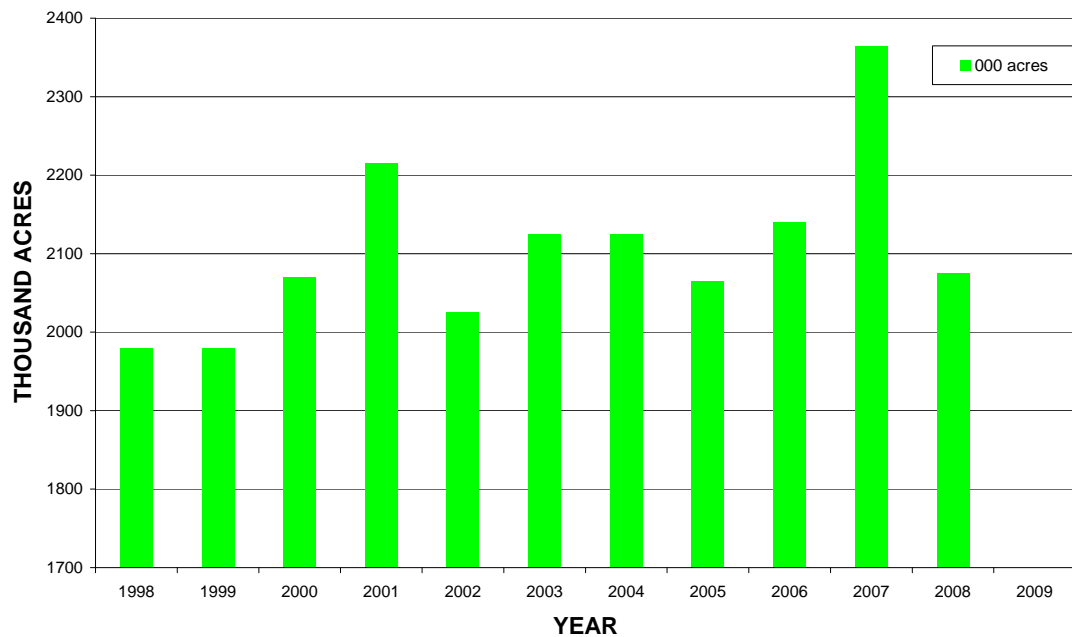


OVERVIEW OF THE TAME HAY SECTOR IN MANITOBA

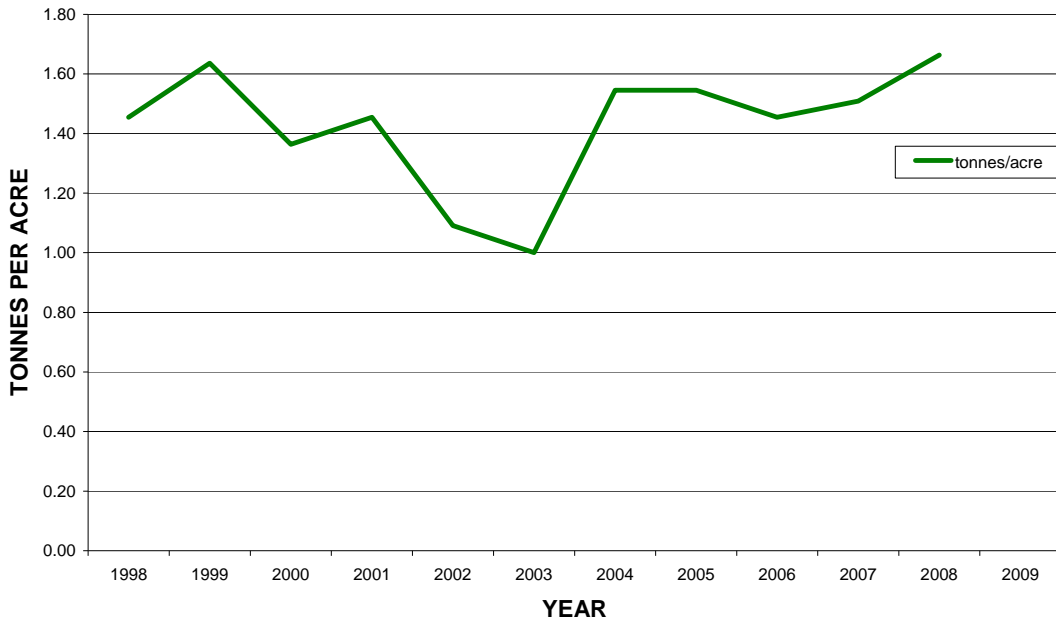
- The production of high-quality hay has a long history in Manitoba and has become an important part of the Manitoba agricultural industry.
- Manitoba livestock producers have been using hay since homesteading in the province began.
- The first recorded production of tame or cultivated hay was in 1908 when 215,000 tons of hay were produced from 119,000 acres.
- Over the years, the number of acres cultivated and tons produced have risen steadily as the livestock numbers in the province increased.
- Today, the annual area of tame hay is approximately 1.9 million acres providing a yield of over 3.0 million tons. The ten-year provincial average yield is 1.69 tons per acre.

Area of Tame Hay in Manitoba, 1998 - 2009



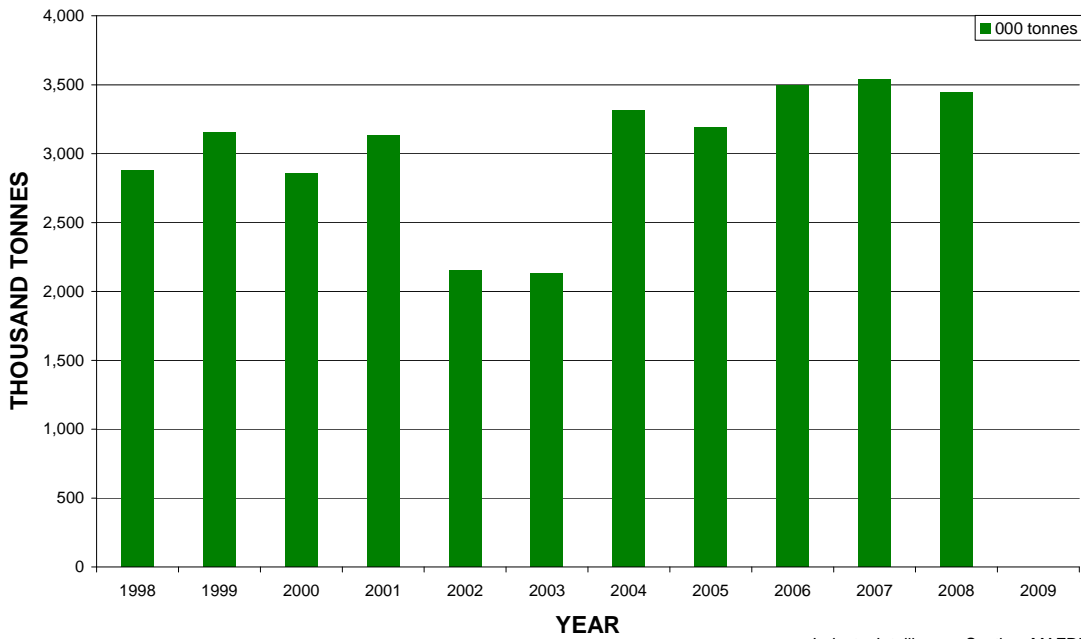
Industry Intelligence Section, MAFRI

Yield of Tame Hay in Manitoba, 1998 – 2009



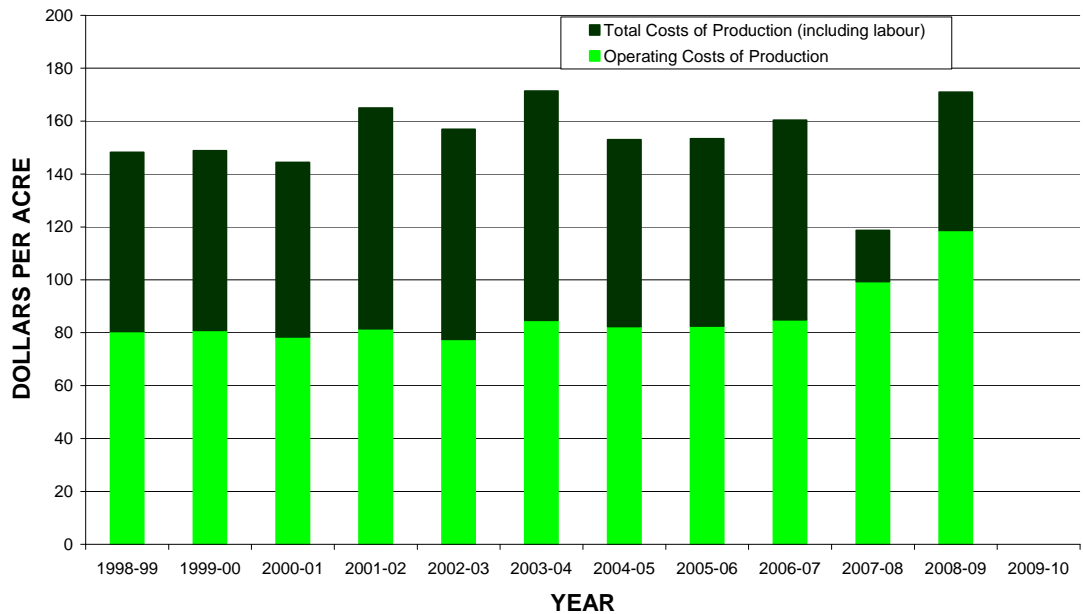
Industry Intelligence Section, MAFRI

Production of Tame Hay in Manitoba, 1998 – 2009



Industry Intelligence Section, MAFRI

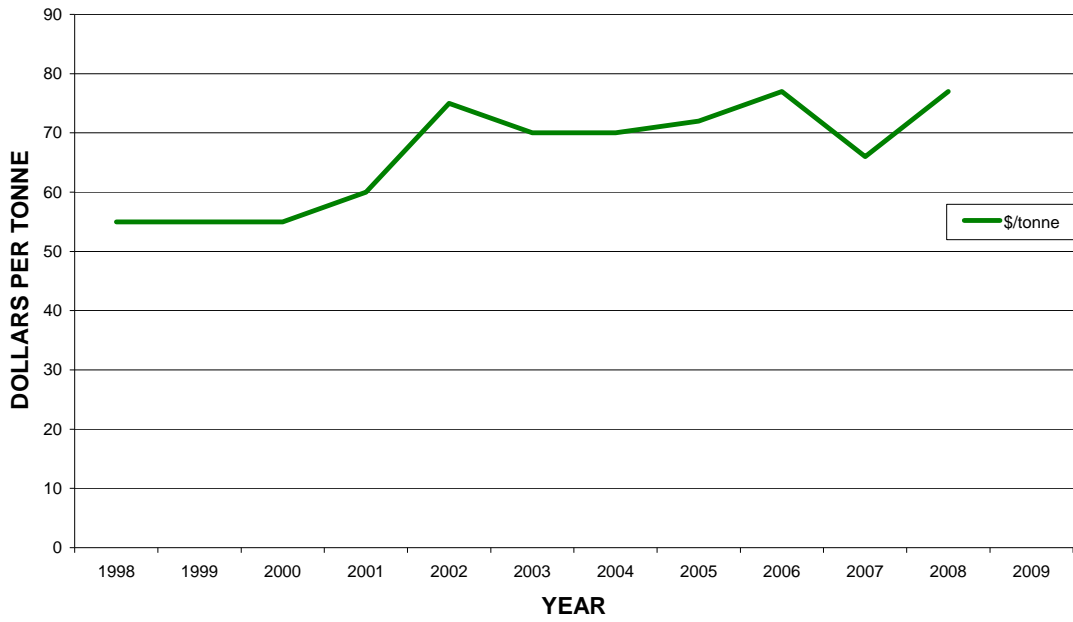
Cost of Tame Hay Production in Manitoba, 1998 – 2009



Processing Tame Hay in Manitoba

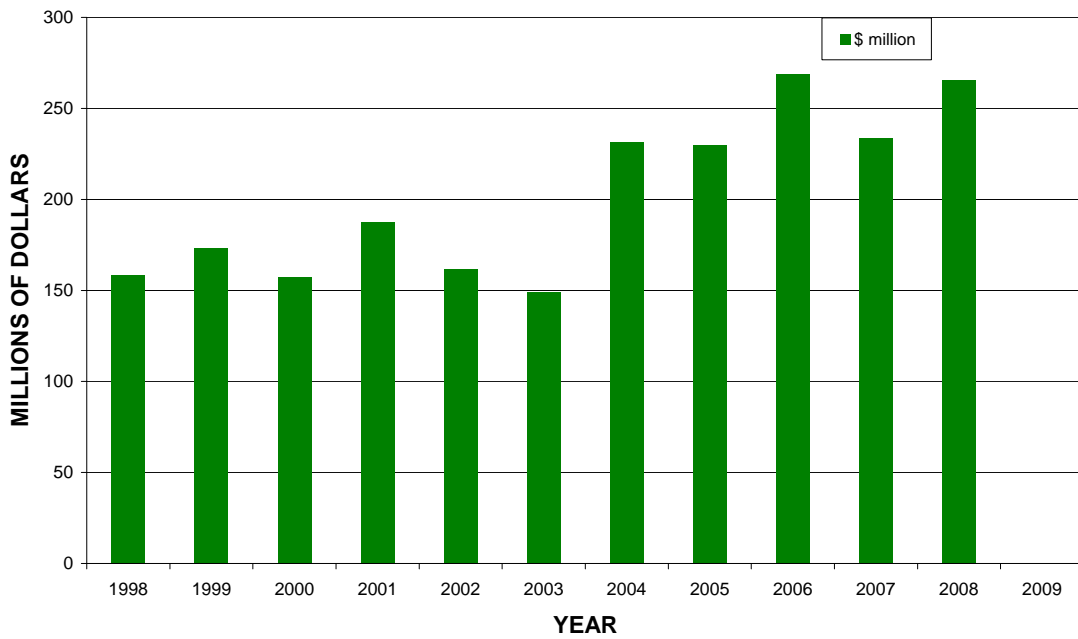
- Most of the Manitoba tame hay crop is used domestically for beef and dairy cattle production with small amounts being used for other ruminant species such as sheep, goats, elk and bison.
- Some of the annual alfalfa and Timothy hay crops are sold to local pelleting and compacting plants, while the remainder of the crops are sold for export.
- Manitoba has two processing companies that process alfalfa into pellets and meal.
- Three compacting plants in Manitoba compact either alfalfa or Timothy for export.
- The quality of Manitoba's tame hay products has been steadily increasing through combined efforts of Manitoba producers, industry and researchers.

Tame Hay Prices in Manitoba, 1998 – 2009



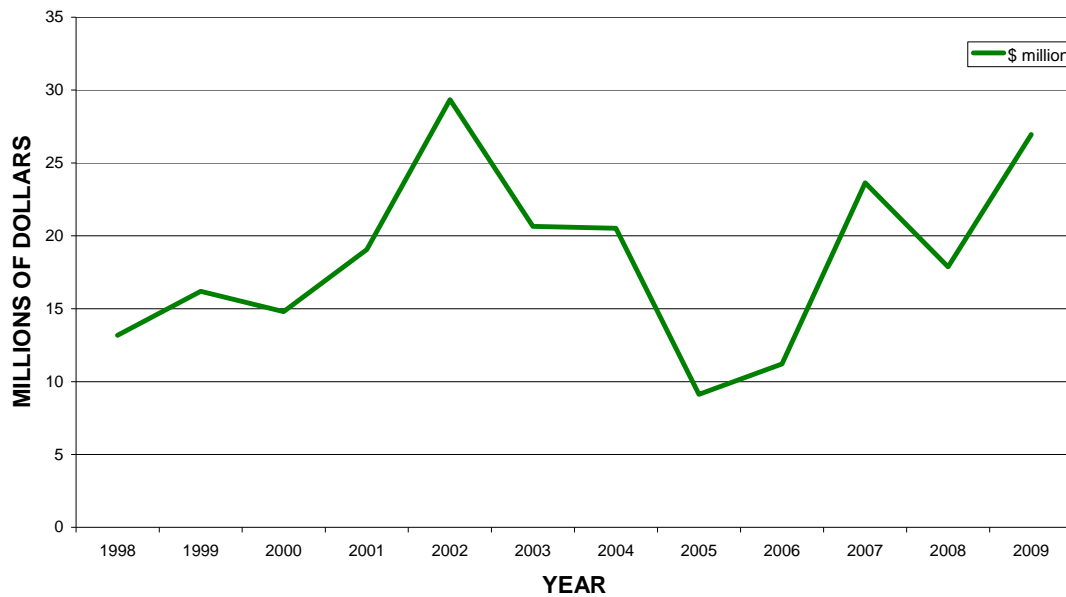
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Value of Tame Hay Production in Manitoba, 1998 - 2009



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Farm Cash Receipts for Tame Hay in Manitoba 1998 - 2009



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Trade

- Manitoba currently exports high-quality alfalfa and alfalfa-mix bales to the dairy industry in the United States.
- Small quantities of compressed hay have been exported to markets in both the United Kingdom and Japan.
- Manitoba also exports alfalfa pellets and meal to several countries including the United States, Germany and Taiwan.