

## Agri-food Export Performance in 2022

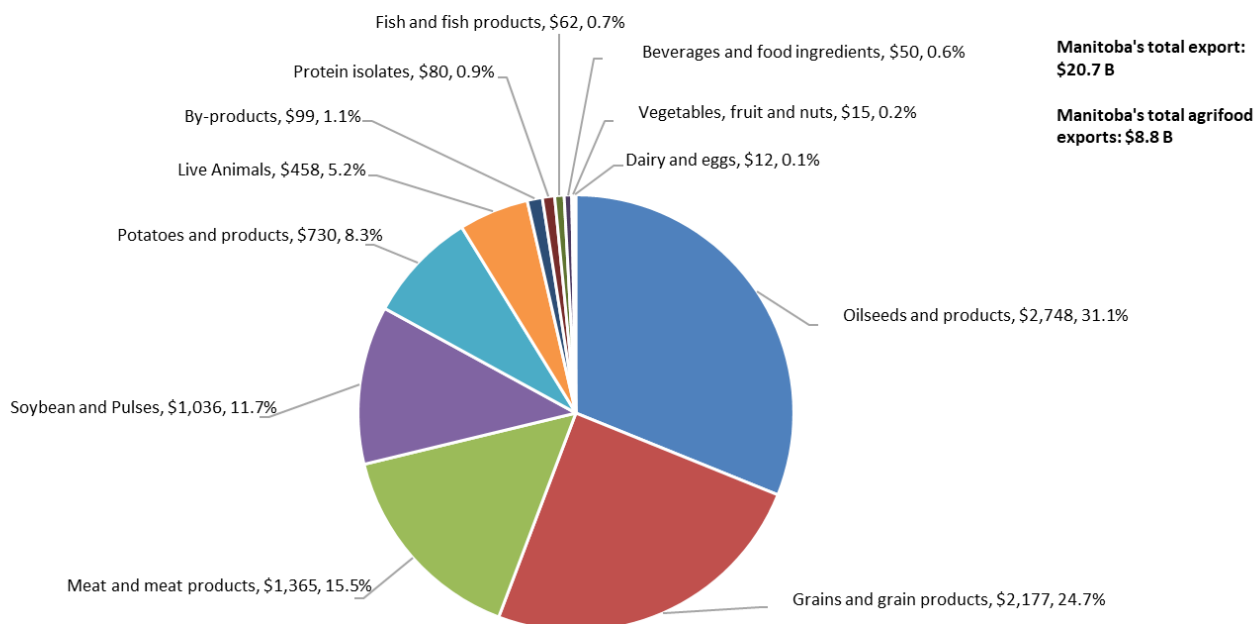


The agri-food sector has registered remarkable export growth in 2022 reaching \$8.8 billion, an increase of 13 per cent compared to 2021. During the same period, Manitoba's total international exports increased by 18.9 per cent, from \$17.4 billion to \$20.7 billion. Agri-food exports accounted for 42.6 per cent of Manitoba's total international exports in 2021, a decrease of 2.2 percent compared to the previous year. The increasing global demand for food and high international food prices are anticipated to provide opportunities for continued growth for Manitoba's agri-food export market.

### Top Agri-food Export Commodities and Products

Oilseeds and products accounted for 31.1 per cent of the total agri-food export values in 2022, followed by grains and grain products (24.7 per cent), meat and meat products (15.5 per cent), soybean and pulses (11.7 per cent) and potatoes and products (8.3 per cent). The top five categories constituted 91.2 per cent of Manitoba's total agri-food exports in 2022, a decrease of 0.5 per cent compared to 2021. The chart below shows the agri-food export commodities and products in 2022. Oilseeds and products exports consisted of mainly canola (91.1 per cent), and hemp (2.7 per cent). Wheat and oats constituted 72.1 per cent and 18.3 per cent of the grains and product exports, respectively. Pork and products accounted for 99.9 per cent of meat and meat products, while soybean accounted for 82.1 per cent of the soybean and pulses export value. Prepared potatoes accounted for 92.9 per cent of potatoes and product exports.

EXPORT COMMODITIES AND PRODUCT GROUPS IN 2022 (MILLION DOLLARS)



Source: CATSNET and Trade Data Online

Manitoba Agriculture,  
Foresight and Analysis, 2023-03-28

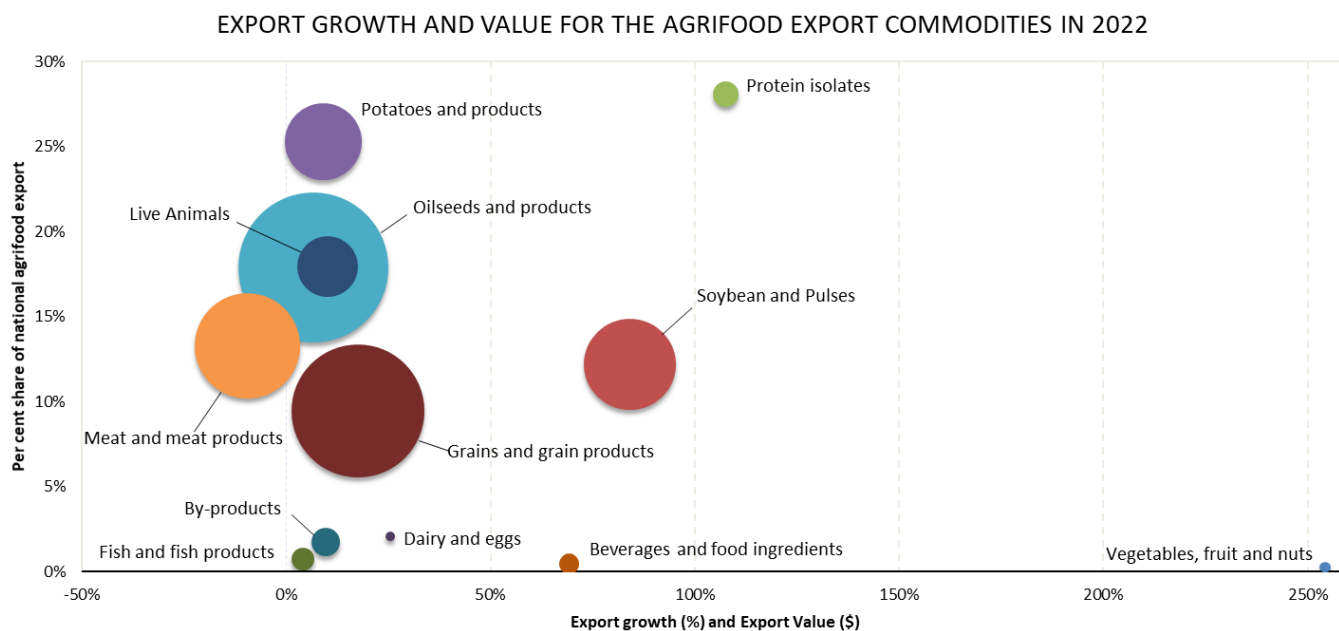
## Export Performance (2022 versus 2021)

In 2022, vegetables and fruit and nuts, protein isolates, soybean and pulses, beverages and food ingredients, and dairy and eggs showed the largest percentage increases in export growth among the commodities and product groups compared to 2021.

Vegetable, fruit and nuts export value increased by 254.3 per cent, from \$4.1 million in 2021 to \$14.5 million in 2022. Growth in this sector was mainly because Manitoba started exporting mushrooms in 2022, reaching \$13.2 million end of year. Protein isolates showed the second-largest export growth where export value increased by 107.5 per cent from \$38.6 million in 2021 to \$80.1 million in 2022. Soybean and pulses showed the third-largest export growth in 2022, with export value increasing by 84.2 per cent, from \$562.4 million in 2021 to \$1 billion in 2022. Beverages and food ingredients, showed the fourth-largest percentage increase in export growth in 2022, mainly because of an increase in honey exports that reached \$34.2 million in 2022. With fifth-largest export growth, dairy and eggs' export value increased by 25.5 per cent, from \$9.7 million in 2021 to \$12.2 million in 2022. Milk powder's export value increased by 111.4 per cent, from \$1.8 million in 2021 to \$3.8 million in 2022.

Among all the product categories, only meat and meat products showed a decline in export value in 2022 compared to the previous year. Meat and meat products' exports decreased by 9.5 per cent, from \$1.5 billion in 2021 to \$1.4 billion in 2022. Export of swine cuts decreased by 21.4 per cent from \$442.8 million in 2021 to \$347.9 million in 2022.

The graph below shows export growth, product category share, and size of export values for Manitoba's agri-food exports. The value of agri-food exports in 2022 is indicated by the size of the bubble. Export increase or decrease is shown on the X-axis, and Manitoba exports are shown on the Y-axis, as a percentage of Canadian agri-food exports for each category.



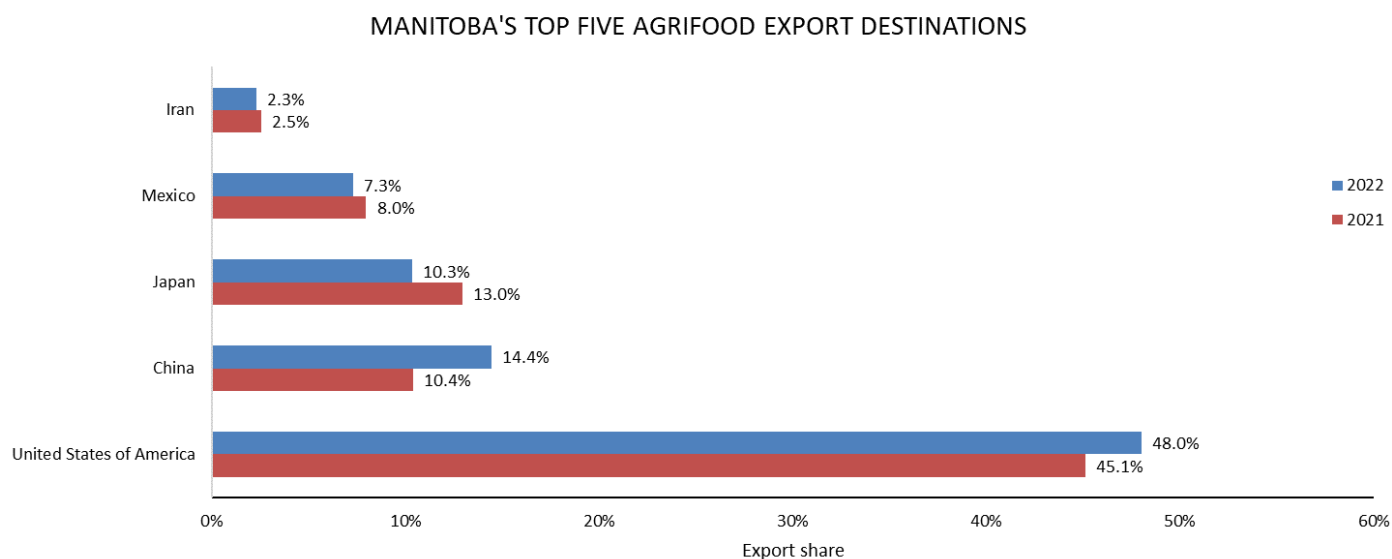
Source: CATSNET

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Foresight and Analysis, 2023-03-28

## Top Five Export Destinations

The U.S., China, Japan, Mexico and Iran were the top five export destinations for Manitoba's agri-food products in 2022. The top five countries accounted for 82.4 per cent of Manitoba's total agri-food exports in 2022, 3.4 per cent higher than the previous year. The U.S. accounted for 48 per cent of Manitoba's total agri-food exports, 2.9 per cent higher than in 2021. Canola oil (22.7 per cent); processed frozen potatoes (15.1 per cent); and pork (8.2 per cent) were the top agri-food exports shipped to the U.S.

China was the second-largest destination for Manitoba's agri-food export in 2022, receiving soybean (38.8 per cent); canola seed (30.7 per cent); and wheat (17 per cent). China's export share increased from 10.4 per cent in 2021 to 14.4 per cent in 2022. Japan was the third-largest destination for Manitoba's agri-food exports. Japan accounted for 10.3 per cent of Manitoba's total agri-food export, a 2.6 per cent decrease from the previous year. Pork cuts (52.2 per cent); canola seeds (26.7 per cent), and wheat (18.7 per cent) were the top three exports to Japan. Mexico and Iran remained the fourth and fifth-largest destinations for Manitoba's agri-food exports. Mexico's export share decreased by 0.7 per cent from eight per cent in 2021 to 7.3 per cent in 2022. Canola seed (32.5 per cent); canola oil (29.2 per cent), and pork cuts (21.2 per cent) were the top three commodities and products exported to Mexico in 2022. Export share to Iran decreased from 2.5 per cent in 2021, to 2.3 per cent in 2022. Soybeans constituted 100 per cent of the export values to Iran. While exports to the U.S. and Mexico were relatively diverse, exports to Japan, China and Iran were highly concentrated on pork, wheat, canola seeds and soybeans. The following graph presents the share of the top five destinations for Manitoba's agri-food exports in 2021 and 2022.



Source: CATSNET

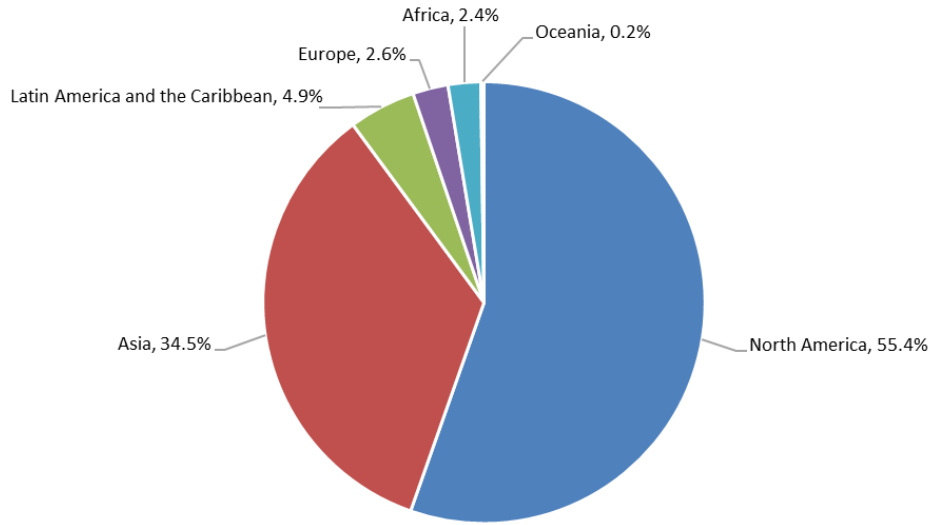
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## Agri-food Export by Region

In 2022, North America (mainly U.S. and Mexico) accounted for 55.4 per cent of Manitoba's total agri-food export value. Accounting for 34.5 per cent of the total agri-food export value in 2022, Asia (mainly Japan and China) is the second-largest regional destination for Manitoba's agri-food export. Latin America and the Caribbean (mainly Peru, Colombia and Ecuador) accounted for 4.9 per cent of Manitoba's agri-food export value in 2022.

Over the past five years, the regional share of Manitoba's agri-food export stayed stable, while North America's share showed a 1.8 per cent annual growth rate. Asia's share showed a 2.6 per cent decline over the same period, while Latin America and the Caribbean's share increased by a 0.9 per cent compounded annual growth rate. The following chart shows Manitoba's agri-food export share value by region in 2022.

## MANITOBA'S AGRI-FOOD EXPORT BY REGION IN 2022



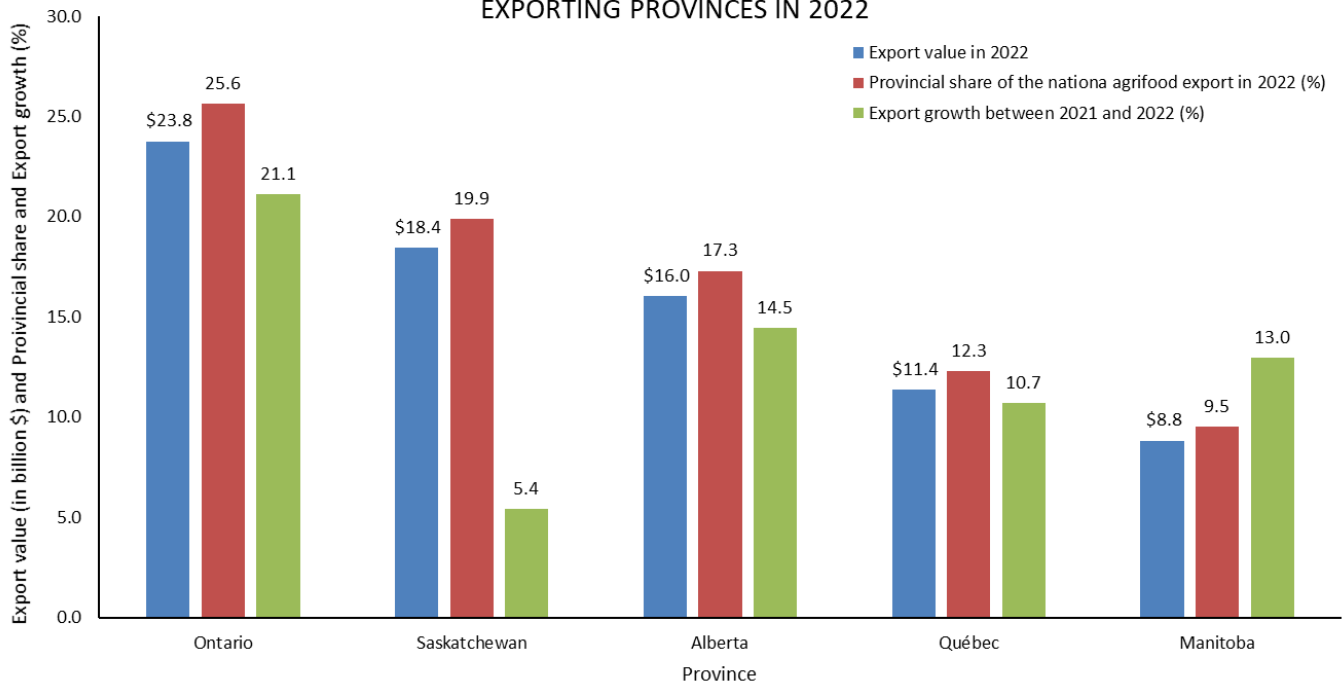
Source: CATSNET

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### Manitoba's Share of National Agri-food Exports

In 2022, Manitoba accounted for 9.5 per cent of Canada's \$92.6 billion agri-food exports. Ontario accounted for 25.6 per cent of Canada's international agri-food exports, while Saskatchewan and Alberta accounted for 19.9 per cent and 17.3 per cent, respectively. Ontario's agri-food exports grew by 21.1 per cent in 2022, compared to 2021, followed by Alberta (14.5 per cent). With 13 per cent export increase, Manitoba registered the third-largest export growth among the top five agri-food exporting provinces in 2022. Quebec and Saskatchewan agri-food exports grew by 10.7 per cent and 5.4 per cent in 2022 compared to 2021, respectively. At the national level, agri-food exports increased by 12.4 per cent from \$82.4 billion 2021 to \$92.6 billion in 2022. The following graph shows export values, provincial shares and export growth for the top five agri-food exporting provinces.

### EXPORT VALUES, PROVINCIAL SHARE AND EXPORT GROWTH FOR THE TOP FIVE AGRIFOOD EXPORTING PROVINCES IN 2022



Source: CATSNET

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### Share of Processed Agri-food and Commodities

Processed agri-food products represented 46.3 per cent of the total agri-food export value in 2022, while the remaining 53.7 per cent was exported as raw commodities. Approximately 68.8 per cent of the export values to the U.S., 53.7 per cent of the exports to Japan, and 58.5 per cent of the exports to Mexico were processed products. Only about 8.7 per cent of the exports to China were processed products. Overall, 53.5 per cent of the agri-food exports to the top five destinations in 2022 were processed products. With nearly half of Manitoba's agri-food exports being in raw form in 2022, there is flexibility to expand local processing and increase the share of provincial agri-food product exports in the coming years.

### Contact us

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