

MANITOBA ANALYTICS

Agri-food Export Performance in 2023



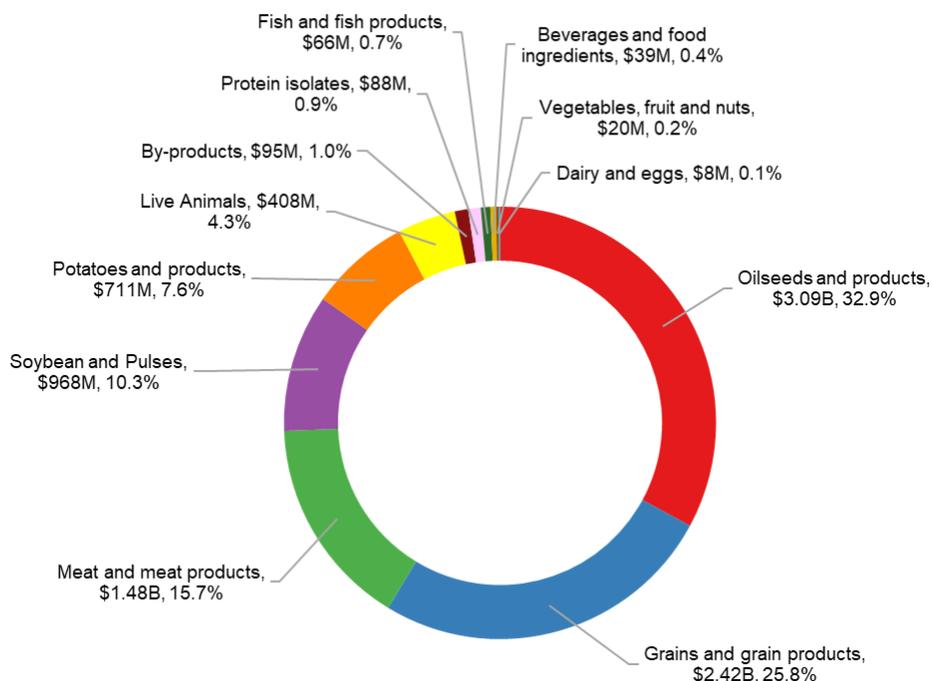
The agri-food sector has registered remarkable export growth in 2023 reaching \$9.39 billion, an increase of 6.4 per cent compared to 2022. During the same period, Manitoba's total international exports increased by 3.9 per cent, from \$20.7 billion to \$21.5 billion. Agri-food exports accounted for 43.6 per cent of Manitoba's total international exports in 2023, a decrease of one per cent 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.

Total Agri-food Export Value	Value Change from Previous Year	Agri-food Export Share in Total Export	MB's Contribution to Canada's Agri-food Export
\$9.39B	+6.43%	43.63%	9.49%

Top Agri-food Export Commodities and Products

As shown in the graph below, the top agri-food export categories in descending order are as follows: oilseed and products (32.9 per cent), grains and grain products (25.8 per cent), meat and meat products (15.7 per cent), soybean and pulses (10.3 per cent) and potatoes and products (7.6 per cent). These top five categories constituted 92.3 per cent of Manitoba's total agri-food exports in 2023, an increase of 1.1 per cent compared to 2022. Oilseeds and products exports consisted of mainly canola (91.4 per cent) and hemp (2.2 per cent). Wheat and oats constituted 75.8 per cent and 15.8 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 75.1 per cent of the soybean and pulses export value. Prepared potatoes accounted for 92.5 per cent of potatoes and product exports.

Agri-food Export Commodities in 2023



Export Performance (2023 versus 2022)

In 2023, vegetables, fruit and nuts showed the largest percentage increase by 35.45 per cent in export growth among the commodities and product groups compared to 2022. Vegetable, fruit and nuts export value increased by \$5.14 million in 2023. Growth in this category stems from the increase in mushroom exports from \$13.2 in 2022 to \$17.7 million in 2023.

Oilseeds and products showed the largest export growth in value (\$344.16 million) and the second-largest growth in percentage (12.54 per cent). Canola oil and canola cake are the main contributors of this growth with \$276.7 and \$55.2 million of growth, respectively.

Dairy and eggs showed the largest decline in percentage by 33.5 per cent in 2023 compared to the previous year. Export of milk and cream decreased by 49.5 per cent, from \$4.74 million in 2022 to \$2.39 million in 2023.

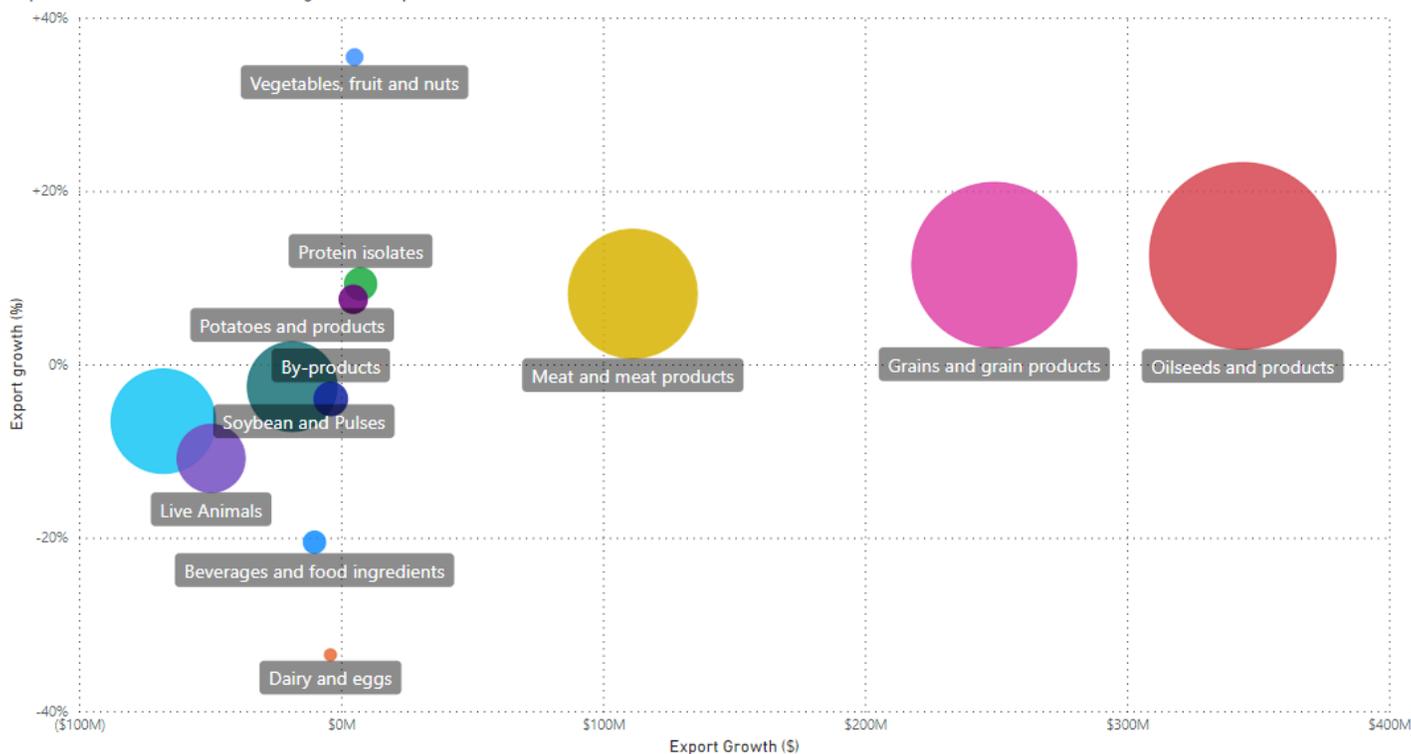
Soybean and pulses showed the largest decline in export value by \$67.8 million in 2023, driven by the decline of soybean exports (14.9 per cent) from \$845.21 million in 2022 to \$719 million in 2023.

The graph below shows the export growth in percentage (Y-axis) and in value (X-axis) as well as the value of Manitoba agri-food exports in Manitoba (size of bubble).

Agri-food Export Performance

Commodities	Export growth (%)	Export growth (\$)	Export value
Oilseeds and products	+12.54%	\$344.16M	\$3,089.70M
Grains and grain products	+11.49%	\$249.34M	\$2,419.44M
Meat and meat products	+8.15%	\$111.35M	\$1,477.40M
Soybean and Pulses	-6.55%	(\$67.84M)	\$968.15M
Potatoes and products	-2.56%	(\$18.68M)	\$711.24M
Live Animals	-10.83%	(\$49.61M)	\$408.40M
By-products	-3.98%	(\$3.95M)	\$95.34M
Protein isolates	+9.29%	\$7.44M	\$87.54M
Fish and fish products	+7.52%	\$4.64M	\$66.35M
Beverages and food ingredients	-20.50%	(\$10.16M)	\$39.37M
Vegetables, fruit and nuts	+35.45%	\$5.14M	\$19.64M
Dairy and eggs	-33.50%	(\$4.09M)	\$8.12M
Total	+6.43%	\$567.73M	\$9,390.68M

Export Growth and Value for the Agri-food Export Commodities in 2023



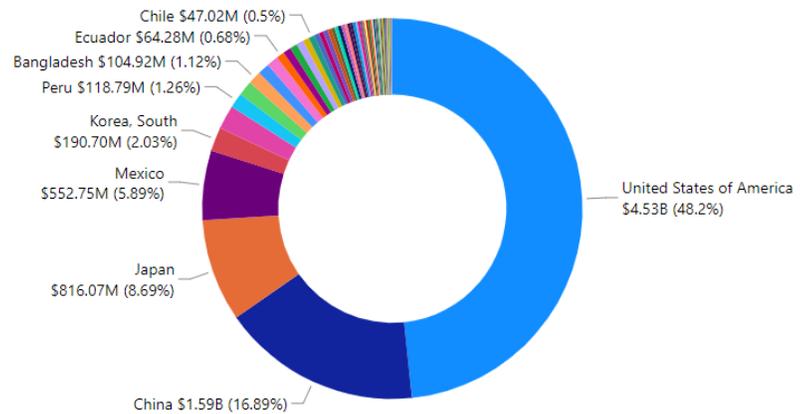
Top Export Destinations

The U.S., China, Japan, Mexico and South Korea were the top five export destinations for Manitoba's agri-food products in 2023. The top five countries accounted for 81.7 per cent of Manitoba's total agri-food exports in 2023, 0.7 per cent lower than the previous year. The U.S. accounted for 48 per cent of Manitoba's total agri-food exports, 0.2 per cent higher than in 2022. Canola oil (29.8 per cent); processed frozen potatoes (13.9 per cent); and Canola cake (8.5 per cent) were the top agri-food exports shipped to the U.S.

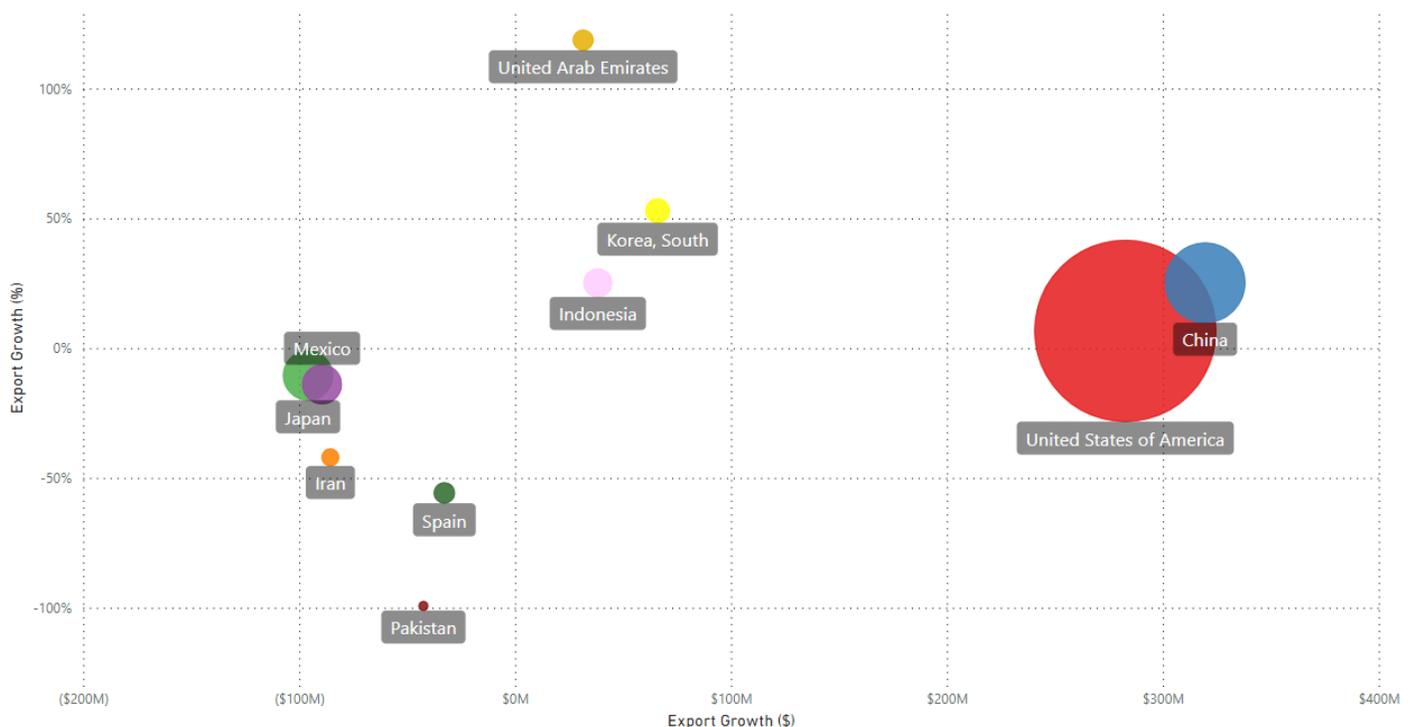
Although China was the second-largest destination for Manitoba's agri-food export in 2023, it had the largest export growth in value, reaching \$1.59 billion. In 2023, China received mainly canola seed (40.4 per cent); soybean (33.5 per cent); and wheat (12.7 per cent). Japan was the third-largest destination for Manitoba's agri-food exports, accounting for 8.7 per cent of Manitoba's total agri-food export. Pork cuts (60.7 per cent); wheat (18.2 per cent) and canola seeds (18 per cent) were the top three agri-food products exported to Japan. Although exports to Japan are significant, exports value to this country showed the largest decline, from \$912 million in 2022 to \$816.1 million in 2023. This was mainly due to a decline of \$97 million in canola seeds.

Despite the decline, Mexico remained the fourth-largest destinations for Manitoba's agri-food exports in 2023. Pork (33.1 per cent); canola seeds (22.9 per cent) and canola oil (14.4 per cent) were the top agri-food products exported to Mexico in 2023. South Korea reached the fifth-largest destination for Manitoba's agri-food exports, with \$66 million or 52.9 per cent export growth in 2023. The top Manitoba agri-food products exported to South Korea are pork cuts (85.1 per cent) and wheat (6.7 per cent). While exports to the U.S., China and Mexico were relatively diverse, exports to Japan, South Korea were highly concentrated on pork, wheat and canola seeds. The following graph shows selected Manitoba's agri-food export destinations that experience the largest export value increase and decrease. The value of agri-food exports in 2023 is indicated by the size of the bubble.

Manitoba's Agri-food Export Destinations



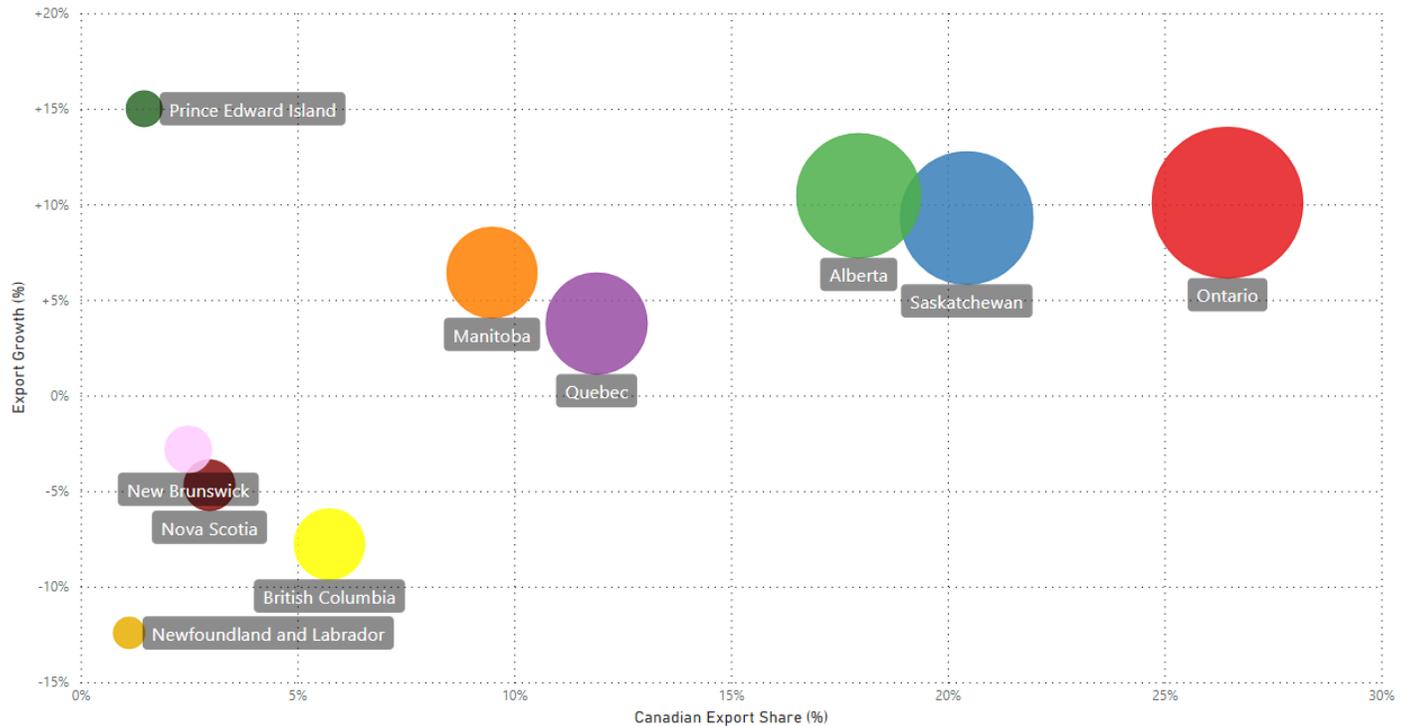
Top Five Gain and Top Five Loss Destinations by Export Value



Manitoba's Share of National Agri-food Exports

In 2023, Manitoba contributed for 9.5 per cent of Canada's \$99 billion agri-food exports and ranked fifth-largest agri-food exporter among all provinces. Ontario accounted for 26.5 per cent of Canada's international agri-food exports, while Saskatchewan and Alberta accounted for 20.4 per cent and 18 per cent, respectively. At the national level, agri-food exports increased by 6.6 per cent from \$92.9 billion 2022 to \$99 billion in 2023. The following graph shows export values, provincial shares and export growth for the top ten agri-food exporting provinces.

Top Ten Agri-food Export Canadian Provinces in 2023



Share of Processed Agri-food and Commodities

Processed agri-food products represented 48.7 per cent of the total agri-food export value in 2023, while the remaining 51.3 per cent was exported as commodities. Approximately 73.1 per cent of the export values to the U.S., 61.9 per cent of the exports to Japan, and 55.1 per cent of the exports to Mexico were processed products. Only about 9.4 per cent of the exports to China were processed products. Overall, 57.8 per cent of the agri-food exports to the top five destinations in 2023 were processed products.

Contact us

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