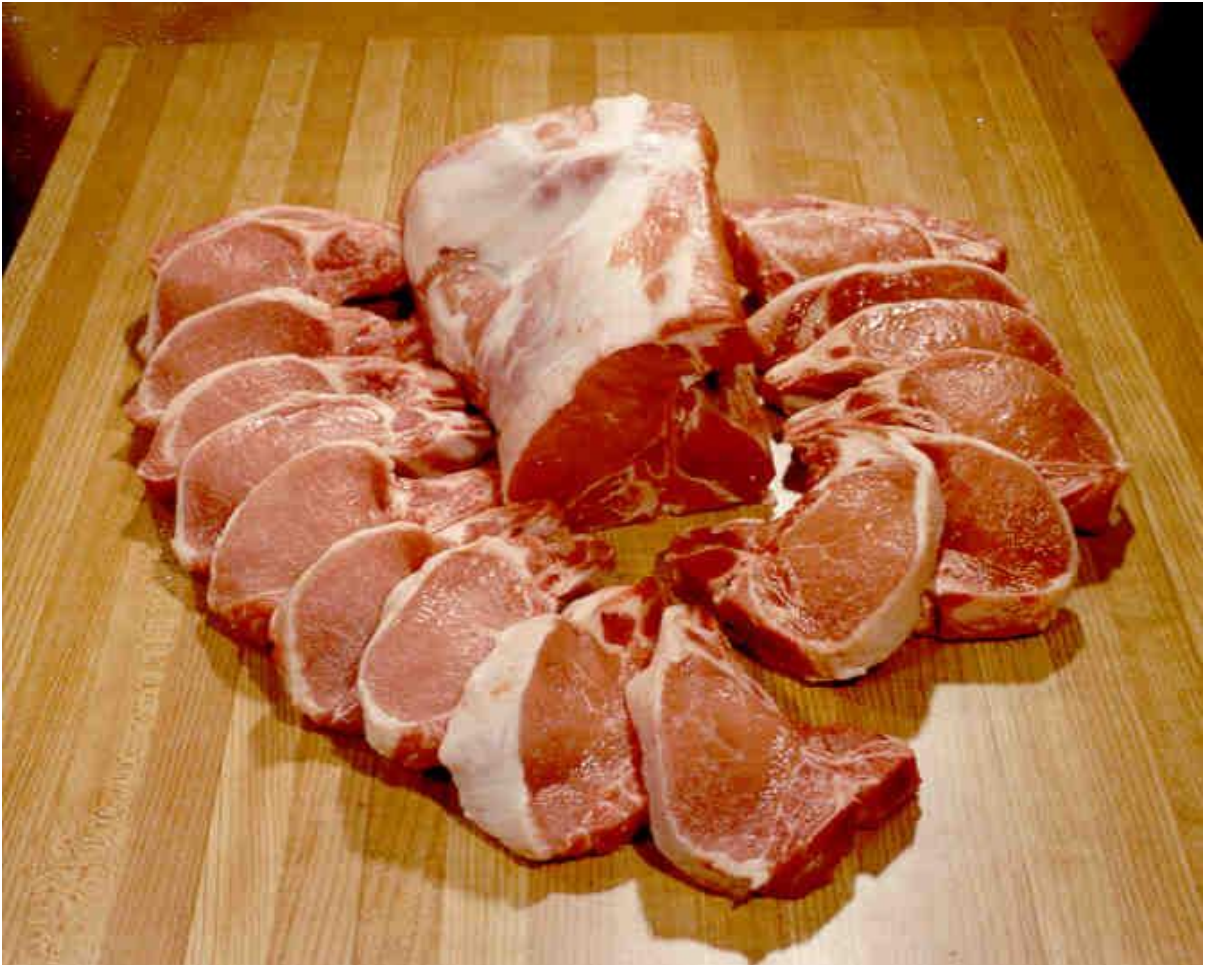


Alternative Market Destinations for Manitoba Pork Products



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Alternative Market Destinations for Manitoba Pork Products

The pork industry is a major economic driver in Manitoba, contributing significantly to the province's agricultural sector. Manitoba leads Canada in hog production with 8.6 million hogs and pigs sold in 2024, accounting for 29 per cent of the total Canadian production. The industry is supported by extensive infrastructure, including 595 hog farms and two major processing facilities.

Manitoba Global Exports of Pork and Pork Products

Exports play a crucial role in the pork industry's success, with over 70 per cent of Manitoba's pork production shipped to international markets. In 2024, Manitoba's pork and pork product exports totaled \$1.7 billion, with key destinations including Japan (\$657 million), the United States (U.S) (\$368 million), South Korea (\$203 million), Mexico (\$199 million) and China (\$153 million) as shown in Table 1. The province's reputation for high-quality pork, backed by research and innovation, helps maintain its competitive edge in global markets.

Table 1. Manitoba Pork and Pork Products Exports by Country in Canadian Dollars

<i>Destination</i>	<i>Total \$ 2020-2024</i>	<i>%</i>	<i>2020 \$</i>	<i>2021 \$</i>	<i>2022 \$</i>	<i>2023 \$</i>	<i>2024 \$</i>	<i>CAGR %</i>
World	7,520,240,810	100.00	1,481,690,323	1,500,225,583	1,366,580,842	1,476,858,829	1,694,885,233	3.42
Japan	2,899,538,539	38.56	673,536,548	597,959,243	475,844,040	495,669,385	656,529,323	-0.64
U.S.	1,878,485,926	24.98	249,478,197	402,359,939	479,117,895	379,952,017	367,577,878	10.17
South Korea	582,327,232	7.74	54,077,820	75,279,104	87,050,451	162,664,910	203,254,947	39.24
Mexico	724,462,114	9.63	66,664,836	137,189,893	137,858,533	184,145,315	198,603,537	31.38
China	998,796,710	13.28	381,436,943	210,421,662	110,504,547	143,928,237	152,505,321	-20.48
Taiwan	114,589,191	1.52	10,292,139	10,454,169	15,915,231	35,796,412	42,131,240	42.24
Philippines	190,823,827	2.54	29,468,827	47,702,814	37,460,038	49,015,613	27,176,535	-2.00
New Zealand	30,986,306	0.41	284,674	1,881,324	3,387,917	8,599,359	16,833,032	177.30
Australia	49,772,198	0.66	7,905,715	5,544,932	12,693,164	10,937,741	12,690,646	12.56
Malaysia	4,745,658	0.06	-	-	-	-	4,745,658	
Jamaica	13,136,164	0.17	1,816,779	3,936,532	2,032,998	1,642,667	3,707,188	19.52
Colombia	3,665,113	0.05	71,965	293,722	-	162,711	3,136,715	156.94
Viet-Nam	8,642,179	0.11	1,815,616	800,807	2,136,756	1,544,370	2,344,630	6.60
Singapore	5,756,313	0.08	1,414,640	1,636,498	685,989	651,044	1,368,142	-0.83

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Manitoba's global pork and pork product exports experienced a Compound Annual Growth Rate (CAGR) of 3.4 per cent between 2020 and 2024. Among the top five markets, South Korea and Mexico saw remarkable growth in export value, with CAGRs of 39.2 per cent and 31.4 per cent, respectively, during this period. Japan has consistently ranked as the leading destination for Manitoba pork exports in terms of both value and volume, maintaining steady performance as reflected in Tables 1 and 2.

In 2024, Mexico emerged as the second-largest destination by volume, as highlighted in Table 2, with export volumes nearly doubling over the past five years. Similarly, South Korea demonstrated significant growth, with export volumes tripling between 2020 and 2024.

Table 2. Manitoba Pork and Pork Products Exports by Country in Kilograms

<i>Destination</i>	<i>Total 2020-2024 KG</i>	<i>%</i>	<i>2020 KG</i>	<i>2021 KG</i>	<i>2022 KG</i>	<i>2023 KG</i>	<i>2024 KG</i>
World	1,943,289,936	100.00	383,263,618	382,644,107	368,948,326	399,888,373	408,545,512
Japan	557,946,262	28.71	117,010,422	115,227,808	102,887,252	102,652,384	120,168,396
Mexico	314,570,331	16.19	40,264,269	63,037,113	59,217,411	72,248,572	79,802,966
U.S.	406,408,157	20.91	55,722,755	82,677,246	103,439,003	87,472,939	77,096,214
China	389,632,218	20.05	136,409,441	72,793,883	51,922,228	66,473,230	62,033,436
South Korea	121,632,735	6.26	12,112,153	19,422,723	20,757,438	34,634,626	34,705,795
Taiwan	36,105,760	1.86	4,121,219	4,401,872	5,733,195	10,866,422	10,983,052
Philippines	73,433,471	3.78	11,571,977	18,582,842	16,530,241	17,127,173	9,621,238
Australia	16,901,804	0.87	2,718,307	1,832,565	4,452,573	3,396,655	4,501,704
New Zealand	8,809,869	0.45	120,016	576,972	1,296,963	2,525,410	4,290,508
Jamaica	4,577,456	0.24	670,294	1,134,033	617,677	710,998	1,444,454
Malaysia	1,124,279	0.06	-	-	-	-	1,124,279
Colombia	1,164,715	0.06	47,610	71,070	-	48,426	997,609
Viet-Nam	3,938,912	0.20	721,841	323,377	1,208,601	810,157	874,936
Singapore	2,372,529	0.12	624,058	780,577	375,002	269,852	323,040

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From 2020 to 2024, Manitoba's pork and pork product exports reached approximately \$7.5 billion, with fresh pork accounting for more than half of the total exports at \$3.83 billion. Fresh pork exports exhibited consistent growth, totalling \$970.98 million in 2024 with an 8.5 per cent CAGR, as shown in Table 3. Conversely, frozen pork, despite being the second-largest export category, declined over time, experiencing a negative 5.1 per cent CAGR. This shift suggests a changing preference for fresh pork among international markets.

Beyond fresh and frozen pork, Manitoba also exports a wide variety of pork products which account for 22.2 per cent of total pork and pork product exports. Fresh hams with bone-in contributed \$418.7 million over five years, while streaky salted bellies accounted for \$364.8 million. Some categories, like prepared or preserved hams (\$212.1 million) and fresh edible offal (\$117.9 million), demonstrated notable growth, with the latter boasting a 21.4 per cent CAGR. However, frozen edible offal and pig fat experienced moderate declines, reflecting potential shifts in demand for this type of pork product.

Certain niche products also stood out, due to their high growth rates. Prepared pork shoulders saw a remarkable 25.7 per cent CAGR, despite a relatively small total export value of \$3.9 million over the last five years. Similarly, frozen pork livers achieved a 26.6 per cent CAGR, suggesting a growing market for these products. On the other hand, salted pork product exports saw a dramatic decline of 35.1 per cent CAGR, suggesting diminished demand for such products. These figures highlight the evolving landscape of Manitoba's pork exports, shaped by consumer preferences and international trade dynamics.

Table 3. Manitoba Pork and Pork Product Exports by HS Code in Canadian Dollars

HS Code	Description	Total (\$) 2020-2024	%	2020 \$	2021 \$	2022 \$	2023 \$	2024 \$	CAGR %
	Total	7,520,240,810	100.00	1,481,690,323	1,500,225,583	1,366,580,842	1,476,858,829	1,694,885,233	3.42
020319	Fresh pork	3,834,883,129	50.99	700,238,067	713,562,152	686,181,202	763,917,102	970,984,606	8.52
020329	Frozen pork	2,021,874,637	26.89	482,424,111	442,835,579	348,010,318	357,707,088	390,897,541	-5.12
020312	Fresh hams w/bone-in	418,724,852	5.57	64,423,451	87,477,827	95,725,120	90,614,463	80,483,991	5.72
021012	Bellies "streaky" salted	364,813,178	4.85	64,429,034	80,643,982	83,352,560	64,586,254	71,801,348	2.75
020649	Frozen offal of swine	292,210,521	3.89	69,138,459	48,873,404	42,295,165	70,839,689	61,063,804	-3.06
160241	Prepared hams	212,105,884	2.82	35,844,516	42,770,247	43,853,170	42,706,818	46,931,133	6.97
020630	Fresh offal of swine	117,879,511	1.57	11,429,757	36,118,374	21,848,480	23,630,156	24,852,744	21.43
020910	Pig fat	96,488,924	1.28	18,253,142	18,561,247	19,620,369	24,136,593	15,917,573	-3.36
050400	Guts/ bladders stomachs	65,710,203	0.87	13,880,128	11,700,003	10,411,960	14,036,121	15,681,991	3.10
020322	Frozen hams w/ bone-in	71,066,413	0.95	17,077,238	12,402,524	8,525,413	19,642,063	13,419,175	-5.85
160242	Prepared shoulders	3,928,794	0.05	-	-	904,383	1,594,281	1,430,130	25.75
021019	Meat of swine, salted	15,483,926	0.21	3,895,833	3,657,909	4,203,513	3,037,457	689,214	-35.15
020641	Frozen livers of swine	4,516,330	0.06	237,977	1,622,335	1,649,189	395,305	611,524	26.61
021011	Salted hams w/ bone	170,939	0.00	50,480	-	-	-	120,459	24.29

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Manitoba Exports of Pork and Pork Products to China

In 2024, China remained one of the top five export destinations for Manitoba pork and pork products, contributing nine per cent of Manitoba's export value, equivalent to \$153 million. However, as shown in Table 1, the export value has declined sharply from 2020 to 2024, reflecting a negative CAGR of -20.48 per cent. This downward trend is primarily attributed to a decrease in frozen pork exports, which compromised 84 per cent of Manitoba pork shipments to China and recorded a negative CAGR of -25 per cent (Table 5). In contrast, edible offal, the second-largest pork export category to China at 10.6 per cent, has remained relatively stable over the same period. Despite this stability, both frozen pork and edible offal have been subject to new Chinese tariffs on Canadian pork products since March 2025 (Table 4). Meanwhile, niche categories such as guts, bladders, and stomachs have shown a positive CAGR of 11 per cent, although they represent only 3.6 per cent of total pork product exports. Other minor categories, including frozen hams, pig fat, and fresh/chilled meat have experienced significant declines.

Table 4. List of Canadian Pork Products subject to Chinese tariffs in 2025

HS Code	Name of Products
02031110	Fresh or chilled whole and half - head suckling pigs
02031190	Other fresh or chilled whole and half - head pigs
02031200	Fresh or chilled bone - in pig forelegs, hind legs and their meat pieces
02031900	Other fresh or chilled pork
02032110	Frozen whole and half - head suckling pigs
02032190	Other frozen whole and half - head pigs
02032200	Frozen bone - in pig forelegs, hind legs and meat pieces
02032900	Other frozen pork
02063000	Fresh or chilled pig offal
02064100	Frozen pig liver
02064900	Other frozen pig offal
02101110	Dried, smoked or salted bone - in pig legs
02101190	Dried, smoked or salted bone - in pig leg meat pieces
02101200	Dried, smoked or salted pork bellies
02101900	Dried, smoked or salted other pork

Canadian Honey Council - April 2025 - List of goods subject to an additional 25 per cent tariff

Table 5. Manitoba Pork and Pork Product Exports to China by HS Code in Canadian dollars

HS Code	Description	Total 2020-2024 \$	%	2020 \$	2021 \$	2022 \$	2023 \$	2024 \$	CAGR %
	Total	998,796,710	100.00	381,436,943	210,421,662	110,504,547	143,928,237	152,505,321	-20.48
020329	Frozen pork	835,651,295	83.67	322,717,928	207,358,348	108,130,363	95,287,263	102,157,393	-24.99
020649	Edible offal of swine, frozen	105,704,336	10.58	35,889,607	-	-	34,552,666	35,262,063	-0.44
050400	Guts, bladders, stomachs	35,992,766	3.60	9,269,800	-	1,636,291	11,004,667	14,082,008	11.02
020322	Frozen hams (with bone in)	13,557,699	1.36	9,675,032	-	-	3,083,641	799,026	-46.39
020641	Frozen edible livers of swine	111,293	0.01	-	-	-	-	111,293	
020910	Pig fat	404,305	0.04	310,767	-	-	-	93,538	-25.93
020321	Frozen swine carcasses	84,636	0.01	84,636	-	-	-	-	
020319	Fresh / chilled pork	7,290,380	0.73	3,489,173	3,063,314	737,893	-	-	-54.01

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Table 6. Manitoba Pork Product Exports to China by HS Code in Kilograms

HS Codes	Description	Total 2015-2024 KG	%	2020 KG	2021 KG	2022 KG	2023 KG	2024 KG
	Total	697,537,117	100.00	136,409,441	72,793,883	51,922,228	66,473,230	62,033,436
020329	Frozen pork	550,003,230	78.85	115,329,738	72,125,807	50,378,980	49,430,947	44,065,576
020649	Edible offal of swine, frozen	104,406,873	14.97	14,599,950	-	-	14,076,688	15,286,412
050400	Guts, bladders and stomachs	14,206,993	2.04	1,782,326	-	224,729	1,716,565	2,306,398
020322	Frozen hams (with bone in)	25,369,318	3.64	3,752,630	-	-	1,249,030	325,050
020910	Frozen edible livers of swine	395,079	0.06	174,944	-	-	-	25,000
020641	Pig fat	74,988	0.01	-	-	-	-	25,000
020321	Frozen swine carcasses	72,743	0.01	39,699	-	-	-	-
020319	Fresh / chilled pork	3,007,893	0.43	730,154	668,076	1,318,519	-	-

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Alternative Market Destinations for Manitoba Frozen Pork and Swine Offal

This section explores alternative market options for Manitoba pork and pork products that are impacted by Chinese tariffs.

Frozen Pork

From 2020 to 2024, Manitoba exported \$2 billion in frozen pork. Despite this substantial figure, the CAGR was -5.1 per cent, indicating a decline in overall exports over this period. China is the leading destination for frozen pork exports, accounting for 41.3 per cent of total exports in this category. However, the CAGR for China was -24.99, reflecting a significant decrease in exports to this country. Japan followed with \$400 million in exports, representing 19.8 per cent of the total. Unlike China, Japan experienced moderate growth with a CAGR of 3.88 per cent. South Korea stood out with \$186 million in exports, making up 9.17 per cent of total, and showed strong growth with a CAGR of 31.74 per cent.

Table 7. Manitoba Exports of Frozen Pork by Country in Canadian dollars

Destination	Total 2020-2024 \$	%	2020 \$	2021 \$	2022 \$	2023 \$	2024 \$	CAGR %
World	2,021,874,637	100.00	482,424,111	442,835,579	348,010,318	357,707,088	390,897,541	-5.12
China	835,651,295	41.33	322,717,928	207,358,348	108,130,363	95,287,263	102,157,393	-24.99
Japan	399,884,639	19.78	83,267,252	82,556,174	66,266,941	70,839,882	96,954,390	3.88
South Korea	185,483,827	9.17	16,660,060	28,739,566	31,569,127	58,334,832	50,180,242	31.74
Taiwan	88,498,821	4.38	6,523,106	5,018,837	12,140,307	28,135,335	36,681,236	53.99
Mexico	110,363,006	5.46	6,330,644	26,770,911	29,745,591	23,079,108	24,436,752	40.17
Philippines	153,959,451	7.61	24,238,237	37,068,959	30,061,348	38,831,203	23,759,704	-0.50
U.S.	151,116,173	7.47	13,085,293	43,820,711	52,474,929	23,460,823	18,274,417	8.71
New Zealand	29,459,743	1.46	233,057	1,459,179	3,294,392	7,960,761	16,512,354	190.13
Australia	38,769,261	1.92	5,177,625	4,596,677	11,339,227	8,570,981	9,084,751	15.09
Malaysia	4,745,658	0.23	-	-	-	-	4,745,658	
Colombia	3,299,426	0.16	-	-	-	162,711	3,136,715	1827.78

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Taiwan and Mexico demonstrated remarkable growth during this period. Taiwan's frozen pork exports had an impressive CAGR of 53.99 per cent and Mexico showed a CAGR of 40.17 per cent. New Zealand, although a smaller market, exhibited exceptional growth with exports totalling \$29 million (1.46 per cent of total) and a staggering CAGR of 190.13 per cent.

Japan has been a significant market for Manitoba, importing frozen pork from around the world at an average yearly value of \$3.1 billion over the past five years. Other notable markets include the U.S., Australia, Singapore, and the Netherlands, with average global import values of \$830 million, \$723 million, \$344 million, and \$172 million, respectively, during the same period. Expanding export volumes to these destinations could serve as a viable alternative to the Chinese market.

Manitoba has successfully diversified its market destinations for frozen swine meat, achieving increased market shares in New Zealand, Colombia, Jamaica, South Korea, and Mexico.

Edible Swine Offal

From 2020 to 2024, Manitoba's global exports of edible pork offal totaled \$292 million, with a CAGR of -3.06 per cent. China led with \$106 million, but saw a slight decline, as shown in Table 8. The U.S. followed with \$71 million, also a decline. Japan had steady growth with \$35 million, while Australia grew nicely with \$9 million. New Zealand, though small, had impressive growth.

In 2024, over half of the Manitoba exports of this product went to China. The export value of this product has remained relatively stable, except in 2021 and 2022, when no exports to China were recorded. In 2024, edible offal exports to China constituted 2.1 per cent of Manitoba's total pork product exports, as reflected in Tables 1 and 8.

Table 8. Manitoba Exports of Edible Swine Offal by Country in Canadian dollars

<i>Destination</i>	<i>Total 2020-2024 \$</i>	<i>%</i>	<i>2020 \$</i>	<i>2021 \$</i>	<i>2022 \$</i>	<i>2023 \$</i>	<i>2024 \$</i>	<i>CAGR %</i>
World	292,210,521	100.00	69,138,459	48,873,404	42,295,165	70,839,689	61,063,804	-3.06
China	105,704,336	36.17	35,889,607	-	-	34,552,666	35,262,063	-0.44
U.S.	71,175,481	24.36	10,632,731	16,358,052	19,223,814	15,507,390	9,453,494	-2.90
Japan	35,319,596	12.09	6,123,943	7,565,274	7,869,996	7,411,915	6,348,468	0.90
Australia	8,880,855	3.04	2,383,393	532,437	781,016	1,937,598	3,246,411	8.03
Mexico	25,306,033	8.66	5,883,950	6,747,413	6,173,140	3,991,409	2,510,121	-19.18
Philippines	21,573,945	7.38	2,716,625	8,469,827	4,376,978	3,967,564	2,042,951	-6.88
Taiwan	12,533,234	4.29	2,332,350	3,331,410	2,299,712	2,763,799	1,805,963	-6.19
New Zealand	695,843	0.24	-	-	93,525	281,640	320,678	85.17
Jamaica	5,567,495	1.91	1,055,327	2,778,706	1,335,178	324,629	73,655	-48.60

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Globally, China stands out as the world's largest importer of edible swine offal, with an annual average import value of \$3.5 billion from 2020 to 2024, representing 67.2 per cent of the total global imports of this segment (Table 9). While other markets exist, they are significantly smaller in comparison.

Table 9. Global Imports of Swine Offal by Country in Canadian dollars

<i>Destination</i>	<i>Total \$</i>	<i>%</i>	<i>2020</i>	<i>2021</i>	<i>2022</i>	<i>2023</i>	<i>2024</i>	<i>CAGR</i>
	<i>2020-2024</i>		<i>\$</i>	<i>\$</i>	<i>\$</i>	<i>\$</i>	<i>\$</i>	<i>%</i>
Total	6,379,317,342	100	5,257,276,763	5,316,435,249	5,080,053,804	5,504,990,917	5,220,560,609	-0.18
China	17,720,306,026	67.17	3,528,139,522	3,531,035,888	3,511,780,804	3,696,020,970	3,453,328,842	-0.53
Philippines	1,644,156,028	6.23	152,870,060	345,056,555	379,627,612	375,053,376	391,548,425	26.51
Vietnam	898,267,395	3.41	129,470,335	187,916,855	117,449,960	210,929,401	252,500,844	18.17
Mexico	647,321,576	2.45	99,949,580	118,940,508	121,396,337	155,645,769	151,389,382	10.94
Côte d'Ivoire	500,698,634	1.9	56,841,510	87,862,745	102,029,323	124,481,435	129,483,621	22.85
Japan	525,975,648	1.99	79,049,300	92,408,104	120,805,748	126,258,380	107,454,116	7.98
Hong Kong	1,436,302,370	5.44	732,576,326	423,525,631	89,994,201	85,520,901	104,685,311	-38.52
U.S.	251,540,407	0.95	31,139,812	45,940,425	61,021,090	59,530,765	53,908,315	14.71
South Korea	235,154,468	0.89	32,382,437	47,422,979	58,684,940	48,397,309	48,266,803	10.49
Spain	120,316,892	0.46	8,967,954	18,292,979	21,663,825	32,337,943	39,054,191	44.46

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Given the recent tariffs imposed by China on swine offal, alternative markets could be explored to mitigate the impact. The Philippines, Vietnam, and Mexico show strong growth and increasing demand, making them viable options. The Philippines imported \$1.64 million during 2020-2024 with a CAGR of 26.51 per cent, Vietnam \$898 million with a CAGR of 18.17 per cent, and Mexico \$647 million with a CAGR of 10.94 per cent. Diversifying export destinations to stable markets may help Manitoba maintain export levels.

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Contact us

www.manitoba.ca/agriculture/

1-844-769-6224

industryintelligence@gov.mb.ca

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