

MANITOBA'S **ECONOMIC DEVELOPMENT STRATEGY**



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**WE WANT
MANITOBA TO
BE A PROVINCE
WHERE EVERYONE
CAN BUILD A
GOOD LIFE**

INTRODUCTION

We want Manitoba to be a province where everyone can build a good life – with an affordable cost of living and good paying jobs, driven by a strong, diversified economy. In the face of economic uncertainty driven by tariffs, it's especially important for Manitoba to have a plan to develop our economy in a way that takes our future into our own hands, and also invests in Manitoba businesses, producers, workers, and families.

Economic growth, underpinned by sustained productivity growth, is how Manitoba will realize this vision – creating good jobs, providing excellent public services and sustaining a high standard of living long into the future.

This strategy builds on the efforts of the Premier's Business and Jobs Council, which has worked with organizations such as Winnipeg Economic Development and Tourism, the Business Council of Manitoba, the Winnipeg Chamber of Commerce, the Manitoba Chambers of Commerce, and CentrePort Canada, among many other stakeholders, to bring together perspectives from business leaders across multiple sectors, Indigenous Peoples, equity-seeking communities, labour, municipalities, and the public. It will help drive economic growth in every part of our province – for centres like Brandon, Dauphin, Selkirk, Thompson, and Winnipeg, and for communities across Westman, the Interlake, the North, and Southern Manitoba.

Manitoba's economy is among the most diversified in Canada, with strong sectors in agriculture, natural resources and mining, manufacturing, biosciences, energy, creative industries, information technology, finance and insurance, transportation, tourism, and many others.

Emerging technologies and global trends also present new prospects for economic development for the province. The drive to secure new markets for Canadian products creates opportunities to leverage existing strengths. For example, we have the critical minerals the world needs and are a secure, stable democracy that provides certainty for investors.

Our government supports a national vision for major projects, delivered in partnership with Indigenous nations, while maintaining high environmental standards.

The path towards becoming a “have” province over the next 15 years will require robust, sustained growth as well as the construction and operation of major projects. Though the climb is steep, Manitoba is well-positioned to meet the challenge. The Port of Churchill, Canada's only deep-water Arctic port connected to the national rail system, offers the shortest marine route from Western Canada to Europe, positioning it as a natural outlet for the growing export demand in agricultural commodities and critical minerals.

Nation-building upgrades to the Port of Churchill, such as rail improvements, an all-weather road and ice breakers to enable year-round shipping, are needed to unlock export growth. The expansion of the port, in combination with investments in defense, a trade corridor and increases in critical minerals mining could contribute significantly to the accelerated growth we need to achieve the goal of becoming a “have” province. Beyond this, working with business to increase fixed capital formation and make Manitoba an ideal place to invest as well as developing our workforce and attracting high skilled labour will be necessary to take us the rest of the way.

WHY FOCUS ON PRODUCTIVITY?

Productivity describes the value of what our economy is producing when compared to what it contributes. From the standpoint of an individual worker, productivity is a measure of how much you produce, or get done, for every hour you work.

We become more productive when we work smarter and get things done more efficiently. For example by using the latest machinery and software, not by working more hours or working harder. In fact, when we work more hours to create the same value, we're less productive, not more.

Higher productivity benefits Manitoba workers. It leads to higher wages, so you can earn more while working the same hours, leaving time to spend with your family and do other things you enjoy. And it benefits Manitoba's economy as a whole, driving economic activity, innovation, and growth.

Unfortunately, Canada's productivity growth at the national level has lagged behind other countries for more than a decade. In fact, several prominent economic institutions have highlighted the urgent need for Canada and its provinces to focus more policy attention on the issue. In response, strategic actions in this plan target sustained productivity growth as the means to achieve economic growth across the broad spectrum of Manitoba's industries. Going forward, productivity will be one of the lenses through which new economic opportunities and programs are assessed.



ACCELERATING PRODUCTIVITY GROWTH: A NATIONAL PRIORITY

"An economy with strong productivity can have faster growth, more jobs and higher wages with less risk of inflation. That's why I want to talk about Canada's long-standing, poor record on productivity and show you just how big the problem is. You've seen those signs that say, "In emergency, break glass". Well, it's time to break the glass."

– **CAROLYN ROGERS**, Senior Deputy Governor at Bank of Canada

“Canada’s productivity has been lagging its peers for many years. Reviving Canada’s productivity has become even more critical because Canada’s productivity gap might become compounded with ongoing transformations brought about by population ageing, the green transition, shifts in global trade, and the advancement of new digital technologies, notably AI. These transformations are reshaping industries and labour markets and are presenting new policy challenges, but also opportunities to raise productivity.”

– **OECD ECONOMIC SURVEYS:** Canada 2025

DRIVING PRODUCTIVITY IN MANITOBA



Productivity is driven by a combination of several factors:

- **Capital intensity**, which reflects workers’ access to tangible capital assets (e.g., buildings and machinery), and access to intangible assets (e.g., intellectual property and software).
- **Labour composition**, which reflects the skills and knowledge of the workforce.
- **Multifactor productivity**, which refers to how efficiently labour and capital work together to produce outputs.

The actions presented in this strategy focus on increasing capital intensity by growing Manitoba’s stock of capital assets, and on enhancing the province’s labour composition through improved knowledge and skills for its workforce. This strategy also aims to create pathways to bring more people into the workforce, which leads to more economic growth.

THE PATH TOWARDS BECOMING A “HAVE” PROVINCE

Manitoba has a lot of advantages: a lower cost of living than neighbouring provinces, a diversified economy and a growing working-age population.

Settling for the status quo is not good enough. Manitobans expect their government to put forward an aggressive – but achievable – plan to grow the economy and create a higher standard of living. To this end, Manitoba is setting out a central vision supported by two objectives:

VISION

Manitobans enjoy an exceptional quality of life, powered by strong economic growth.

OBJECTIVE 1

Foster a business climate that is conducive to productivity growth.

OBJECTIVE 2

Promote an inclusive workforce and partner with underrepresented groups to raise participation, so that all Manitobans can enjoy meaningful opportunity.

To be on the trajectory of becoming a “have” province, robust productivity growth is key. From 2000 to 2015, Manitoba’s business sector enjoyed labour productivity growth that averaged 1.85 per cent per year. However, in the years since, average annual growth has declined by 0.21 per cent per year. In real terms, this means that, on average, the Manitoba business sector produced more value in an hour of work in 2014 than it did in 2024.

Following a near-decade of decline, Manitoba now has an opportunity to make real gains in productivity, but it will require focussed, targeted policies that improve access to capital, make Manitoba a more attractive place to invest and incentivize growth, help develop intellectual property, and make it easier to interact with government.

At the same time, economic growth is about more than machinery and equipment. Technological innovation alone will not be enough to achieve our economic vision. At its heart, the economy is driven by people. Increasing labour productivity and participation requires that we support all Manitobans in reaching their potential. A thriving labour force grows when people are supported with fair wages, lifelong learning opportunities, and a shared vision for prosperity across communities. That is why this strategy sets out policies to create more pathways to good jobs through stronger workforce development programs; to support continuous learning and upskilling; to improve career development programming in K-12 education; to help more apprentices complete their training to become fully qualified tradespeople; and to align immigration programs with our productivity objective.

Increasing productivity across the economy takes a shift in mindset. We need to work toward not just creating jobs, but creating good, high-productivity jobs that have high wages and support families. We need to strive to facilitate the adoption of new technologies and processes, so that Manitoba's businesses and organizations can stay at the technological forefront and compete globally. And as government, we need to look at our operations, programs and services through a productivity lens, where possible and appropriate, to align them with our objective of higher productivity, higher wages and increased real GDP per capita.

ECONOMIC GROWTH



JOBS & WAGE GROWTH

Economic growth that leads to job creation and wage growth.

INNOVATION



DEVELOPMENT & ACQUISITION

Innovation that leads to the development and dissemination of technology throughout the economy.

PROGRAMS & SERVICES



PRODUCTIVITY FOCUS

Programs and services viewed through a productivity lens.

Guided by a vision of an exceptional quality of life for Manitobans powered by strong economic growth, this strategy sets out five pillars that support the dual objectives of productivity growth and increased participation:

1. Facilitating productive investments

Incentives and programs to facilitate productive investments

2. Boosting trade and investment

Attracting more high-productivity investment and growing exports

3. Focusing on workforce development

Building a more productive and inclusive workforce

4. Developing intellectual property

Growing the stock of intellectual property held in Manitoba

5. Growing productivity in the public sector

More efficient government for a more productive economy

Under each pillar, actions are identified that establish how we will achieve the overall aim of that pillar.



INDIGENOUS ECONOMIC RECONCILIATION

Manitoba is committed to economic reconciliation with Inineew, Anishinaabe, Anishininew, Dakota, Dene, Inuit, and Red River Métis Peoples recognizing their distinct rights, languages, cultures and histories. Closing the socioeconomic gaps between Indigenous and non-Indigenous Manitobans will be a key driver of our shared economic success.

The path forward involves listening to Inineew, Anishinaabe, Anishininew, Dakota, Dene, Inuit and Red River Métis Peoples as we develop the economy and labour force. This means that programs designed to remove systemic barriers and achieve shared economic success must include Indigenous economic interests.

Increasing the Participation Rate of Inineew, Anishinaabe, Anishininew, Dakota and Dene in Manitoba through True Partnership and Education

A key component of the strategy's objective of increasing participation is to equalize the participation rate of Inineew, Anishinaabe, Anishininew, Dakota and Dene with other populations in the province. Co-developing plans, initiatives and educational opportunities with these rights-holders can contribute to closing the socioeconomic gap they face compared to other populations, which in turn benefits all Manitobans.

Distinctions-based Co-development of Plans and Initiatives

Removing barriers to economic participation will require that we reinforce efforts to support Indigenous businesses, entrepreneurs, organizations, and Nations as they promote economic development and employment for Indigenous Manitobans.

The ongoing co-development of distinctions-based initiatives with Inineew, Anishinaabe, Anishininew, Dakota, Dene, Inuit and the Red River Métis broadly includes:

- Indigenous-led economic development
- equitable access to education, training and meaningful jobs
- economic and fiscal benefits from major projects
- business partnerships
- shared land and resource management approaches

Following on the recommendations of the Premier's Business and Jobs Council's Economic Reconciliation Sub-committee, other strategies include increasing Indigenous inclusion in industry sectors and the broader economy, ensuring workforce development includes Indigenous peoples, and capacity building for Indigenous businesses. This aligns with the goals and objectives of Manitoba's Mino'Ayaawag Ikwewag Strategy, in which economic development is a key pillar.

Manitoba has taken important initial steps to advance economic reconciliation, including the creation of the Indigenous Economic Development Fund (IEDF), release of a critical mineral strategy that included economic reconciliation as a key focus (*Securing our Critical Mineral Future*), establishment of the Manitoba Indigenous Loan Guarantee Program (MILGP), and working with Inineew, Anishinaabe, Anishininew, Dakota and Dene subject matter experts to support the establishment and development of urban reserves in Manitoba. These actions support a living framework recognizing that ongoing distinctions-based collaboration with Inineew, Anishinaabe, Anishininew, Dakota, Dene, Inuit and Red River Métis partners on these and other important initiatives will be crucial to ensuring Manitoba continues to make progress toward our shared economic reconciliation objectives.

MANITOBA'S PLACE IN THE WORLD: OUR APPROACH TO TRADE

The global economy is much more interconnected today than at any other point in history. The world's goods, services, information and data seamlessly flow between countries and continents at an increasingly rapid pace.

Modern economies now aggressively compete for access to the world's most important global value chains, not only to gain trade and investment opportunities, but also to ensure that a competitive position is maintained by always interacting with – and benchmarking against – the best in class. The potential gains from observing and integrating with the highest performing commercial hotspots are immense.

That is why this strategy includes ramping up trade promotion and market diversification initiatives by embedding a greater in-market presence, in a variety of forms, into the ecosystems that sustain the provincial economy (See Pillar 2).

Going forward, we will increase our efforts to seek out trade and investment opportunities in targeted markets, create institutional linkages to leverage innovation and commercialization capacity, provide in-market guidance and intelligence for Manitoba companies, build strong relationships with outside businesses and governments, and promote the province as both an ideal trade partner and as an ideal location for investment, work and play, including tourism.

Manitoba's approach to trade will focus on cities and regions that act as key nodes in the global value chains where Manitoba companies actively compete and will aim to deepen the bonds between both markets. That translates into an emphasis on maintaining a thorough understanding of Manitoba's domestic market and the markets of target regions, as well as building the relationships that make long-term engagements fruitful.

The geographical focus of our market diversification efforts will also reflect the globalization of opportunities and the need to diversify trade partners. While that points to markets in Europe and Asia, it will not take away from the value of also focussing on regions within the United States.





Expanding the Port of Churchill: Unlocking Manitoba's Potential

In September 2025, the federal government selected the Port of Churchill as one of six strategic areas of focus that will be transformative for Canada and Canadians. This recognizes the port's extraordinary potential to drive market diversification and economic resilience, as a gateway for critical minerals, agricultural products, and other commodities.

Upgrading the port to enable year-round shipping, supported by improvements to rail infrastructure and an all-weather road will allow for vast increases in exports. The ongoing economic impacts associated with the exports flowing through the Port of Churchill following the upgrades could be in the range of \$3.5 billion as a contribution to Manitoba's GDP, supporting over 14,000 jobs.

Agriculture and Agri-food: Key to Market Diversification

Manitoba is committed to fostering a growing and competitive agriculture and agri-food industry as a key driver of the provincial economy. Access to international markets remains a top priority, supporting industry efforts to expand trade in regions where Manitoba's high-quality products are in demand.

Recent uncertainties with some of Manitoba's traditional trading partners highlight the need to enhance our efforts to maintain relationships with and access to key markets. Manitoba is actively supporting the federal government's diplomacy and trade advocacy efforts at multiple levels with China and the United States. Particular focus is being placed on key Manitoba exports such as canola and pork. Re-establishing mutually beneficial trading relationships is essential to maintaining and growing access in these critical markets.

In addition, Manitoba's strategic investments through the Sustainable Canadian Agricultural Partnership support market diversification, ensuring products continue to reach customers both in Canada and abroad. Notable successes include the diversification of pork markets, showing annual growth in exports to South Korea and Mexico in recent years. As well, the Fair Trade in Canada Act removes interprovincial trade barriers for goods and services between Manitoba and other jurisdictions in Canada creating new domestic trading opportunities.



OUR SECTORS

Manitoba has one of the most diversified economies in Canada, making it more resilient to cyclical forces than most other provinces. No one sector dominates, and there is substantial diversity among the industries within each sector.

Our strategic approach to building Manitoba's economy recognizes the complex interplay of supply chains, interprovincial and international trade, the need to build physical and intellectual capital locally, the role of the public and non-profit sectors, and above all, the need to invest in Manitobans themselves as the workforce of today and into the future.

Manitoba's industries illustrate important variation in the types of investments needed to advance productivity, based on how they create value. For example, industries as diverse as life sciences, creative and cultural industries, information technology, manufacturing, and transportation and warehousing will differ widely in the types of intellectual property they develop; in the technologies, processes and equipment they employ; and in their comparative reliance on machinery and equipment.

There are also variations in the types of workforce development programs needed to boost productivity in industries such as retail or tourism and accommodation, compared to construction or mining which depend on specialized trade apprenticeships.

Lastly, it is worth recognizing that the kinds of policies that are most helpful to businesses will vary at different stages in their lifecycles. Earlier-stage start-ups and smaller businesses may require greater access to training, information and knowledge-sharing as well as other forms of easier-to-access direct support. Larger businesses may benefit more from adjustments to Manitoba's tax credit structure, where incentives are made available following the realization of an upfront investment.

The actions proposed in this document aim to spur productivity growth for businesses of all sizes, across all sectors and at each stage in their development.

CONTINUOUS ENGAGEMENT

Businesses across the spectrum benefit from an economic climate that is conducive to growth and productivity. They also benefit from government's work to promote Manitoba to the world including through export development and investment attraction. In addition, all businesses benefit from responsive government services and investments in workforce development. However, each sector in the economy also has specific needs which requires detailed analysis. As such, this strategy includes continuous engagement with the business community as a priority (See Pillar 5).

Government action must be informed and systematically structured, not just for the present day, but also to capture emerging opportunities that may become increasingly relevant over the coming years. Keeping our fingers on the pulse of the economy while maintaining proper coordination is the best way to strategically align policy in a dynamic and responsive way.





**GROWING OUR
ECONOMY WILL
CREATE HIGHER-
PAYING JOBS AND
MAKE LIFE MORE
AFFORDABLE
FOR YOU**

PILLAR 1: FACILITATE PRODUCTIVE INVESTMENTS

Incentives, programs and measures to facilitate productive investments.

Facilitating productive investments raises per-worker capital, which is a key ingredient in productivity. As workers gain increased access to machinery, equipment and technology, they produce more in every hour worked.

Launch a productivity-oriented business financing program, unleashing private capital

To meet the challenge of access-to-capital, Manitoba will launch a new \$50 million financing program for businesses focussed on productivity-enhancing investments. Businesses will be able to access loans and other supports to invest in capital and create high-quality jobs in Manitoba. They will be able to leverage this financial assistance to attract additional capital from other sources, such as private equity or commercial lenders, magnifying the program's impact. The program will be centred on the following themes:

- **Trade and export growth**
Support for SMEs investing in fixed assets to boost productivity and/or to pivot operations to diversify markets.
- **Wage growth and job creation**
Support to help finance capital costs for expansions or upgrades that will lead to higher wages or more jobs for Manitobans.
- **Inclusion and workforce development**
Support to help finance capital costs for expansions or upgrades that include important training, upskilling or inclusion components.
- **IP creation and commercialization**
Support to offset finance costs for projects with a significant IP component, leading to a new patent or helping to commercialize existing patents.

Consideration will be given to the needs of start-ups and entrepreneurs. The program will be complemented by customer-oriented guidance in navigating government services, supports and incentives.

Working with Manitoba Natural Resources and Indigenous Futures, we will ensure Indigenous-led businesses are fully included in the program.

Enhance Manitoba's tax credits and tax exemptions for investment to make them more competitive, business-friendly and productivity-oriented.

Investment in capital assets, both tangible and intangible, is key to boosting productivity. Tax credits and exemptions for investment can be efficient, easy-to-access and effective incentives that lower the cost of capital, thereby increasing its acquisition. In view of this:

- Manitoba will convert the seven refundable points of the Manufacturing Investment Tax Credit (MITC) for machinery and equipment into a retail sales tax exemption at the time of purchase, lowering financing costs and easing administrative burden for manufacturers.
- The additional one non-refundable point of MITC will be applied as a tax credit for machinery and equipment and the full eight per cent (seven per cent refundable, one per cent non-refundable) MITC will still be available for buildings and qualified properties not subject to RST.
- Manitoba will raise the Small Business Venture Capital Tax Credit (SBVCTC) program limit by 36 per cent to unleash a total investment of \$30M in small business across the province when fully subscribed. It will also lower the minimum eligible investment to \$5,000 for eligible investors, allow investments to be made through limited partnerships, and ensure that Simple Agreements for Future Equity (SAFEs) qualify for the credit.

These measures will help to equip Manitoba businesses and workers with the tools they need to compete. They will also foster the uptake of productivity-enhancing technology by small and local businesses, enabling them to innovate and grow. This need for access to capital is also underpinning the creation of the Indigenous Economic Development Fund (IEDF) and the establishment of the Manitoba Indigenous Loan Guarantee Program.

As detailed in the recommendations of the Premier's Business and Jobs Council's Subcommittee on Trade with the United States, it is vital to support the uptake of productivity-enhancing technology by small and local businesses, as well as to focus on facilitating knowledge transfer. Programs that provide more direct access to financial assistance give businesses the resources they need to implement new technologies.

BOOSTING HOUSING CONSTRUCTION

Budget 2024 announced a new Rental Housing Construction Initiative (RHCI) that provides a refundable tax credit of \$8,500 on all new rental units, with an additional \$5,000 available for affordable units, for units commencing construction on or after Jan. 1, 2024.



Continue the Modernization of Manitoba's Regulatory Support for Financial Services

Building on the implementation of the self-certified investor prospectus exemption in 2024, Manitoba will continue to modernize the regulation of financial services with an eye to facilitating investment and business engagement. This will include the forthcoming launch of the new Manitoba Financial Services Authority (MFSA).

As recommended by the Premier's Business and Jobs Council's Subcommittee on Trade with the United States, the MFSA will put greater emphasis on engaging and educating investors and businesses alike and continuously work to understand their evolving needs. This will be done by establishing

advisory committees that represent MFSA stakeholders and by reinvigorating promotional and educational resources that will underscore that Manitoba is open for investment. In addition, the MFSA will work to responsibly lower barriers that impede access to early-stage capital for Manitoba businesses, including by continuing its participation in the Canadian Securities Administrators Financial Innovation Hub and Collaboratory to facilitate innovative initiatives. Finally, the MFSA will examine greater harmonization of rules with other provinces, where such harmonization would be advantageous to Manitoba.

PILLAR 2: BOOST TRADE & INVESTMENT

Attracting more high-productivity investment and growing exports

Investment attraction and export development are key to productivity growth. Manitoba will attract leading businesses that wish to engage in high value-added activities using state-of-the-art technologies. Similarly, Manitoba will support businesses based here in expanding to new export markets. In turn, this global engagement will spur new innovations that drive further growth.

Promote Manitoba businesses to connect them to global value chains and double the Export Support Program.

To drive export development and trade, Manitoba will ramp up the promotion of Manitoba businesses across sectors, from biosciences and tourism to film and video production. This will help further integrate Manitoba companies into global value chains and attract companies that are already part of international supply networks, ensuring they contribute to local productivity growth. Research suggests that companies participating in global value chains tend to be larger, more productive, and pay higher wages.

We will work to continuously identify specific segments of global value chains that Manitoba can participate in and focus investment attraction efforts on securing these opportunities. This will require aligning the promotion of local sectors and industries with the structure of global supply chains, emphasizing sectors where Manitoba has a competitive advantage. At the same time, equal attention will be given to promoting Manitoba's technical capabilities to ensure a broader, more resilient integration into global value chains.

We will work closely with Indigenous partners to promote Manitoba's Indigenous economy as one of our strengths. As well, working with Manitoba's francophone economic development partners, we will showcase Manitoba's bilingual advantage and engage with the French-speaking business community locally and abroad.

In support of these efforts, we will double the Export Support Program to help more companies diversify their export markets.

- In collaboration with partners across the province, Manitoba will be improving coordination of activities in national and global markets through increased trade show participation and support to businesses.
- Work to strengthen Indigenous, rural, northern and francophone representation at interprovincial and international trade shows supported by the Manitoba government.
- Double the Export Support Program to help companies with their market diversification activities.



Explore a Made-in Manitoba visa program geared towards start-ups to encourage more high-potential companies to locate in Manitoba.

Following the recommendations of the Premier's Business and Jobs Council's Subcommittee on Immigration and Skills Alignment, Manitoba will explore designing the parameters of its own visa program geared towards start-ups, under the Manitoba Provincial Nominee Program.

Implementing this program would streamline and facilitate both immigrating to and starting a new business in Manitoba, especially as it relates to the tech industry. Manitoba will engage with Immigration, Refugee and Citizenship Canada to negotiate the design and launch of the program.

- Explore the launch of a Made-in Manitoba visa program geared towards start-ups.

Create an inventory of certified investment-ready sites.

Excellent site selection services are key to a robust investment attraction program. As recommended by the Premier's Business and Jobs Council's Subcommittee on Trade with the United States, we will develop an investment readiness site certification inventory, working closely with communities. This coordinated inventory will build on the work being done at existing industrial parks to support both domestic and international proponents to expand within Manitoba. Manitoba will collaborate with communities and asset owners to develop the inventory and promote these sites to potential investors. Manitoba will also collaborate with municipalities to identify additional land available for economic development. Finally, Manitoba will strengthen its engagement with site selectors to promote Manitoba sites and increase site visits.

- Launch the Certified Investment Readiness Site Inventory.
- Increase the number of incoming site visits into Manitoba.

Work with municipalities across Manitoba to improve waste-water management and to ensure water/wastewater services are available to support economic development.

Water/wastewater capacity is key to enabling economic development and securing investment. Investment in infrastructure requires planning and scoping to meet current and future regional needs. Manitoba supports shared infrastructure solutions among regions and communities, including Ininew, Anishinaabe, Anishininew, Dakota, Dene, Inuit and Red River Métis to deliver lower costs and other benefits to Manitobans.

Manitoba will continue to work with the federal government, municipalities, Ininew, Anishinaabe, Anishininew, Dakota, Dene, Inuit and Red River Métis to ensure water/wastewater services are available to support economic development and community growth. This includes our commitment to get the North End Water Pollution Control Centre built with good union jobs, laying the foundation for new housing developments and new opportunities for business developments.



STRONG SUPPORT FOR VALUE-ADDED AGRI-PROCESSING THROUGH THE SUSTAINABLE CANADIAN AGRICULTURAL PARTNERSHIP

Manitoba is supporting agri-processors to make capital investments at their facilities and to diversify markets through the Sustainable Canadian Agricultural Partnership. These investments support value-added activities, allowing high-quality Manitoba products to continue to find their way to customers both in Canada and abroad. In 2025/26, Manitoba is reinforcing its assistance to the agri-processing sector by:

- Providing over \$6M for 19 projects through the Capital Infrastructure and Investments program. These projects represent a total investment of over \$60M and focus on equipment upgrades, facility expansions, and new technologies that will improve efficiency, production capacity and environmental performance.
- Introducing the Agri-processing Productivity Improvement program – This program, which has already approved over \$170K for 19 projects, will increase productivity through scale-up, automation, bottleneck reduction and waste reduction activities, with a particular focus on small to medium- sized agri-processors.

Put Innovation at the Core of Manitoba's Agriculture Investments for Strong Rural Economies and Communities.

Agriculture is the backbone of Manitoba's economy and critical to rural communities and the rural economy that underpin our province. Manitoba will continue to strengthen support for productivity growth and market diversification in agriculture, including by:

- Working closely with industry to maximize water allocation and to improve irrigation efficiency and yield in Southern Manitoba. Manitoba Agriculture is working across departments and with producers to develop a sustainable irrigation plan to support reliable supply for potato processing. Manitoba will continue to support community-minded farmers who feed Manitoba families and are the foundation of the provincial economy and rural economy.
- Recruiting new agri-food and agri-product investment from existing Manitoba companies, other Canadian companies and companies located globally including in Asia and Europe. This involves leading site visits and working with federal and municipal partners to pursue investment.
- Going forward, Manitoba will step up and enhance the coordination of these efforts, working closely with economic development partners.
- Identifying new opportunities in the bioeconomy. Manitoba produces many of the raw materials and processing byproducts that are being used in sustainable industries such as biofuels, biomaterials, life sciences and personal care. Manitoba Agriculture is commissioning a white paper to analyze the province's bioeconomy, showcase local companies, and outline opportunities within the sector. This white paper will communicate Manitoba's bioeconomy potential to stakeholders within the province, across Canada, and in global markets and help to inform policies and programs.
- Advancing collaboration between industry and academia through applied research initiatives, and leveraging opportunities with global and national research funding agencies and innovation accelerators.

PILLAR 3: FOCUS ON WORKFORCE DEVELOPMENT

Build a more productive and inclusive workforce

Manitoba's employers consistently indicate that finding workers with the right skills and abilities is a top concern. Workforce development refers to a suite of strategies that employers, government and community organizations use to ensure workers have the skills they need. It leads to a more productive workforce by providing upskilling or training to existing or new hires to help them adopt new technologies or processes. It also leads to a more inclusive workforce by supporting underrepresented groups in the labour market, including Indigenous peoples, visible minorities and racialized groups, newcomers and persons with disabilities.



Strengthen workforce development programming to drive productivity growth and raise wages

Manitoba will ensure government training investments result in tangible gains for Manitoba workers, driven by higher productivity. Redesigned and strengthened programming will streamline the delivery of workforce development services to industry and enhance support for small and medium-sized enterprises (SMEs). Program criteria, application processes and reporting requirements will be clear and concise. This will include specific worker-focused outcomes, including:

- a job for a laid-off, unemployed, or underemployed individual
- a better job for a current employee
- greater job security for a current employee

In addition to supporting higher wages and productivity, this programming will help to tariff-proof our economy by building a more resilient, change-ready workforce. Manitoba will continue to review and evaluate industry support programs to ensure provincial funding is supporting workforce development, including delivering good jobs for Manitobans and providing workers with transferable skills.

Support Continuous Learning and Upskilling in the Broader Community to Increase Workforce Participation

Supporting and incentivizing lifelong learning, as well as creating pathways for workers to access ongoing education, re-training, and skills development programs will improve Manitoba's workforce resilience, participation, productivity, and economic competitiveness in a context of increasing global uncertainty. It will also help meet the needs of critical sectors such as healthcare, childcare, trades, manufacturing, and mining, while helping to support financial stability for families, a key aim of Manitoba's poverty reduction strategy.

At present, a range of sectors in Manitoba are experiencing workforce challenges, including both attraction and retention. At the same time, certain demographics face barriers to labour market entry. A special focus on integrating these populations can be especially fruitful, as it both connects them to good family-supporting jobs and reduces their reliance on income support, breaking the cycle of poverty. Increasing skills also pays economic dividends. For example, a 2018 Canada West Foundation study reported that a one per cent increase in adult literacy alone could boost GDP per capita by three per cent and raise productivity by five per cent.

Learning and upskilling programs are best delivered through strong partnerships between government, community-based service providers and industry, including sector council programming. Organizations with deep knowledge of the populations they serve play a critical role in raising the participation rates of diverse groups.

To support continuous learning and upskilling, in partnership with community organizations and industry, Manitoba will:

- Modernize adult literacy and education programs through improved coordination, supports and strong partnerships. This will help bring those further from the labour market into the workforce, particularly those from Indigenous, racialized and newcomer communities.
- Strengthen partnerships with community organizations that deliver specialized workforce development programs to underrepresented groups, including Indigenous people, to help them enter high-skill, high-wage industries.
- Continue to invest in social supports that have direct connections to labour force participation (e.g. access to transit, childcare).
- Leverage insights from the Community Living disABILITY Services (CLDS) Quality of Life Employment Pilot Project to ensure young adults with an intellectual disability are supported with employment services as early as possible. As the pilot project concludes, Manitoba will use evaluation findings to inform future service design and policy direction, with the goal of removing age-related barriers, promoting early engagement, and improving long-term employment outcomes. These findings will also guide broader efforts to ensure all CLDS participants who identify employment as a goal receive timely, individualized support.
- Reduce barriers to work for all Manitobans receiving income assistance, including people living with disabilities.
- Implement recommendations from the 5-year review of the Accessible Employment Standard to make work more accessible for Manitobans living with disabilities.

- Strengthen affordable childcare for all children under 12 to complement the school system and help children become successful, while giving the parents the option of participating in the workforce.
- Following on the recommendations of the Premier's Business and Jobs Council's Subcommittee on Manitoba AI Technology and Jobs, encourage employers to incorporate training on AI and new technology into employees' existing work and professional development programs.
- Strengthen assistance to newcomers with access to referral services and supports to help them settle in Manitoba, including settlement services, employment services, language training and education/credential recognition.
- Continue to improve incentives to support workers in expanding their skills and earning industry-recognized, transferable certifications.
- Reinforce English/French-at-work programs to fill service gaps where they exist and deliver job-specific English/French language training for workers in partnership with employers who are committed to hiring or advancing workers.
- Working within Business, Mining, Trade, and Job Creation's established workforce development programs, support initiatives to retrain and match workers who might otherwise exit the labour force with suitable services and employment opportunities.
- Explore specialized programs for individuals facing persistent barriers to employment.

Support Kindergarten to Grade 12 students with stronger career development education to prepare them for the workforce after graduation.

Manitoba is working together with school divisions, schools and educators to equip learners with a comprehensive set of skills to help each student play an active role in shaping their future. As reflected in the recommendations provided by the Premier's Business and Jobs Council's Subcommittee on Trade with the United States, initiatives geared towards developing informed, resilient and productive young people are key to preparing Manitoba students for their path beyond graduation. Supports for these actions include:

- Expanding teacher advisor programming to provide more high school students with individual guidance and mentorship.
- Ensuring skills being taught from an early age foster inquiry in areas with high productivity potential, in alignment with the focus on supporting babies and children in the province's poverty reduction strategy.
- Emphasizing the safe use of technology and the perils of misinformation.
- Creating practicum and volunteer opportunities for students to get exposure to different sectors and types of work environments.
- Focussing resources on groups facing barriers on the pathway to meaningful careers.
- Continuing investing in the Universal School Food Program, made permanent by Nello's Law, to ensure students can focus on learning while in school.

Strike an Industry-Higher Education Roundtable

Manitoba has high quality public colleges and universities, and enhancing collaboration with industry through a formal table will support positive employment outcomes for graduates and promote critical sectors of our economy.

The table will provide a forum to explore opportunities to work together on shared priorities such as:

- Understanding the rapidly changing nature of work in key sectors to ensure alignment between education and the workplace
- Building a shared understanding of the needs of Manitoba's labour market today and tomorrow
- Developing new and enhanced academic and technical programming that will help Manitoba's economy thrive
- Promoting Manitoba as a top-notch place to study, live and work, encouraging young people to stay in Manitoba to receive an excellent education as well as welcoming students from across Canada and abroad
- Creating clear information on pathways from education to work to help students navigate and build great careers here at home, while also strengthening Manitoba's workforce
- Growing opportunities for students to develop connections to employers through work-integrated learning
- Tackling complex industry challenges, enabling students to connect to employers at the same time as enabling innovation and productivity growth.
- Ensuring smooth transitions of students from post-secondary education to the workforce by ensuring they have the skills and competencies to thrive

Focusing on working together as a system, the table will build on the excellent partnerships already in place and recognize the unique context of each post-secondary institution as well as the principles of institutional autonomy and academic freedom.

Enable more apprentices to complete their apprenticeships and become qualified tradespeople.

High-skilled, highly productive tradespeople are a pillar of our economy. In the years ahead, there will be an unprecedented demand for new skilled tradespeople in our province. To meet this demand, we will focus on ensuring more apprentices complete their apprenticeships and go on to a prosperous career in the trades. New technologies, the changing demands of industry, and the challenges posed by shifting trade relationships are driving the need for a modern, flexible, and innovative apprenticeships system that enables every apprentice to complete their journey.

- Implement a new apprenticeship system that enables more apprentices to complete their apprenticeships and become qualified tradespeople

Work with the federal government to ensure sustainable Labour Market Funding

Labour Market Transfer Agreement funding provides important support for local employment and skills development programs. However, in real terms, this federal funding is the same as it was three decades ago. An increase in labour market transfer funding to keep pace with increased demand for services and costs associated with delivering programming is needed so workers, job seekers and Manitobans who need support have the resources they need to train for and find work. Manitoba will continue to advocate to the federal government for increased Labour Market Transfer Agreement base funding to grow our skilled workforce.



Enhance the Manitoba Provincial Nominee Program (MPNP) to fully recognize skills and experience in the immigration process and make it easier to start businesses

The MPNP allows government to nominate immigrants who are committed to economically establish and remain in Manitoba long-term. It can help drive productivity by enabling the province to select international business investors and skilled workers who fill critical labour shortages, promote innovation and contribute to the technical know-how of Manitoba's workforce, across sectors and in all regions of the province. Manitoba will leverage the MPNP to attract foreign nationals who will create businesses, address succession planning concerns in agriculture, or otherwise grow the economy. Working with the federal government, Manitoba will explore broadening the streams of the MPNP to recognize the work experience of self-employed entrepreneurs, professionals, business owners and tradespeople who are not in traditional employer-employee relationships, in cases where the applicant is able to demonstrate that their self-employment activities were highly productive.

Continue to Strengthen Workplace Health and Safety

A safe worker is a productive worker. Workers perform their best when their well-being is secured. In view of this, we have amended the Workplace Health and Safety Act to ensure psychological safety at work, advance diversity and enhance safe workplace policies, particularly for those who work on the frontlines. Through this change in legislation, in partnership with labour and employers, we will make workplaces healthier, safer and more productive.

We all have a role in fostering healthy workplaces. To this end, the Minister's Advisory Council on Workplace Safety and Health Act was restored to ensure stakeholders are engaged on strategies to improve workplace safety and health. In addition, eight safety and health officer positions were added to the Workplace Safety and Health Branch, enhancing our enforcement resources and helping to protect the rights of Manitobans.

PILLAR 4: DEVELOP INTELLECTUAL PROPERTY (IP)

Create and Commercialize Intellectual Property in Manitoba

Tangible capital assets are only one part of the productivity equation. Intangible assets, like IP, are also key. Encouraging businesses to own and increase their IP will unlock growth associated with patented technology. Manitoba already leads with North Forge, Canada's only startup incubator, accelerator and fabrication lab, and is poised to continue making great strides in the area of innovation.

Led by Manitoba's Innovation and Productivity (IP) taskforce, deliver a strategic plan to drive innovation and intellectual property commercialization.

The stock of intellectual property is an increasingly important ingredient in economic growth. With this in mind, Manitoba aims to advance the ownership of IP and data and play a central role in Canada's innovation and research ecosystem. Chaired by Jim Balsillie, the IP taskforce, supported by the new department of Manitoba Innovation and New Technology (MINT), will develop new data strategies, intellectual property commercialization and sovereign cloud initiatives to position our province as a leader in 21st-century digital governance and economic competitiveness.

- Deliver a strategic plan to drive innovation and intellectual property commercialization.



Provide tailored support to businesses in creating, protecting and commercializing IP.

A range of options will be explored to encourage the development, ownership and commercialization of IP within Manitoba. This will include working with post-secondary institutions to drive innovation and IP commercialization as well as improving support to businesses in identifying, applying or commercializing their IP such as through Research Manitoba's IP Collective.

Strategically attract the most productive foreign proponents who demonstrate a commitment to creating high-wage jobs and growing IP in Manitoba.

Attracting foreign direct investment (FDI) can drive productivity growth by introducing state-of-the-art technologies to Manitoba's economy and enabling knowledge spillovers. Targeted investment attraction efforts help to secure these major investments and introduce innovations to the provincial economy. Manitoba will continue to aggressively pursue FDI, with an eye to securing not only jobs, economic growth and IP, but also broader benefits such as opportunities for local professionals to train on or observe new technologies, or other community partnerships and investments.



PILLAR 5: GROW PRODUCTIVITY IN THE PUBLIC SECTOR

Making government operations become more efficient to boost productivity throughout the economy.

Governments provide a range of essential services and ensure compliance with essential regulations. However, it's important to recognize that the time businesses spend interacting with government is time taken away from productive activities. A more productive public sector means more efficient processes that are easier to navigate and yields higher quality public services.

Business interacts with government for many reasons, ranging from procurement to permit applications. But these interactions, while respecting government's regulatory role and the public interest, should not be daunting, particularly for small businesses. Rather, they should be as efficient and easy-to-follow as possible.

Put the client experience at the core of all business-facing services

Businesses should be able to maximize the time they spend on productive activities, rather than navigating government programs, policies and procedures. In collaborating with economic development partners and reviewing economic programs and services, we will give careful consideration to the experience of businesses. Core principles will include:

- **Complete support:** We will work towards a vision of complete support for businesses throughout the entire lifecycle of a project and beyond. From the time initial contact is made with government to the completion of a project, and onwards, we will strive to provide clear, continuous guidance and assistance with respect to pertinent programs, services, requirements and regulatory processes.

- **One point of contact:** Businesses in contact with government around a specific project or as part of regular operations should have access to a single point of contact who can coordinate responses to their queries, facilitate access to services and advise on procedures and processes, across departments.
- **Accessible services:** Business-facing services delivered by government will be designed with accessibility in mind, in accordance with The Accessibility for Manitobans Act. This includes ensuring that digital platforms, physical spaces and communications materials are accessible to all Manitobans.

This approach will also allow government to better monitor the services it provides to businesses in a coordinated fashion, identifying and correcting pinch-points.



Improve broadband and cellphone networks across rural and northern Manitoba.

Connectivity is an essential tool for individuals to access education and training programs, and for businesses and entrepreneurs to access the resources and services required for economic growth. In Indigenous, rural and northern communities, broadband connectivity is hindered by slower transmission speeds, less availability and higher costs when compared to urban centers. Improving broadband infrastructure across rural Manitoba will include:

- utilizing available federal digital infrastructure funding to improve networks across Manitoba
- facilitating use of built public digital infrastructure to increase connectivity for Indigenous and rural communities

Grow productivity in the core public service.

Boosting the productivity levels within the public service will help to strengthen operational efficiency and effectiveness, free up limited resources that can be allocated towards further improving public services or used to address emerging priority areas or challenges. Supporting public servants to focus on high-value activities with minimal red tape will involve:

- accelerating deployment of human-supervised AI in the public sector to support public employees
- working to reduce processing and lead times for government inspections, approvals and applications, including by working with municipal governments
- improving the matching of skillsets within the public service and boosting the availability of skillsets that remain in short supply
- exploring the possibility of digitally mapping processes and regulations to show gaps and find efficiencies
- reducing accessibility barriers in the workplace and providing reasonable accommodations to help increase the productivity of the public service

Continuously engage industry to inform policy development and identify new economic opportunities

Manitoba's Economic Development Strategy is a dynamic approach rather than a static document. It must be continuously reevaluated, based on ongoing consultation with business. Hearing from business on issues that are critical to their daily operations, including gaps in supply chains, regulatory obstacles, infrastructure deficiencies, and workforce availability is key to developing effective policies. This information also allows government to plan for future economic opportunities.

Engagement with business will be achieved by developing a robust business research program, formal and informal consultations, and better tracking and analysis of inputs received. This will involve collaboration with partners undertaking similar research in this space, as well as enhanced sharing

of insights and better coordination. The aim of this work will be to both keep a pulse on the needs of the business community and to continuously identify economic opportunities for Manitoba. Building on the successes of the Premier's Business and Jobs Council, this program will provide a structured pathway for companies to engage with government and ensure the concerns of industry are heard in a prompt and consistent manner.

- Working with the Premier's Business and Jobs Council, stakeholder groups and economic development organizations, implement a robust business research program that regularly reports to government on businesses' needs and economic opportunities for Manitoba.



Centralize and Disseminate Scientific Knowledge by strengthening Research Manitoba

Scientific research and knowledge foster the innovation needed for long-term growth. Whether it is homegrown research or the adoption of know-how from outside, centralizing and disseminating scientific knowledge is critical to sustaining economic development. That is why Manitoba is reinvigorating its provincial research agency, Research Manitoba, by increasing its operational funding by \$5M (36 per cent) in 25/26. This will encourage high-calibre researchers to locate and remain in the province and contribute to the province's innovation ecosystem. The funding also encompasses the creation of new research chairs, as well as a new intellectual property collective to facilitate research and development relationships between academia and the private sector.

Use public procurement as a tool to encourage productivity.

Manitoba is projected to spend \$3.7B on the procurement of capital assets in 2025/26 (Budget 2025). This makes the Manitoba government one of the most important single purchasers in the economy. Leveraging the government's purchasing power to encourage productivity, innovation and competitive practices will spur productivity growth and lead to improved outcomes for the public funds being invested. Similarly, helping industry, and in particular small business, to better engage with public procurement processes will support local innovation and growth.

We are prioritizing Manitoba jobs for Manitobans, while also driving productivity growth. For example, Manitoba is implementing the Manitoba Jobs Agreements, a policy that will help ensure major public infrastructure and construction projects are completed safely and without labour stoppages, on time and on budget, and to the benefit of local communities with a clear focus on workforce development and training. The Manitoba Jobs Agreements set a minimum wage for skilled labour and prioritize good union jobs. By encouraging bidders to compete based on the efficient use of inputs and innovation, rather than labor costs, they also support productivity goals.

Manitoba will strengthen the support it provides to business, including small businesses, throughout the procurement process. A greater emphasis on industry engagement initiatives and supports, such

as reverse trade shows, workshops and training in the use of procurement tools such as the Merx tendering platform will increase the participation of smaller and diverse businesses in public procurement. Providing the information businesses need to compete for contracts will increase the participation of local businesses, including Indigenous-owned companies and those located in remote communities, thereby increasing competition and generating value for taxpayers.

Finally, specifications in competitive processes that seek out innovative solutions or allow for the testing of an innovative process, potentially delivered by a smaller or newer business, alongside a more traditional vendor will help spur innovation. Tools such as Requests-for-Information, Expressions-of-Interest and Competitive Dialogue will be used to enable proponents to provide direct input into the tender requirements and sourcing strategy. This will encourage more creativity in the procurement process and improve bidder participation. In fact, as recommended by the Premier's Business and Jobs Council's Subcommittee on a Clean Energy Economy, the creation of Expression-of-Interest programming can support green economic policies and promote the development of high potential, green industries.

- Deploy Manitoba Jobs Agreements to drive innovation, workforce development and productivity, while helping to deliver projects on-time and on budget.

Leverage Manitoba Hydro to promote productivity.

Manitoba Hydro is a partner in economic development. As part of the *Affordable Energy Plan*, Manitoba Hydro's modernized regulations ensure contributions to the provincial economy are considered when prioritizing requests for large grid connections. Going forward, Manitoba will participate in an examination of all aspects of the connection process with the aim of streamlining and accelerating connections for projects that clearly align to economic development goals. Lastly, as a Crown corporation, Manitoba Hydro will use Manitoba Jobs Agreements for major tenders.

As recommended by the Premier's Business and Jobs Council's Subcommittee on a Clean Energy Economy, Manitoba will align energy policy and net-zero strategies to provide industrial consumers with a clear and stable environment to plan for business expansion. The Manitoba Government will support Manitoba Hydro to endeavor to deploy AI solutions to improve grid-reliability and support planning.



CHARTING PRODUCTIVITY POLICIES ACROSS INDUSTRIES

AGRICULTURE, FORESTRY, FISHING AND HUNTING (NAICS 31-33)		
Overview <ul style="list-style-type: none">Agriculture in Manitoba is a \$3.42B industry, with crop production representing \$2.58B, and animal raising representing \$589.4M in 2023.Crop production includes oilseeds and grains; vegetables, fruits and tree nuts; greenhouse, nursery and floriculture production.Animal raising includes hogs and cattle; poultry; goats and sheep; aquaculture.	Industry Profile - 2023	
	Hourly Productivity	Engineering Construction
	\$85.30	\$18M
	Jobs	Machinery & Equipment
	20,735	\$368M
	GDP Contribution	Intellectual Property
	\$3.42B	\$14M
Key Targeted Actions <ul style="list-style-type: none">Promote Manitoba businesses connect them to global value chains and double the Export Support ProgramWork with municipalities across Manitoba to improve waste-water management and to ensure water/wastewater services are available to support economic developmentPut innovation at the core of Manitoba’s agriculture investments for strong rural economies and communitiesLed by Manitoba’s Innovation and Productivity (IP) taskforce, deliver a strategic plan to drive innovation and intellectual property commercializationImprove broadband and cellphone networks across rural Manitoba		

MANUFACTURING (NAICS 31-33)

Overview

- Manufacturing is Manitoba's largest industrial sector, representing more than 60 per cent of exports.
- Largest sectors: food and beverage, chemicals, machinery, transportation equipment.
- Manufacturing industry includes food, beverage and tobacco; textiles, apparel and leather; wood, paper and printing; petroleum, chemicals, plastics and rubber; non-metallic, primary and fabricated metals; machinery (includes aerospace, pharma, agricultural equipment, and others); computer, electronic and electrical production; transportation equipment; furniture products.

Industry Profile - 2023

Hourly Productivity \$51.40	Engineering Construction \$2M
Jobs 68,200	Machinery & Equipment \$425M
GDP Contribution \$6.79B	Intellectual Property \$239M

Key Targeted Actions

- Enhance Manitoba's tax credits and tax exemptions for investment to make them more competitive, business-friendly and productivity-oriented
- Promote Manitoba businesses connect them to global value chains and double the Export Support Program
- Create an inventory or certified investment-ready sites
- Led by Manitoba's Innovation and Productivity (IP) taskforce, deliver a strategic plan to drive innovation and intellectual property commercialization
- Provide tailored support to businesses in creating, protecting and commercializing IP
- Continuously engage industry to inform policy development and identify new economic opportunities

MINING, QUARRYING, AND OIL AND GAS EXTRACTION (NAICS 21)

Overview

- Manitoba has 30 of the 34 critical minerals that Canada has deemed critical in the transition to a clean, green economy.
- Nickel, copper, zinc, gold, and oil are the main minerals currently being extracted in the province.
- Industry includes activities such as quarrying, well operations, milling, and other preparation processes.

Industry Profile - 2023

Hourly Productivity \$133.60	Engineering Construction \$457M
Jobs 4,215	Machinery & Equipment \$59M
GDP Contribution \$1.34B	Intellectual Property \$200M

Key Targeted Actions

- Promote Manitoba businesses connect them to global value chains and double the Export Support Program
- Enable more apprentices to complete their apprenticeships and become qualified tradespeople
- Improve broadband and cellphone networks across rural Manitoba

FINANCE & INSURANCE (NAICS 52)

Overview

- Finance and Insurance contributed over \$4.4B to the provincial GDP in 2023.
- Over 355 companies in the provincial industry operate with at least 10 employees.
- Industry includes credit intermediation; securities; commodity contracts; insurance; funds and other financial vehicles; related customer service and data centres; and billing payment services.

Industry Profile - 2023

Hourly Productivity \$106.60	Engineering Construction \$0M
Jobs 25,105	Machinery & Equipment \$23M
GDP Contribution \$4.45B	Intellectual Property \$220M

Key Targeted Actions

- Continue the modernization of Manitoba's Regulatory Support for Financial Services
- Led by Manitoba's Innovation and Productivity (IP) taskforce, deliver a strategic plan to drive innovation and intellectual property commercialization
- Provide tailored support to businesses in creating, protecting and commercializing IP

TRANSPORT & WAREHOUSING (NAICS 48-49)

Overview

- Manitoba is a key transport hub across Canada and south into the U.S. Midwest and Mexico.
- The province is home to one of the world's largest railyards; Canada's only rail-connected deepwater Arctic port; an international cargo airport; four of Canada's largest trucking companies; and CentrePort Canada - one of North America's largest trimodal inland ports.
- Industry also includes warehousing and storage of goods.

Industry Profile - 2023

Hourly Productivity \$48.40	Engineering Construction \$225M
Jobs 45,520	Machinery & Equipment \$600M
GDP Contribution \$4.46B	Intellectual Property \$83M

Key Targeted Actions

- Promote Manitoba businesses connect them to global value chains and double the Export Support Program
- Led by Manitoba's Innovation and Productivity (IP) taskforce, deliver a strategic plan to drive innovation and intellectual property commercialization

LIFE SCIENCES (NAICS 3254)

Overview

- The province has an extensive ecosystem of research and commercialization in health, agriculture biotech, and clean tech.
- Manitoba is the second largest producer of pharmaceutical products in Canada and exported over \$2B of medicaments in 2023.
- Manitoba-based scientists created both the world's first vaccine against the Ebola virus, and the world's first canola seeds.

Industry Profile - 2023

Hourly Productivity \$118.20	Engineering Construction N/A
Jobs 1,785	Machinery & Equipment N/A
GDP Contribution \$403.5M	Intellectual Property N/A

Key Targeted Actions

- Promote Manitoba businesses connect them to global value chains and double the Export Support Program
- Led by Manitoba's Innovation and Productivity (IP) taskforce, deliver a strategic plan to drive innovation and intellectual property commercialization
- Provide tailored support to businesses in creating, protecting and commercializing IP
- Enhance Manitoba's tax credits and tax exemptions for investment to make them more competitive, business-friendly and productivity-oriented

CREATIVE AND CULTURAL INDUSTRIES (NAICS 512-516)

Overview

- Manitoba's publishing sector contributed \$192.9M to the provincial GDP in 2023. That was followed by broadcasting (\$96.4M), and motion picture and sound (\$60.3M).
- Industry includes motion picture and sound recording; publishing; broadcasting; and content providers.

Industry Profile - 2023

Hourly Productivity	Engineering Construction
\$17.90–\$55.60	N/A
Jobs	Machinery & Equipment
4,655	N/A
GDP Contribution	Intellectual Property
\$349.6M	N/A

Key Targeted Actions

- Provide tailored support to businesses in creating, protecting and commercializing IP
- Improve broadband and cellphone networks across rural Manitoba
- Continuously engage industry to inform policy development and identify new economic opportunities

INFORMATION INDUSTRY (NAICS 517-519)

Overview

- The provincial information industry contributed over \$3.28B to GDP in 2023, with the telecommunications sector alone contributing \$1.57B.
- The industry is comprised of telecommunications; computing infrastructure providers; data processing and web hosting; and other specialty information services.

Industry Profile - 2023

Hourly Productivity	Engineering Construction
\$30.60–\$177.90	N/A
Jobs	Machinery & Equipment
5,845	N/A
GDP Contribution	Intellectual Property
\$3.28B	N/A

Key Targeted Actions

- Enhance Manitoba's tax credits and tax exemptions for investment to make them more competitive, business-friendly and productivity-oriented
- Led by Manitoba's Innovation and Productivity (IP) taskforce, deliver a strategic plan to drive innovation and intellectual property commercialization
- Provide tailored support to businesses in creating, protecting and commercializing IP
- Improve broadband and cellphone networks across rural Manitoba

CONSTRUCTION (NAICS 23)

Overview

- The industry's contribution to provincial GDP was \$4.14B in 2023.
- Manitoba's industry includes constructing, repairing and renovating buildings; heavy and civil engineering construction; and subdividing trade contractors.

Industry Profile - 2023

Hourly Productivity	Engineering Construction
\$41.90	\$0M
Jobs	Machinery & Equipment
49,360	\$227M
GDP Contribution	Intellectual Property
\$4.14B	\$14M

Key Targeted Actions

- Enhance Manitoba's tax credits and tax exemptions for investment to make them more competitive, business-friendly and productivity-oriented
- Enable more apprentices to complete their apprenticeships and become qualified tradespeople
- Continue to strengthen workplace health and safety

RETAIL (NAICS 44-45)

Overview

- Over 1,115 retail companies in Manitoba operate with at least 10 employees.
- The industry includes retail merchandising and rendering services incidental to the sale of merchandise.

Industry Profile - 2023

Hourly Productivity	Engineering Construction
\$36.10	\$2M
Jobs	Machinery & Equipment
79,785	\$140M
GDP Contribution	Intellectual Property
\$4.17B	\$73M

Key Targeted Actions

- Support continuous learning and upskilling in the broader community to increase participation
- Strengthen workforce development programming to drive productivity growth and raise wages
- Support Kindergarten to Grade 12 students with stronger career development education to prepare them for the workforce after graduation.

TOURISM / ACCOMMODATION (NAICS 72)		
Overview <ul style="list-style-type: none"> The industry contributed over \$1.38B to the provincial GDP in 2023. The industry is comprised of providing short-term lodging for travelers, restaurants, recreational facilities. 	Industry Profile - 2023	
	Hourly Productivity	Engineering Construction
	\$20.90	\$1M
	Jobs	Machinery & Equipment
	47,460	\$17M
	GDP Contribution	Intellectual Property
	\$1.38B	\$10M
Key Targeted Actions <ul style="list-style-type: none"> The industry contributed over \$1.38B to the provincial GDP in 2023. The industry is comprised of providing short-term lodging for travelers, restaurants, recreational facilities. 		

HEALTHCARE AND SOCIAL ASSISTANCE (NAICS 62)		
Overview <ul style="list-style-type: none"> Healthcare in Manitoba contributed over \$6.18B to provincial GDP, while social assistance contributed \$727.6M in 2023. The industry includes health care by diagnosis and treatment; residential care for medical and social reasons; and social assistance, such as counselling; welfare; child protection; community housing and food services; vocational rehabilitation; and childcare. 	Industry Profile - 2023	
	Hourly Productivity	Engineering Construction
	\$48.70	\$0M
	Jobs	Machinery & Equipment
	24,135	\$21M
	GDP Contribution	Intellectual Property
	\$6.91B	\$9M
Key Targeted Actions <ul style="list-style-type: none"> Support K-12 students with stronger career development education to prepare them for the workforce after graduation Put the client experience at the core of all business-facing services Improve broadband and cellphone networks across rural Manitoba 		

Table 1: Connecting sectors to actions.

Source: Statistics Canada (CANSIM:36-10-0480-01; 36-10-0096-01; 36-10-0402-01), Chained 2017 dollars

EMERGING SECTORS

Critical minerals supply chain	<ul style="list-style-type: none"> Manitoba has 30 of the 34 minerals critical to the EV battery supply chain It is home to six that are priority minerals (cobalt, copper, graphite, lithium, nickel, and rare earth elements) Significant high-potential deposits still under-explored There is potential to produce intermediate products
Other advanced manufacturing (e.g., semiconductor fabrication)	<ul style="list-style-type: none"> Large U.S. investments have been made to repatriate semiconductor production from Taiwan With base materials, including silicon, gallium and germanium, Manitoba has an opportunity to participate in the semiconductor supply chain
Renewable Fuels (sustainable aviation fuel, biodiesel, ethanol)	<ul style="list-style-type: none"> Production of biodiesel and ethanol New opportunities for sustainable aviation fuel, produced from canola or soybeans
Agriculture Technologies Digital and precision agriculture technologies and emerging agri-food industries	<ul style="list-style-type: none"> Increased global demand for meat alternatives produced from peas or soybeans Growing market for precision technology developments that drive efficiency and sustainability across the agriculture sector. Development of smart farms, farm automation, and farm machinery
AI (Power AI server centres, applications in Agriculture)	<ul style="list-style-type: none"> Digital services; data centres for processing and storage of big data Productivity enhancements in traditional industries such as: manufacturing, finance, insurance, agriculture.

Table 2: In a rapidly changing world, it's important to continuously analyse emerging sectors and trends and make sure Manitoba is well-positioned to take advantage of new opportunities.

