

MANITOBA ANALYTICS

Agri-food Export Performance in 2025



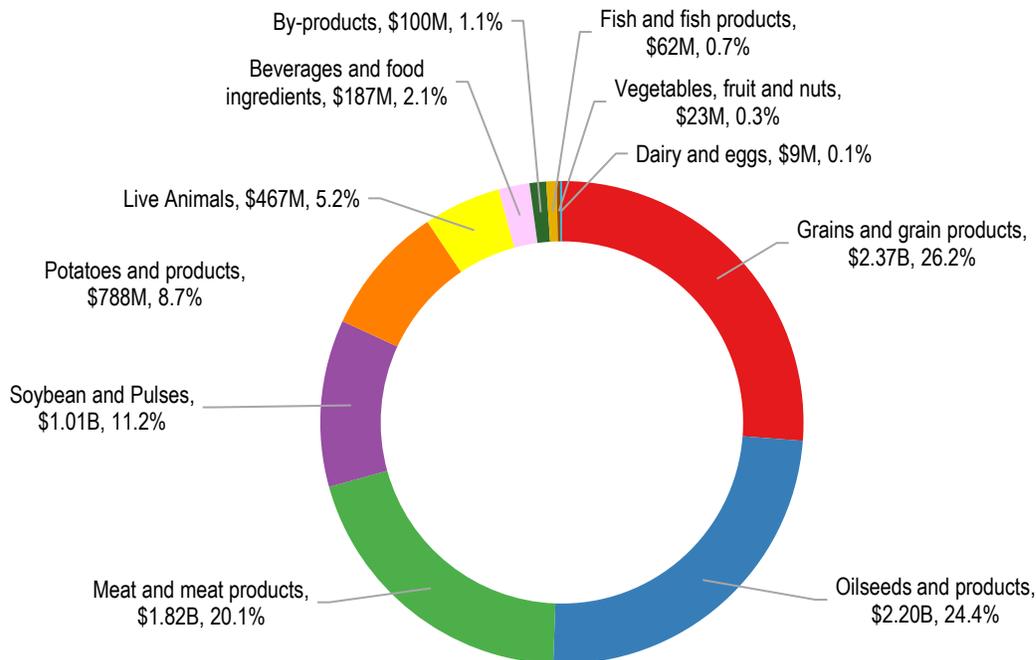
In 2025, the Manitoba agri-food sector's export value declined to \$9.04 billion, a 2.7 per cent decrease compared to 2024. During the same period, Manitoba's total international exports fell by 4.4 per cent, from \$20.6 billion to \$19.7 billion. Agri-food exports made up 45.9 per cent of Manitoba's total international exports in 2025, a one per cent increase from the previous year.

Total Agri-food Export Value	Value Change from Previous Year	Agri-food Exports as Share in Total Export	MB's Contribution to Canada's Agri-food Export
\$9.04B	-2.70%	45.88%	8.93%

Top Agri-food Export Commodities and Products

The following graph shows the top agri-food export categories in 2025, in descending order: grains and grain products (26.2 per cent), oilseed and products (24.4 per cent), meat and meat products (20.1 per cent), soybean and pulses (11.2 per cent) and potatoes and products (8.7 per cent). These top five categories made up 90.6 per cent of Manitoba's total agri-food exports in 2025, a decrease of 1.1 per cent compared to 2024. Oilseeds and products exports were mainly canola (89.6 per cent) and hemp (3.1 per cent). Wheat and oats constituted 77.6 per cent and 14.8 per cent of the grains and product exports, respectively. Pork and products accounted for 99.6 per cent of meat and meat products, while soybeans made up 81.9 per cent of the soybean and pulses export value. Prepared potatoes accounted for 94.4 per cent of potatoes and product exports.

Agri-food Exports in 2025



Export Performance (2025 versus 2024)

In 2025, beverage and food ingredients recorded the largest percentage increase in exports among all categories, rising 17.8 per cent compared to 2024, or \$28.3 million. This growth was driven mainly by a sharp increase in protein concentrate exports (157 per cent) and a significant rise in the volume of whisky exports, which increased \$1.1 million in value relative to 2024.

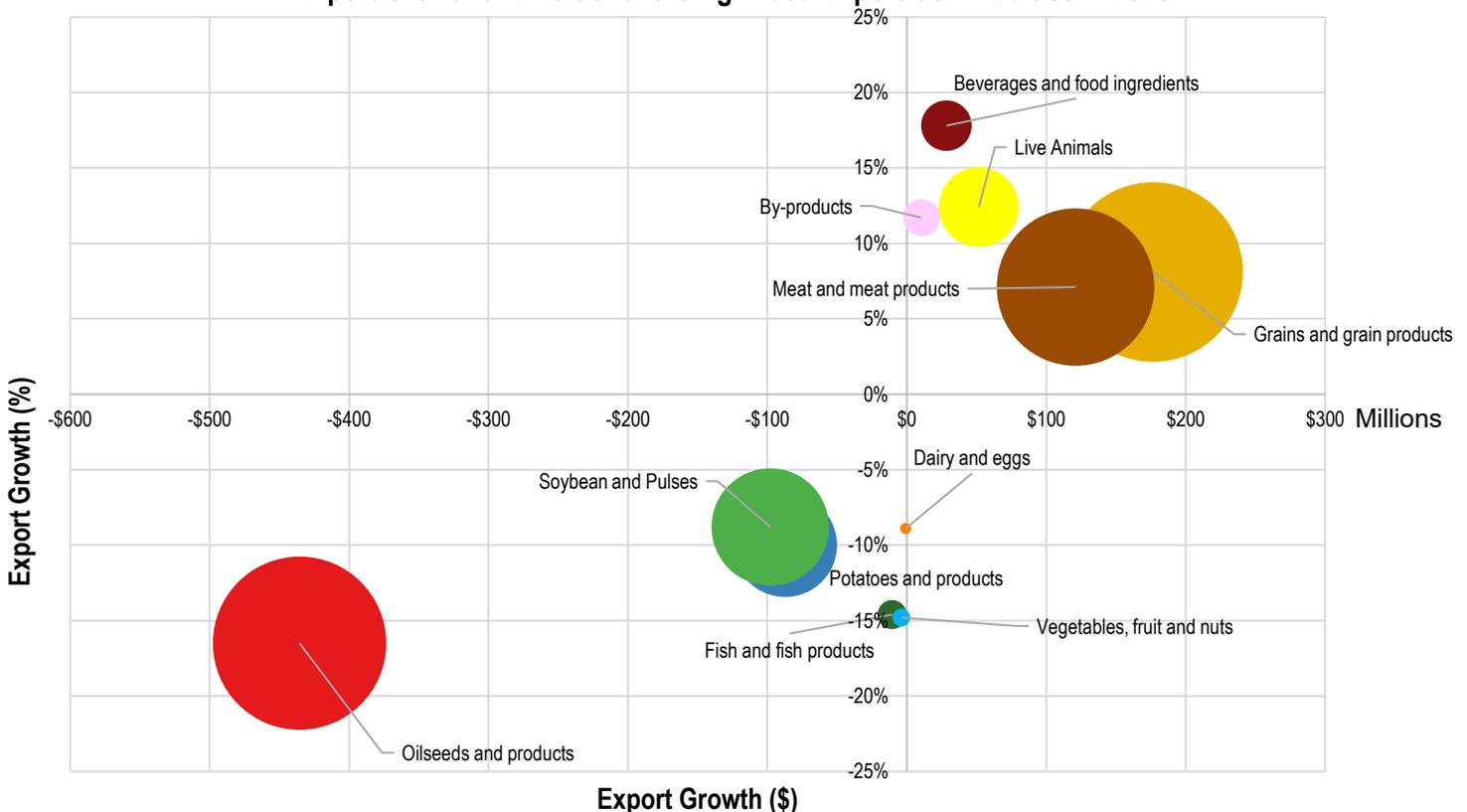
Grains and grain products saw the largest increase in export value overall, growing by \$177 million, primarily due to a 15.7 per cent increase in wheat export volumes from 2024 to 2025.

Agri-food Export Performance			
Commodity	Export growth (%)	Export growth (\$)	Export Value
Grains and grain products	8.10%	\$176,526,802	\$2,368,227,402
Oilseeds and products	-16.50%	-\$435,517,855	\$2,201,157,395
Meat and meat products	7.10%	\$120,956,642	\$1,818,320,513
Soybean and Pulses	-8.80%	-\$97,972,267	\$1,010,658,155
Potatoes and products	-10.00%	-\$87,267,504	\$787,934,476
Live Animals	12.40%	\$51,580,519	\$467,321,149
Beverages and food ingredients	17.80%	\$28,345,993	\$187,448,338
By-products	11.70%	\$10,485,560	\$100,139,943
Fish and fish products	-14.60%	-\$10,584,825	\$61,839,004
Vegetables, fruit and nuts	-14.80%	-\$4,008,960	\$23,095,776
Dairy and eggs	-8.90%	-\$867,731	\$8,923,374

Oilseeds and oilseed products recorded the largest decline in 2025, both in value (down \$436 million) and in percentage (16.5 per cent) compared to the previous year. This decline was driven by lower canola oil prices (down 4.5 per cent) and export volumes (down 8.3 per cent), reduced canola meal prices (down 38.6 per cent) and export volumes (down 5.8 per cent), as well as a decrease in canola seed export volumes (down 15.4 per cent).

Meat and meat products recorded the second-largest increase in value (\$121 million) and the fifth-largest increase in percentage (7.1 per cent) between 2024 and 2025. This growth was primarily driven by a 14 per cent increase in pork products prices and a 6.2 per cent increase in the volume of pork exports in 2025. The following graph shows the export growth in percentage (Y-axis) and in value (X-axis) as well as the value of Manitoba agri-food exports in Manitoba (size of bubble).

Export Growth and Value for the Agri-food Export Commodities in 2025



Top Export Destinations

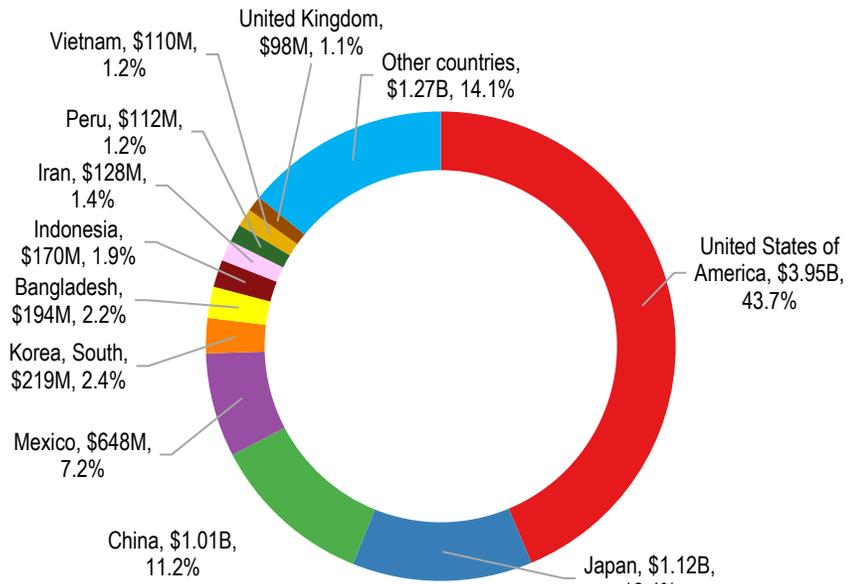
The United States (U.S.), Japan, China, Mexico and South Korea were the top five export destinations for Manitoba's agri-food products in 2025. Together, these countries accounted for 76.9 per cent of Manitoba's total agri-food exports, 2.8 per cent lower than the previous year. The U.S. remained Manitoba's largest agri-food export destination, accounting for 43.7 per cent of total exports, or \$3.95 billion, in 2025. This represented an 8.1 per cent decline compared to 2024, largely due to reduced exports of canola oil and canola meal. The top agri-food products exported to the U.S. were canola oil (21.1 per cent), processed frozen potatoes (17.4 per cent), and pork (six per cent).

Japan was the second-largest destination for Manitoba's agri-food export in 2025, with exports totaling \$1.12 billion. Key products exported to Japan included pork (66.4 per cent), canola seeds (17.4 per cent), and wheat (12.4 per cent). China ranked third, with agri-food exports reaching \$1.01 billion in 2025. The top products exported to China were soybeans (36.2 per cent), canola seeds (22.7 per cent), and wheat (22.6 per cent).

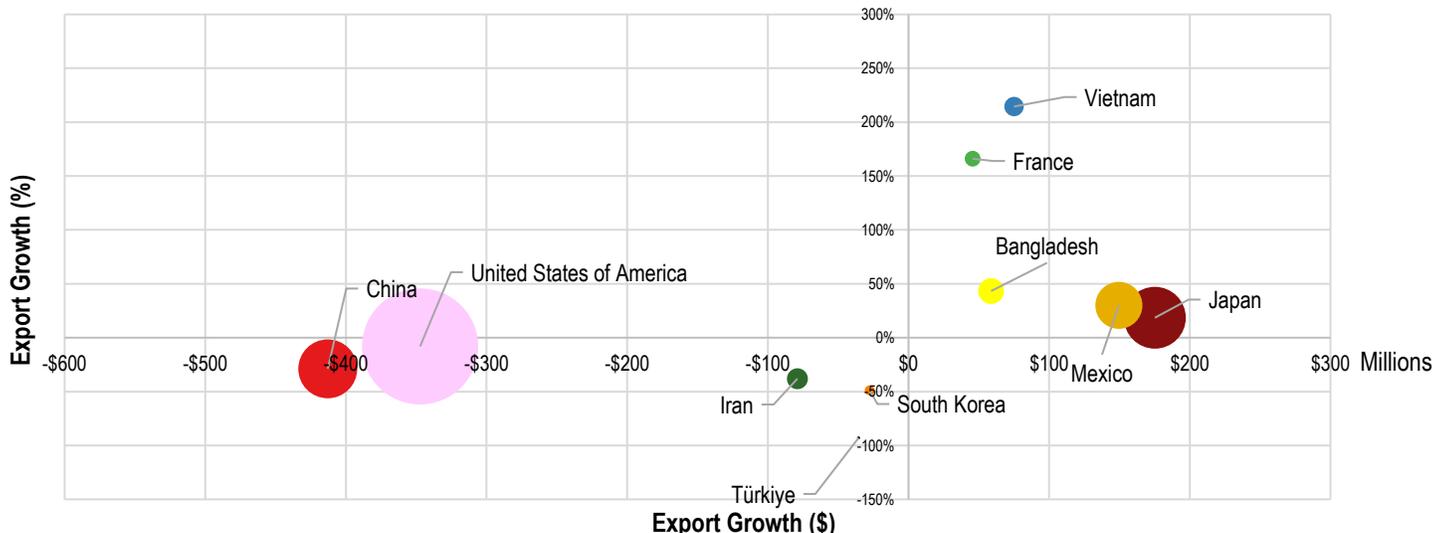
Despite a significant increase in exports, Mexico remained the fourth-largest destination for Manitoba's agri-food exports in 2025. Pork (35.2 per cent), canola oil (21.5 per cent), and canola seeds (17.1 per cent) were the leading agri-food products exported to Mexico. South Korea was the fifth, with agri-food exports totaling \$219 million, representing six per cent decrease in 2025. Pork cuts (87.3 per cent) and wheat (6.1 per cent) accounted for most Manitoba agri-food products exported to South Korea.

While exports to the U.S., China, and Mexico were relatively diversified, exports to Japan and South Korea were highly concentrated on pork, wheat, and canola seeds. The following graph shows Manitoba's agri-food export destinations that experienced the largest increases and decreases in export value. The value of agri-food exports in 2025 is indicated by the size of the bubble.

Manitoba Agri-food Export Destinations in 2025



Top Five Gain and Top Five Loss Destination by Export Value

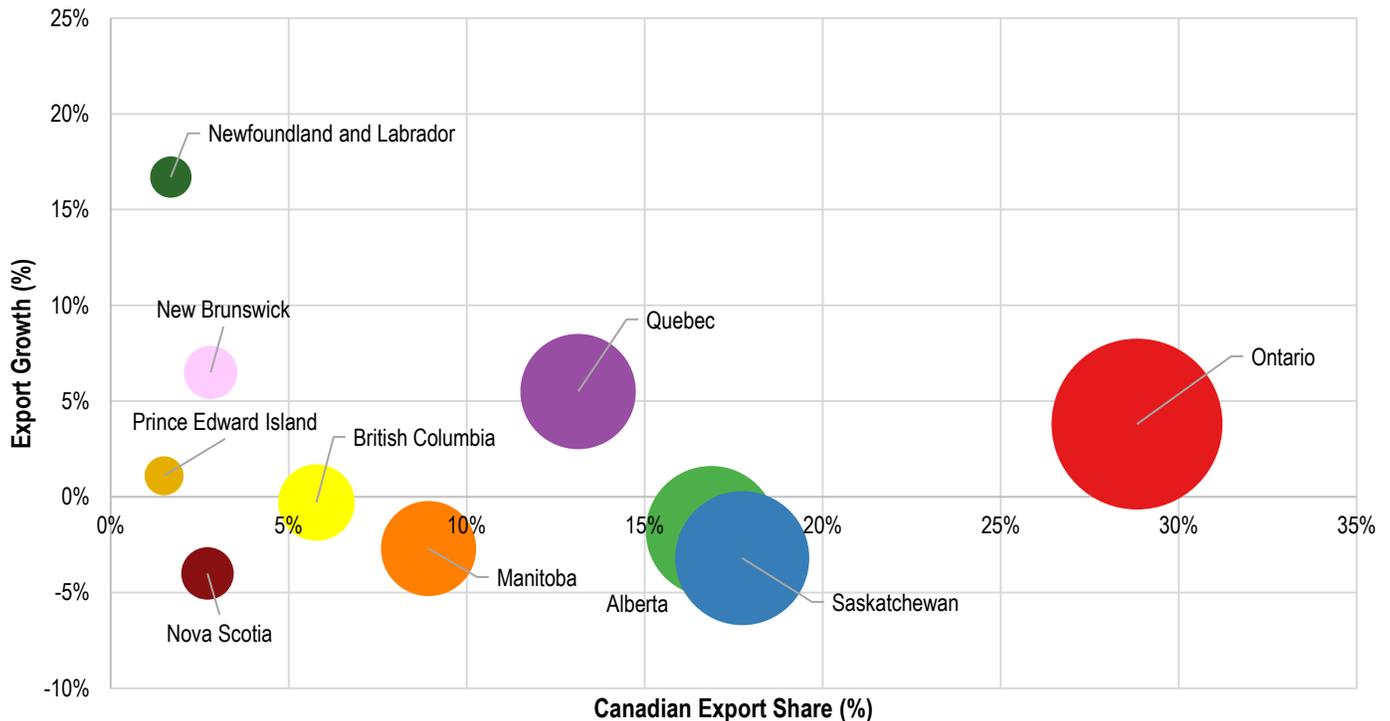


Manitoba's Share of National Agri-food Exports

In 2025, Manitoba accounted for 8.9 per cent of Canada's \$101.2 billion in agri-food exports, ranking as the fifth-largest agri-food exporter among the provinces. Ontario led all provinces, accounting for 28.8 per cent of Canada's international agri-food exports, followed by Saskatchewan and Alberta at 17.7 per cent and 16.9 per cent, respectively.

At the national level, agri-food exports increased by 0.9 per cent from \$100.3 billion in 2024 to \$101.2 billion in 2025. The following graph shows export values, provincial shares and export growth for the top 10 agri-food exporting provinces.

Top Ten Agri-food Export Canadian Provinces in 2025



Share of Processed Agri-food and Commodities

In 2024, processed agri-food products accounted for 48.7 per cent of total agri-food export value, while the remaining 51.3 per cent was exported as unprocessed commodities. Processed products made up approximately 67.9 per cent of exports to the U.S. (\$2.68 billion), 67.7 per cent of exports to Japan (\$759 million), and 66.6 per cent of exports to Mexico (\$432 million). In contrast, only 12.6 per cent of exports to China (\$128 million) consisted of processed products. Overall, processed products represented 60.3 per cent of agri-food exports to the top five destinations in 2025.

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