

Manitoba's Rural Economy

Structure and Trends:

An Update

Webinar prepared for the
Rural Development Institute

Brandon University

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Manitoba's Rural Economy

Outline

- **Different measures of the size of the rural economy**
- **The structure differs, depending upon the measure used**
- **Trends in employment**
 - Overall employment: Level and trend
 - Employment rates: Level and trend
 - Employment by sector: Level and trend
 - Employment by economic region: Level and trend
- **The rural economic problematique**
- **Landscape vs. people-scape**
- **Role of agriculture and food processing**
 - Agriculture GDP: Level and trend
 - Food processing GDP
 - Trend in farm prices
- **Intentions to invest in rural Manitoba**

Manitoba's Rural Economy

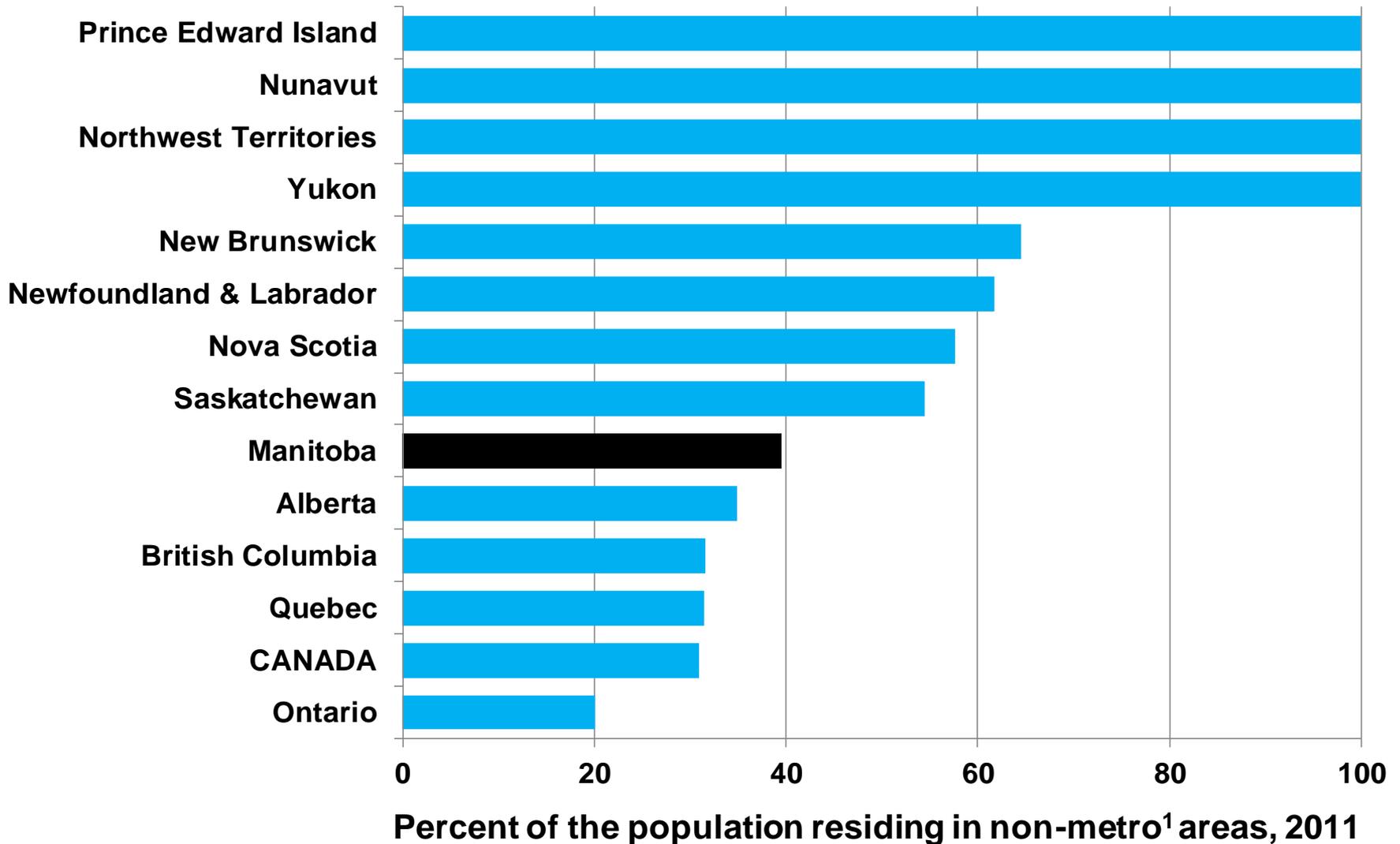
Outline

- **Different measures of the size of the rural economy**

Different measures of the size of Manitoba's rural economy:

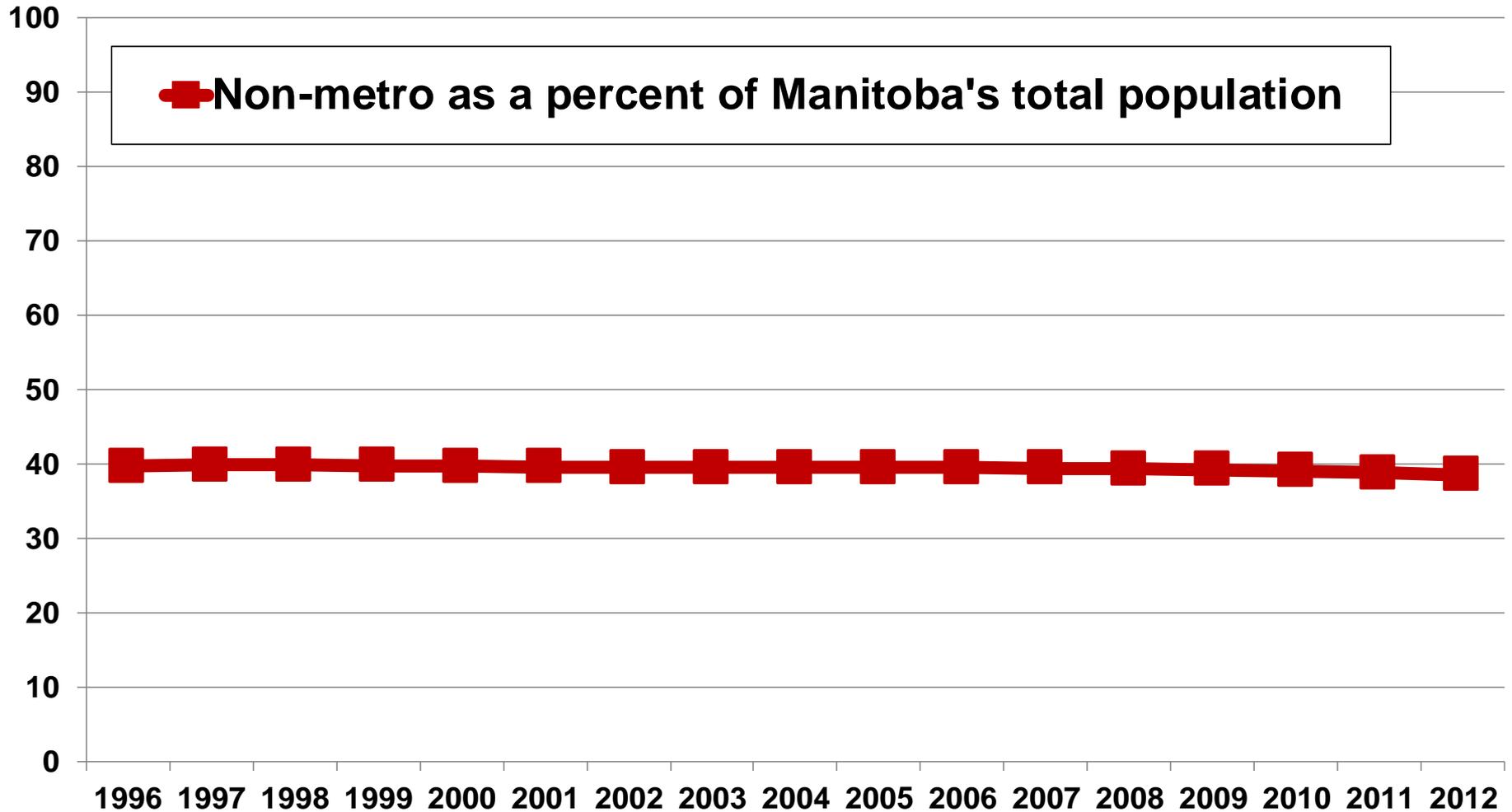
- **Non-metro = 40% of population**

In 2011, 40% of Manitoba's population resided in non-metropolitan areas



1. Non-metro refers to the population outside Census Metropolitan Areas (i.e. areas with a core population of 50,000 or more and a total population of 100,000 or more, including all neighbouring towns and municipalities where 50% or more of the employed residents commute to the CMA).
Source: Statistics Canada. Census of Population, 2011.

Non-metro represented 40% of Manitoba's population in 2012



* Reclassification is not an issue in this time series. These data have been tabulated within the 2006 boundaries of metro and non-metro.
Source: Statistics Canada. **Annual Demographic Statistics**. CANSIM Table 051-0001 and 051-0046.

Different measures of the size of Manitoba's rural economy:

- Non-metro = 40% of population**
- Non-metro = 34% of employment**

Number employed in non-metro areas, Canada and Provinces, November¹, 2014

	All areas	Non-metro	Non-metro as a percent of all areas
	Number employed (,000)		
Newfoundland and Labrador	228	119	52
Prince Edward Island	74	74	100
Nova Scotia	448	221	49
New Brunswick	353	212	60
Quebec	4,033	1,168	29
Ontario	6,921	1,258	18
Manitoba	632	214	34
Saskatchewan	564	261	46
Alberta	2,267	732	32
British Columbia	2,323	658	28
Canada	17,842	4,917	28

1. Data are the average for the previous 12 months (i.e. a 12-month moving average).

Source: Statistics Canada. Labour Force Survey, CANSIM Tables 282-0001 and 282-0011.

Different measures of the size of Manitoba's rural economy:

- Non-metro = 40% of population**
- Non-metro = 34% of employment**
- Non-metro = 35% of (approximate) GDP**

Approximate GDP in non-metro areas, Canada & Provinces, 2010

	2010 GDP of industrial sectors ¹ (billion)		
	Total for province	Estimate for non-metro areas ²	Non-metro as a percent of total
Newfoundland and Labrador	26	16	61
Prince Edward Island	4	4	100
Nova Scotia	30	15	50
New Brunswick	25	16	63
Quebec	289	87	30
Ontario	544	103	19
Manitoba	45	16	35
Saskatchewan	56	31	55
Alberta	245	90	37
British Columbia	170	54	32
Sum of 10 provinces	1,436	432	30

1. In this table, the GDP generated from owner-occupied housing (i.e. imputed house rent) has been subtracted from the 'real estate and leasing' sector and has been excluded from the total.

2. Calculated by the author by simply multiplying the provincial GDP in an industry sector by the percent of the workforce in the given sector that resides in a non-metro area.

Approximate gross domestic product (GDP) of industrial sectors in non-metro areas, Manitoba, 2010

	All areas ¹	Estimate for non-metro areas ²	All areas ¹	Estimate for non-metro areas ²	Non-metro as percent of province total
	(\$billion)		Percent distribution		
All industry sectors ³	45.1	15.9	100	100	35
Goods sectors (subtotal)	13.3	6.8	29	43	51
.. Agriculture	1.6	1.5	4	10	94
.. Forestry, fishing, mining, quarrying, oil & gas	2.0	1.7	5	11	83
.. Utilities	1.3	0.5	3	3	41
.. Construction	3.3	1.3	7	8	40
.. Manufacturing	5.0	1.7	11	11	35
Services sectors (subtotal)	36.0	9.1	80	57	25
.. Wholesale and retail trade	5.6	1.9	12	12	33
.. Transportation and warehousing	2.8	0.8	6	5	30
.. Finance, insurance, real estate and leasing ³	4.8	1.1	11	7	23
.. Professional, scientific & technical services	1.5	0.3	3	2	18
.. Business, building & other support services	1.1	0.2	3	1	15
.. Educational services	2.8	0.9	6	6	33
.. Health care and social assistance	4.6	1.6	10	10	34
.. Information, culture and recreation	2.0	0.5	4	3	25
.. Accommodation and food services	0.9	0.2	2	2	27
.. Other (personal) services	1.0	0.3	2	2	34
.. Public administration	4.7	1.2	10	8	27

1. Source: Statistics Canada. Gross Domestic Product by Industry Sector and by Province, CANSIM Table 379-0030.

2. Calculated by the author by simply multiplying the provincial GDP in an industry sector by the percent of the workforce in the given sector that resides in a non-metro area.

3. In this table, the GDP generated from owner-occupied housing (i.e. imputed house rent) has been subtracted from the 'real estate and leasing' sector and has been excluded from the total.

Different measures of the size of Manitoba's rural economy:

- Non-metro = 40% of population**
- Non-metro = 34% of employment**
- Non-metro = 35% of (approximate) GDP**

Different measures of the size of Manitoba's rural economy:

- Non-metro = 35% of (approximate) GDP**
- Recently Statistics Canada published “experimental estimates” of metro and non-metro GDP (see next table) which, for Manitoba, generally confirm the rough estimates in the previous table.**

Experimental estimates of metro and non-metro gross domestic product, Manitoba, 2001 - 2009										
		2001	2002	2003	2004	2005	2006	2007	2008	2009
Metro	Gross domestic product (current \$ million)	22,188	22,860	23,555	24,958	26,099	27,382	29,074	30,653	31,013
	Population (persons)	695,885	700,022	704,623	710,620	713,101	716,447	723,677	731,838	741,807
	GDP per capita	31,885	32,656	33,429	35,121	36,599	38,219	40,175	41,885	41,807
Non-metro	Gross domestic product (current \$ million)	10,340	10,754	11,008	11,897	12,700	14,621	16,351	17,373	16,167
	Population (persons)	455,565	456,614	458,905	462,603	465,195	467,077	465,689	465,936	466,782
	GDP per capita	22,697	23,552	23,988	25,718	27,300	31,303	35,111	37,286	34,635
Manitoba (total)	Gross domestic product (current \$ million)	32,528	33,614	34,563	36,855	38,799	42,003	45,425	48,026	47,180
	Population (persons)	1,151,450	1,156,636	1,163,528	1,173,223	1,178,296	1,183,524	1,189,366	1,197,774	1,208,589
	GDP per capita	28,250	29,062	29,705	31,413	32,928	35,490	38,193	40,096	39,037
Non-metro as percent of Manitoba	Gross domestic product (current \$ million)	32	32	32	32	33	35	36	36	34
	Population (persons)	40	39	39	39	39	39	39	39	39
	GDP per capita	80	81	81	82	83	88	92	93	89

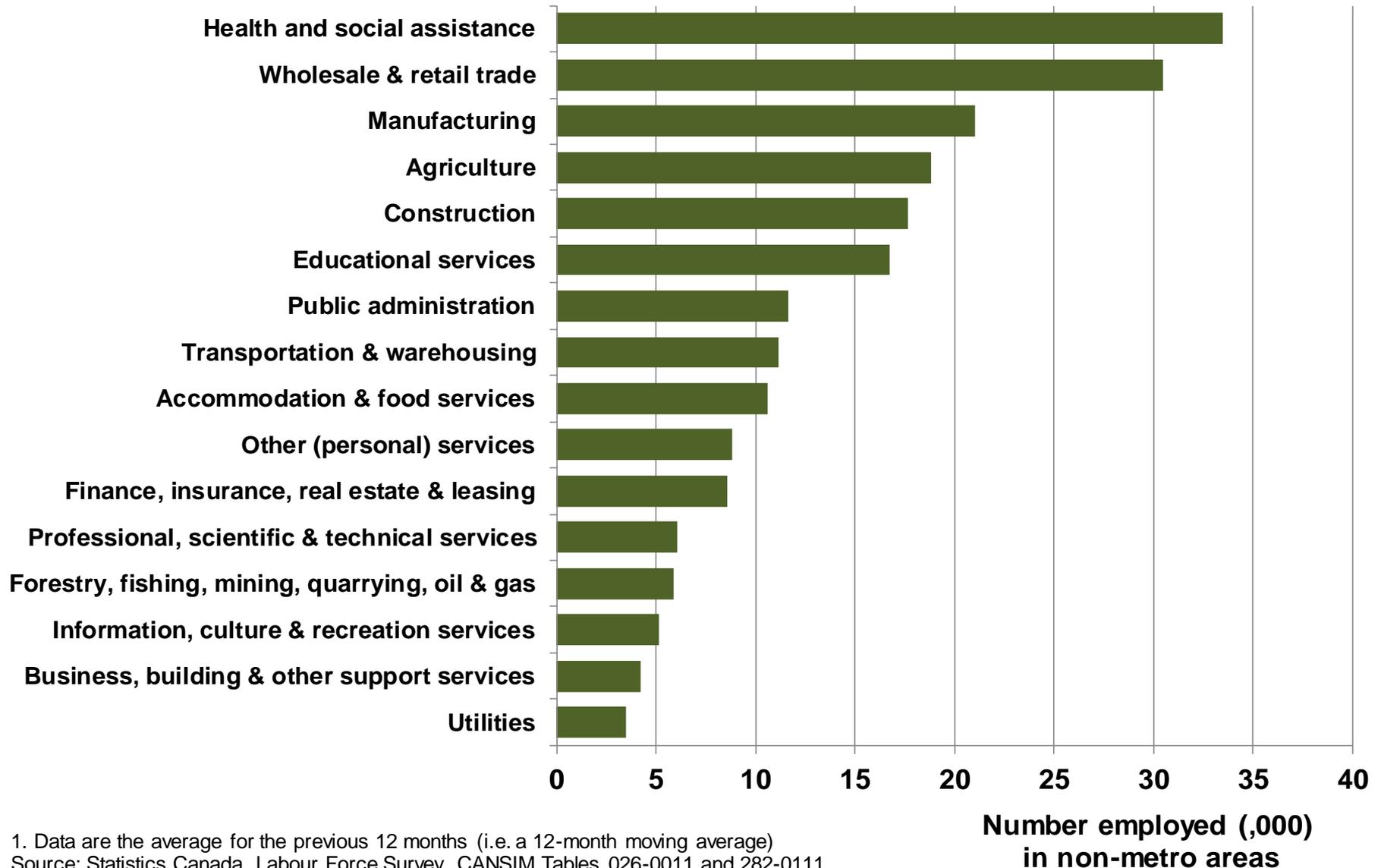
Source: Brown, Mark and Luke Rispoli. (2014) Metropolitan Gross Domestic Product: Experimental Estimates, 2001 to 2009 (Ottawa: Statistics Canada, Catalogue no. 11-626-X — No. 042) and CANSIM Table 381-0005.

Manitoba's Rural Economy

Outline

- Different measures of the size of the rural economy
- The structure differs, depending upon the measure used

Number employed by industry sector in non-metro areas, Manitoba, November¹, 2014

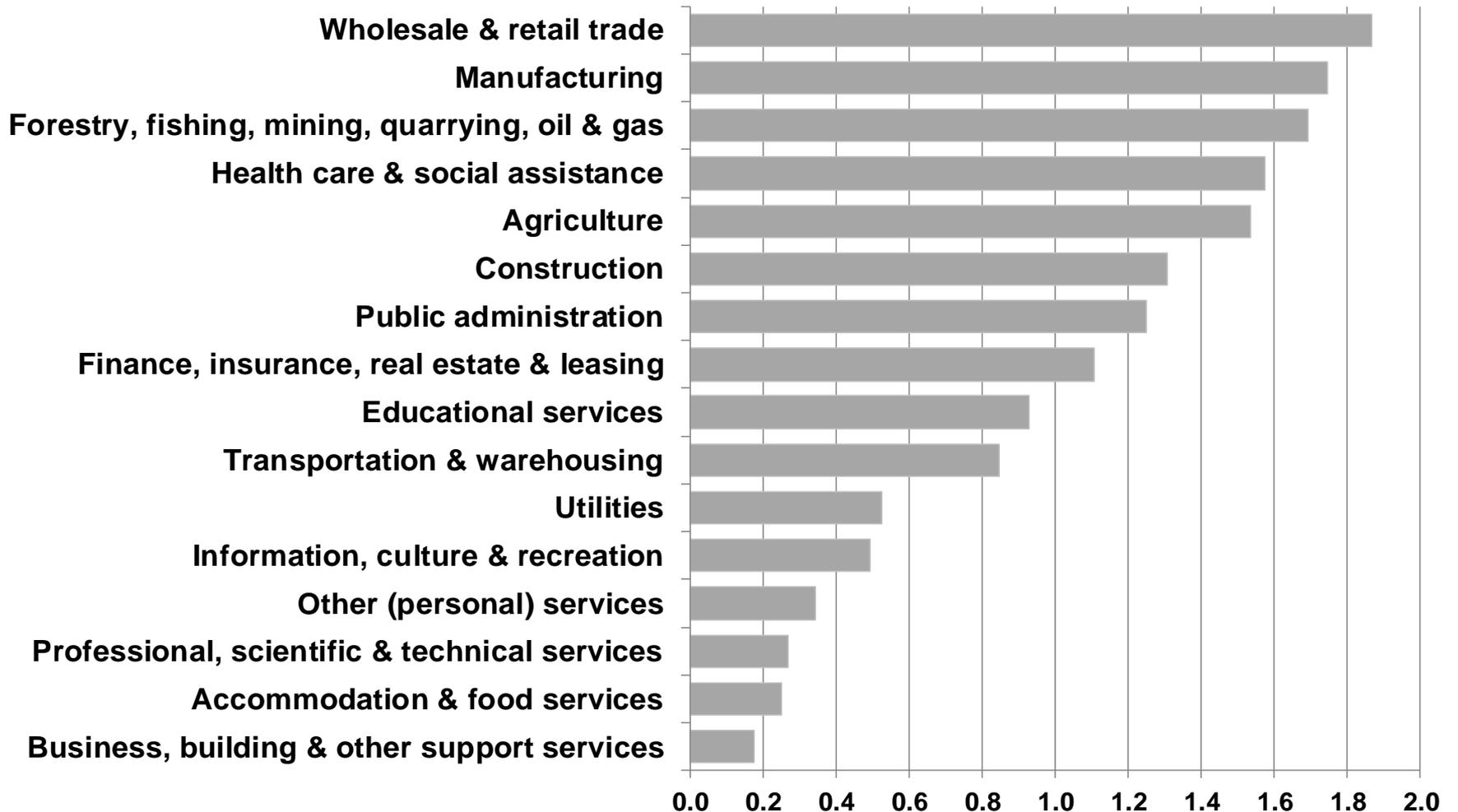


1. Data are the average for the previous 12 months (i.e. a 12-month moving average)
Source: Statistics Canada. Labour Force Survey, CANSIM Tables 026-0011 and 282-0111.

The structure differs, depending upon the measure used

Ranking of non-metro sectors by:	
Employment	(approximate) GDP
#1 Health & social assistance	
#2 Wholesale & retail trade	
#3 Manufacturing	
#4 Agriculture (on farms)	
#13 Forestry/mining/oil/gas	

Approximate gross domestic product in non-metro areas¹, Manitoba, 2010



Approximate gross domestic product in non-metro areas¹, \$billion, Manitoba, 2010

1. Calculated by the author by simply multiplying the provincial GDP in an industry sector by the percent of the provincial workforce in the given sector that resides in a non-metro area. In this chart, "imputed house rent" has been subtracted from "finance, insurance, real estate and leasing".

The structure differs, depending upon the measure used

Ranking of non-metro sectors by:	
Employment	(approximate) GDP
	#1 Wholesale & retail trade
	#2 Manufacturing
	#3 Forestry/mining/oil/gas
	#4 Health & social assistance
	#5 Agriculture (on farms)

The structure differs, depending upon the measure used

Ranking of non-metro sectors by:	
Employment	(approximate) GDP
#1 Health & social assistance	#1 Wholesale & retail trade
#2 Wholesale & retail trade	#2 Manufacturing
#3 Manufacturing	#3 Forestry/mining/oil/gas
#4 Agriculture (on farms)	#4 Health & social assistance
#13 Forestry/mining/oil/gas	#5 Agriculture (on farms)

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- **Trends in employment**
 - **Overall employment: Level and trend**

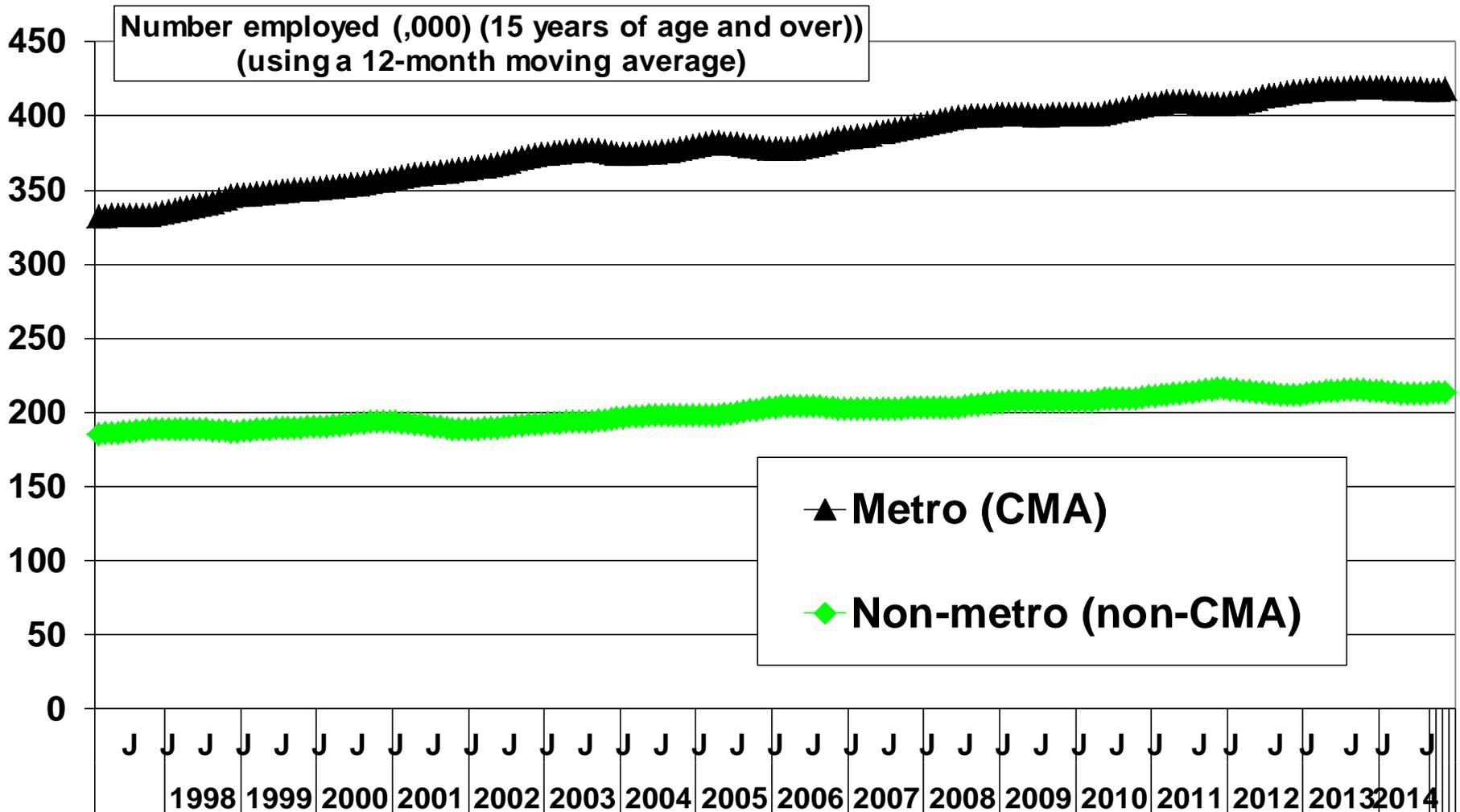
Number employed in non-metro areas, Canada and Provinces, November¹, 2014

	All areas	Non-metro	Non-metro as a percent of all areas
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1. Data are the average for the previous 12 months (i.e. a 12-month moving average).

Source: Statistics Canada. Labour Force Survey, CANSIM Tables 282-0001 and 282-0011.

Employment in non-metro Manitoba was 214 thousand, November, 2014



Source: Statistics Canada. Labour Force Survey, CANSIM Tables 026-0001 and 282-0111.

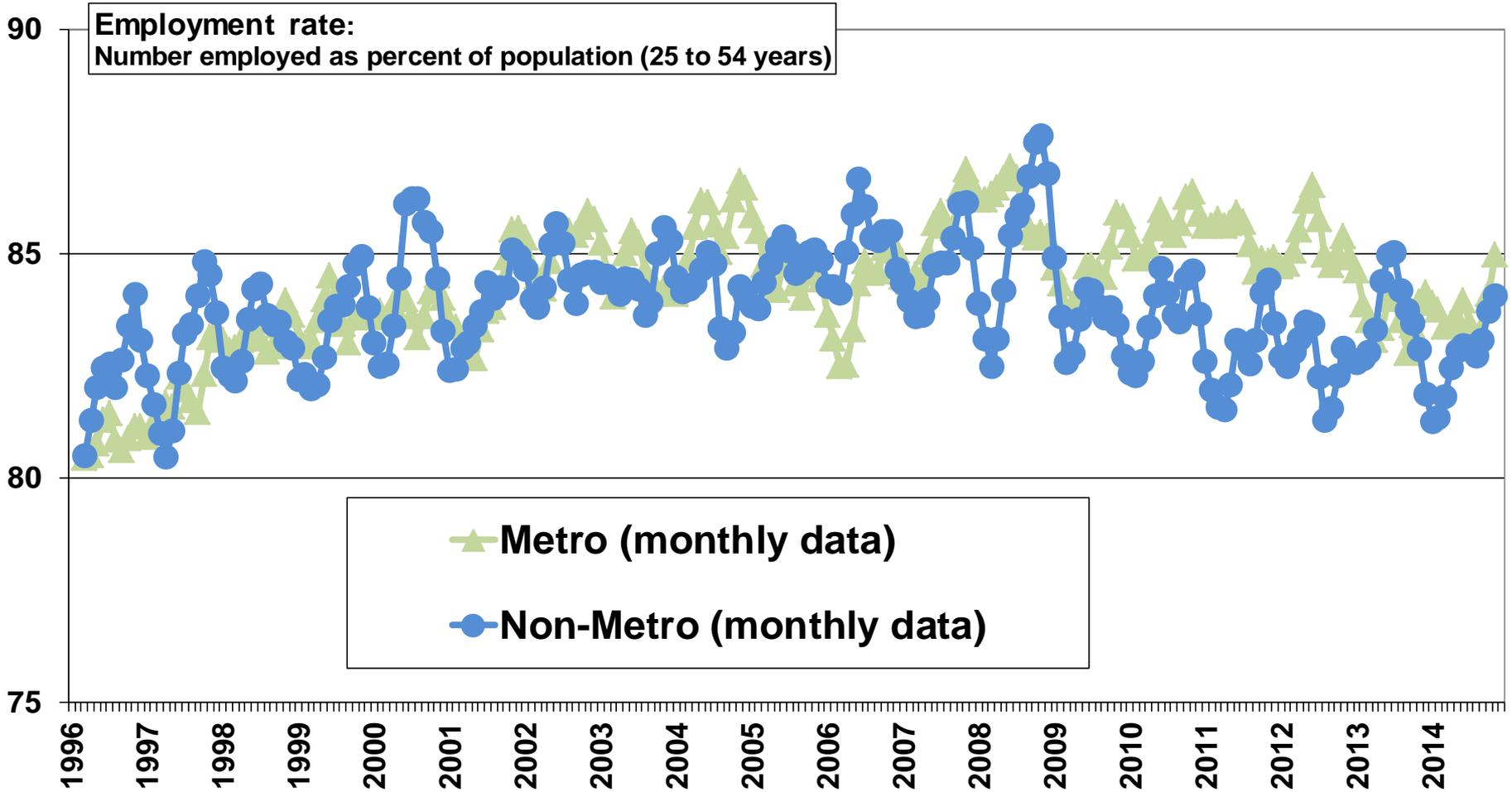
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- **Trends in employment**
 - Overall employment: Level and trend
 - Employment rates: Level and trend
 - → Employment / population ratio
 - → (i.e. percent of population that is employed)

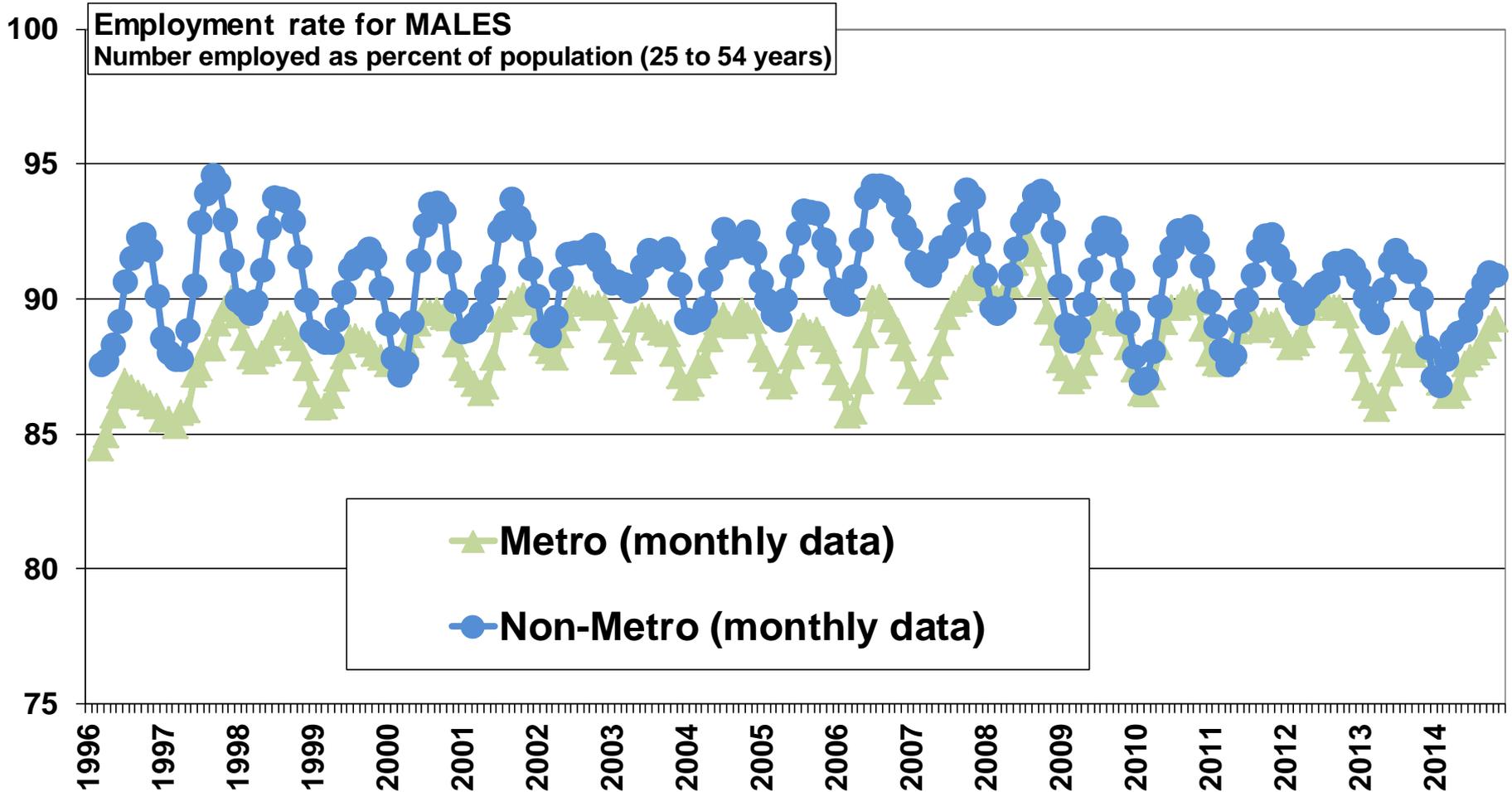
Manitoba employment rates:

Non-metro is higher than metro in the peak months (except 2010 - 2012)



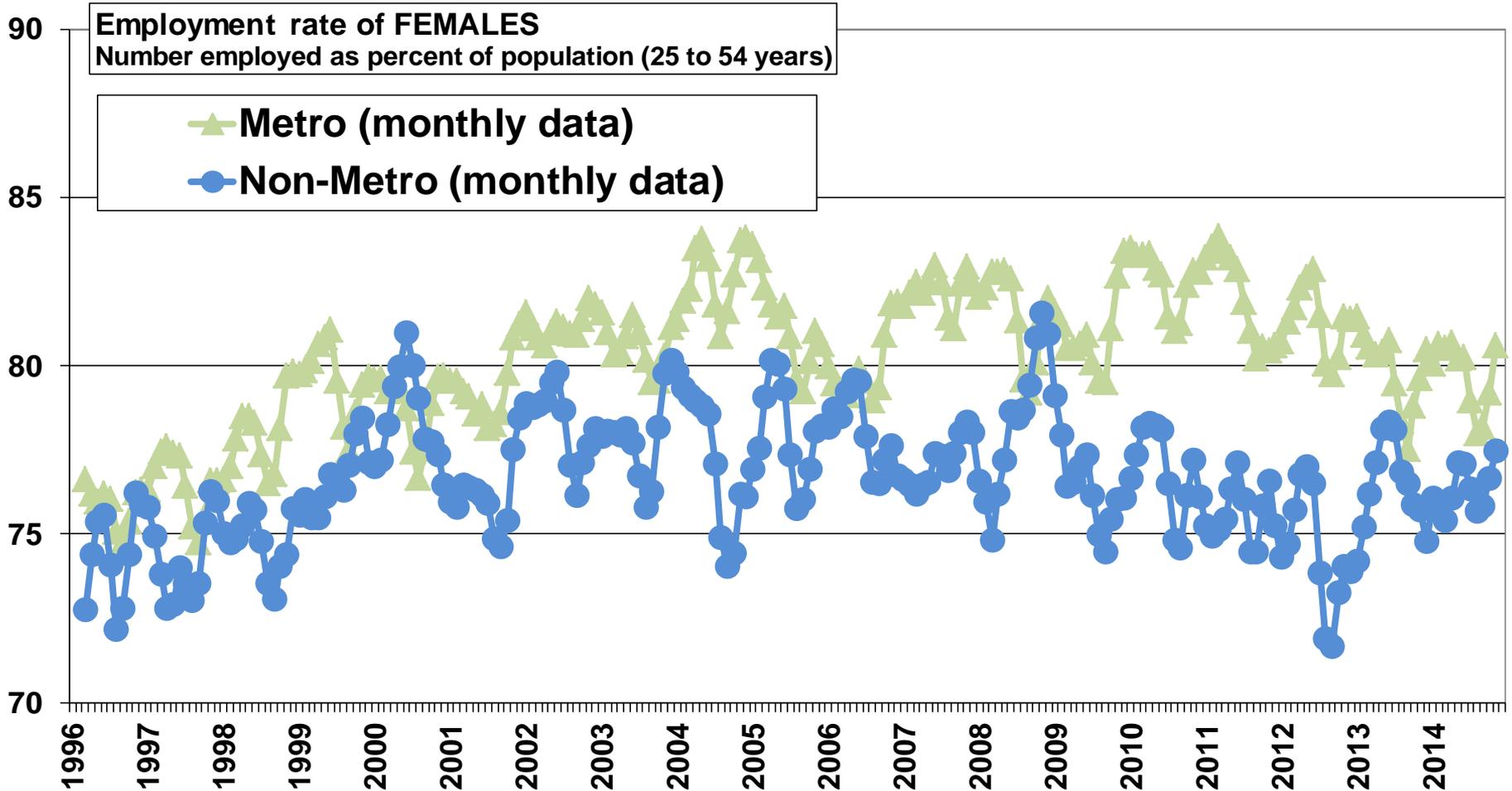
Source: Statistics Canada. Labour Force Survey, CANSIM Tables 026-0001 and 282-0109.

Manitoba MALE employment rates: Non-metro is (almost always) above metro



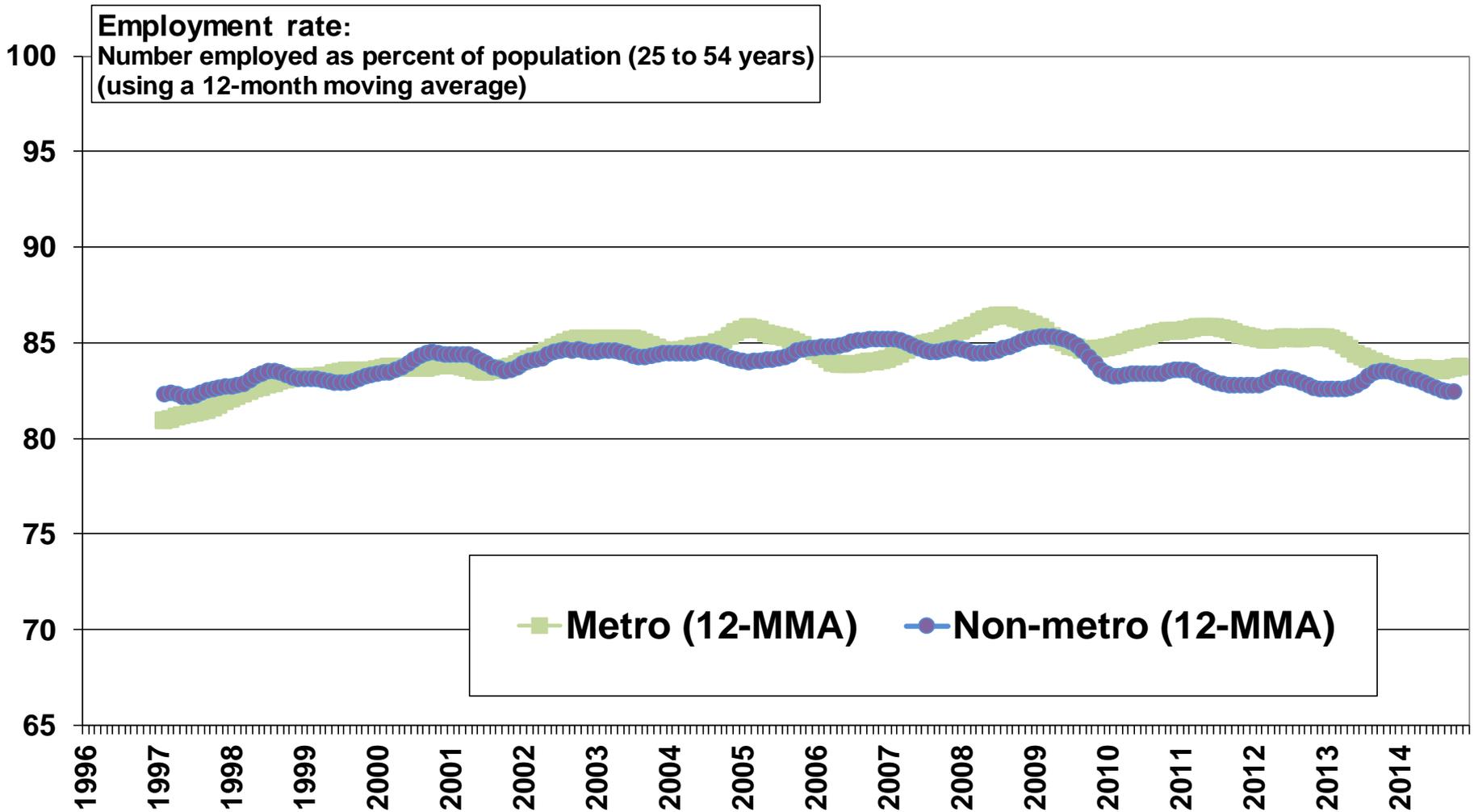
Source: Statistics Canada. Labour Force Survey, CANSIM Tables 026-0001 and 282-0109.

Manitoba FEMALE employment rates: Non-metro is (generally) lower than metro



Source: Statistics Canada. Labour Force Survey, CANSIM Tables 282-0001 and 282-0109.

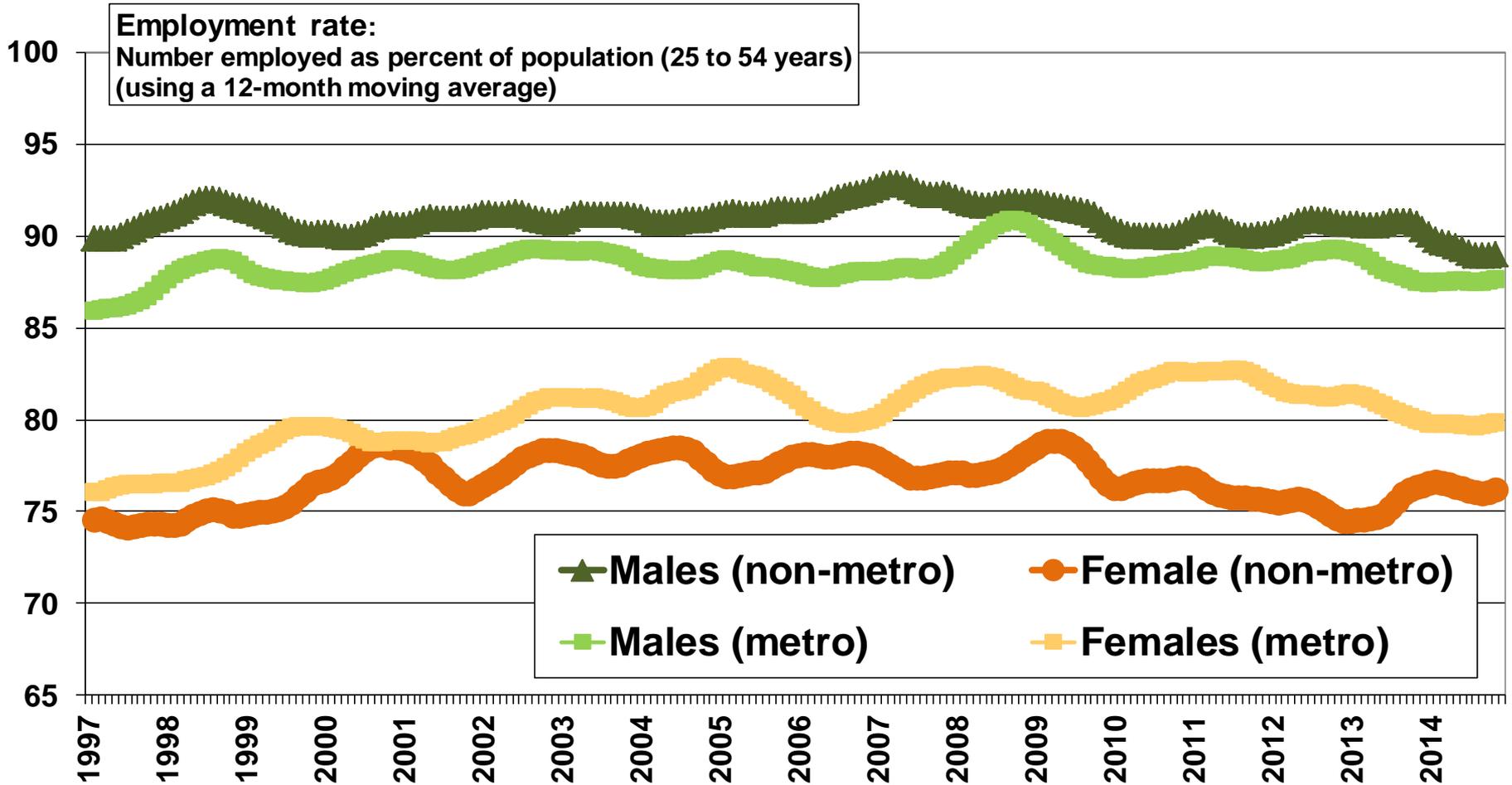
Manitoba employment rates: Non-metro is below metro since 2010



Source: Statistics Canada. Labour Force Survey, CANSIM Tables 026-0001 and 282-0109.

Manitoba employment rates:

Non-metro males above metro males but declining since May, 2007
Non-metro females above metro females



Source: Statistics Canada. Labour Force Survey, CANSIM Tables 282-0001 and 282-0109.

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- **Trends in employment**
 - Overall employment: Level and trend
 - Employment rates: Level and trend
 - Employment by sector: Level and trend

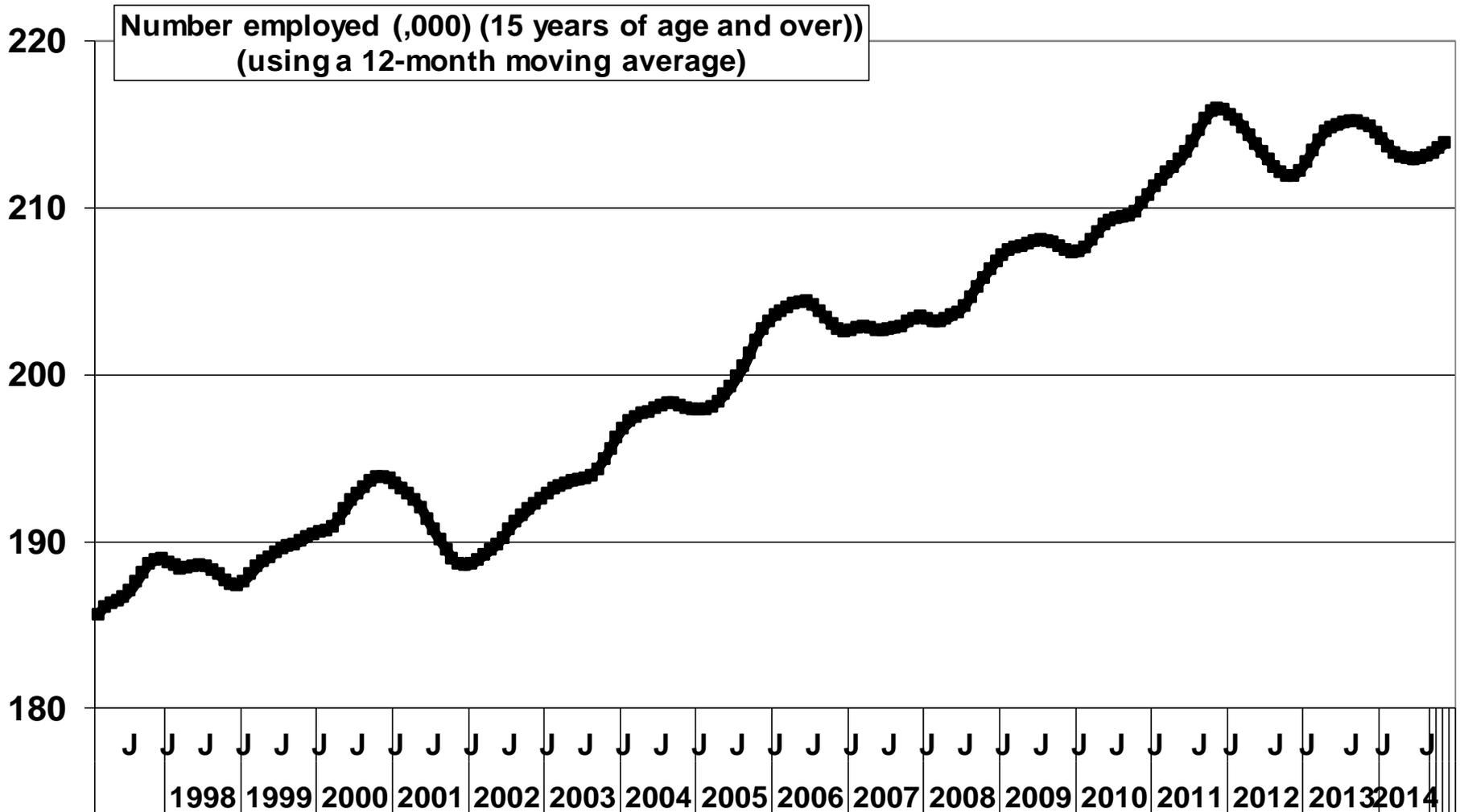
**Number employed by industry sector, metro and non-metro regions,
Manitoba, November¹, 2014**

Industry sector (sorted by number employed in non-metro areas)	Number employed ¹ (,000)			Percent distribution			Non-metro as percent of total
	Total	Metro	Non-metro	Total	Metro	Non-metro	
Goods-producing sectors (subtotal)	146	79	67	23	19	31	46
Manufacturing	64	43	21	10	10	10	33
Agriculture	22	4	19	4	1	9	84
Construction	44	26	18	7	6	8	41
Forestry, fishing, mining, quarrying, oil & gas	7	1	6	1	0	3	86
Utilities	9	6	3	1	1	2	38
Services-producing sectors (subtotal)	486	339	147	77	81	69	30
Health and social assistance	100	66	33	16	16	16	34
Wholesale & retail trade	94	63	31	15	15	14	33
Educational services	51	35	17	8	8	8	33
Public administration	37	25	12	6	6	5	32
Transportation & warehousing	37	26	11	6	6	5	30
Accommodation & food services	39	28	11	6	7	5	27
Other (personal) services	27	19	9	4	4	4	32
Finance, insurance, real estate & leasing	34	26	9	5	6	4	25
Professional, scientific & technical services	26	20	6	4	5	3	23
Information, culture & recreation services	23	18	5	4	4	2	22
Business, building & other support services	18	14	4	3	3	2	23
All sectors	632	418	214	100	100	100	34

1. Data are the average for the previous 12 months (i.e. a 12-month moving average)

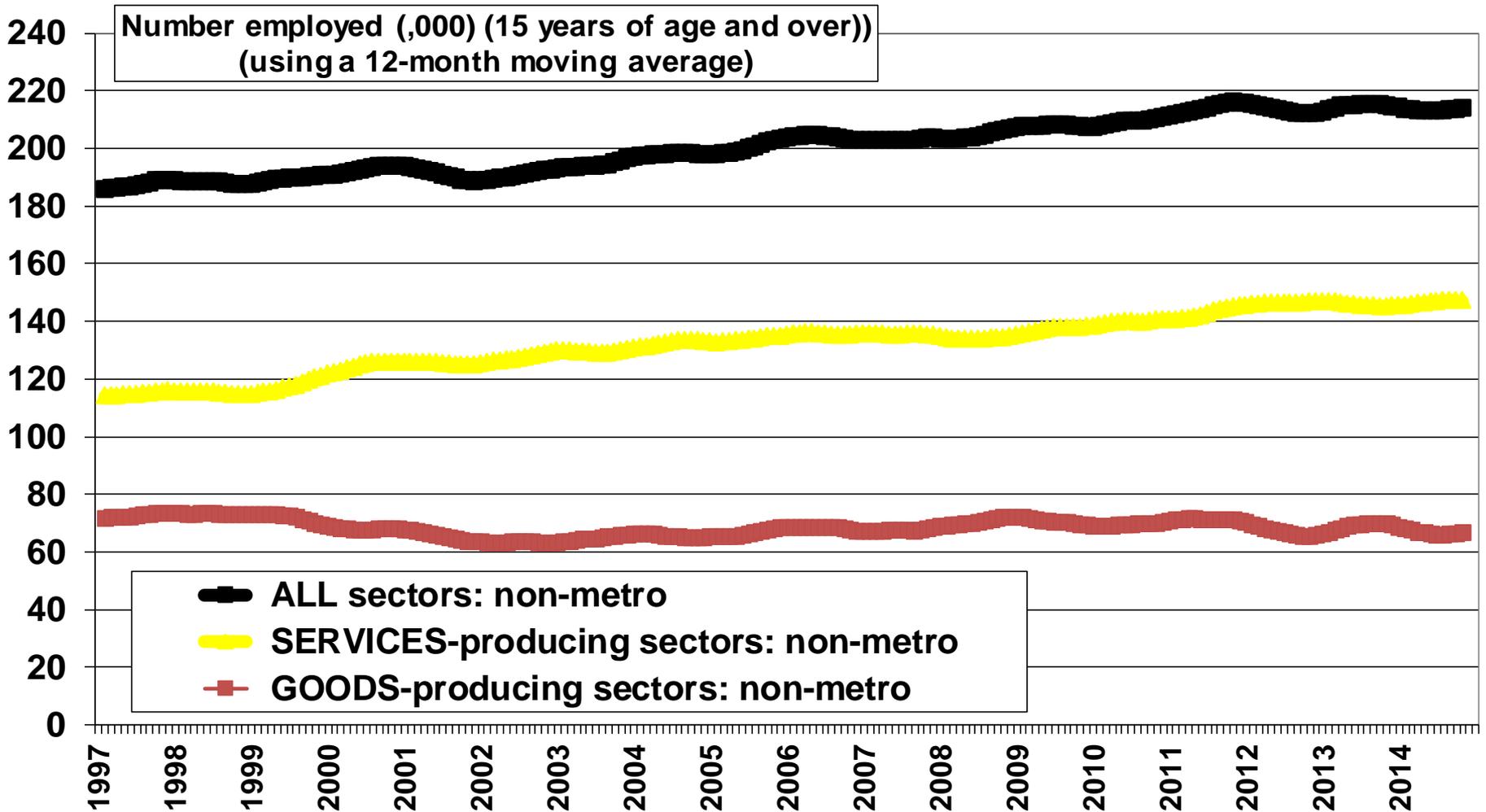
Source: Statistics Canada. Labour Force Survey, CANSIM Tables 026-0011 and 282-0111.

Employment in non-metro Manitoba: general growth 2002 to 2011



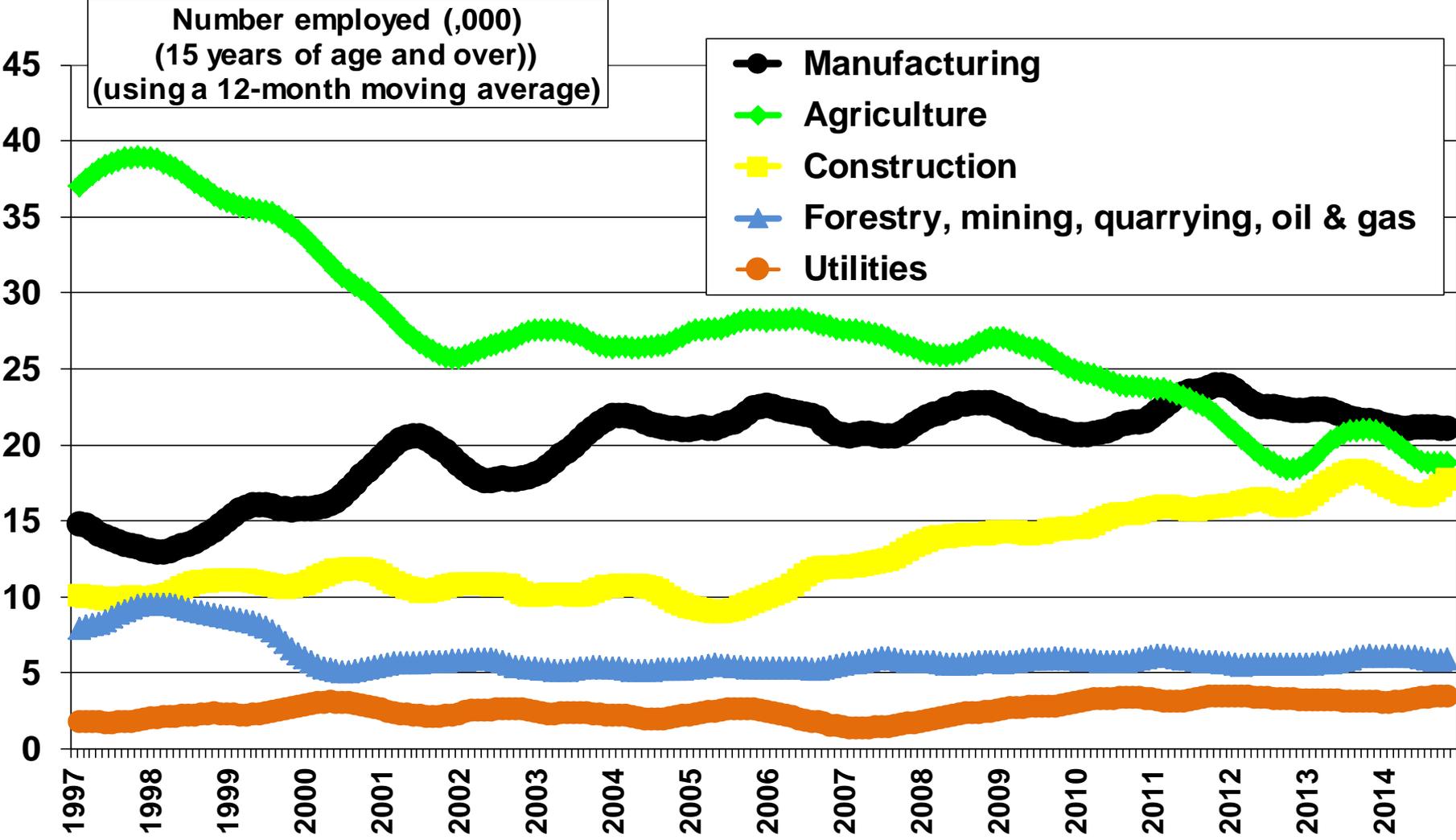
Source: Statistics Canada. Labour Force Survey, CANSIM Tables 026-0001 and 282-0111.

Employment trends in non-metro Manitoba: growth in services -- no growth in goods



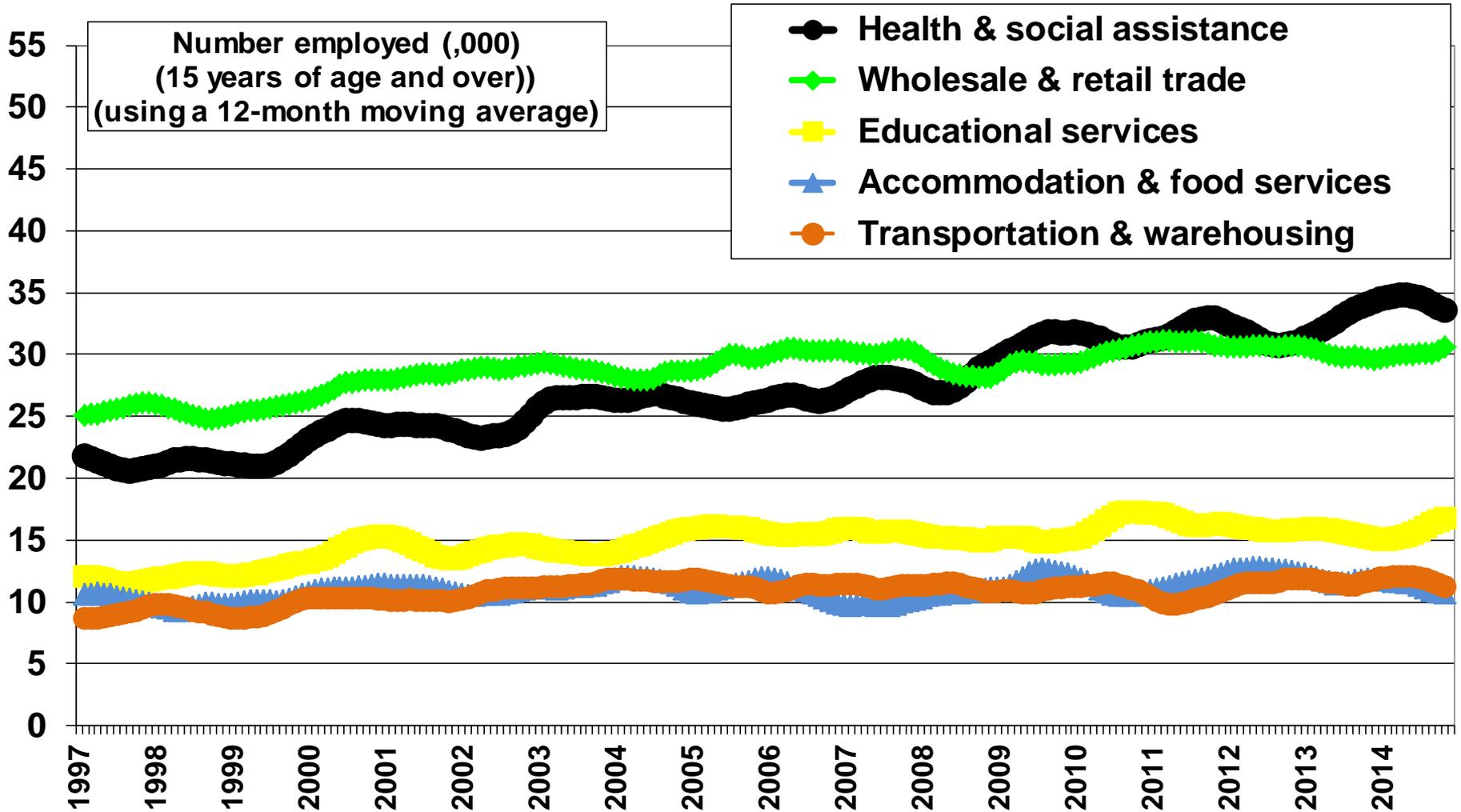
Source: Statistics Canada. Labour Force Survey, CANSIM Tables 026-0001 and 282-0111.

Employment trends goods-producing sectors: non-metro Manitoba



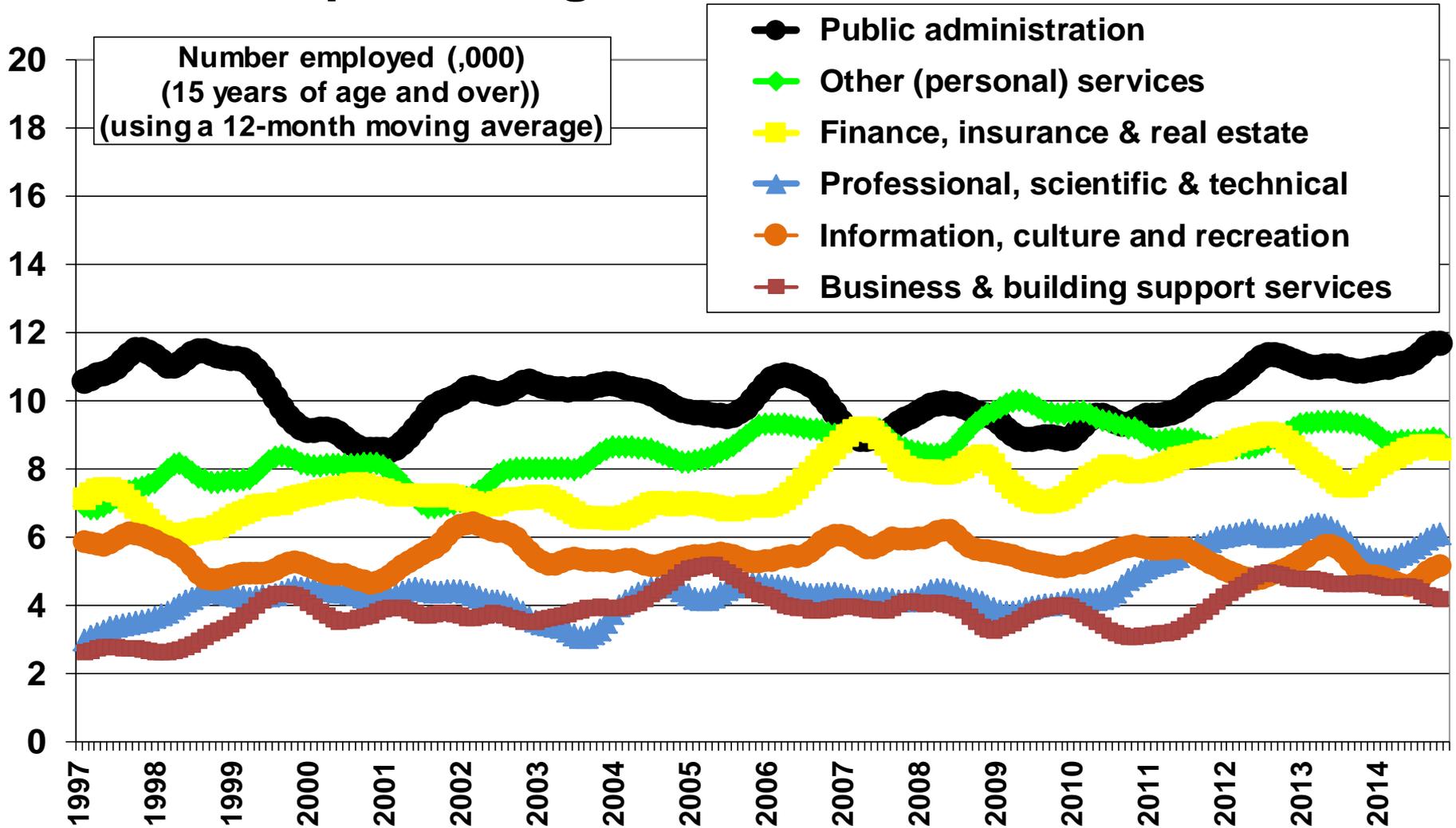
Source: Statistics Canada. Labour Force Survey, CANSIM Tables 026-0001 and 282-0111.

Employment in the five largest services-producing sectors: non-metro Manitoba



Source: Statistics Canada. Labour Force Survey, CANSIM Tables 026-0001 and 282-0111.

Employment in the six smallest services-producing sectors: non-metro Manitoba



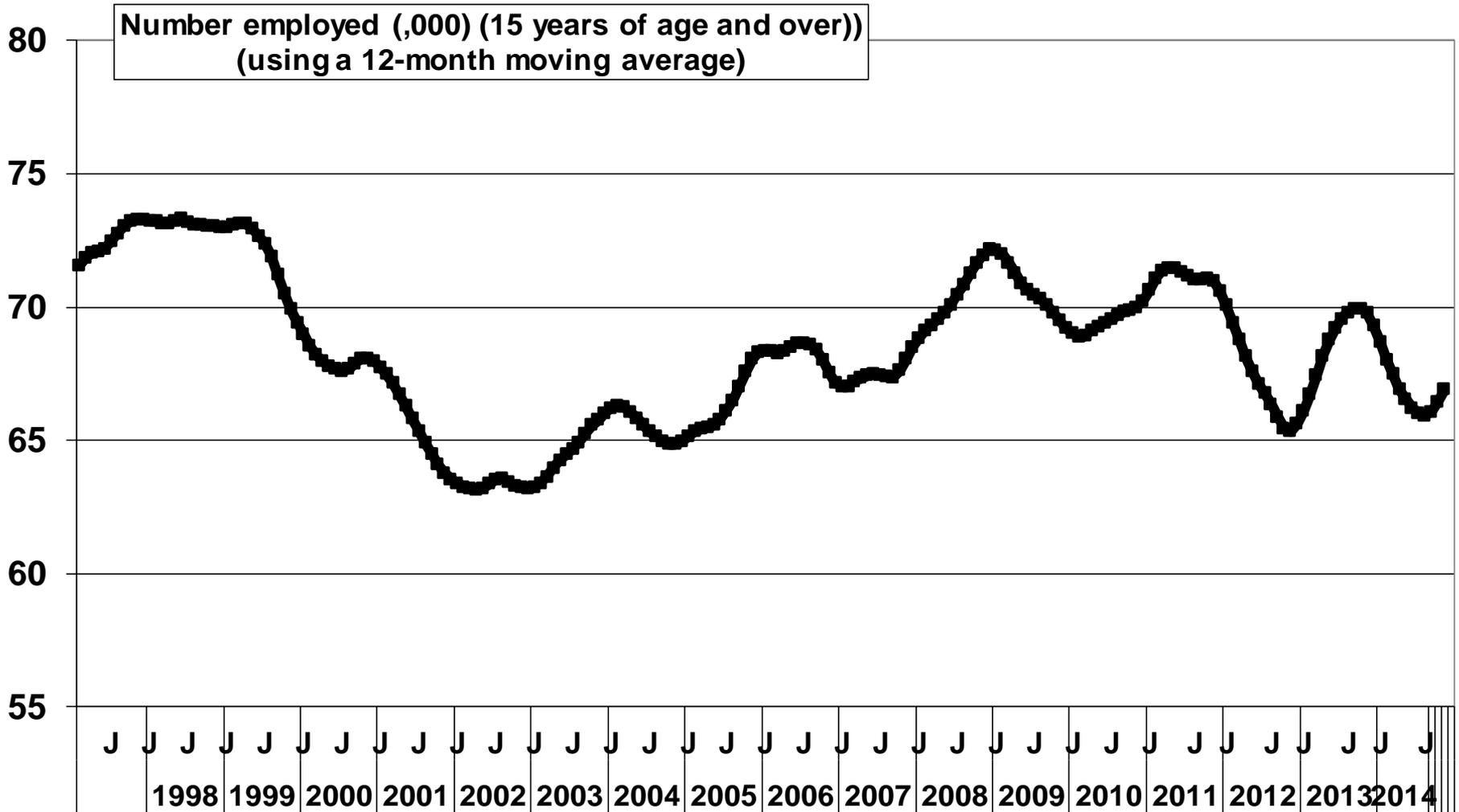
Source: Statistics Canada. Labour Force Survey, CANSIM Tables 026-0001 and 282-0111.

Change in employment from November¹, 2013 to November¹, 2014, Manitoba				
Industry sector	Number employed (,000) (average for 12 previous months)			
	November¹, 2013	November¹, 2014	Change	Percent change
Goods-producing sectors (subtotal)	70	67	-3	-4
Agriculture	21	19	-2	-10
Forestry, fishing, mining, quarrying, oil & gas	6	6	0	-3
Utilities	3	3	0	12
Construction	18	18	0	-2
Manufacturing	22	21	-1	-2
Services-producing sectors (subtotal)	145	147	2	1
Wholesale & retail trade	30	31	1	3
Transportation & warehousing	12	11	0	-4
Finance, insurance, real estate & leasing	8	9	1	12
Professional, scientific & technical services	5	6	1	11
Business, building & other support services	5	4	0	-10
Educational services	15	17	2	10
Health and social assistance	34	33	-1	-2
Information, culture & recreation services	5	5	0	4
Accommodation & food services	12	11	-1	-10
Other (personal) services	9	9	0	-5
Public administration	11	12	1	7
All sectors	215	214	-1	0

1. Data are the average for the previous 12 months (i.e. a 12-month moving average)

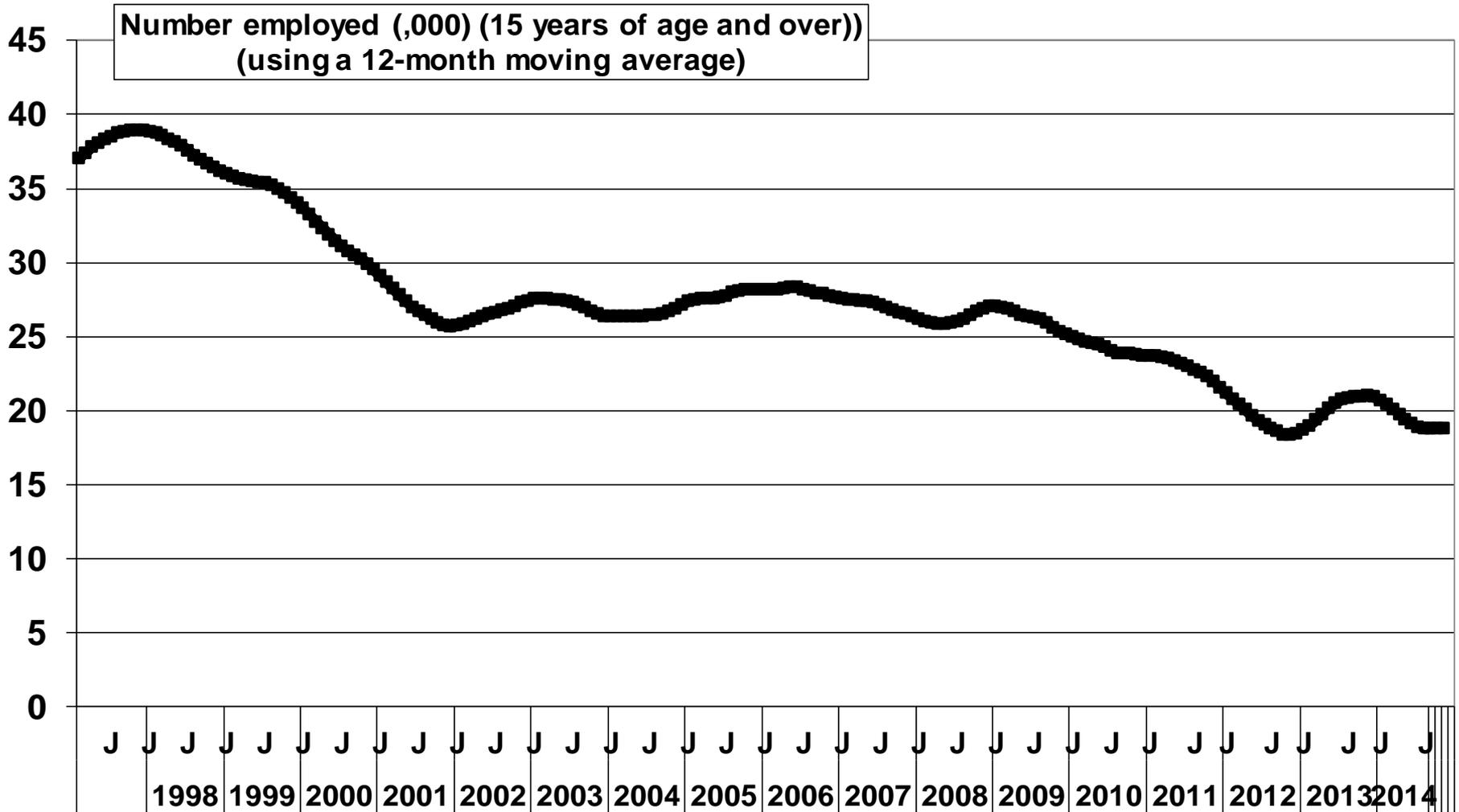
Source: Statistics Canada. Labour Force Survey, CANSIM Tables 282-0011 and 282-0111.

Employment in non-metro Manitoba: Goods-producing sectors



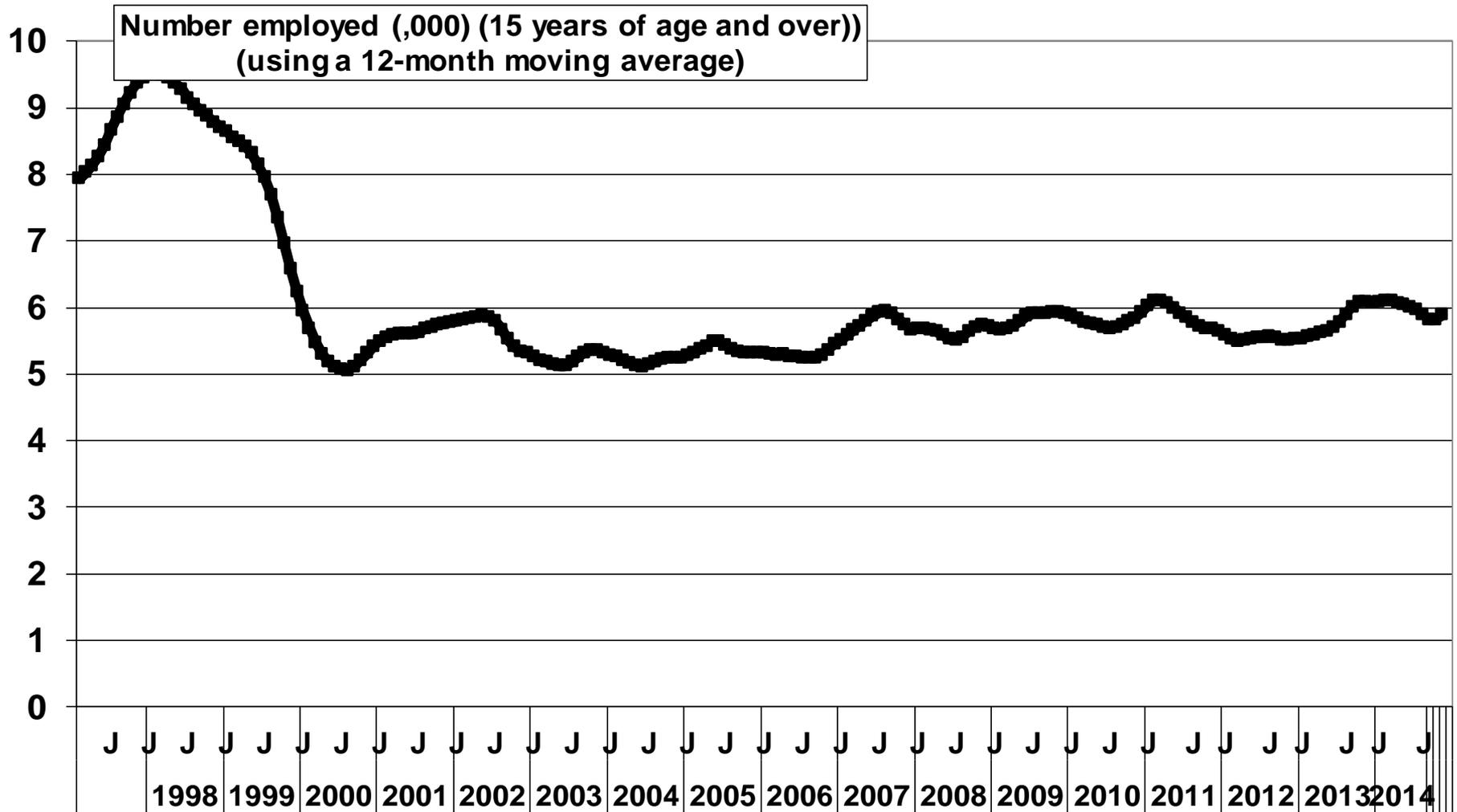
Source: Statistics Canada. Labour Force Survey, CANSIM Tables 026-0001 and 282-0111.

Employment in non-metro Manitoba: Agriculture



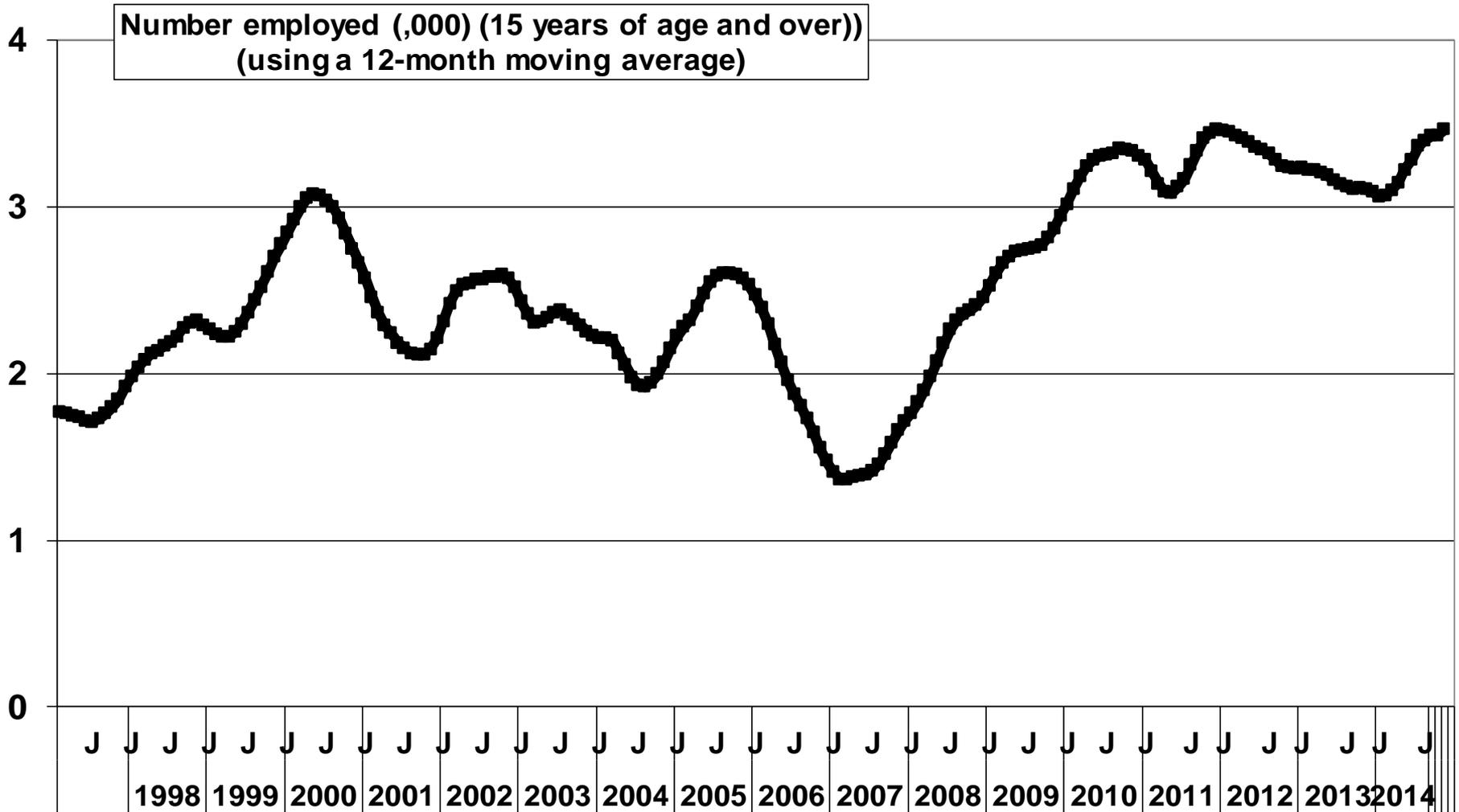
Source: Statistics Canada. Labour Force Survey, CANSIM Tables 026-0001 and 282-0111.

Employment in non-metro Manitoba: Forestry, fishing, mining, quarrying & oil & gas extraction



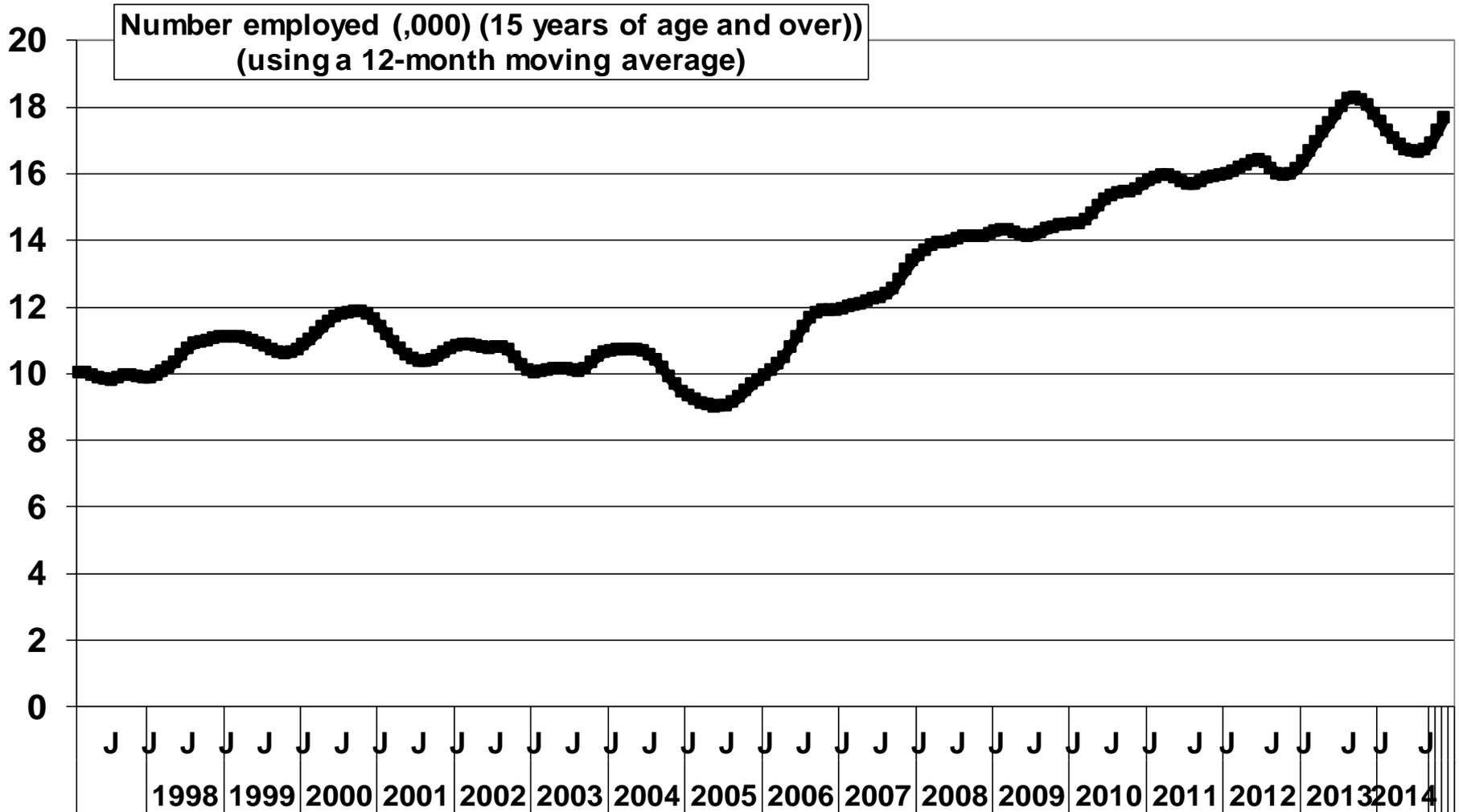
Source: Statistics Canada. Labour Force Survey, CANSIM Tables 026-0001 and 282-0111.

Employment in non-metro Manitoba: Utilities



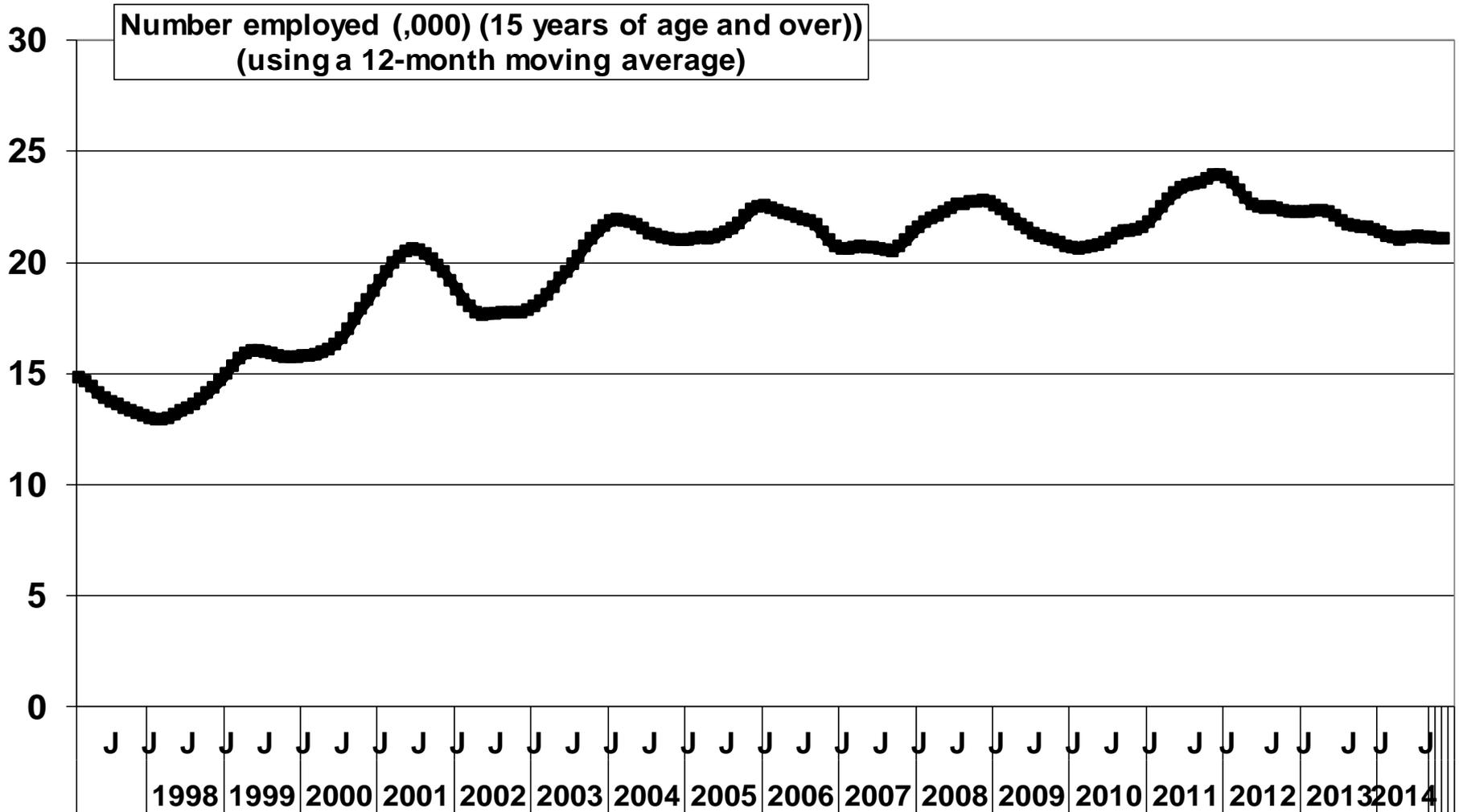
Source: Statistics Canada. Labour Force Survey, CANSIM Tables 026-0001 and 282-0111.

Employment in non-metro Manitoba: Construction



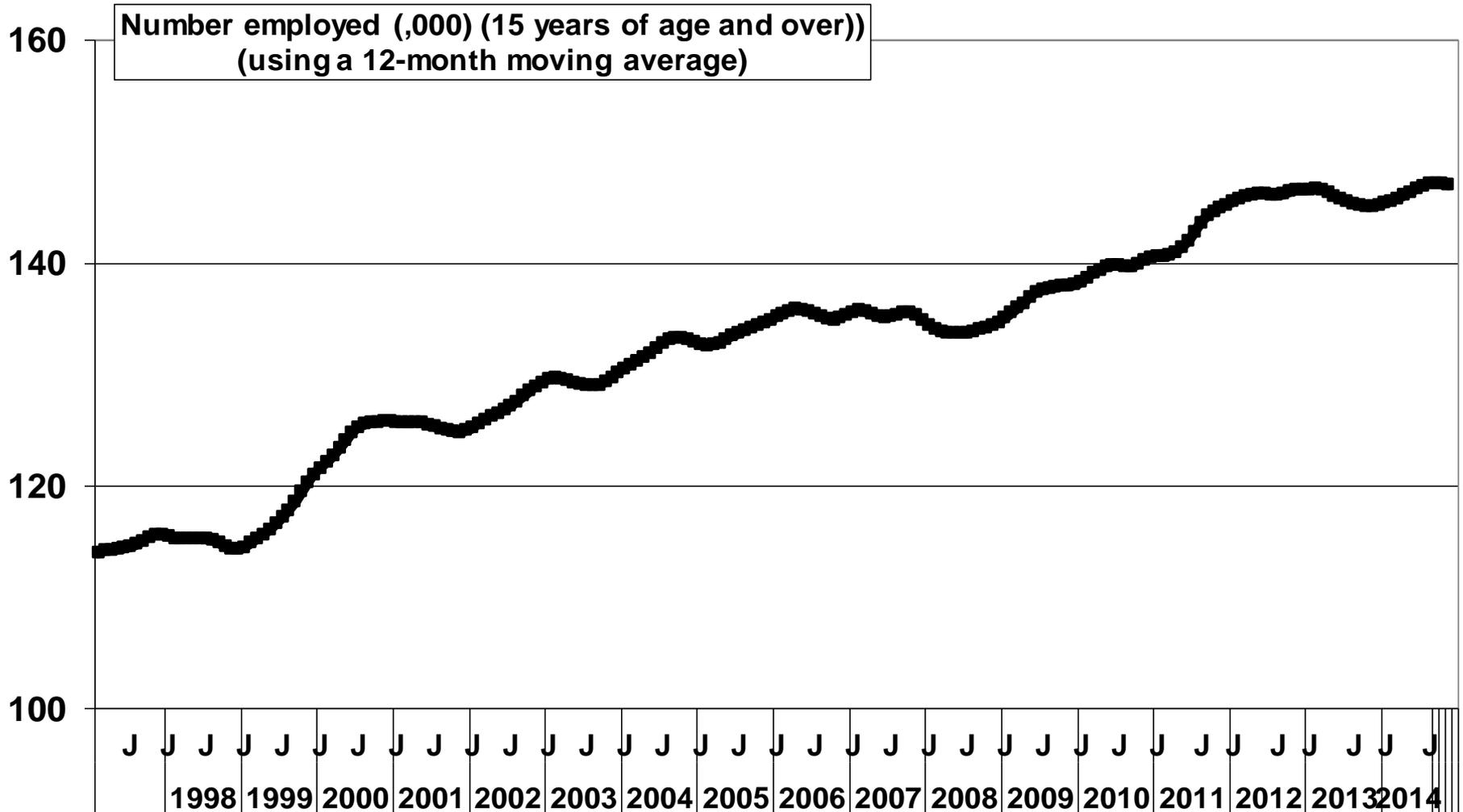
Source: Statistics Canada. Labour Force Survey, CANSIM Tables 026-0001 and 282-0111.

Employment in non-metro Manitoba: Manufacturing



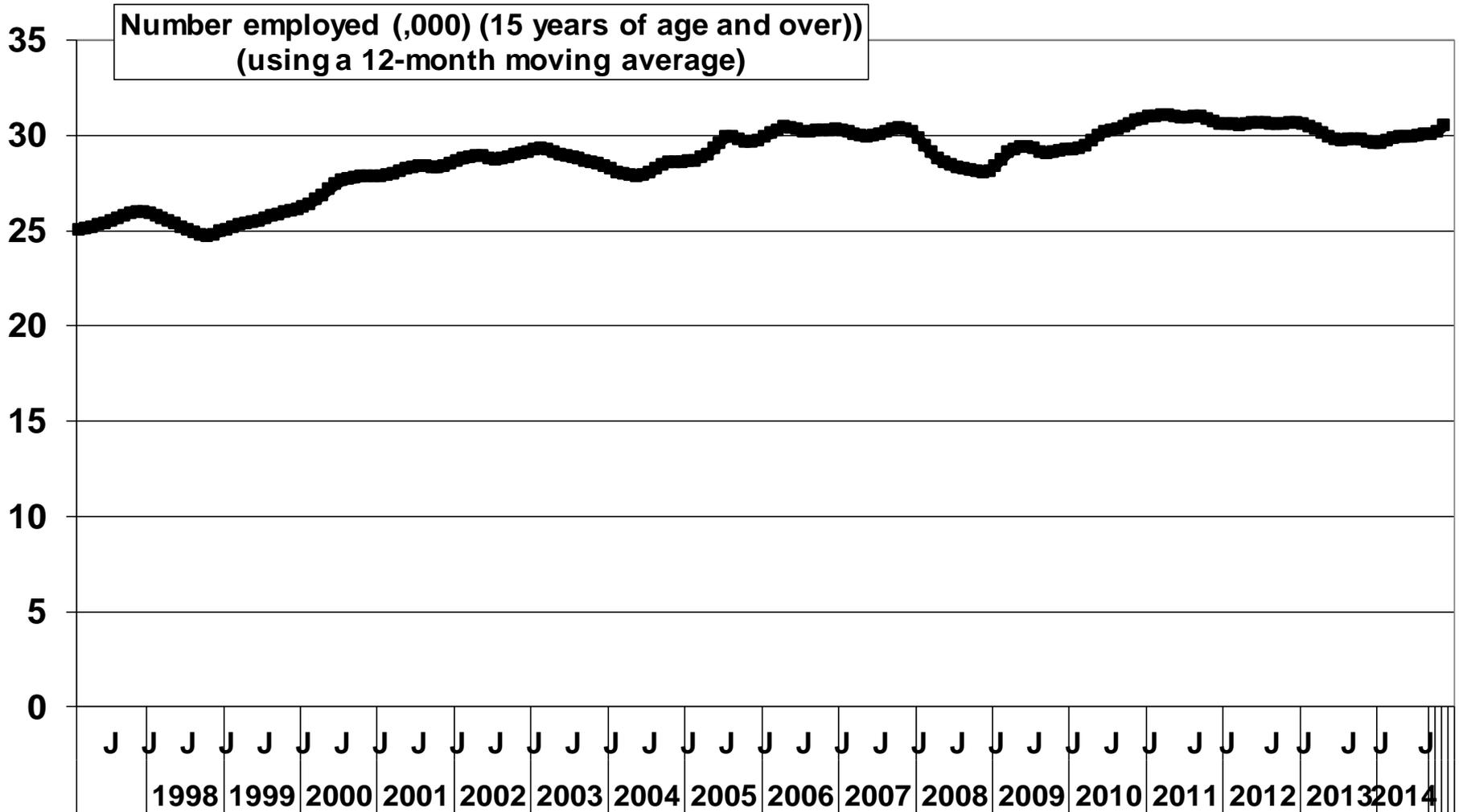
Source: Statistics Canada. Labour Force Survey, CANSIM Tables 026-0001 and 282-0111.

Employment in non-metro Manitoba: Services-producing sectors



Source: Statistics Canada. Labour Force Survey, CANSIM Tables 026-0001 and 282-0111.

Employment in non-metro Manitoba: Wholesale and retail trade



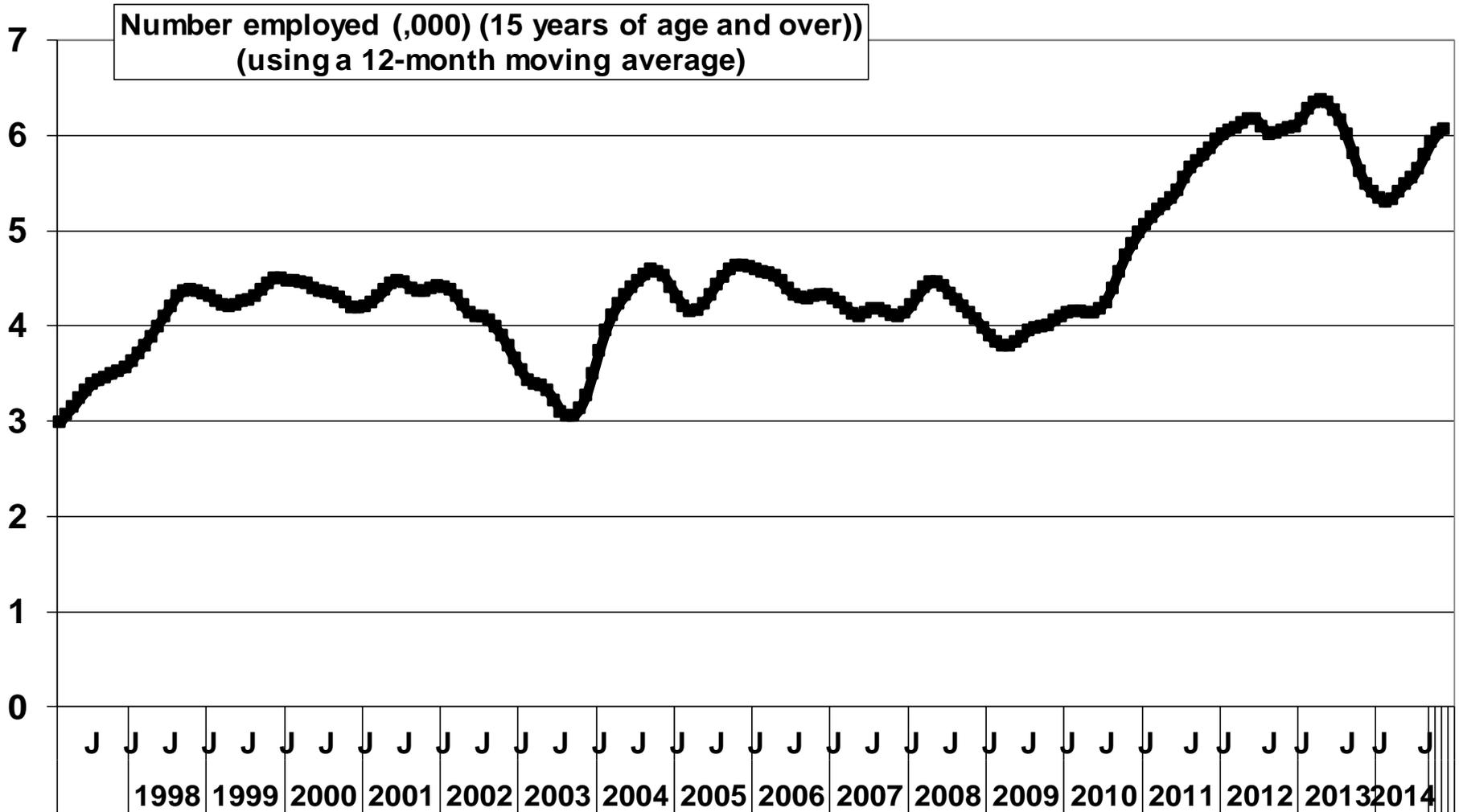
Source: Statistics Canada. Labour Force Survey, CANSIM Tables 026-0001 and 282-0111.

Employment in non-metro Manitoba: Finance, insurance, real estate and leasing



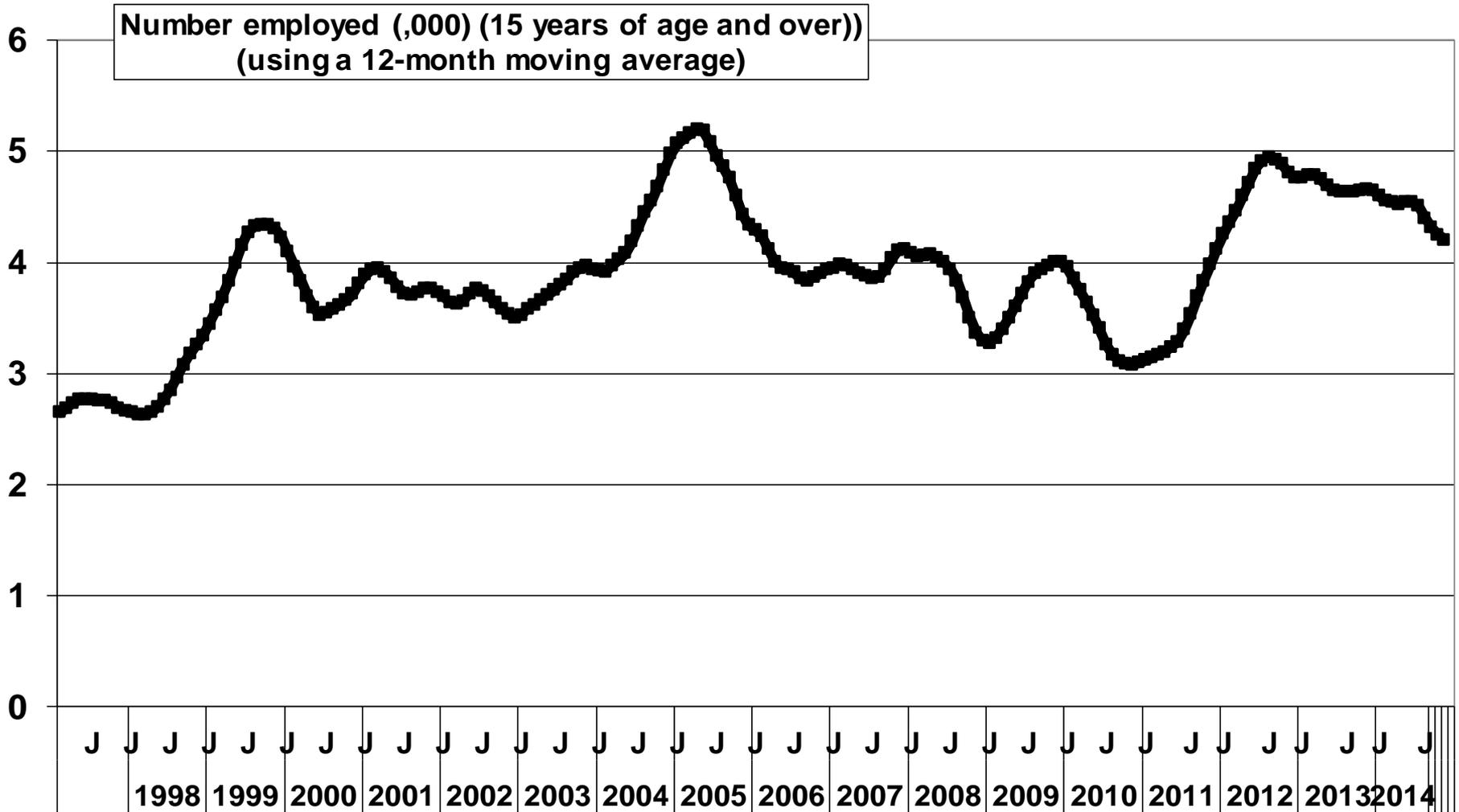
Source: Statistics Canada. Labour Force Survey, CANSIM Tables 026-0001 and 282-0111.

Employment in non-metro Manitoba: Professional, scientific and technical services



Source: Statistics Canada. Labour Force Survey, CANSIM Tables 026-0001 and 282-0111.

Employment in non-metro Manitoba: Business, building & other support services



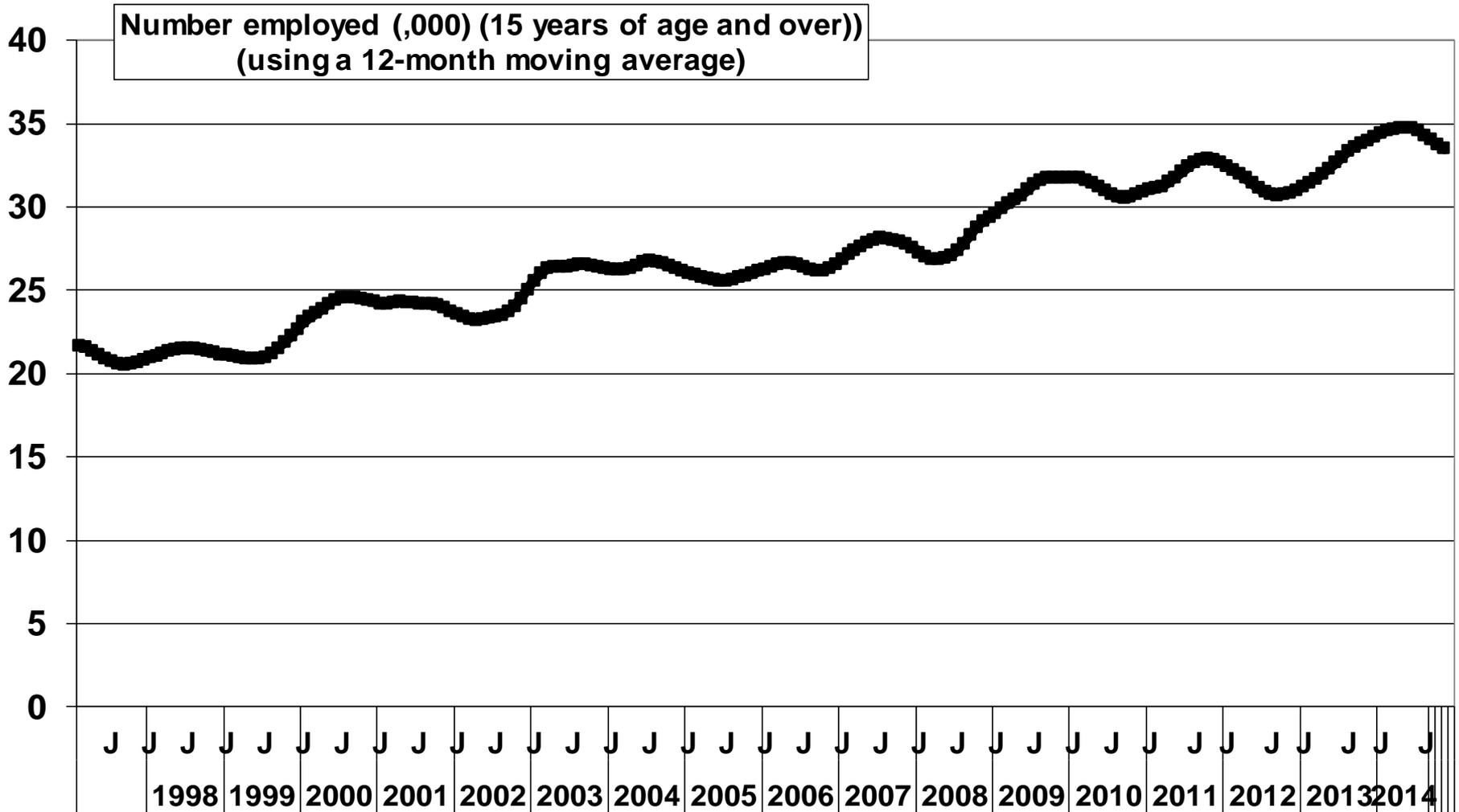
Source: Statistics Canada. Labour Force Survey, CANSIM Tables 026-0001 and 282-0111.

Employment in non-metro Manitoba: Education services



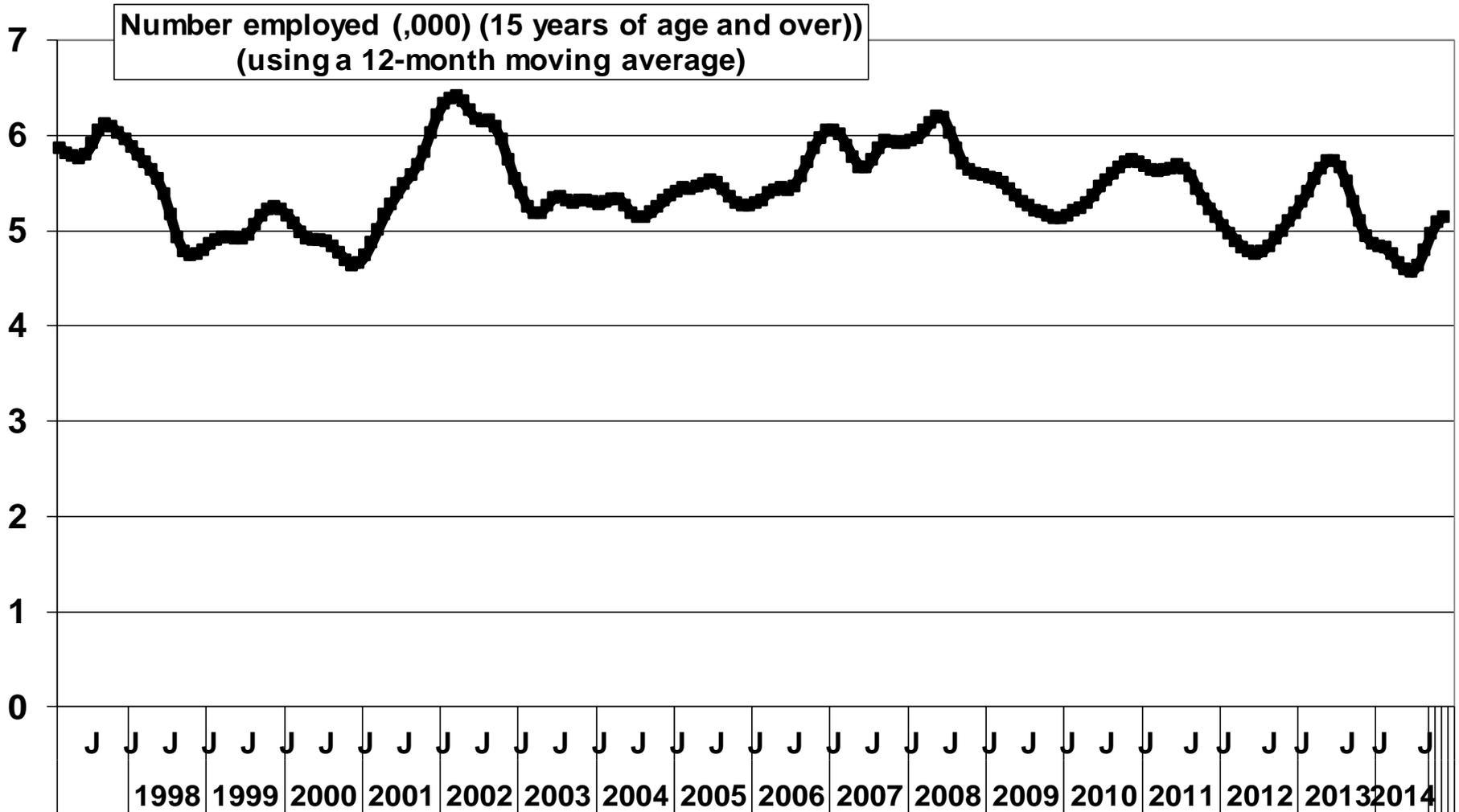
Source: Statistics Canada. Labour Force Survey, CANSIM Tables 026-0001 and 282-0111.

Employment in non-metro Manitoba: Health services



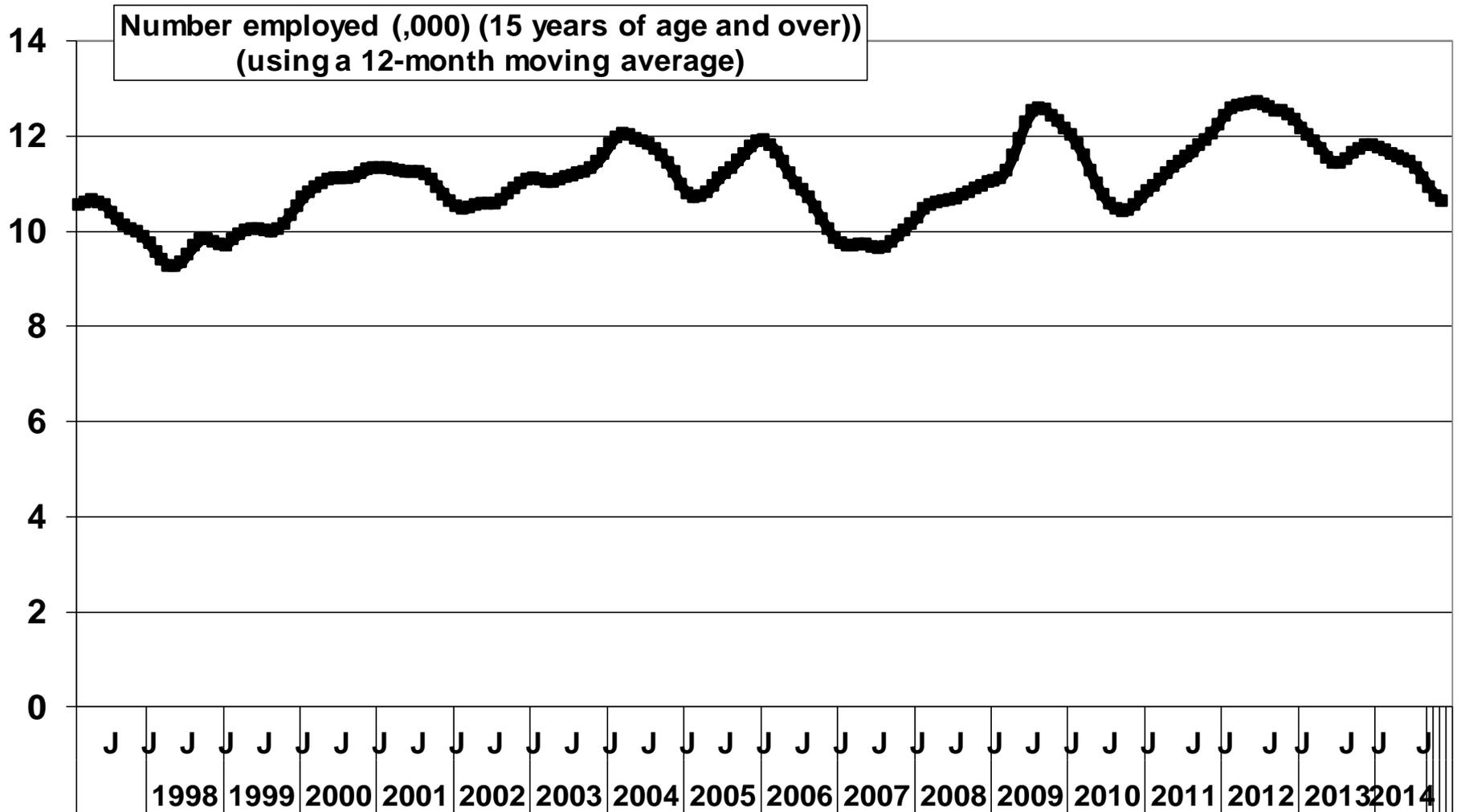
Source: Statistics Canada. Labour Force Survey, CANSIM Tables 026-0001 and 282-0111.

Employment in non-metro Manitoba: Information, culture and recreation services



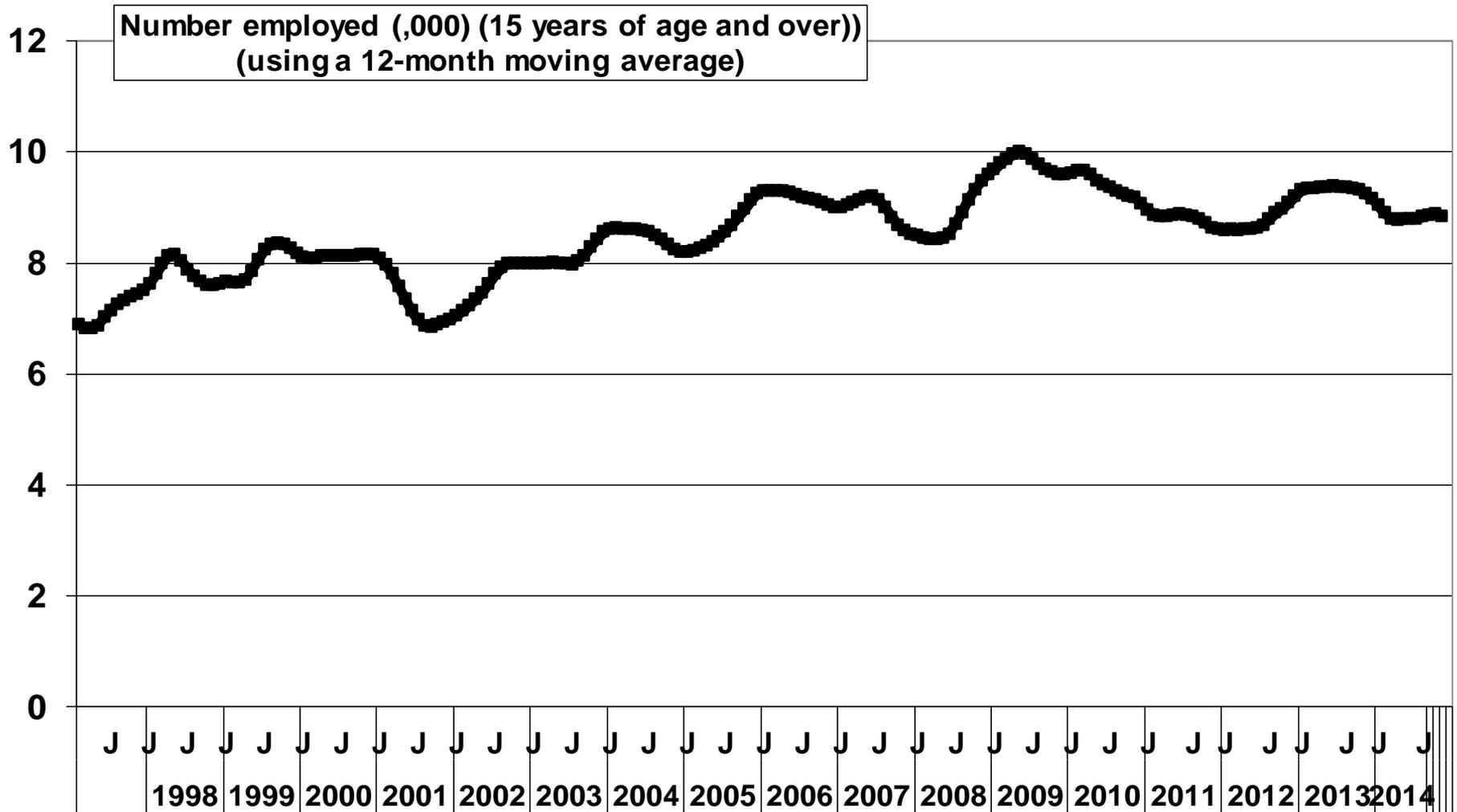
Source: Statistics Canada. Labour Force Survey, CANSIM Tables 026-0001 and 282-0111.

Employment in non-metro Manitoba: Accommodation and food services



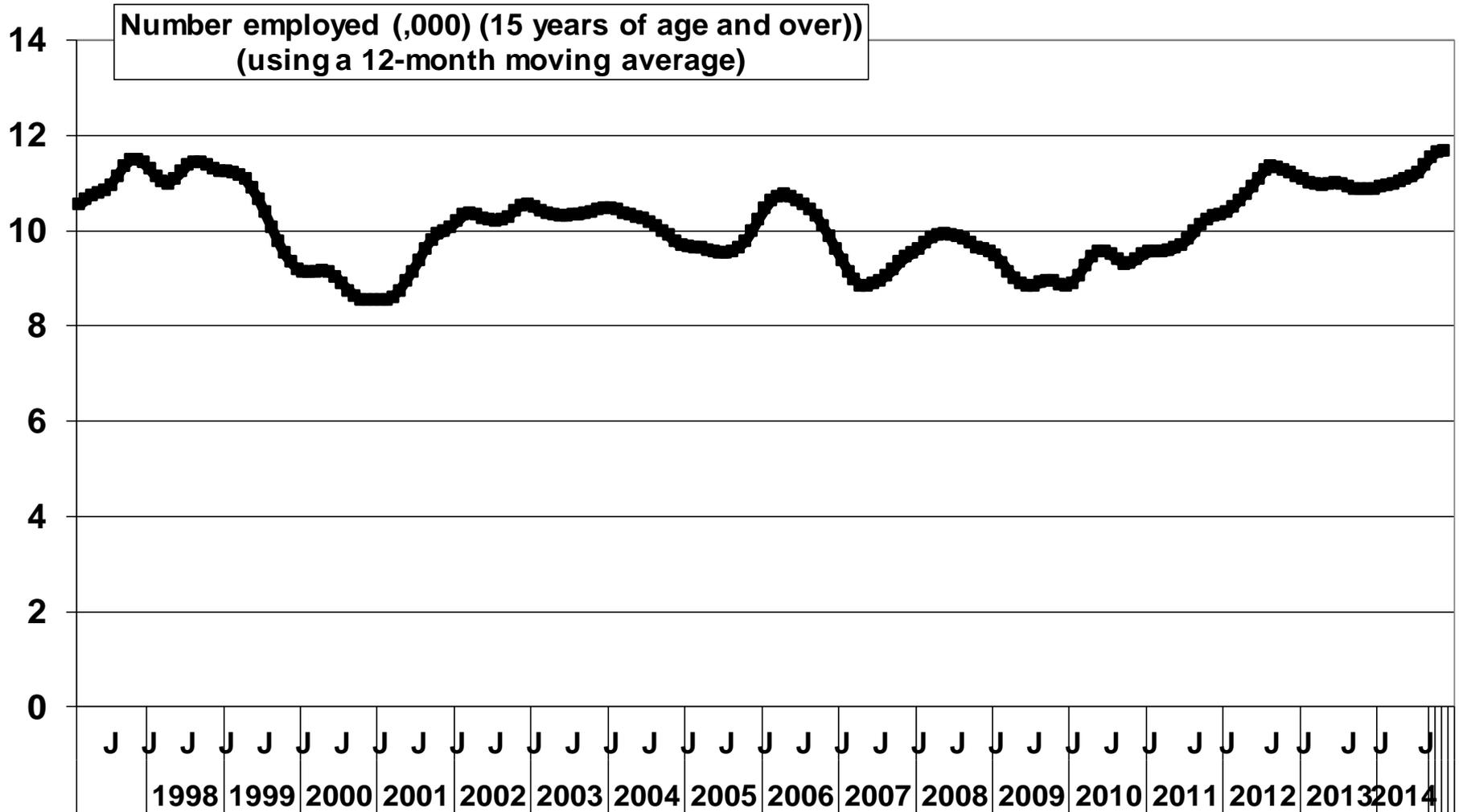
Source: Statistics Canada. Labour Force Survey, CANSIM Tables 026-0001 and 282-0111.

Employment in non-metro Manitoba: Other (personal) services



Source: Statistics Canada. Labour Force Survey, CANSIM Tables 026-0001 and 282-0111.

Employment in non-metro Manitoba: Public administration (federal, provincial & municipal)



Source: Statistics Canada. Labour Force Survey, CANSIM Tables 026-0001 and 282-0111.

Manitoba's Rural Economy

Outline

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- **Trends in employment**
 - **Overall employment: Level and trend**
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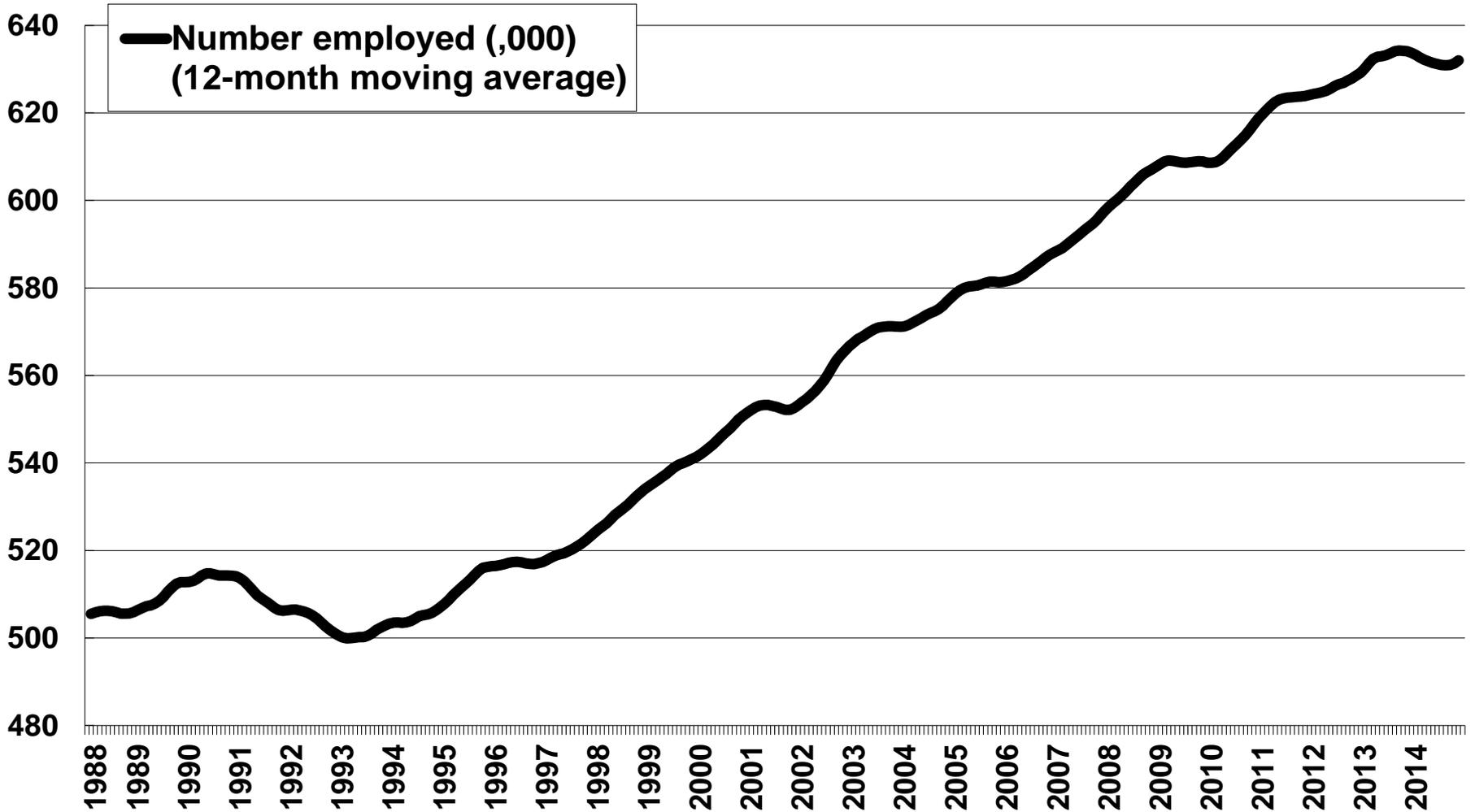
Percent change in employment in November¹, 2014 by Economic Region, Manitoba (compared to same month in previous year) (15 years of age and over)

Name of Economic Region (ER)	Number employed (,000)		Change	Percent change	Rank within Manitoba
	November ¹ , 2013	November ¹ , 2014			
Interlake ER, Manitoba	47	49	2	3.6	1
South Central (incl. Winkler) ER, Manitoba	32	32	1	2.3	2
Winnipeg ER, Manitoba	380	379	-1	-0.3	3
Parklands (incl. Dauphin) & North ER, Manitoba	35	35	0	-0.8	4
Southeast (incl. Steinbach) ER, Manitoba	58	57	-1	-2.0	5
Southwest (incl. Brandon) ER, Manitoba	57	56	-1	-2.2	6
North Central (incl. Portage) ER, Manitoba	25	24	-1	-2.5	7

1. Data are the average for the previous 12 months (i.e. a 12-month moving average)

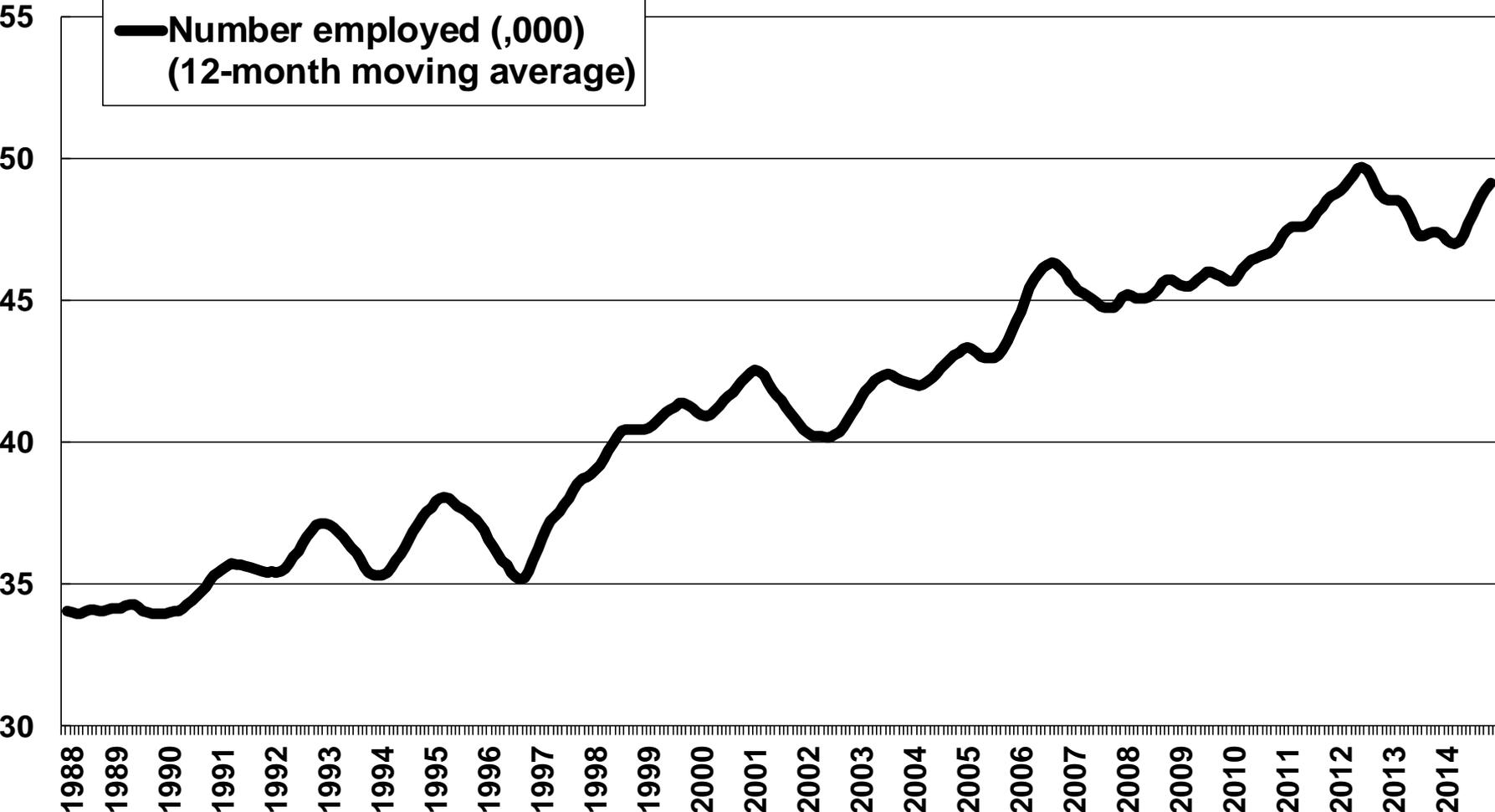
Source: Statistics Canada, Labour Force Survey, CANSIM Table 282-0054.

Number employed in Manitoba



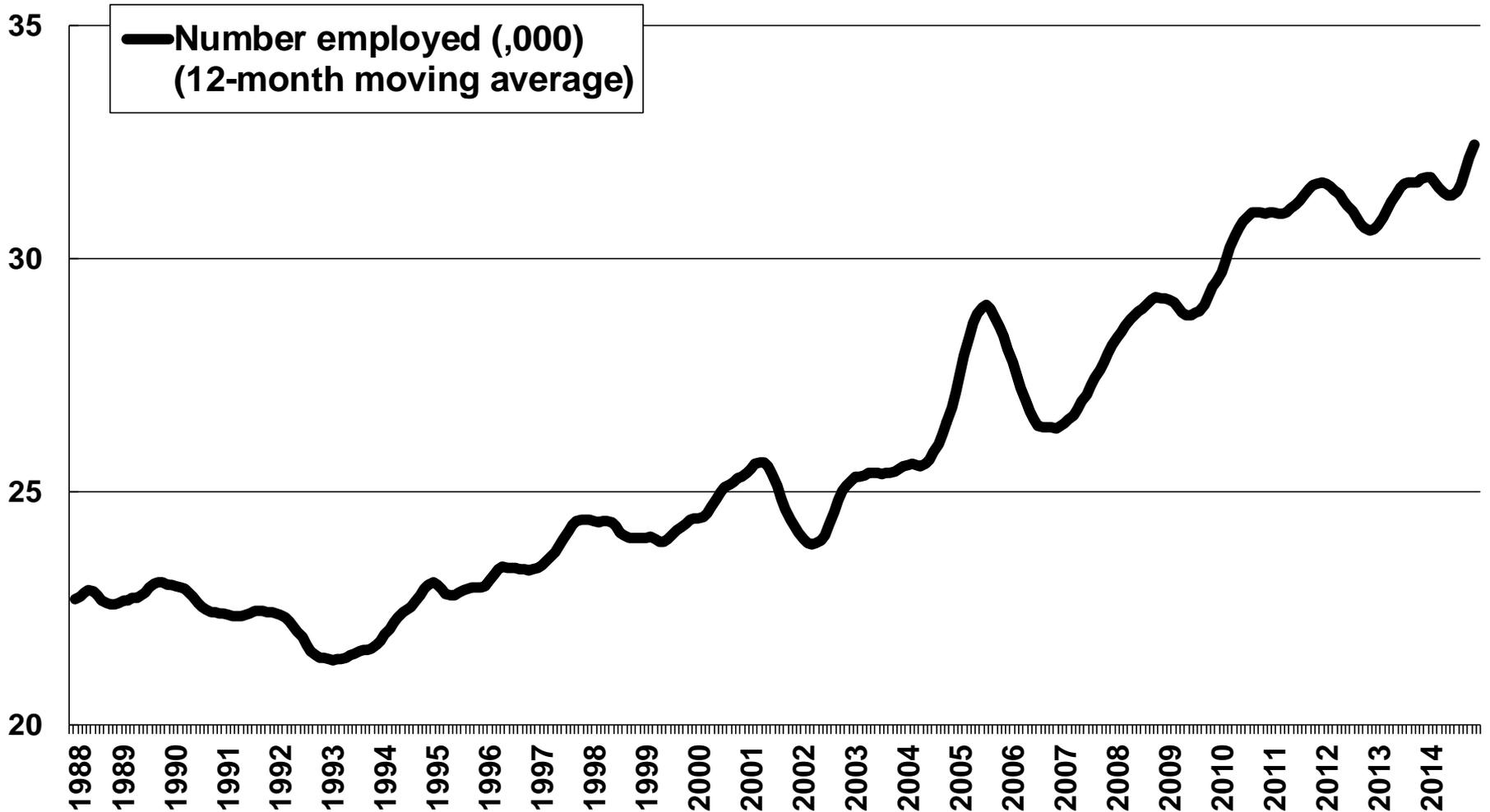
Source: Statistics Canada, Labour Force Survey, CANSIM Table 282-0054.

Number employed in Manitoba's Interlake Economic Region



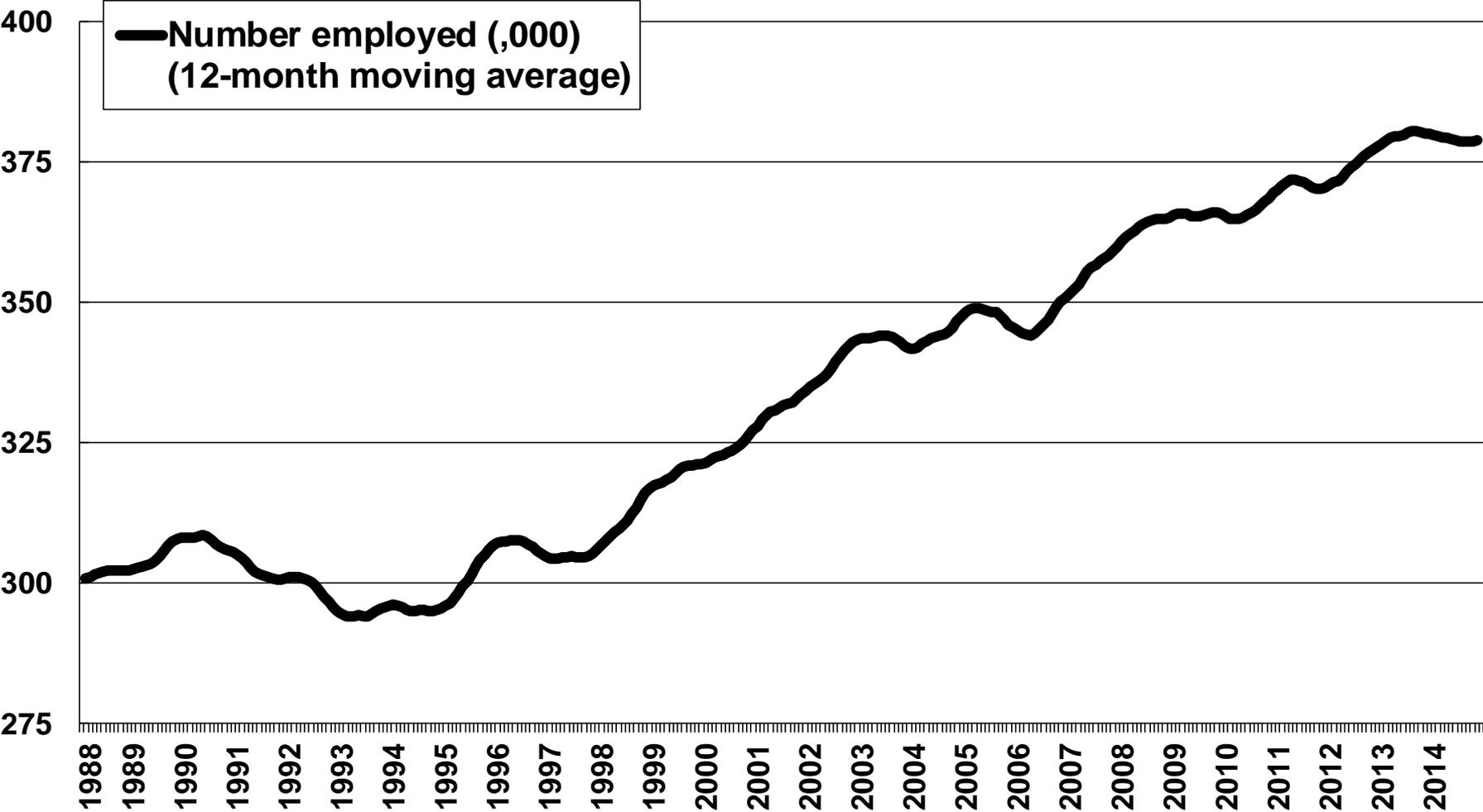
Source: Statistics Canada, Labour Force Survey, CANSIM Table 282-0054.

Number employed in Manitoba's South Central (incl. Winkler) Economic Region



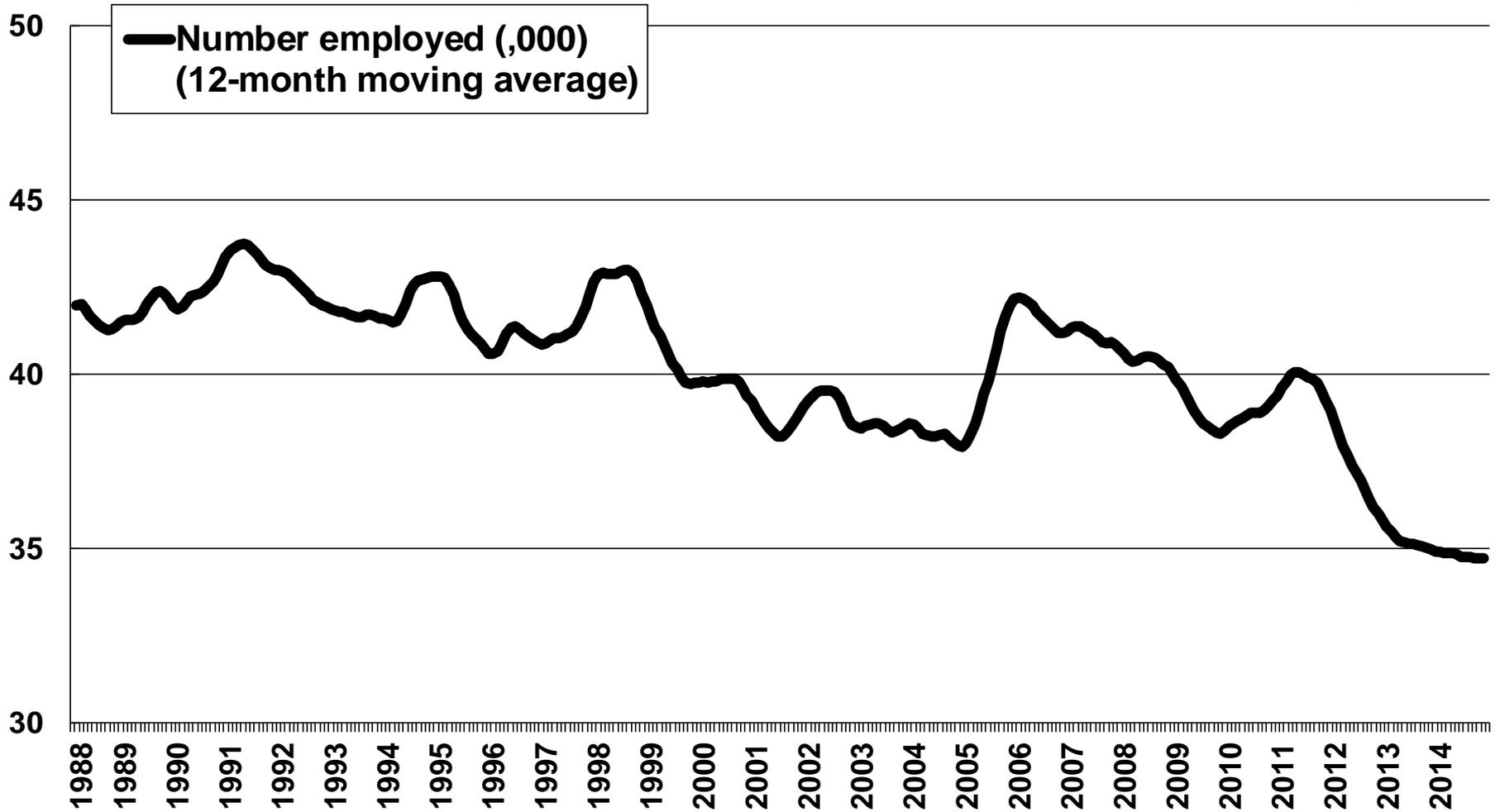
Source: Statistics Canada, Labour Force Survey, CANSIM Table 282-0054.

Number employed in Manitoba's Winnipeg Economic Region



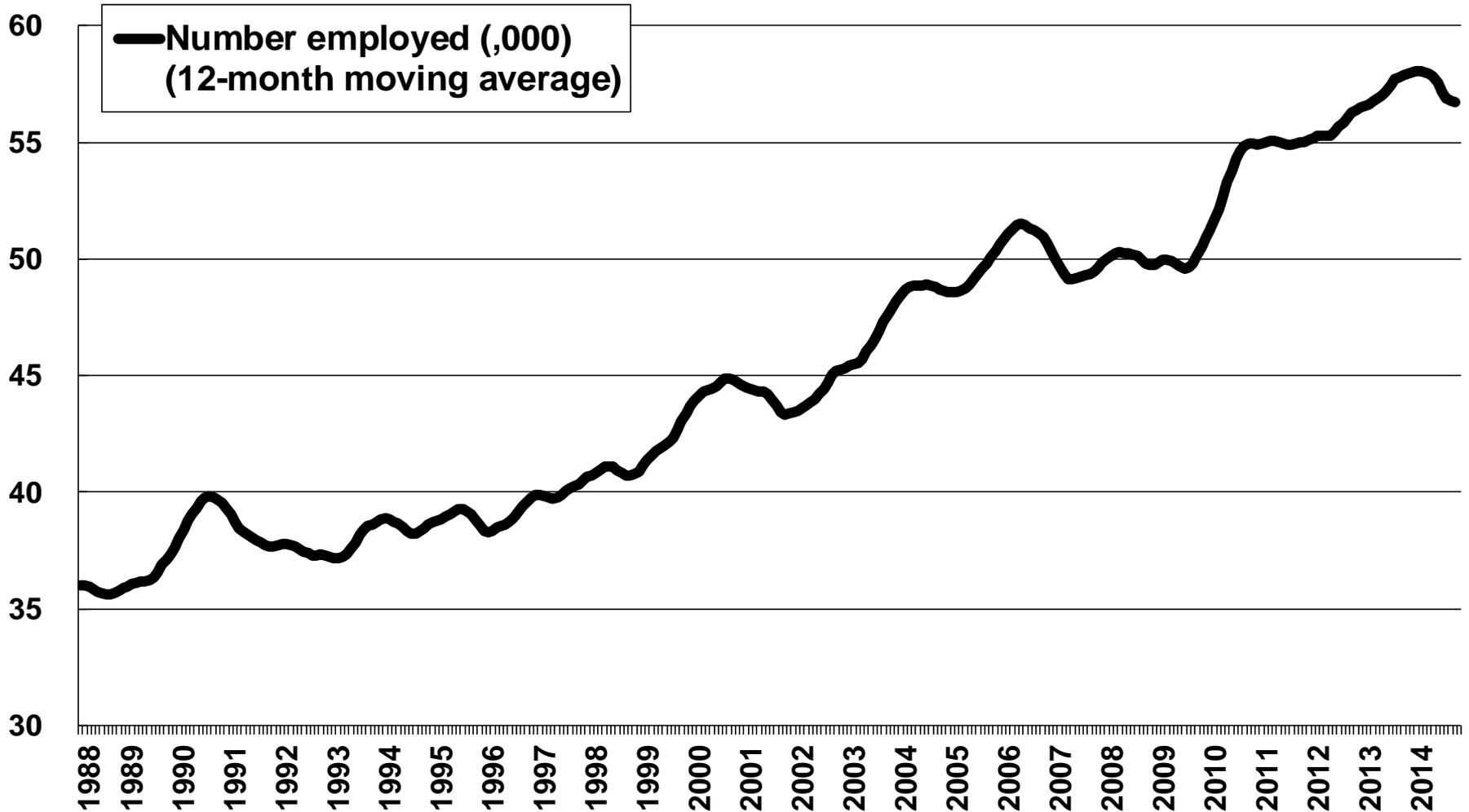
Source: Statistics Canada, Labour Force Survey, CANSIM Table 282-0054.

Number employed in Manitoba's Parklands (incl. Dauphin) and North Economic Regions



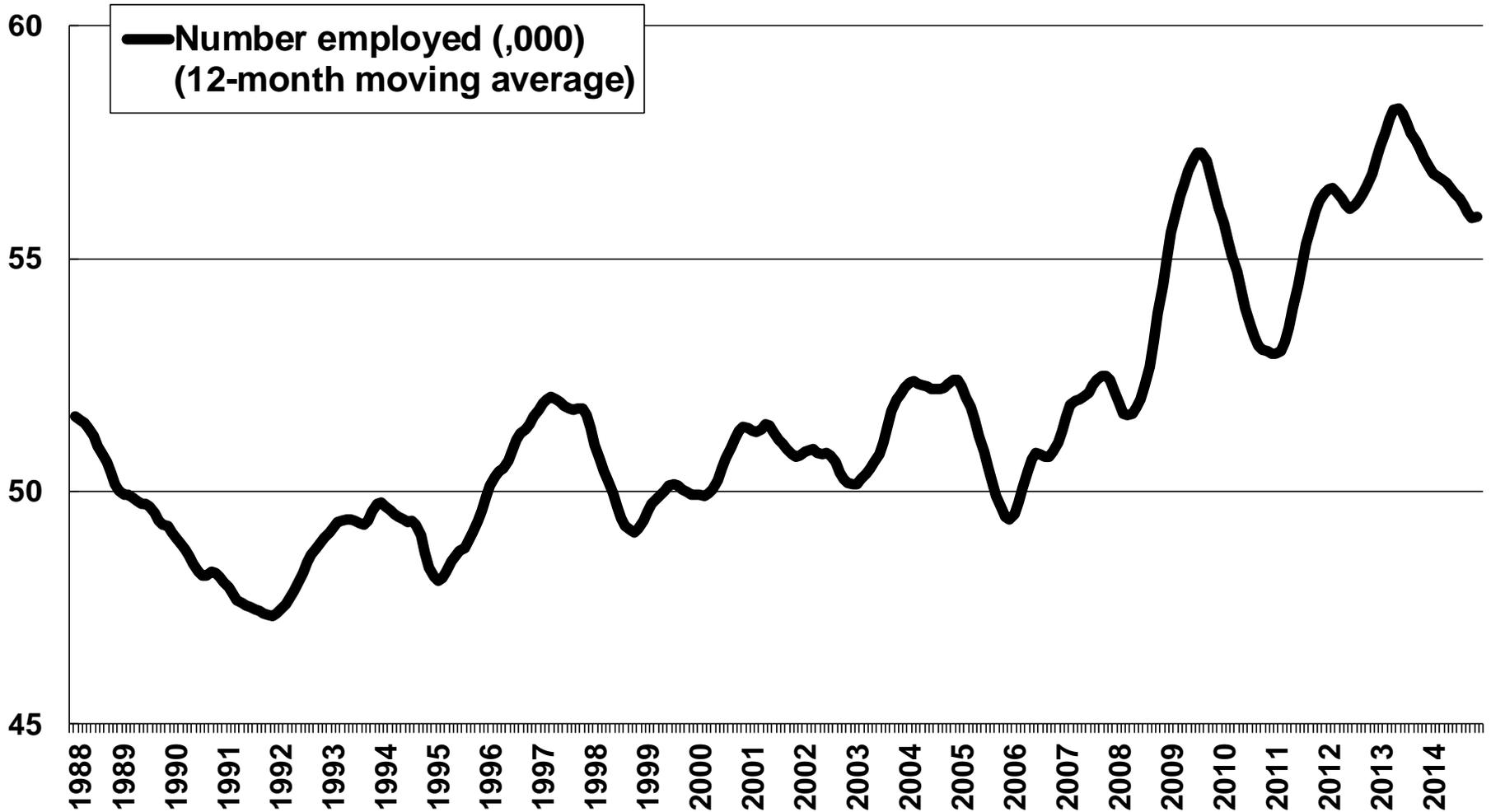
Source: Statistics Canada, Labour Force Survey, CANSIM Table 282-0054.

Number employed in Manitoba's Southeast (incl. Steinbach) Economic Region



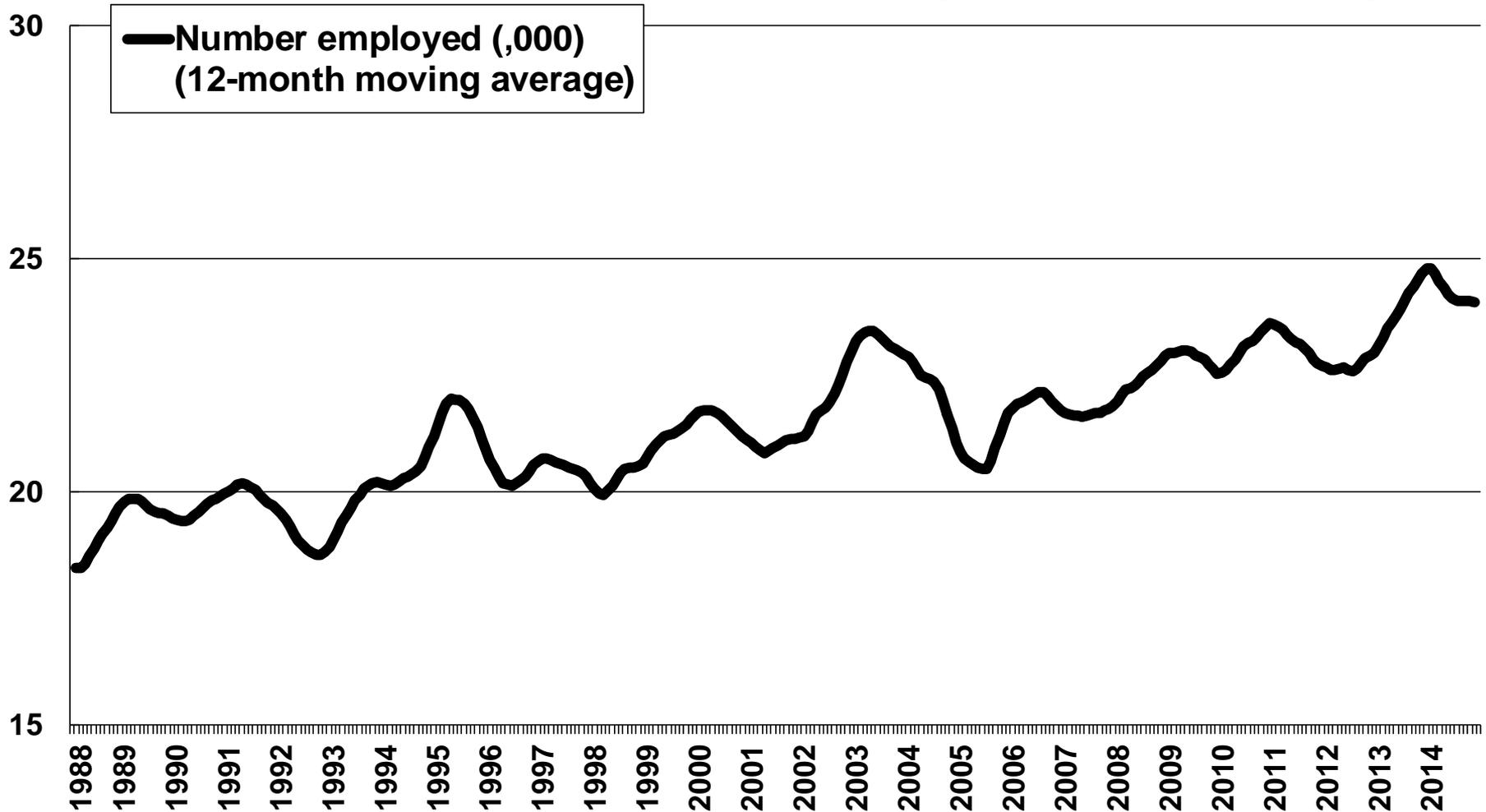
Source: Statistics Canada, Labour Force Survey, CANSIM Table 282-0054.

Number employed in Manitoba's Southwest (incl. Brandon) Economic Region



Source: Statistics Canada, Labour Force Survey, CANSIM Table 282-0054.

Number employed in Manitoba's North Central (incl. Portage) Economic Region



Source: Statistics Canada, Labour Force Survey, CANSIM Table 282-0054.

Percent change in employment in November¹, 2014 by Economic Region, Manitoba

(compared to same month in previous year) (15 years of age and over)

Name of Economic Region (ER)	Number employed (,000)		Change	Percent change	Rank within group (across all ERs in Canada)
	November ¹ , 2013	November ¹ , 2014			
Economic Regions that are less than 5% non-metro , sorted by percent change in employment in November ¹ , 2014, compared to same month in previous year					
Laval ER, Quebec	218	228	10	4.4	1
Winnipeg ER, Manitoba	380	379	-1	-0.3	5
Montréal ER, Quebec	964	957	-7	-0.7	6
Economic Regions that are 33-94% non-metro , sorted by percent change in employment in November ¹ , 2014, compared to same month in previous year					
Muskoka-Kawarthas ER, Ontario	168	181	14	8.3	1
Interlake ER, Manitoba	47	49	2	3.6	3
Southeast (incl. Steinbach) ER, Manitoba	58	57	-1	-2.0	13
North Central (incl. Portage) ER, Manitoba	25	24	-1	-2.5	16
Laurentides ER, Quebec	303	293	-10	-3.4	18
Economic Regions that are 95+% non-metro , sorted by percent change in employment in November ¹ , 2014, compared to same month in previous year					
Banff-Jasper-Rocky Mountain House ER, Alberta	53	56	3	6.3	1
South Central (incl. Winkler) ER, Manitoba	32	32	1	2.3	6
Parklands (incl. Dauphin) & North ER, Manitoba	35	35	0	-0.8	16
Southwest (incl. Brandon) ER, Manitoba	57	56	-1	-2.2	20
Kootenay ER, British Columbia	78	70	-8	-10.4	32

1. Data are the average for the previous 12 months (i.e. a 12-month moving average)

Source: Statistics Canada, Labour Force Survey, CANSIM Table 282-0054.

Manitoba's Rural Economy

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- **The rural economic problematique**

Manitoba's Rural Economy

The rural economic problematique

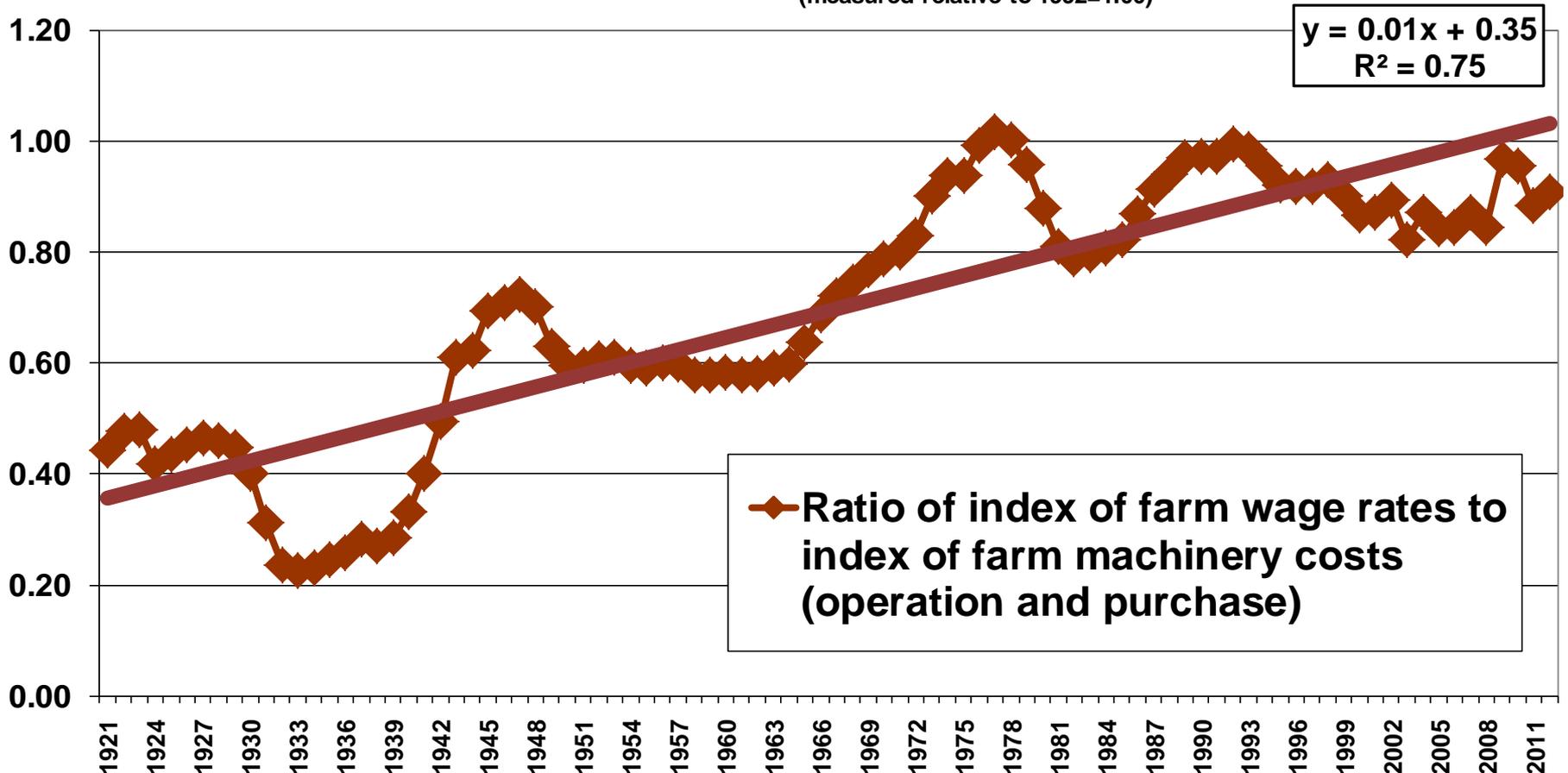
The increasing value of human time

Schultz, T. W. (1972) "The Increasing Economic Value of Human Time." **American Journal of Agricultural Economics**, Vol. 54, No. 5 (December), pp. 843 – 850.

- **Good news: our real wage is going up.**
- **Thus, incentive for firms to substitute machines for labour.**
- **Good news: each of us has a bigger / more efficient machine with which to work.**
- **Bad news: rural Manitoba needs fewer and fewer workers to ship more and more goods.**
- **The rural problematique: rural communities need to find new goods or services to export in order to maintain their workforce and to keep their population.**

The price of farm labour tends to increase over time relative to farm machinery costs (operation and purchase),

(measured relative to 1992=1.00)



Manitoba's Rural Economy

Outline

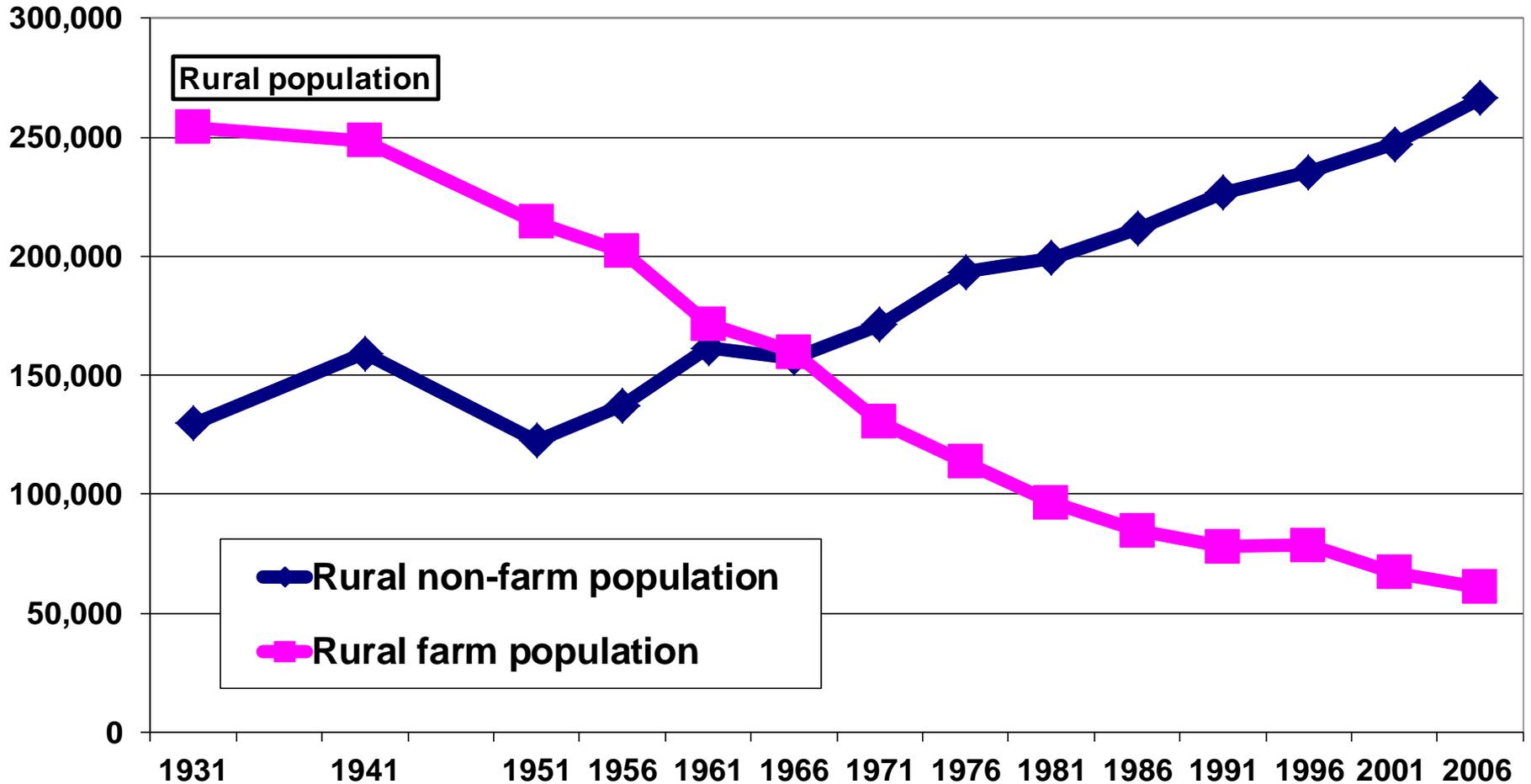
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Manitoba's Rural Economy

Landscape vs. people-scape

- Landscape looks “agricultural” (or “forestry”) when you fly over.
- However, a minority of rural people are involved in agriculture or forestry.
 - Farmer minority in rural in 1971
 - Less than 20% now
- The landscape does not predict the livelihoods of the population.

Rural population: Farmer minority since 1971



"Rural" population refers to residents outside population centres of 1,000 or more.

The "farm" population refers to members of households where one (or more members) is a census-farm operator.

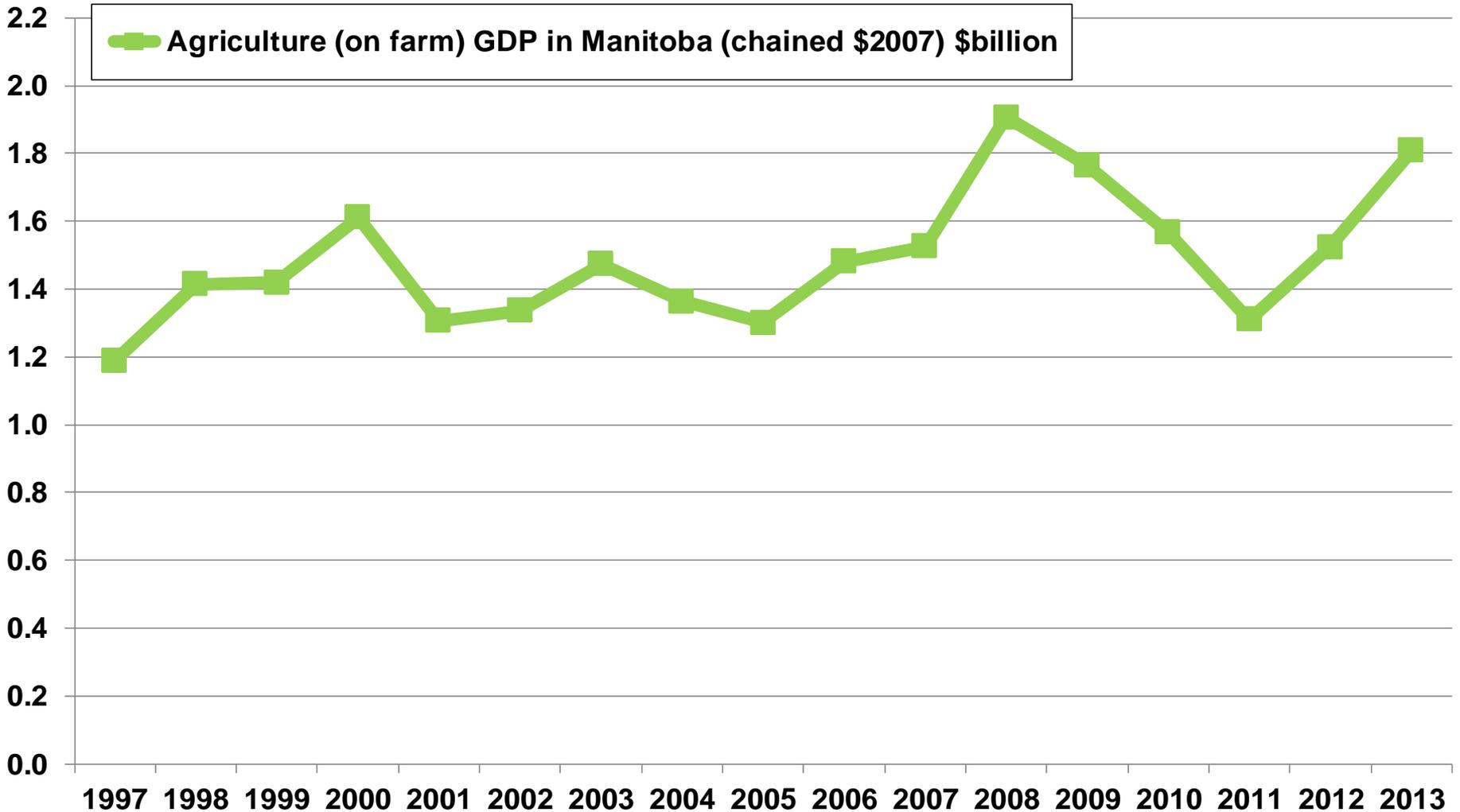
Source: Statistics Canada. Census of Population, 1931 - 2006.

Manitoba's Rural Economy

Outline

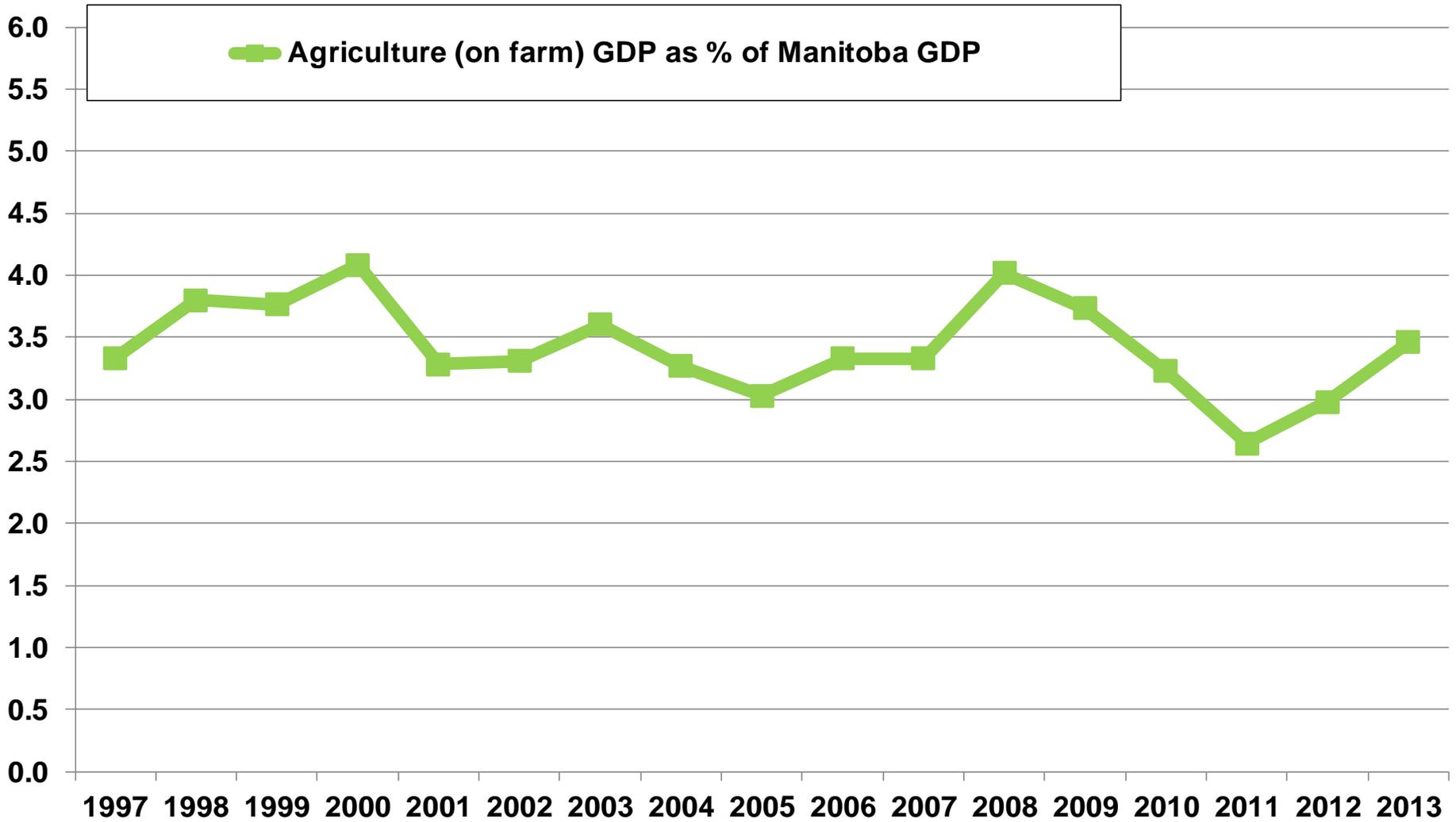
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- **Role of agriculture and food processing**
 - Agriculture GDP: Level and trend

Agriculture GDP in Manitoba has varied between \$1.2 and \$1.9 billion over the last 16 years



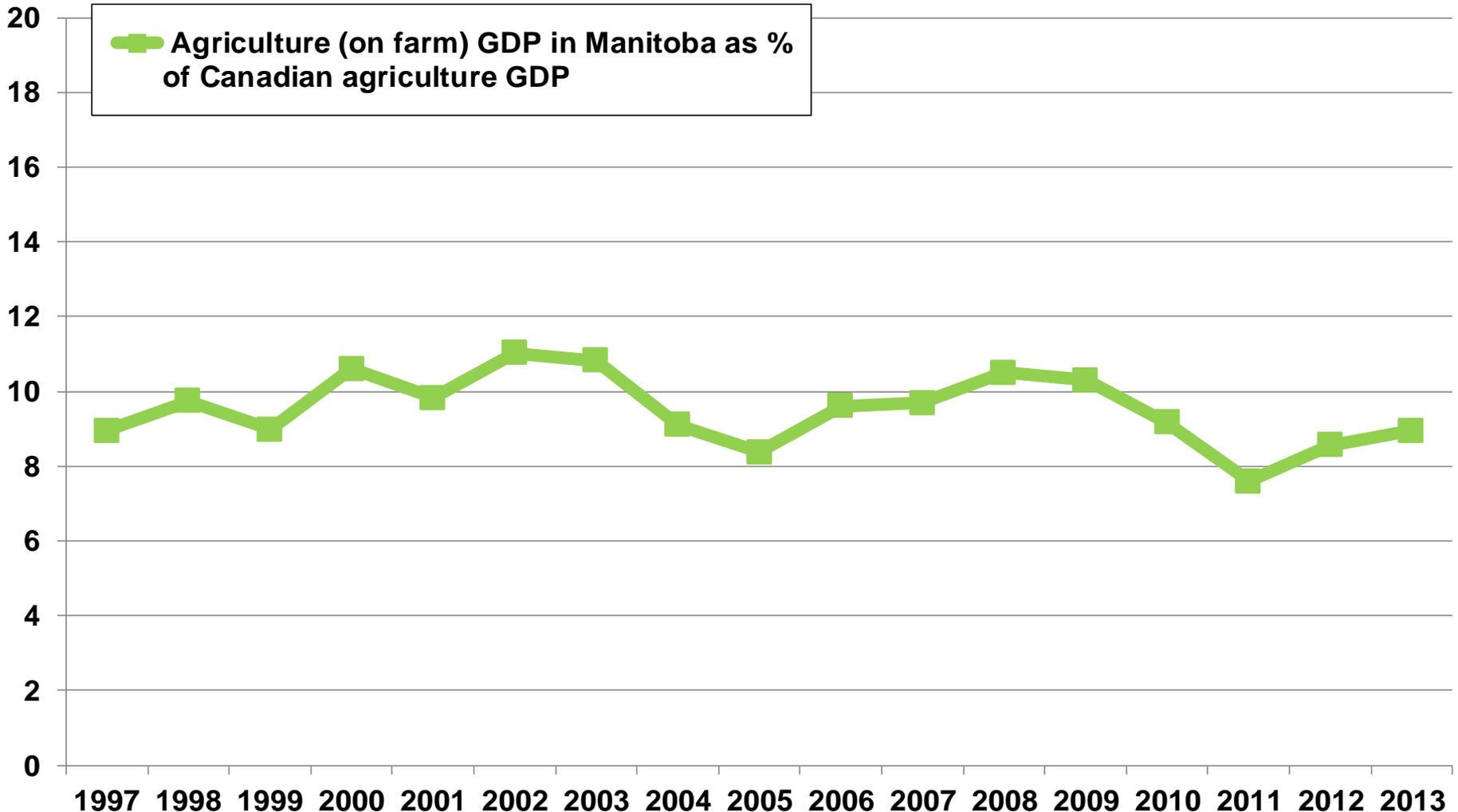
Source: Statistics Canada. Gross Domestic Product (GDP) by Industry Sector by Province, CANSIM Table 379-0030.

In 2013, agriculture contributed 3.5% of Manitoba's GDP



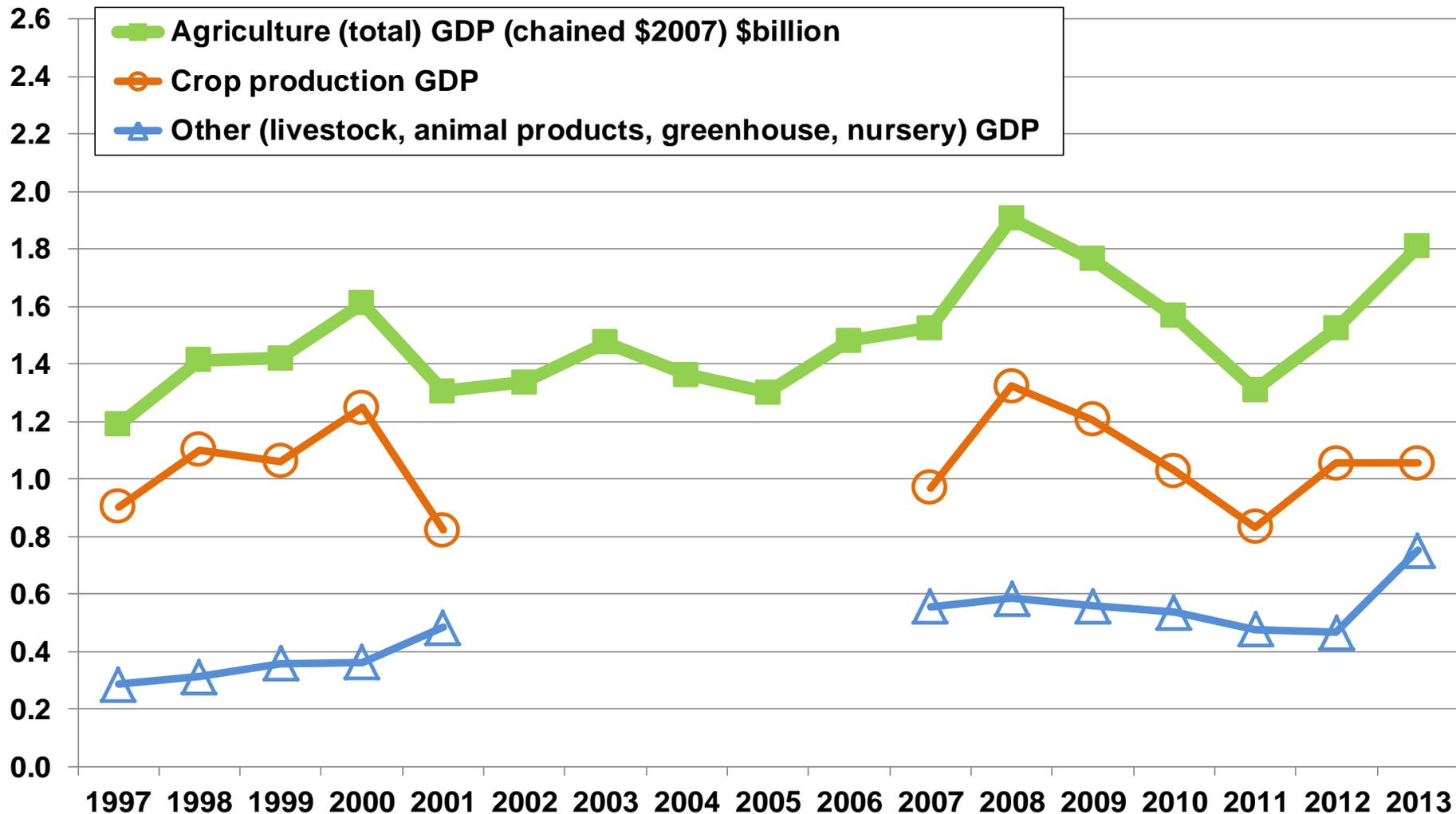
Source: Statistics Canada. Gross Domestic Product (GDP) by Industry Sector by Province, CANSIM Table 379-0030.

Agriculture GDP in Manitoba has represented 8% to 11% of Canada's Agriculture GDP over the last 16 years



Source: Statistics Canada. Gross Domestic Product (GDP) by Industry Sector by Province, CANSIM Table 379-0030.

In Manitoba, the GDP from crop production is about double the GDP from livestock production



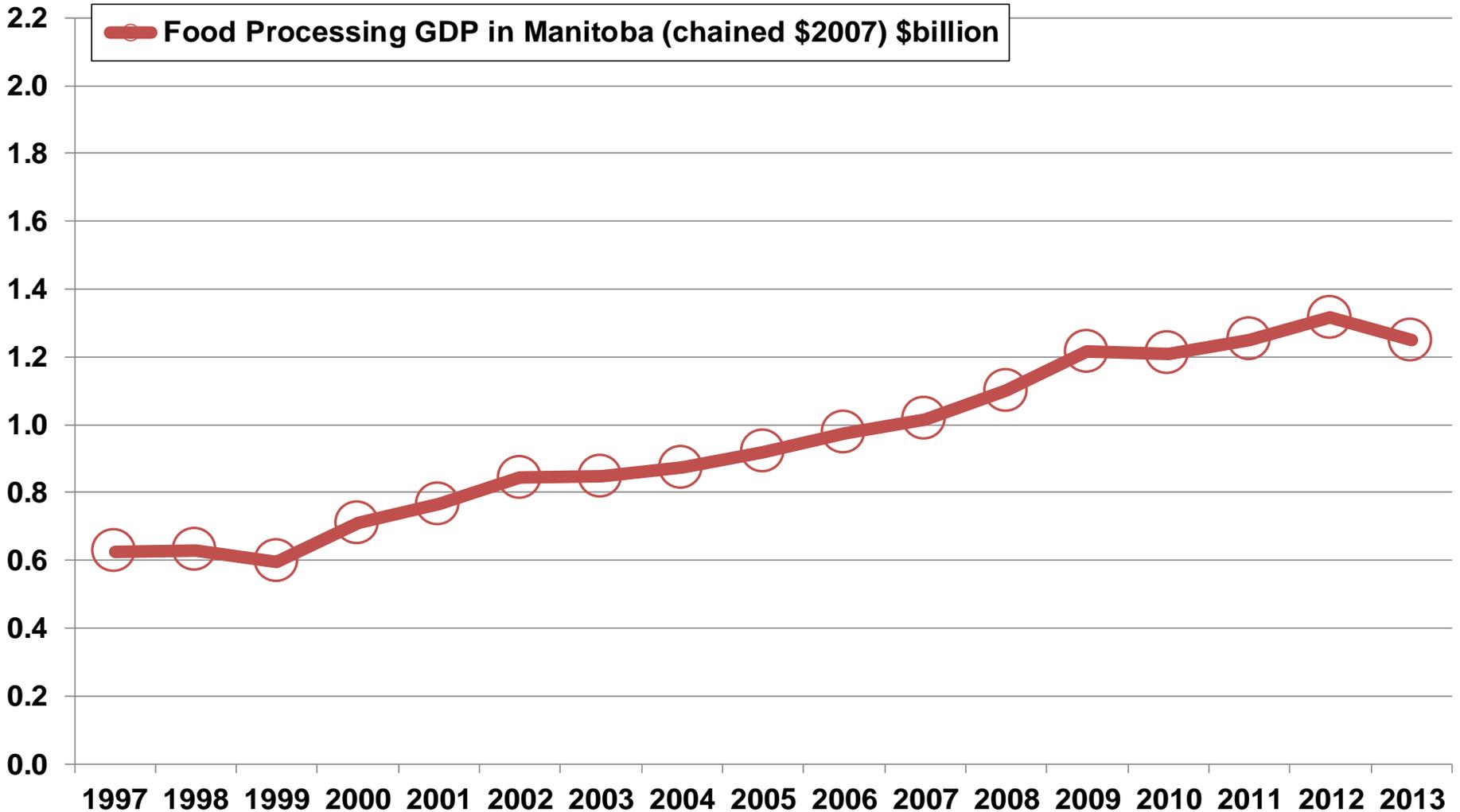
Source: Statistics Canada. Gross Domestic Product (GDP) by Industry Sector by Province, CANSIM Table 379-0030.

Manitoba's Rural Economy

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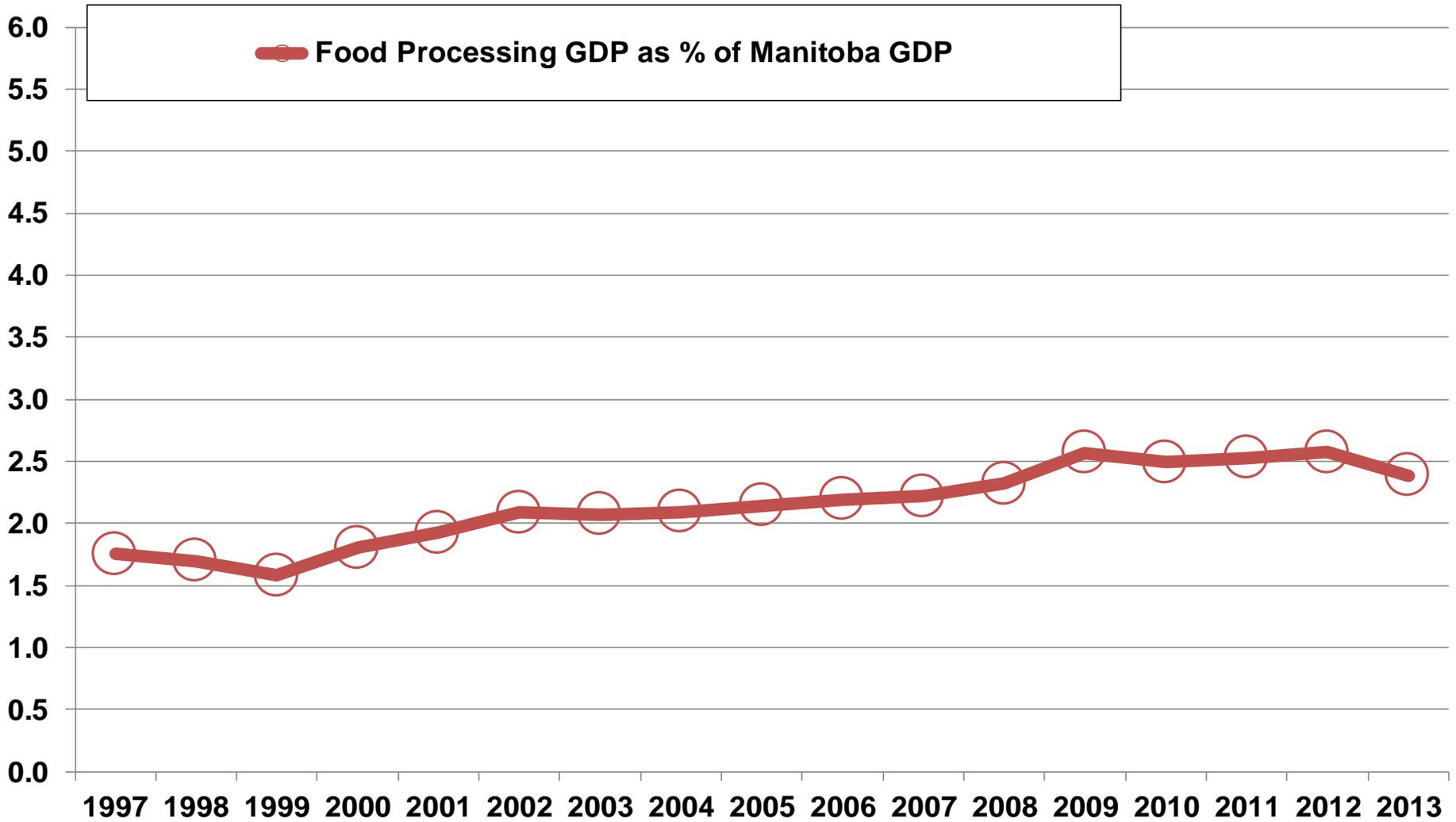
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- **Role of agriculture and food processing**
 - Agriculture GDP: Level and trend
 - Food processing GDP

Food processing GDP in Manitoba has doubled from \$0.6 billion in the late 1990s to \$1.2 billion in 2014



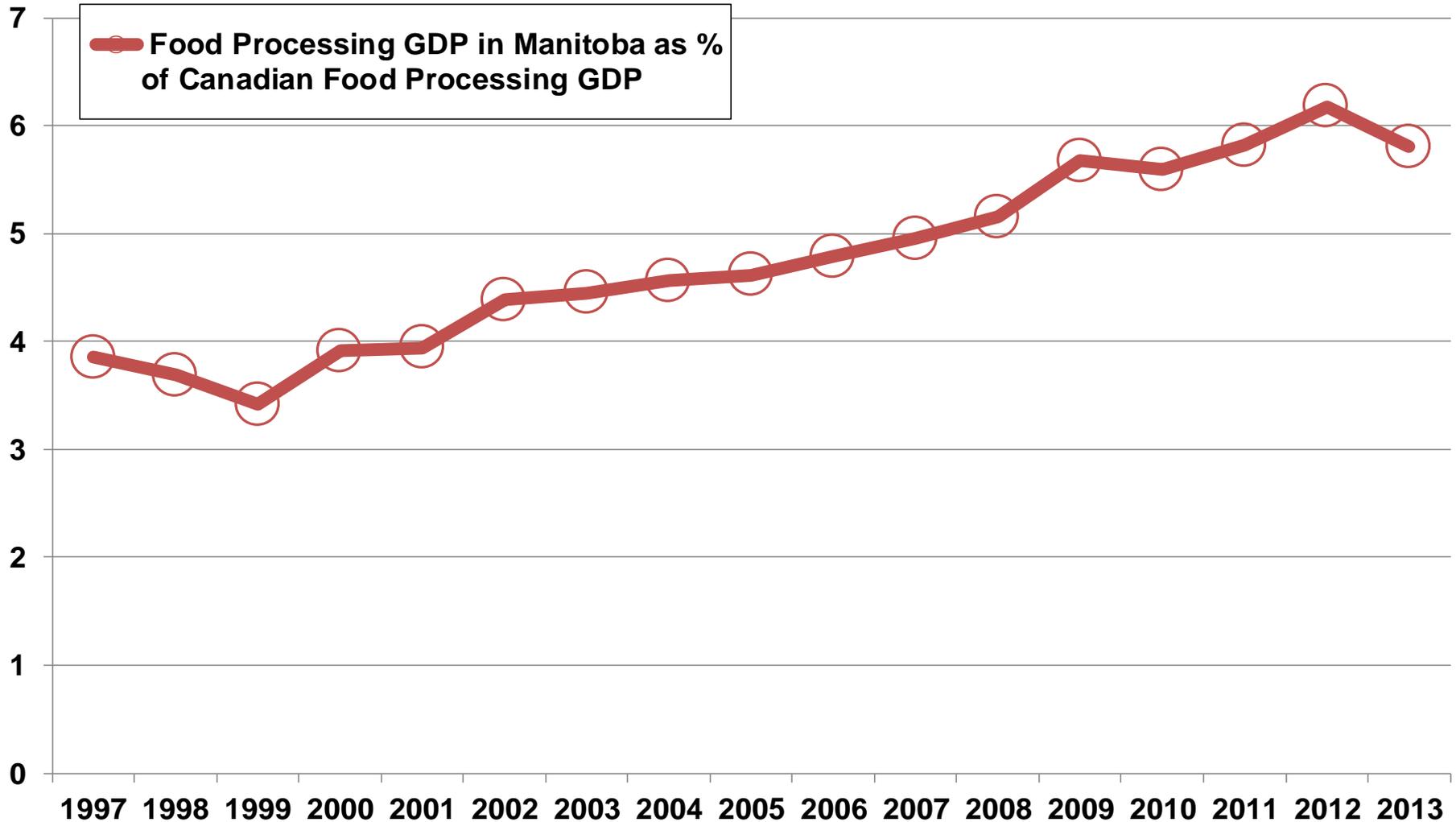
Source: Statistics Canada. Gross Domestic Product (GDP) by Industry Sector by Province, CANSIM Table 379-0030.

In 2013, food processing contributed 2% of Manitoba's GDP



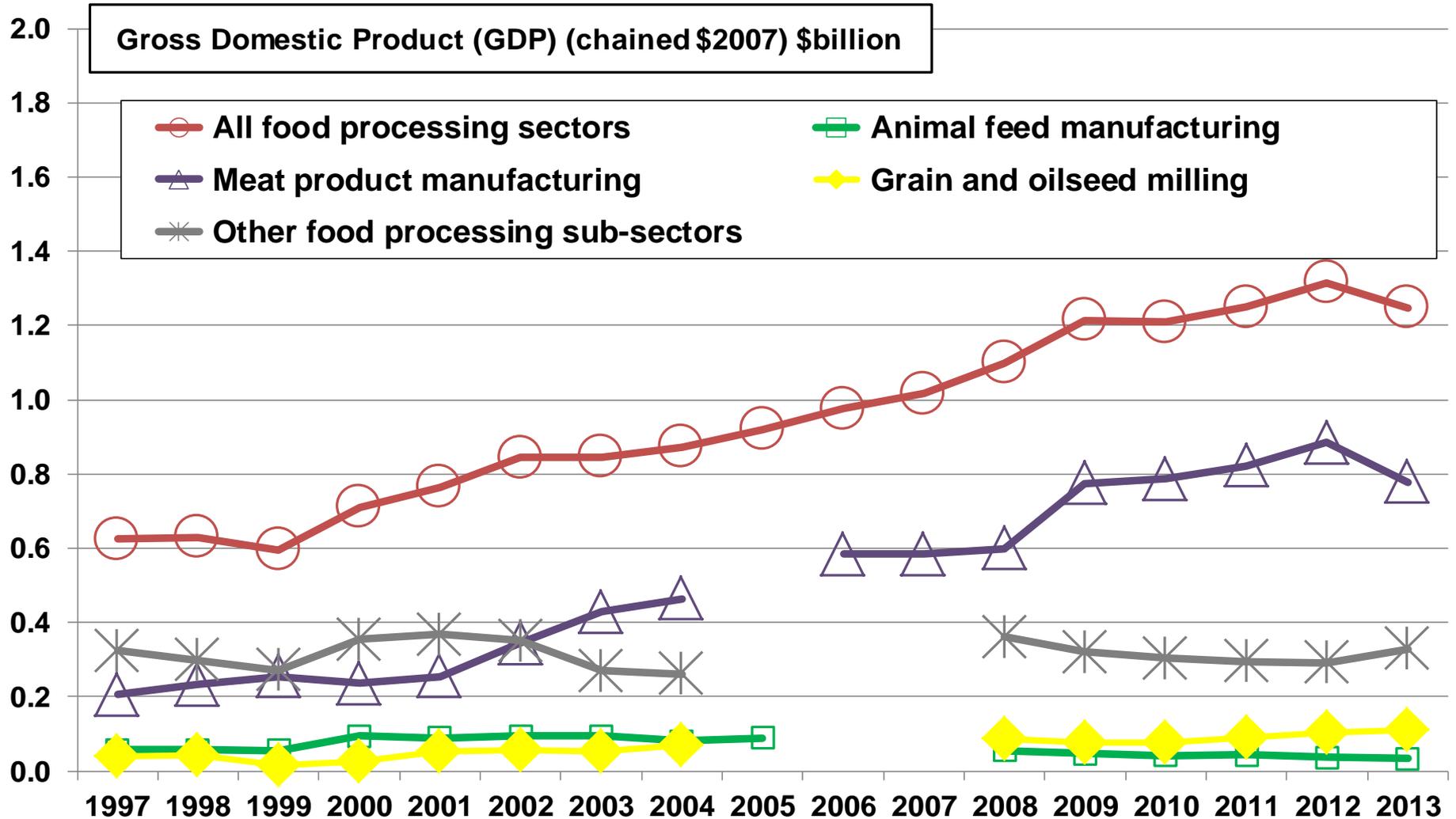
Source: Statistics Canada. Gross Domestic Product (GDP) by Industry Sector by Province, CANSIM Table 379-0030.

In 2012, Manitoba's food processing GDP represented 6% of Canada's food processing GDP



Source: Statistics Canada. Gross Domestic Product (GDP) by Industry Sector by Province, CANSIM Table 379-0030.

The growth up to 2012 in food processing GDP in Manitoba was due to the growth in the meat product processing



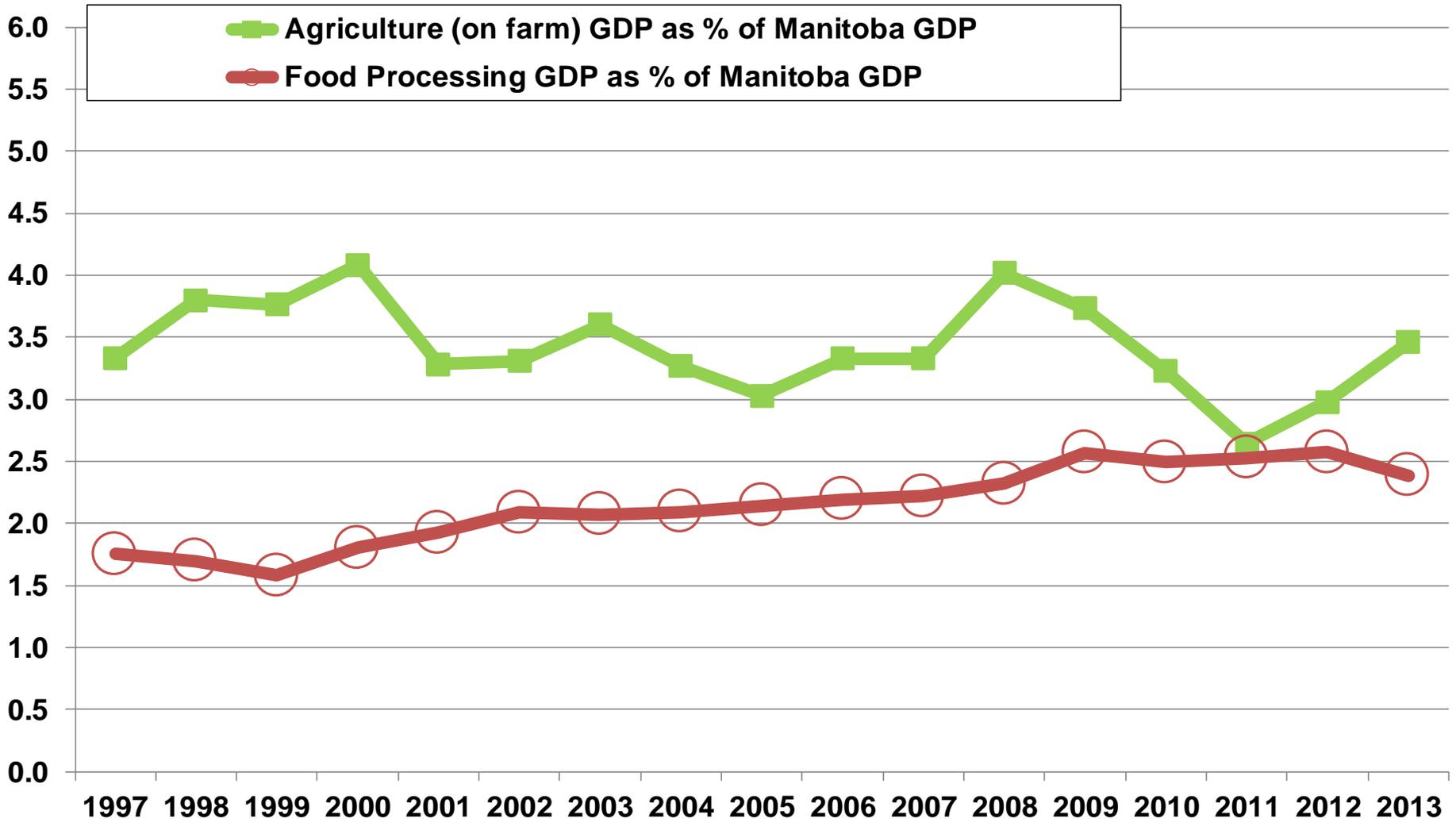
Source: Statistics Canada. Gross Domestic Product (GDP) by Industry Sector by Province, CANSIM Table 379-0030.

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 - TO SUMMARIZE

In 2013, agriculture contributed 3.5% and food processing contributed 2% of Manitoba's GDP



Source: Statistics Canada. Gross Domestic Product (GDP) by Industry Sector by Province, CANSIM Table 379-0030.

Ranking of Provinces by Size of AGRICULTURE GDP as a percent of Canadian Agriculture GDP, 2013		Ranking of Provinces by Size of FOOD PROCESSING GDP as a percent of Canadian Food Processing GDP, 2013	
Saskatchewan	22	Ontario	42
Alberta	21	Quebec	22
Ontario	21	Alberta	11
Quebec	18	British Columbia	8
Manitoba	9	Manitoba	6
British Columbia	6	Saskatchewan	4
New Brunswick	1	New Brunswick	3
Nova Scotia	1	Nova Scotia	2
Prince Edward Island	1	Newfoundland & Labrador	1
Newfoundland & Labrador	0	Prince Edward Island	1

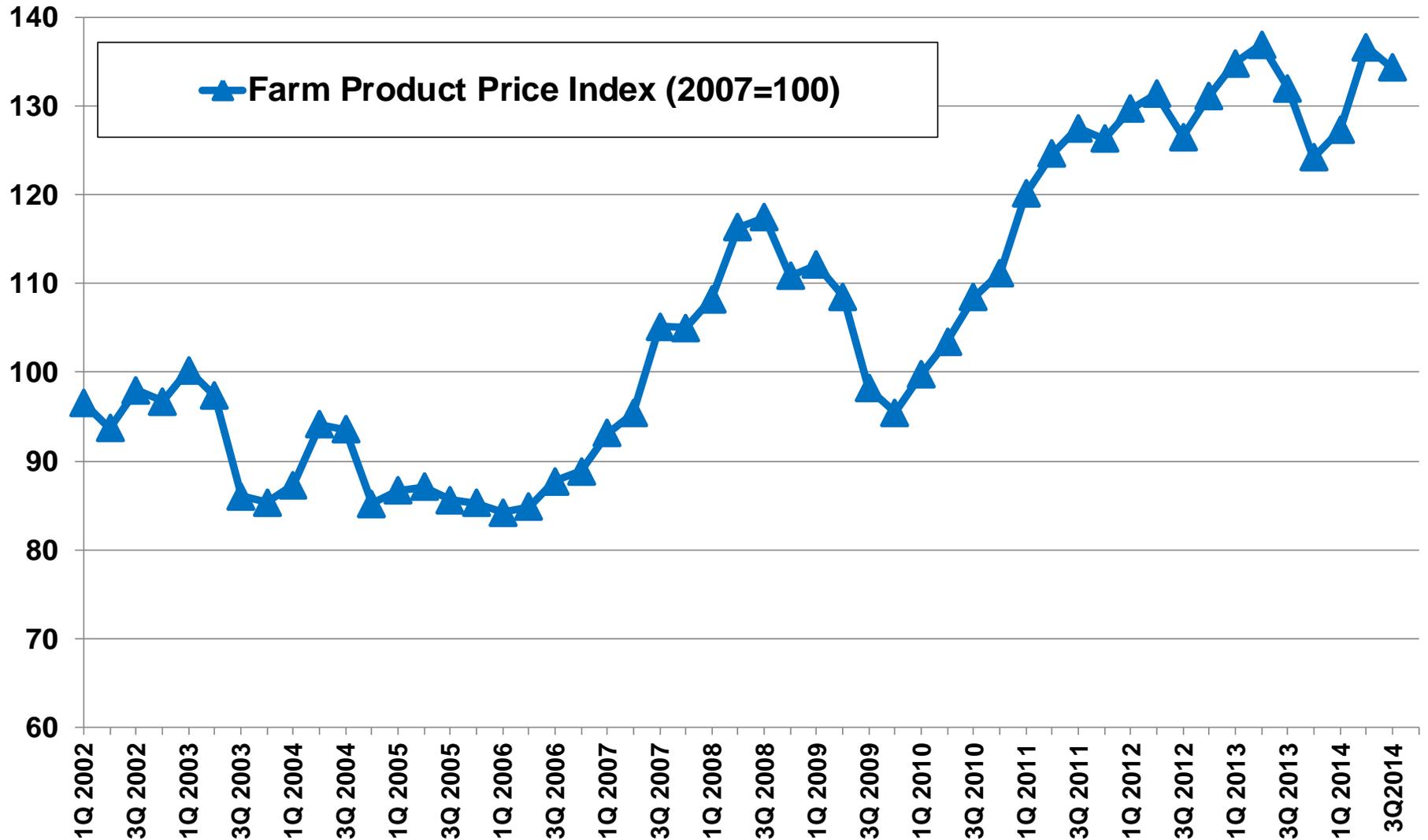
Source: Statistics Canada. Gross Domestic Product (GDP) by Industry, CANSIM Table 379-0030.

Manitoba's Rural Economy

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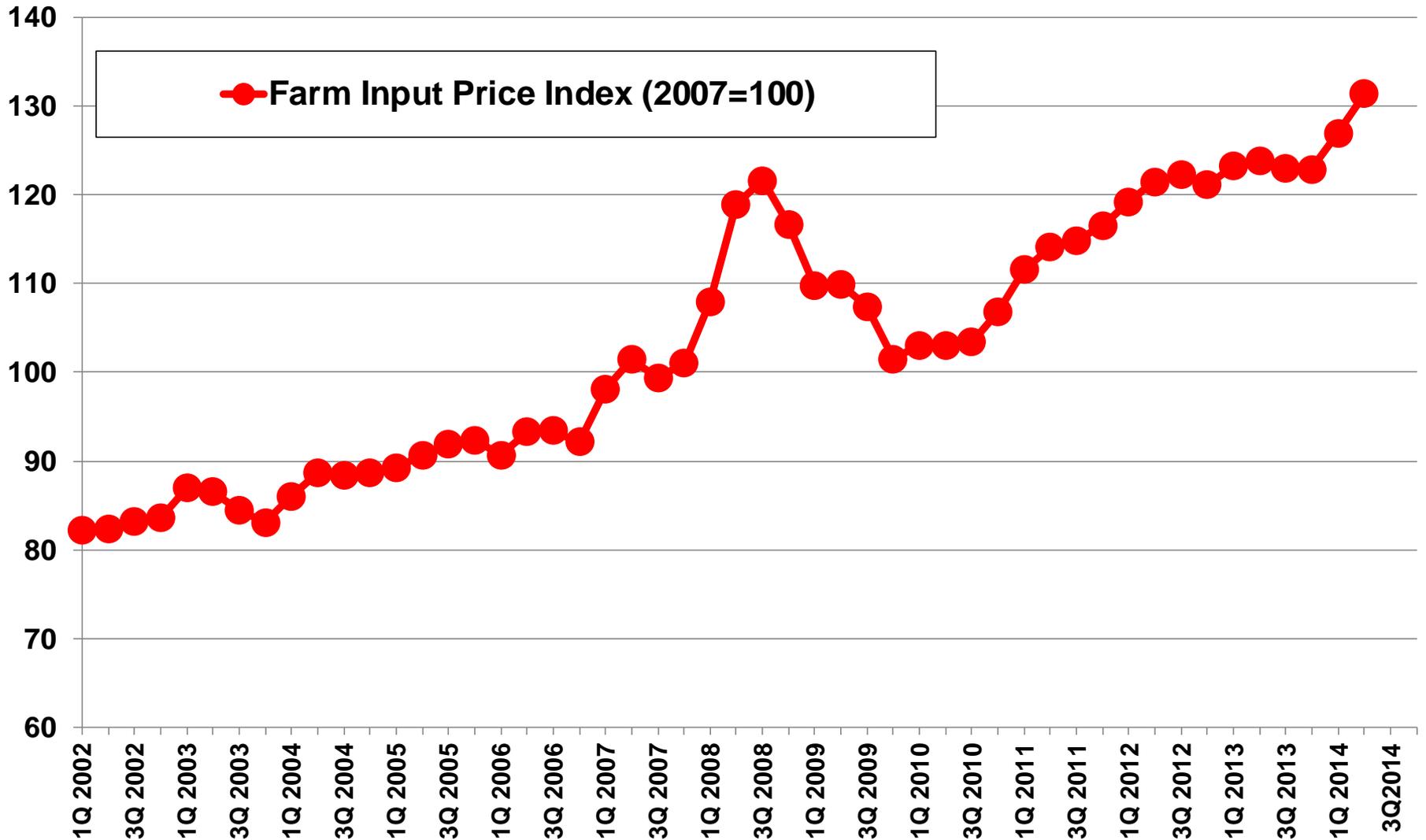
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Index of prices of farm outputs (2007=100), Manitoba



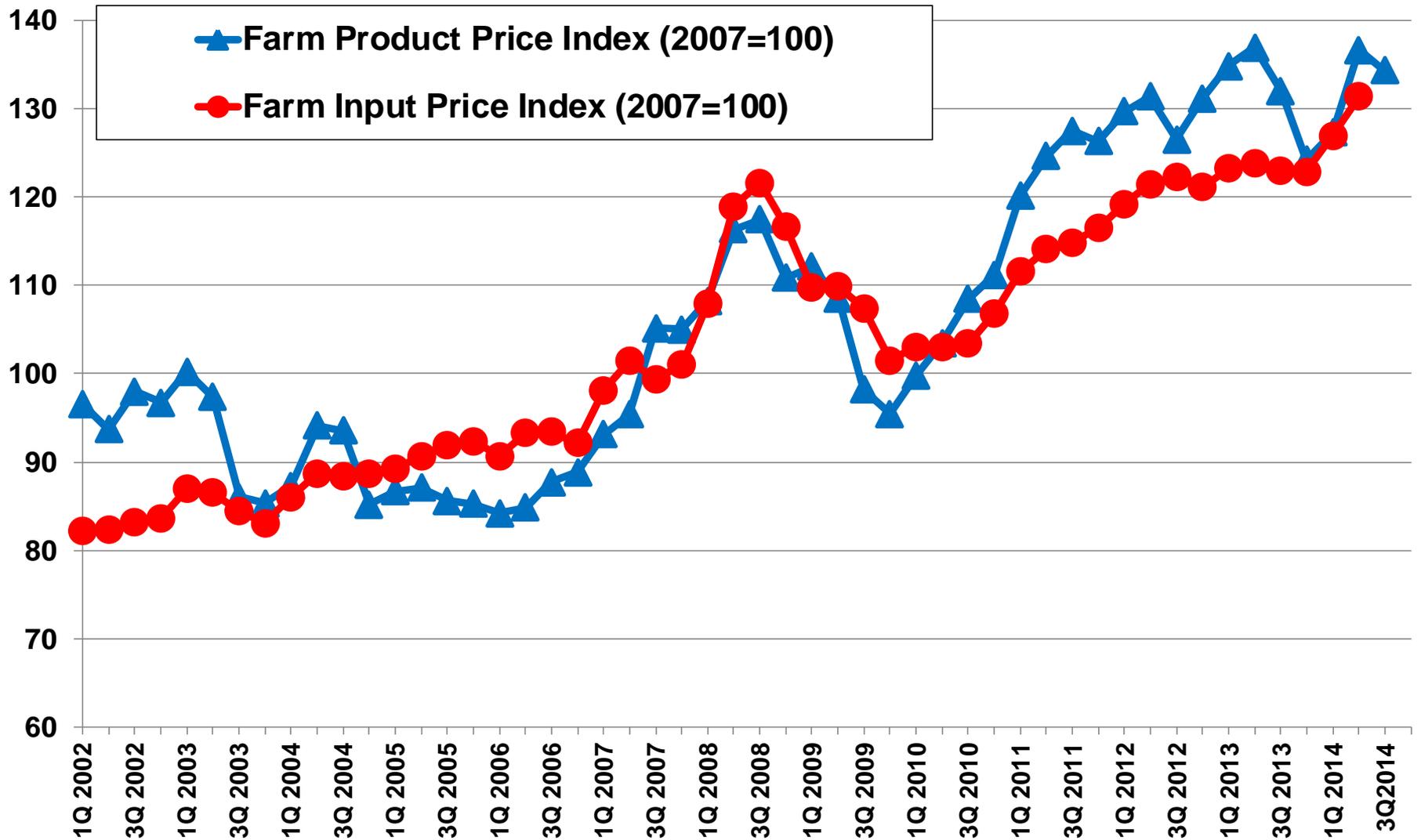
Sources: Statistics Canada. Farm Product Price Index, CANSIM Table 002-0043 and Farm Input Price Index, CANSIM Table 328-0015.

Index of prices of farm inputs (2007 = 100), Manitoba



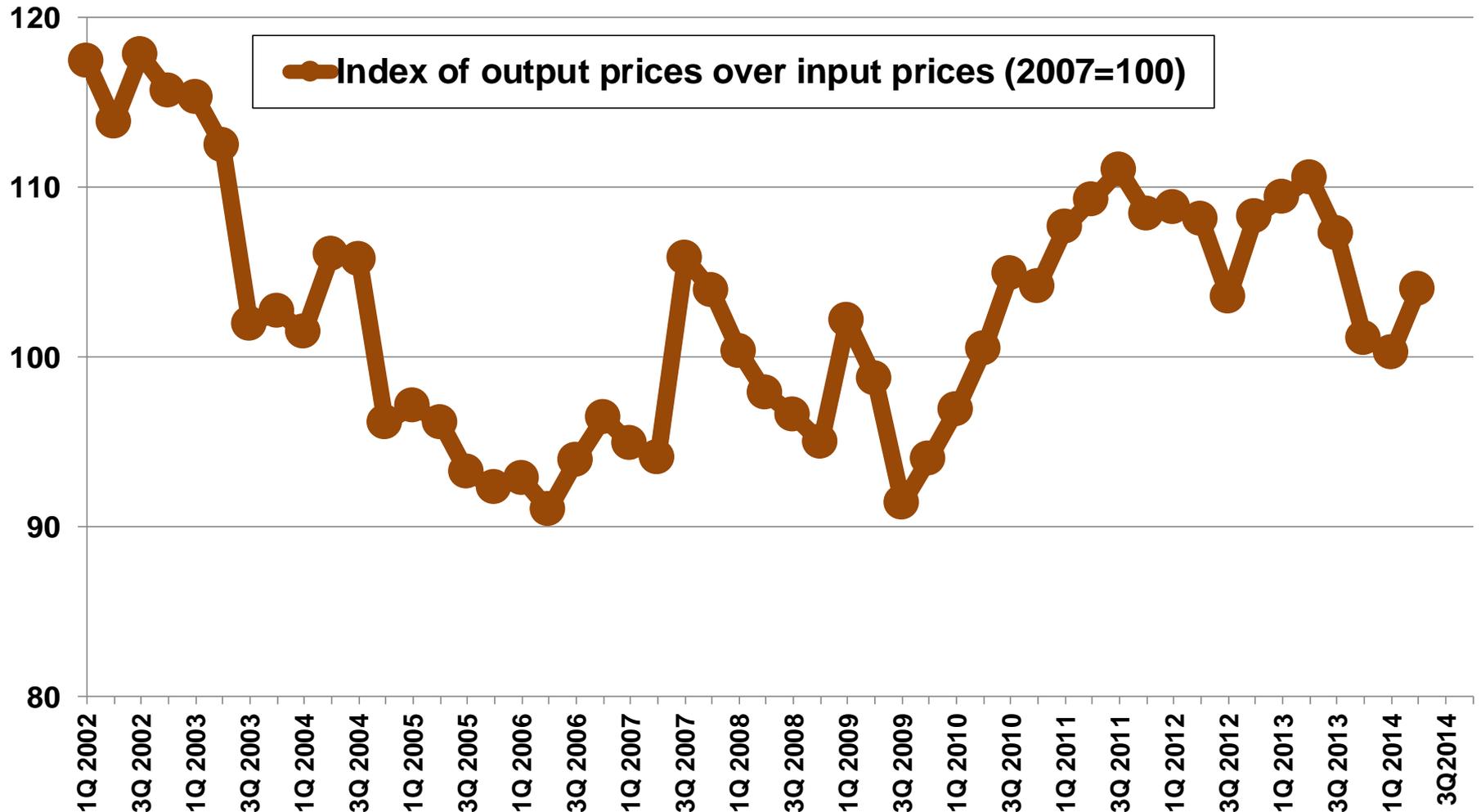
Sources: Statistics Canada. Farm Product Price Index, CANSIM Table 002-0043 and Farm Input Price Index, CANSIM Table 328-0015.

Index of prices of farm outputs and farm inputs, Manitoba



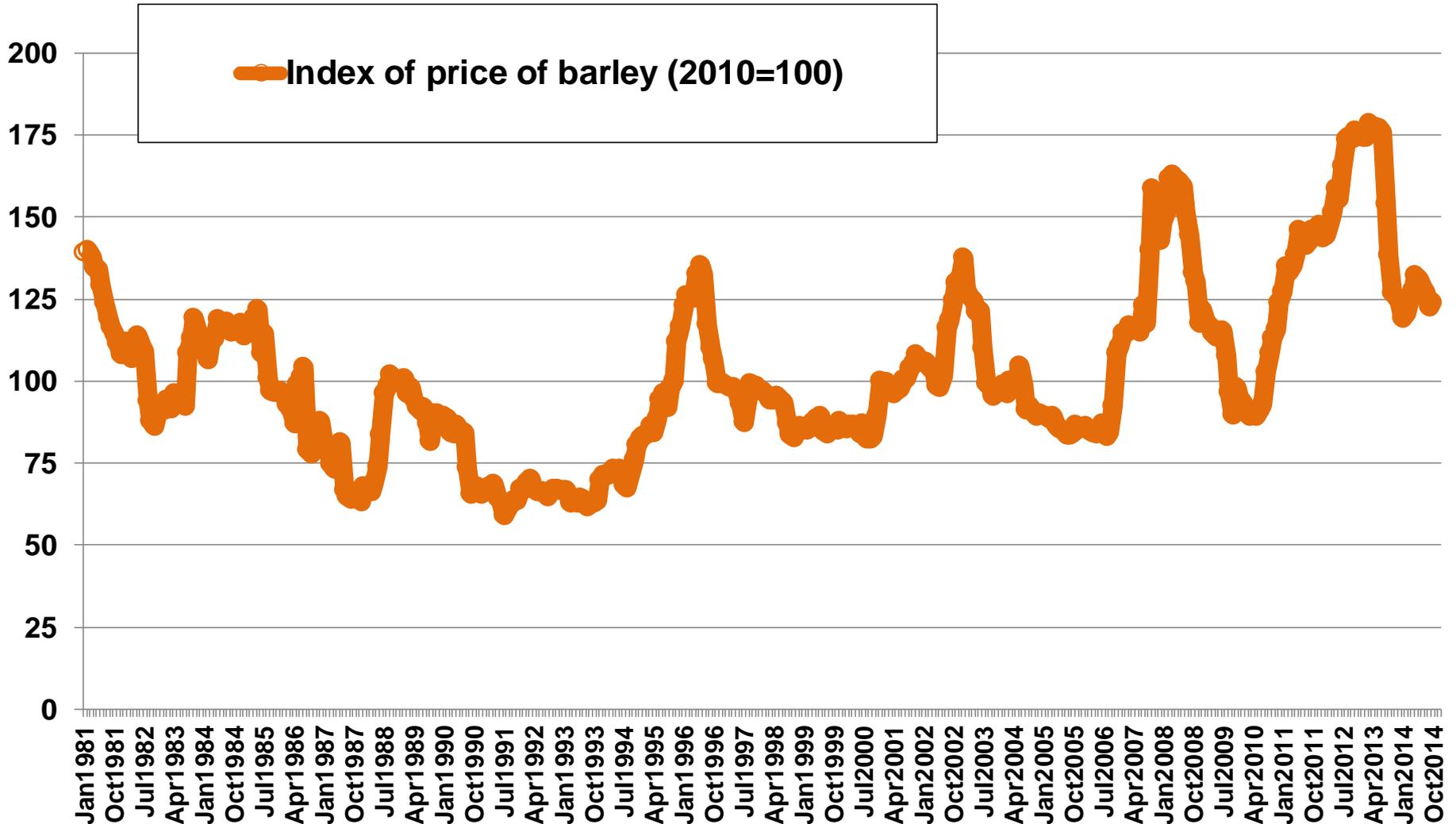
Sources: Statistics Canada. Farm Product Price Index, CANSIM Table 002-0043 and Farm Input Price Index, CANSIM Table 328-0015.

Agriculture terms of trade: Output prices relative to input prices, Manitoba



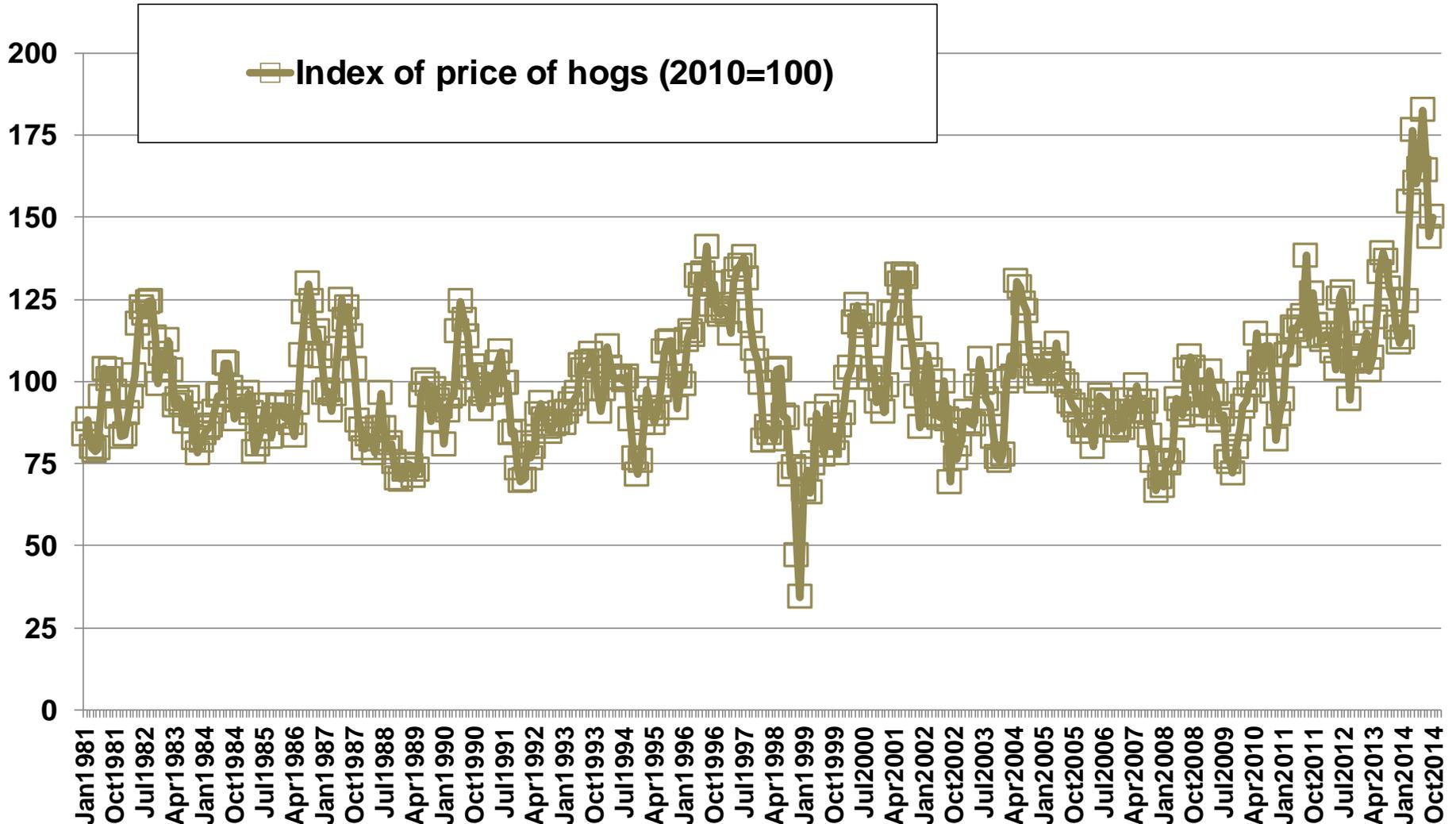
Sources: Statistics Canada. Farm Product Price Index, CANSIM Table 002-0043 and Farm Input Price Index, CANSIM Table 328-0015.

Index of price of barley (2010=100), Canada



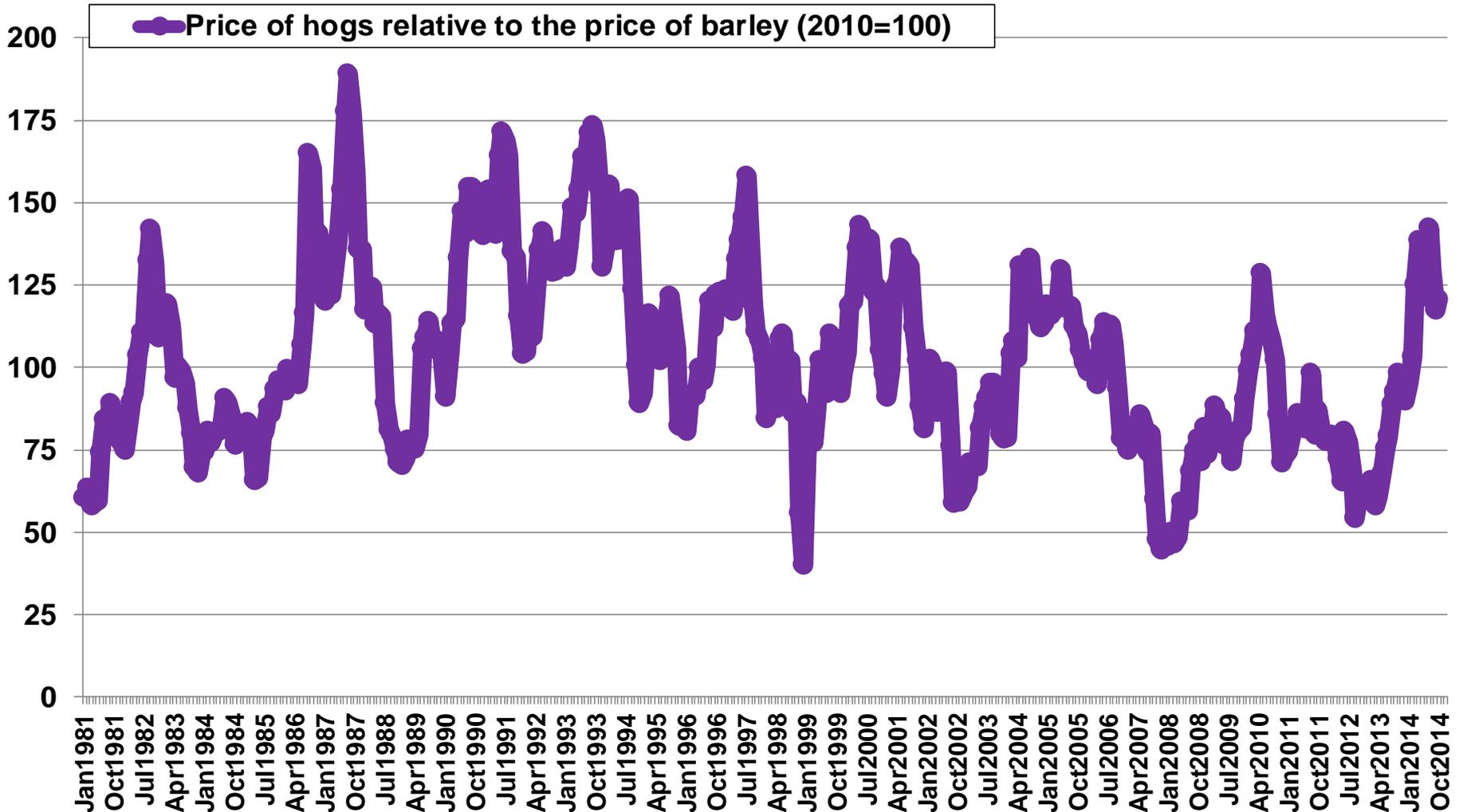
Source: Statistics Canada. Raw Commodity Price Index, CANSIM Table 220-0008.

Index of price of hogs (2010=100), Canada



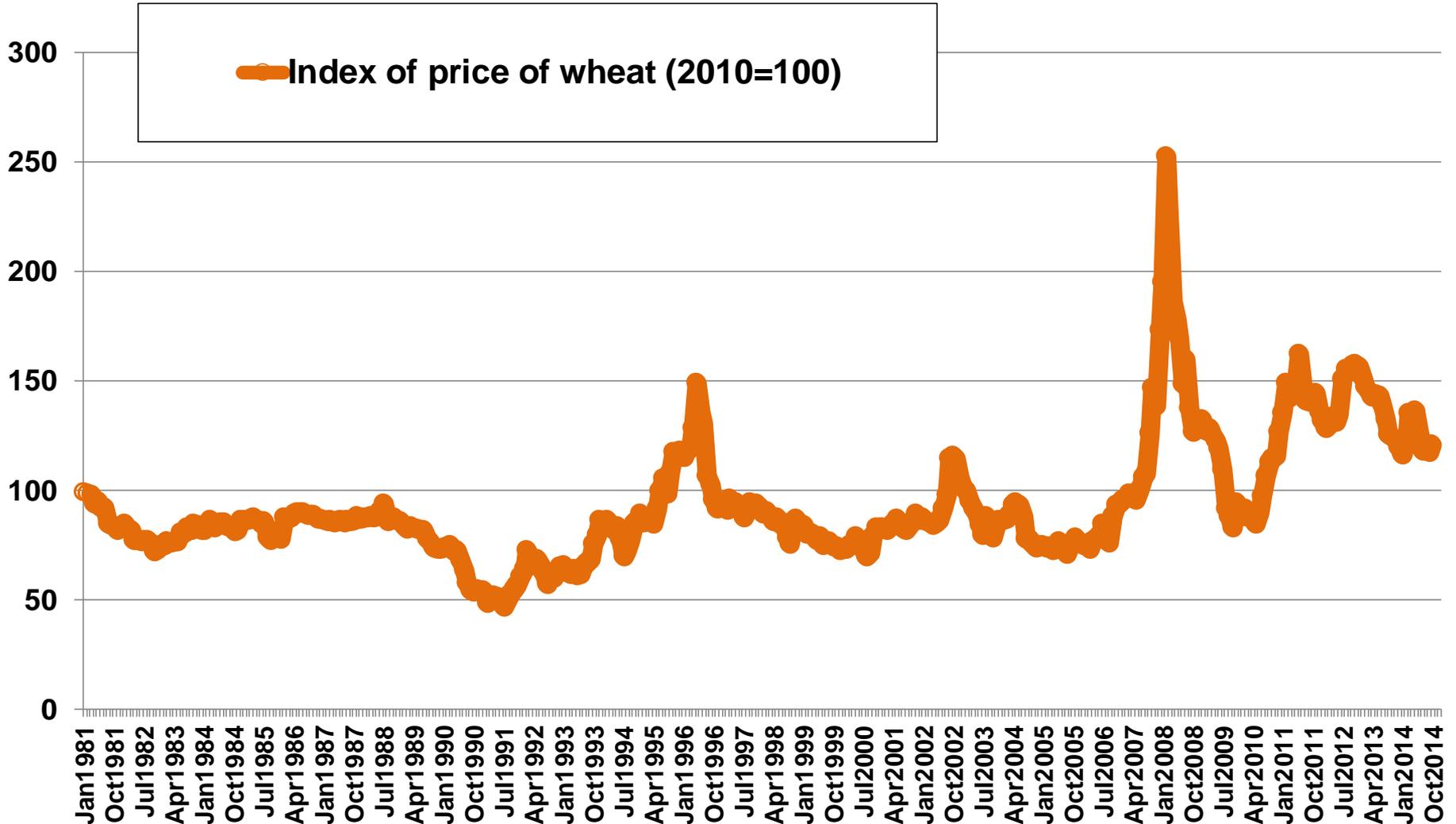
Source: Statistics Canada. Raw Commodity Price Index, CANSIM Table 220-0008.

General decline in the price of hogs relative to the price of barley, but wide fluctuations, Canada



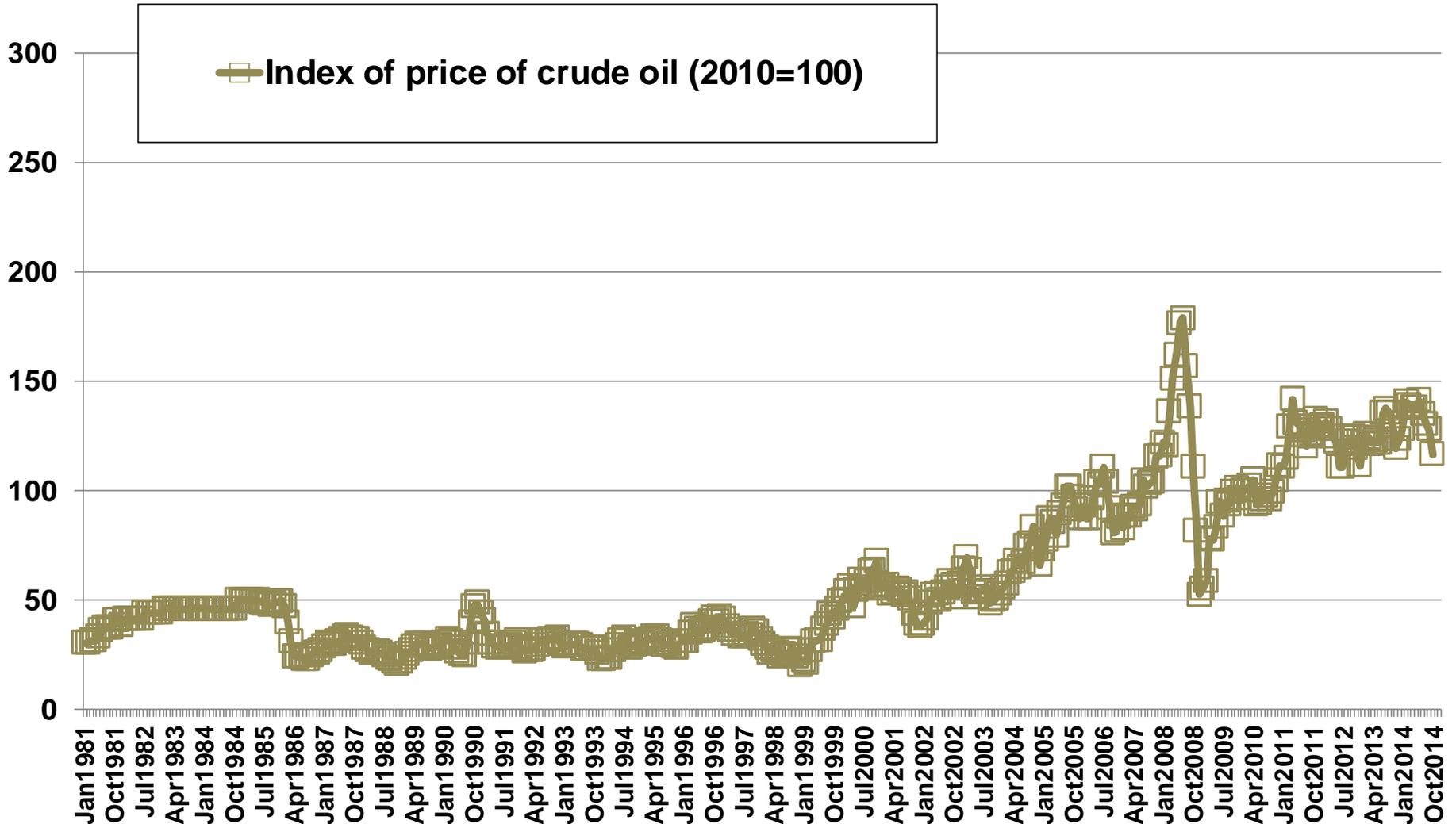
Source: Statistics Canada. Raw Commodity Price Index, CANSIM Table 220-0008.

Index of price of wheat (2010=100), Canada



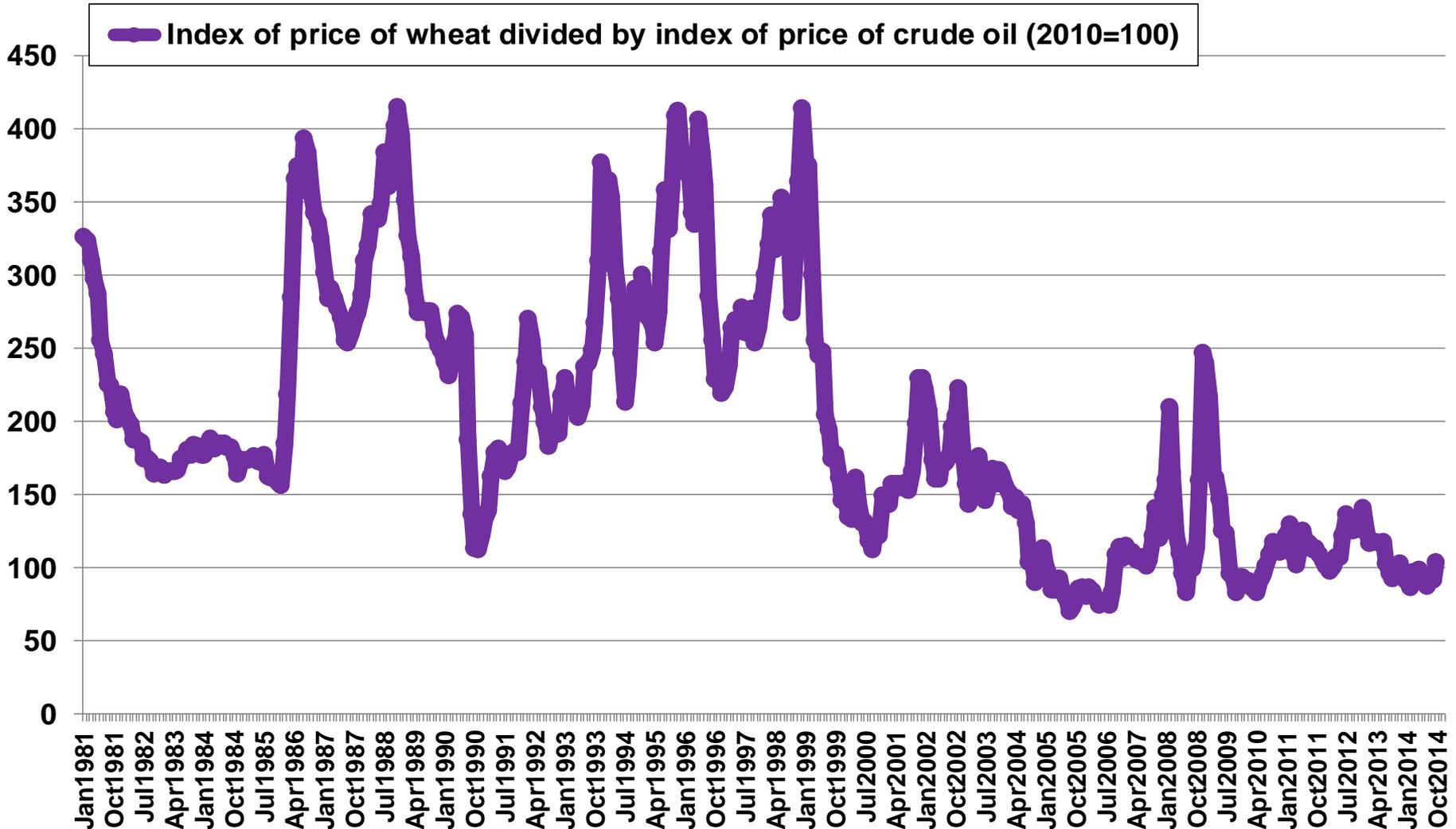
Source: Statistics Canada. Raw Commodity Price Index, CANSIM Table 220-0008.

Index of price of crude oil (2010=100), Canada



Source: Statistics Canada. Raw Commodity Price Index, CANSIM Table 220-0008.

Price of wheat relative to price of crude oil became lower and remained lower after 2000, Canada



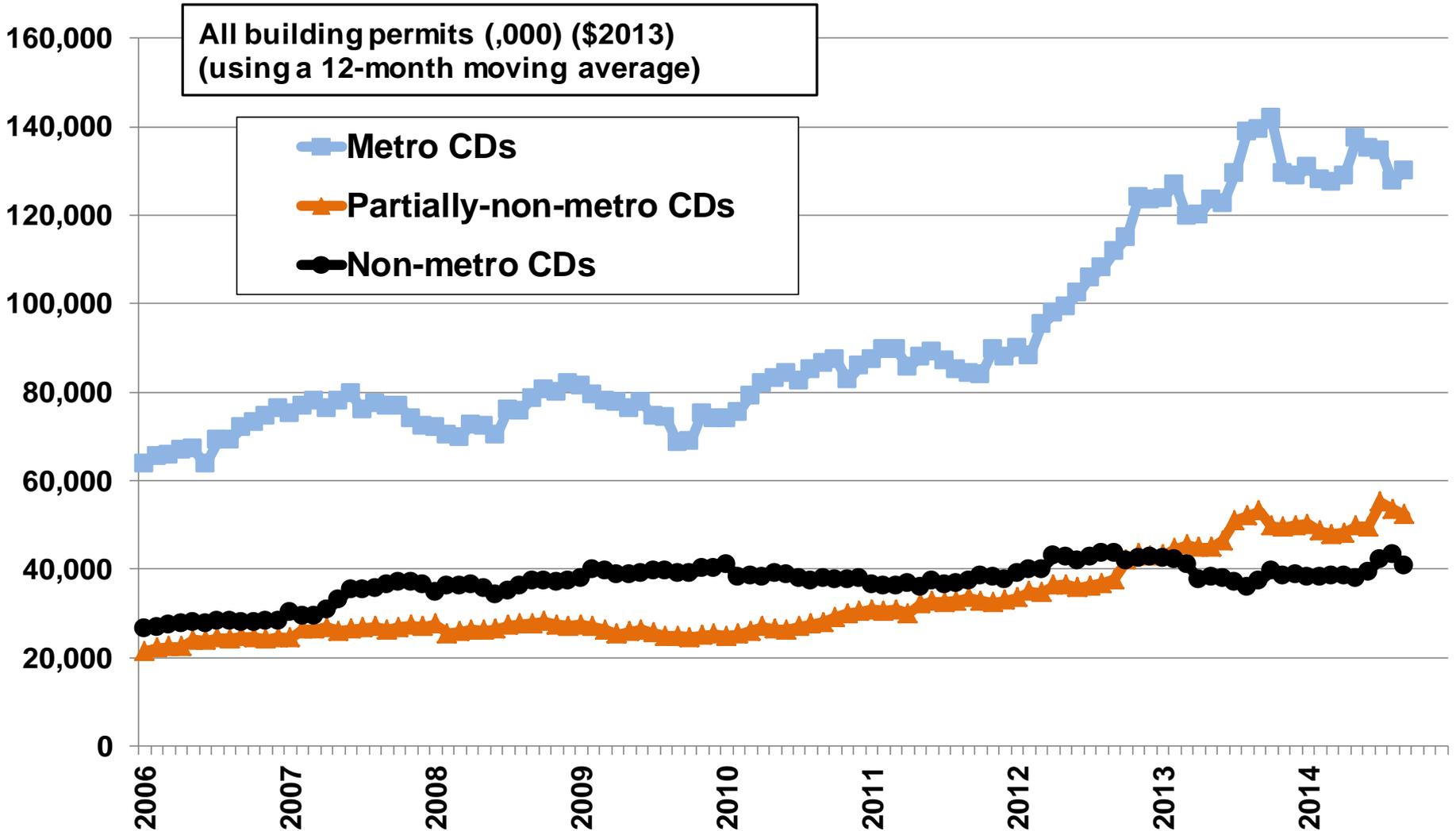
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Manitoba's Rural Economy

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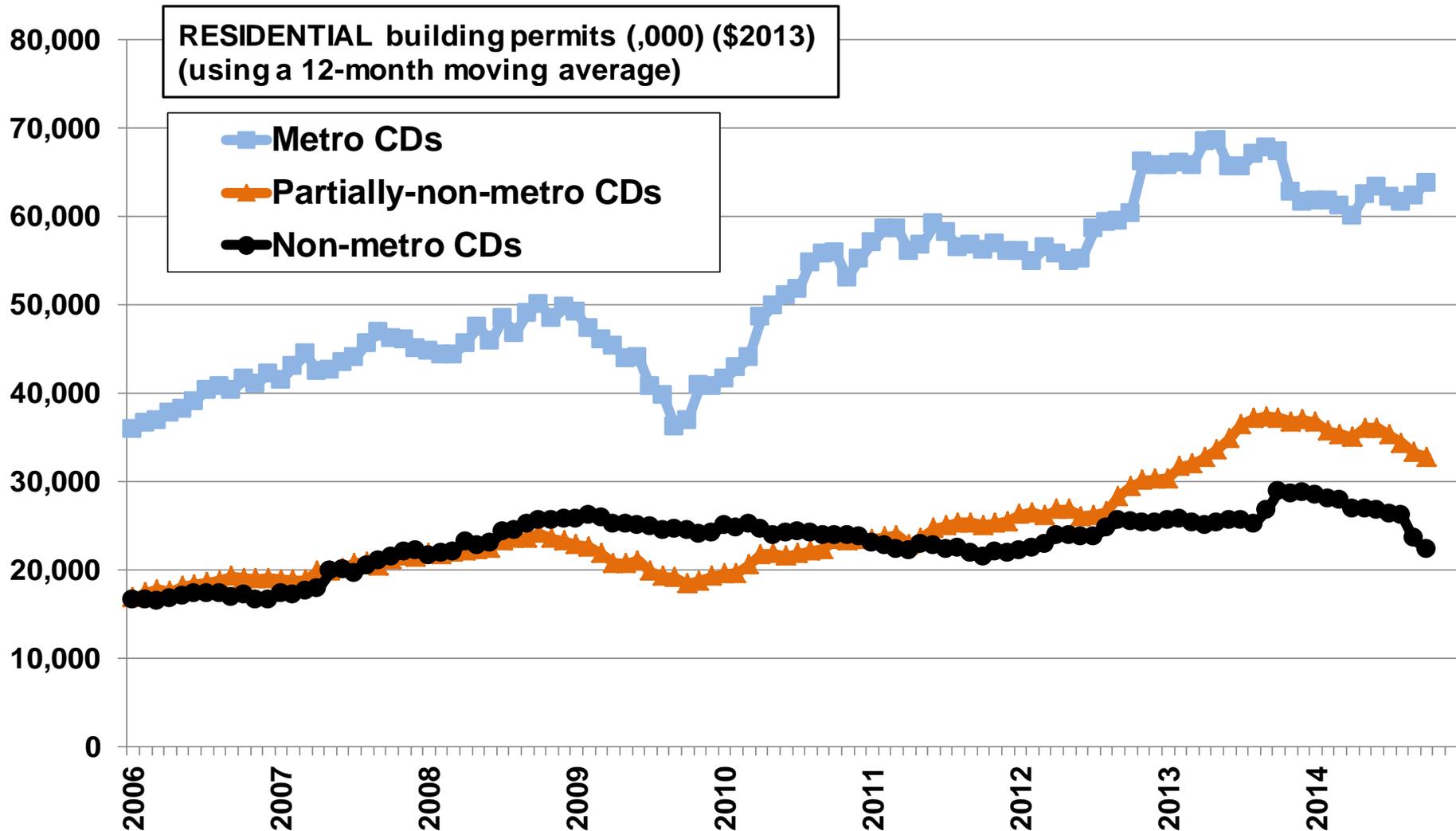
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- **Intentions to invest in rural Manitoba**

Trend in level of intentions to invest (all building permits) Manitoba



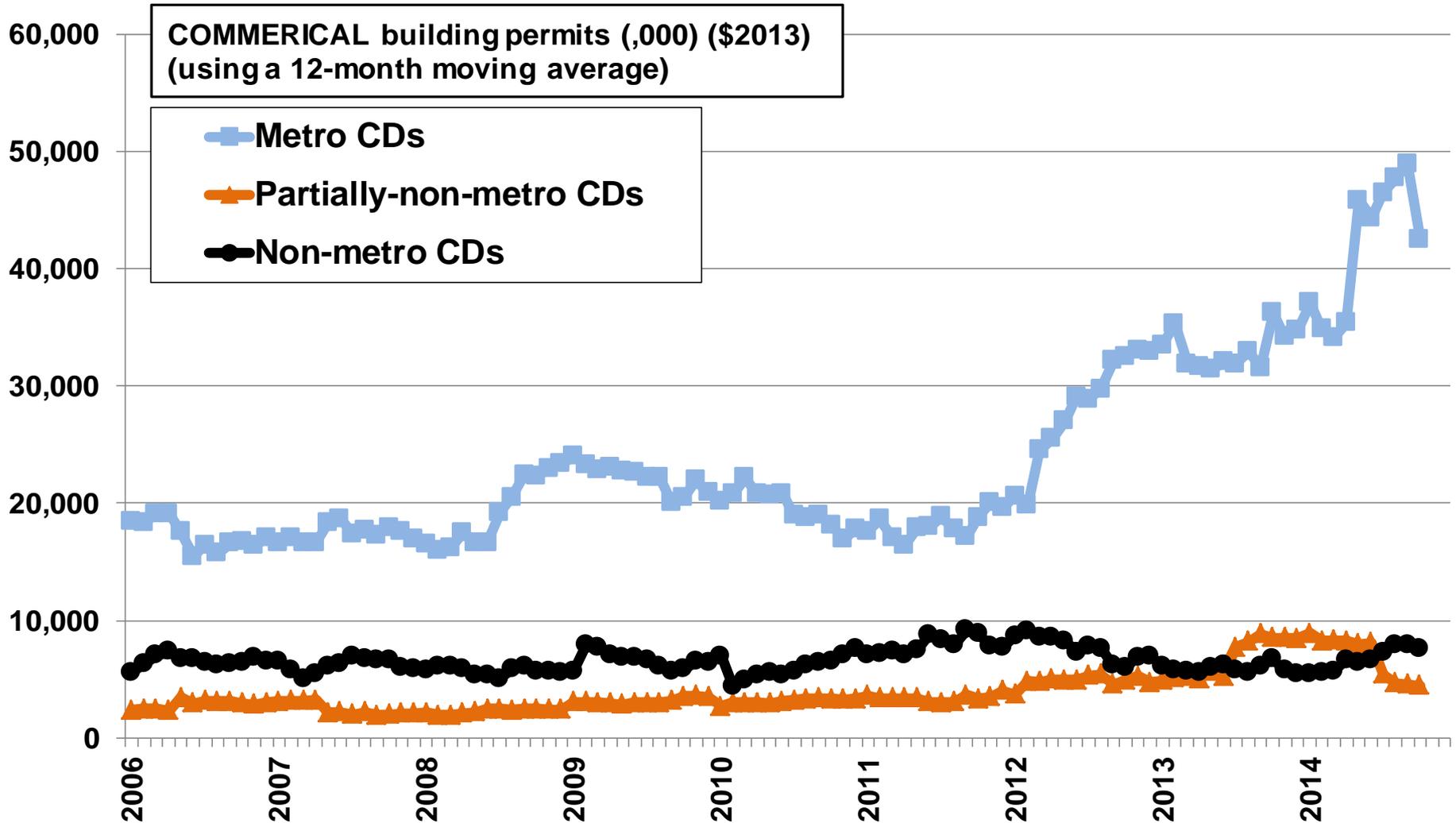
Source: Statistics Canada. Building Permits, Cat. no. 64-001.

Trend in level of RESIDENTIAL building permits, Manitoba



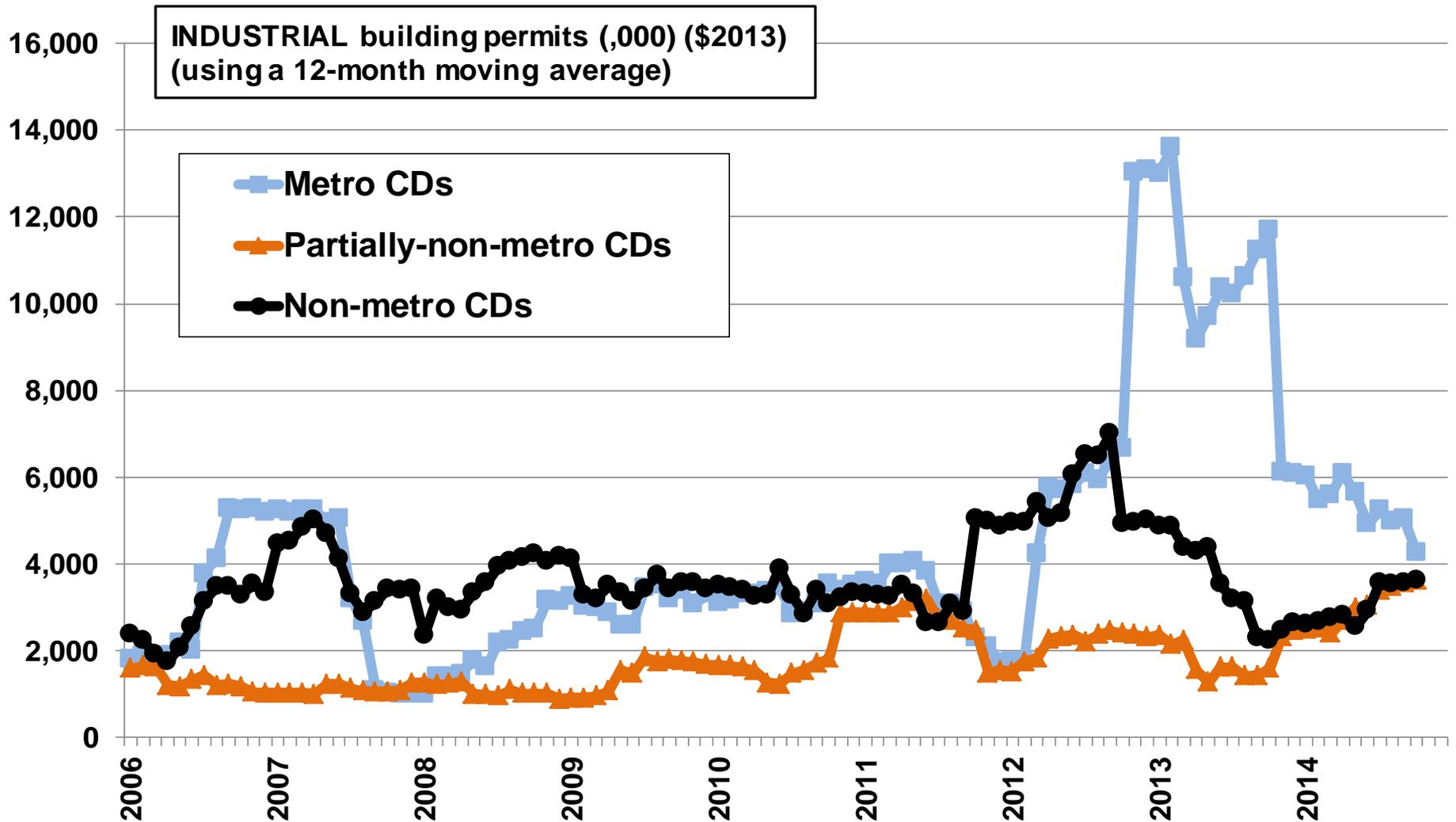
Source: Statistics Canada. Building Permits, Cat. no. 64-001.

Trend in level of COMMERCIAL building permits, Manitoba



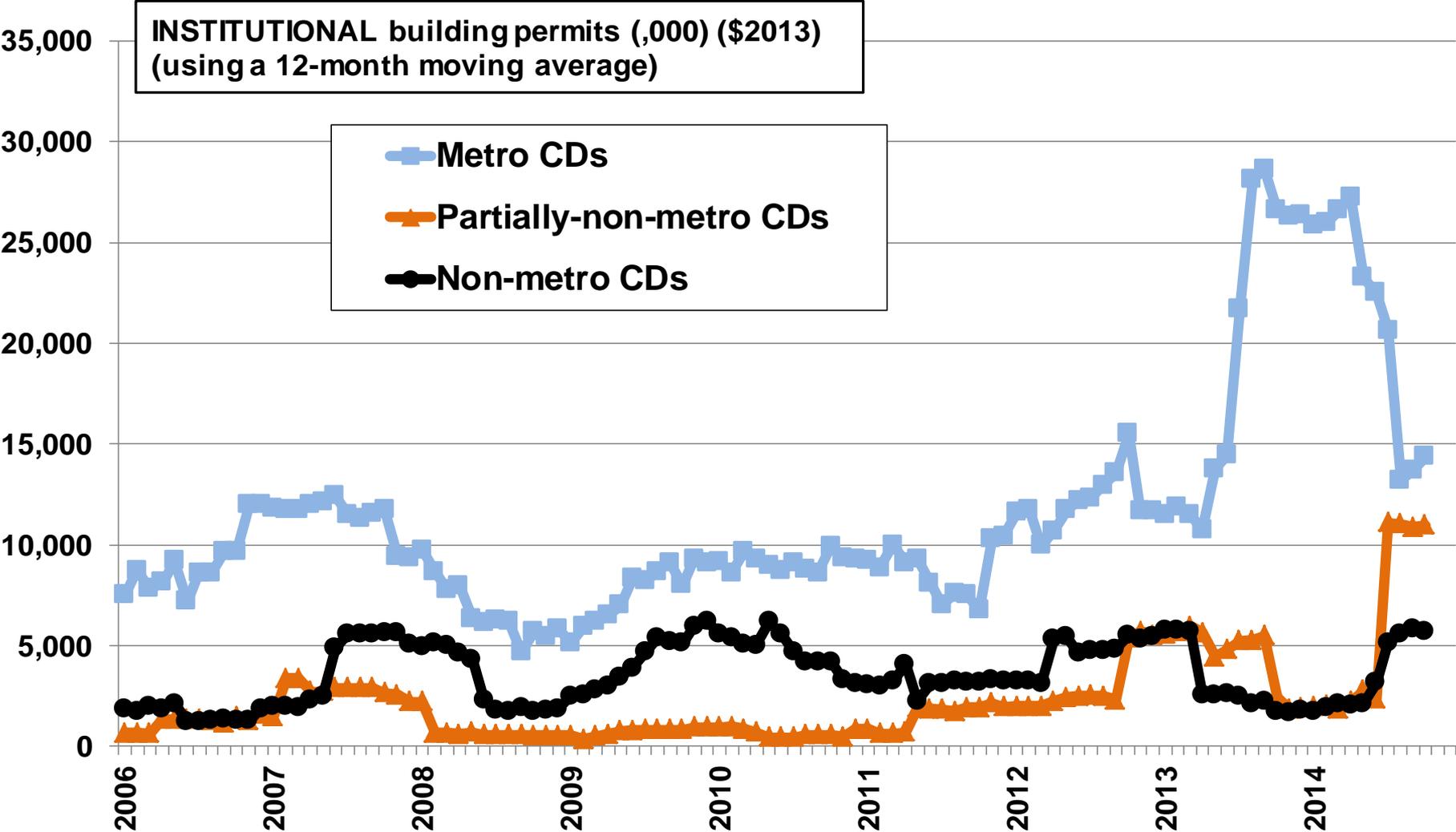
Source: Statistics Canada. Building Permits, Cat. no. 64-001.

Trend in level of INDUSTRIAL building permits, Manitoba



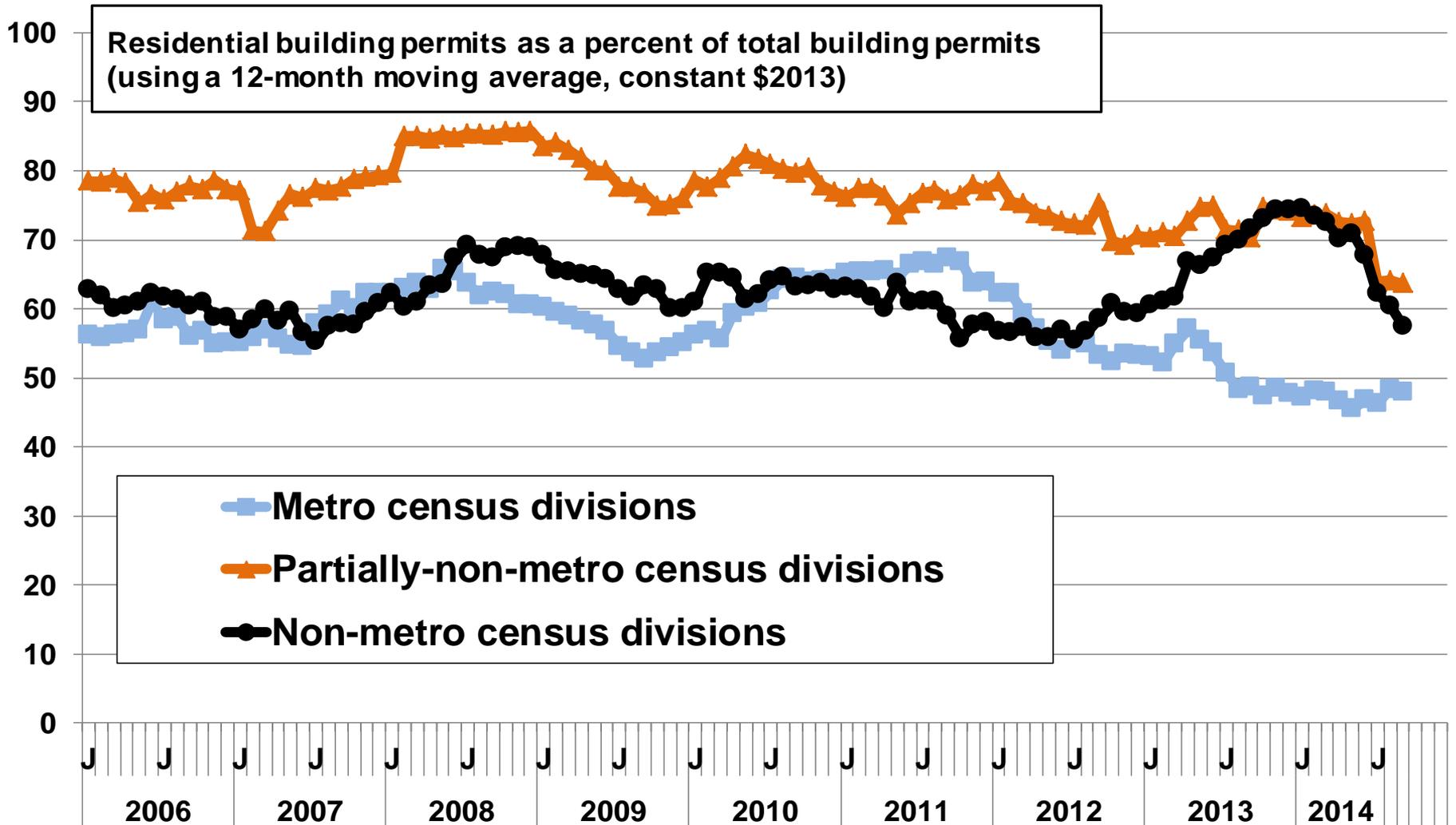
Source: Statistics Canada. Building Permits, Cat. no. 64-001.

Trend in level of INSTITUTIONAL building permits, Manitoba



Source: Statistics Canada. Building Permits, Cat. no. 64-001.

In October, 2014, residential building permits were 58% of the total value of building permits in non-metro Manitoba



Source: Statistics Canada. Building Permits, Cat. no. 64-001.

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Manitoba's Rural Economy

Structure and Trends:

An Update

Webinar prepared for the
Rural Development Institute

Brandon University

December 10, 2014

Questions /
Discussion

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Adjunct Professor, University of Saskatchewan