



Manitoba Trade and Investment



Connecting Your Business to the World

Manitoba Trade
and Investment



Manitoba 

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➤ Objectives:

- International Business Development
 - New exporters
 - Market diversification
- Investment Promotion
- Trade Agreements and Negotiations

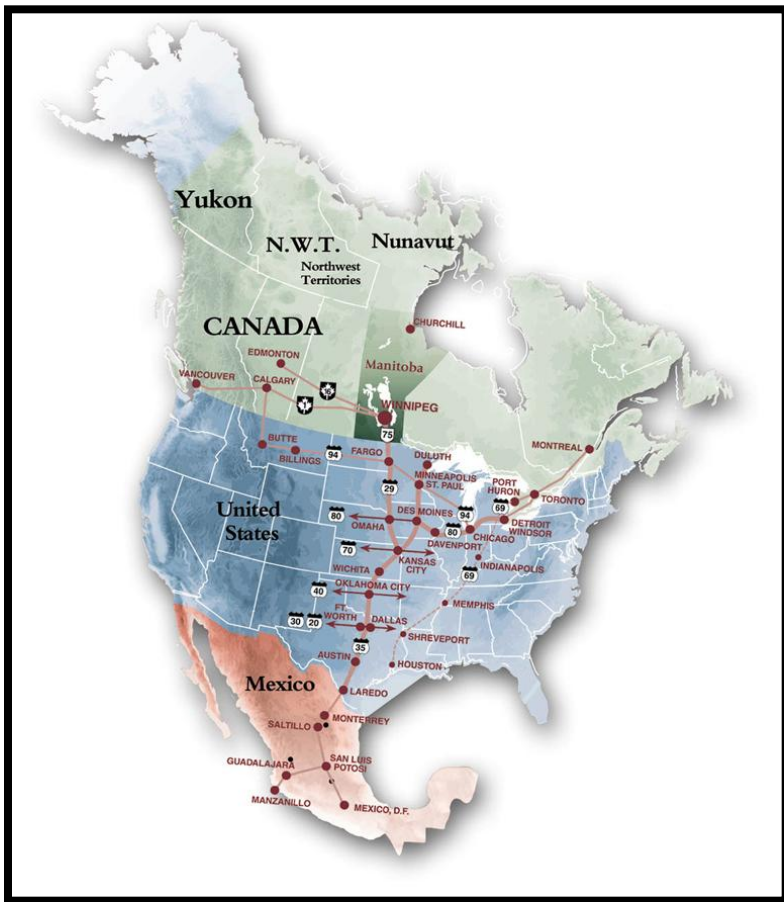
Manitoba Trade and Investment

- MTI has been providing trade services to Manitoba companies for over **20** years.
- MTI worked with over **430** Manitoba companies/organizations in 2015/16.
- MTI offers Manitoba companies over **510** years of combined international business and trade experience.
- MTI can provide service in **17** languages.

Services Provided

- Manitoba Trade and Investment (MTI) works with Manitoba companies/organizations providing:
 - export counselling;
 - in-market experience;
 - market intelligence
 - industry consulting; and
 - language expertise.
- Additional services provided by MTI include:
 - information seminars;
 - mission and tradeshow participation;
 - Foreign Trade Representatives; and
 - Stream 3 of the Commercialization Support for Business Program.

Geography



- Water Area - 102,000 km²
- 100,000 clean freshwater lakes and rivers
- Vast fertile agricultural plains
- Abundant mineral and forests
- Land Area - 548,000 km²
- Extremes in climate

The Manitoba Advantage

- **A well-diversified and vibrant economy**
- **A productive, well-educated labour force**
 - The total employed labour force in 2016 was 674,300 persons.
 - It is projected to grow to 724,900 persons by 2020.
 - Competitive costs for doing business -- KPMG's biennial *Competitive Alternatives Reports* in 2010, 2012, 2014 and 2016 showed Winnipeg as having the most competitive overall business costs among participating cities in North America's Midwest.
- **A “business friendly” attitude at all levels of government – The Manitoba government invests in workforce development, innovation and trade diversification.**

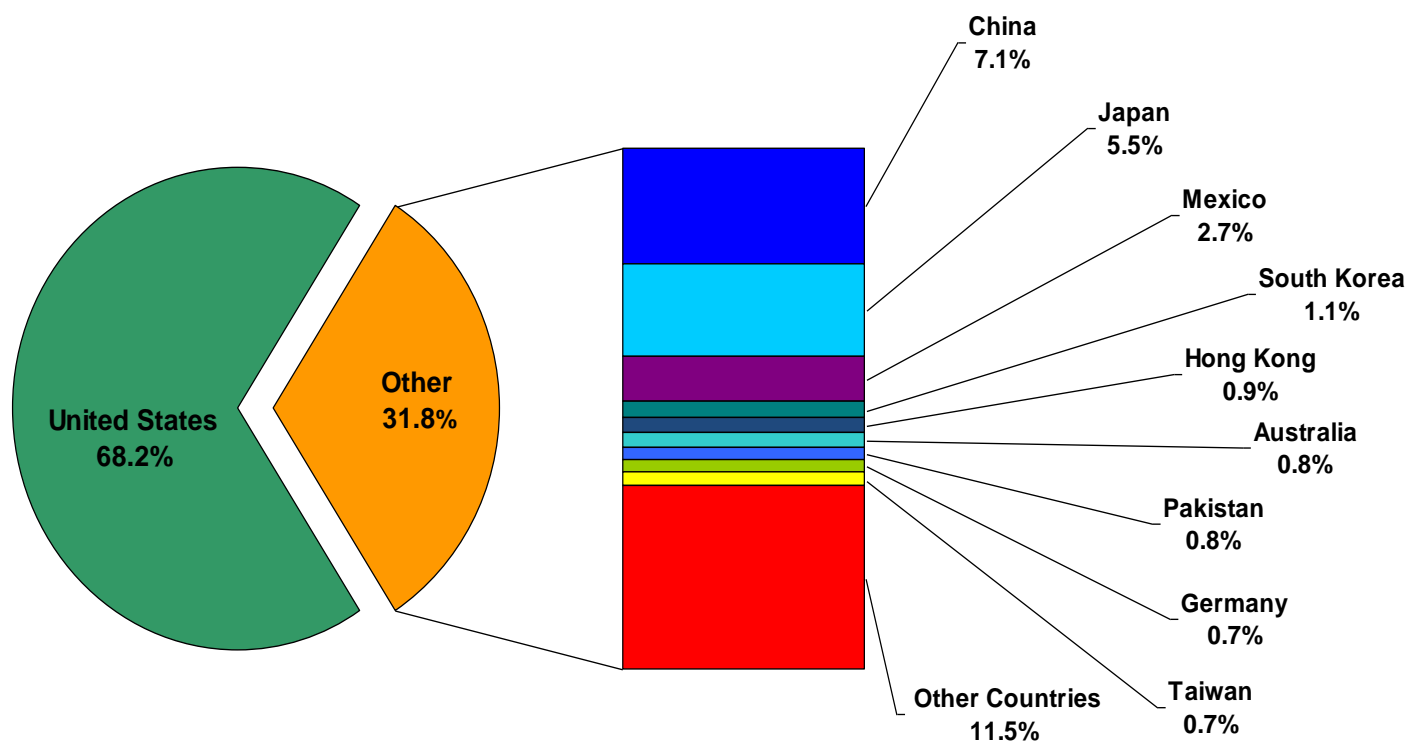
A Diversified Economy

Manitoba's economy is among the most diversified in Canada

- **Economic diversity provides for more stable growth rates over time, since weakness in certain industries is offset by strength in others; no one or two industries dominate the economy**
- **Diversity exists “within” major industries as well:**
 - agriculture: even split between crops and livestock
 - even these are diversified- e.g. pork, cattle, poultry, sheep, etc.
 - mining: nickel, but also copper, zinc, gold & industrial minerals
 - manufacturing: processed foods and transportation equipment, but also wood products, chemicals, furniture, paper, etc.

Manitoba's Export Destinations

2016 Foreign Merchandise Exports: \$13.4 billion



Manitoba's Trade with Japan

Manitoba's Total Trade with Japan in **2016** was **\$982.4 million**

Exports

Total: **\$741.2 million**

Top 5 exports:

- Pork (fresh/chilled/frozen)
- Canola
- Wheat
- Unwrought nickel
- Edible offal – bovine/swine/etc.

Imports

Total: **\$241.2 million**

Top 5 imports:

- Gas turbines
- Machinery parts
- Self-propelled bulldozers
- Electrical transformers/converters
- Motor vehicle parts

Example of Manitoba's Sectors

- Advanced Manufacturing
 - Aerospace
 - Composites Innovation
 - Grain Handling & Storage
 - Heavy Vehicle Manufacturing
- Agri-food
- Building Products
- Education and Training Partnerships
- Energy
- Environmental and Cleantech
- Information Communications Technologies
- Life Sciences & Biotechnology
- Mining and Minerals
- New Media
- Research & Development
- Transportation and Distribution

Advanced Manufacturing

- Manufacturing accounts for approximately 10% of Manitoba's Real GDP, and is the largest contributor to GDP among industries.
- Manitoba manufacturers shipped \$17.4 billion worth of goods in 2016.
- Manufacturing employment, at an average of 63,600 for 2016, represents approximately 10% of Manitoba's total employed workforce.
- Manufacturing capital investment in Manitoba totaled \$471.0 million in 2016.
- Key manufacturing subsectors include processed foods, transportation equipment (aerospace and heavy duty ground vehicles), primary metals, electrical products, machinery and chemicals.
- In 2016, Manitoba's manufacturing sector accounted for approximately \$9.0 billion in foreign merchandise exports, up 1.2% from 2015.

Aerospace

- Third largest cluster in Canada, largest in Western Canada
- MRO, Manufacturing, Testing, Design, Certification, Space Systems, Research & Development
- Annual revenues surpassing \$1.6 billion
- Over 80% exported to customers on six continents
- Highly skilled workforce of 5,500
- KPMG Top City for aerospace manufacturing
- Strong network and collaboration – industry/government/academia/research
- Workforce development, career awareness and outreach programs
- Competitive Edge Supplier Development Program

Composites Innovation Centre Bio-fibre Initiative



Farmers



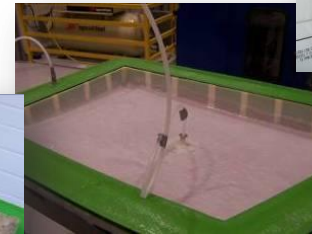
Processors



Test Facilities



Mat Producers



Composite Part
Manufacturers



Original Equipment
Mfg

Grain Handling & Storage – Commercial

- Grain & bulk storage
- Aeration & drying
- Conveying & handling
- Bulk handling & weighing – truck & railcar
- Grain cleaning & separation
- Dust & pollution control



Grain Handling & Storage – Project

- Commodity sampling, grading & testing
- Agrifood – human consumption and/or animal feeds
- Merchandising & marketing
- Precision instrumentation & controls
- Project consortia groups - grain-based



Heavy Vehicle Manufacturing

- Buses
- Fire Trucks
- Recreational vehicles
- Agricultural machinery
- Mining equipment

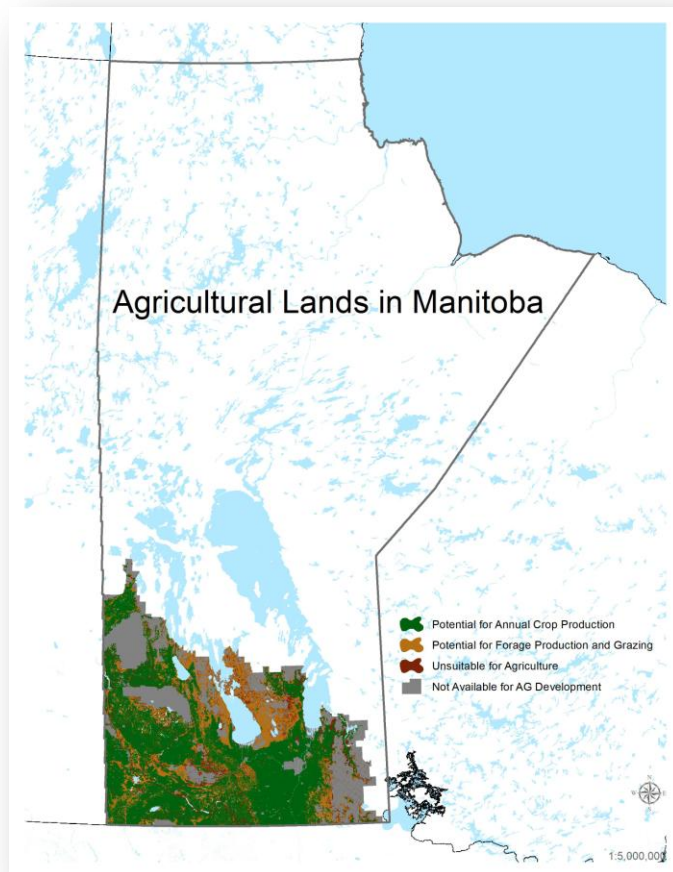


Agri-Food

- Primary Production
- Livestock & Poultry
- Food Processing
- Food Development Centre



Primary Production



- In 2015, agriculture accounted for 3.6% or \$1.9 billion of Manitoba's GDP.
- Farm cash receipts totaled \$5.7 billion in 2015.
- There are 19,000 farms in Manitoba with \$31.5 billion invested in land, building and equipment.
- 19.1 million acres of farmland

Livestock & Poultry



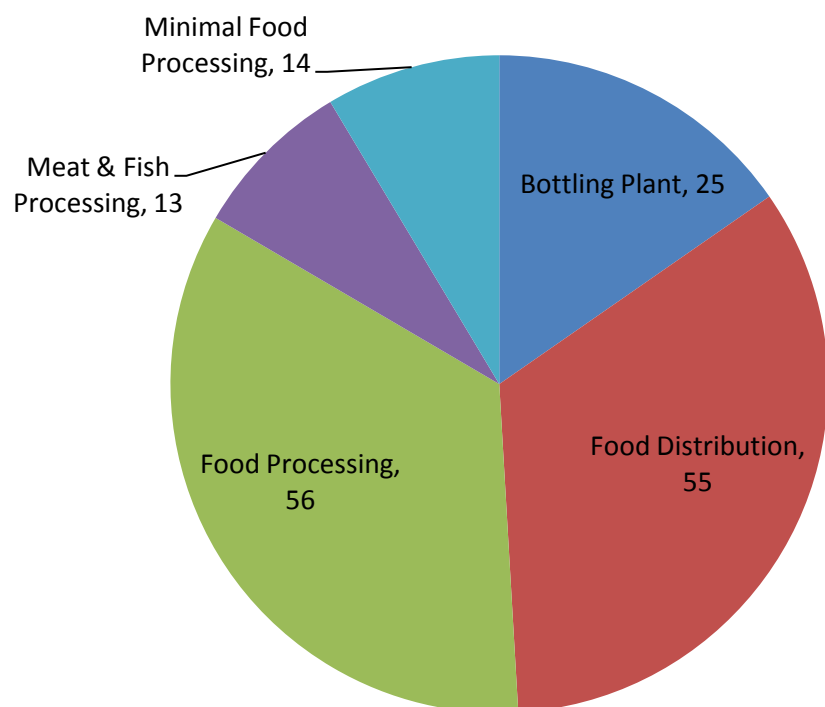
Food Processing

- Manitoba's food and beverage industry is the largest manufacturing sector in the province.
 - \$5.0 billion in sales
 - 26% of total manufacturing sales
 - 3.6% of Manitoba's GDP

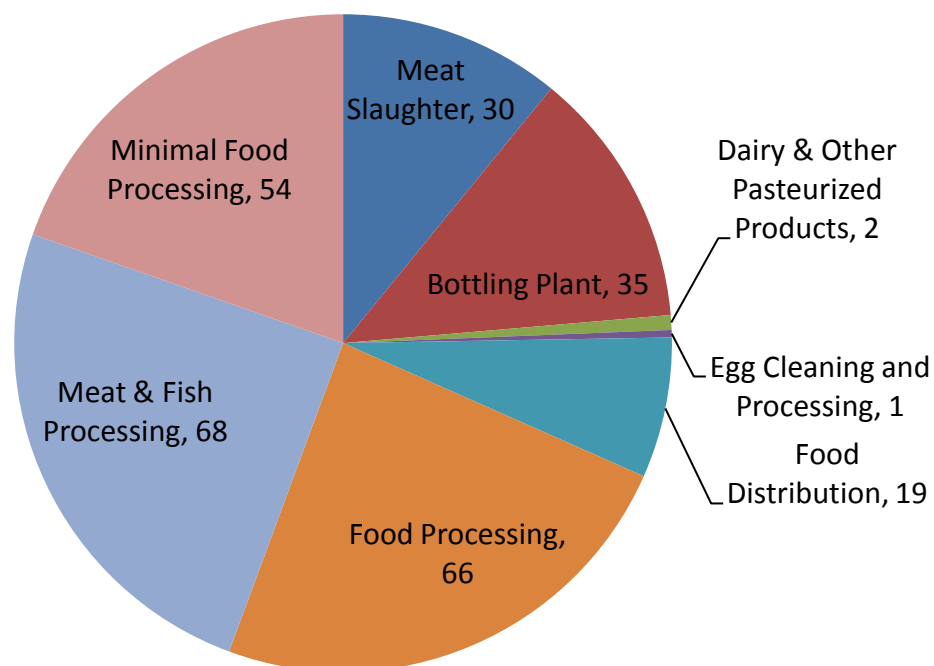
- The largest food and beverage processing industry is meat product manufacturing; followed by grain and oilseed milling; fruit and vegetable preserving, and specialty food manufacturing; dairy product manufacturing; and animal food manufacturing.

Food Processing and Distribution Facilities

Winnipeg - 163



Outside Winnipeg - 275



Food Development Centre

- A non-profit, fee-for-service special operating agency under Manitoba Agriculture, Food and Rural Development
- Assists Manitoba's agri-food industry to develop and commercialize food products
 - Experienced food scientists, engineers and technologists
 - Pilot plant with food processing equipment and innovative technologies.



Food Development Centre – Success Stories

- Best Cooking Pulses, Inc.
- Bothwell Cheese
- Genki Bar
- Gorp Bar
- Granny's Poultry
- Greetalia Food Products Inc.
- Las Salsas Corp.
- Manitoba Harvest Hemp Foods
- Millet King Seeds
- Rockylake Birchworks
- Shoal Lake Wild Rice
- Solberry Seabuckthorn Puree
- Stone-Milled Specialty Grains Ltd.
- Tabletree Juice
- The Canadian Birch Company
- Yomm Beverages



Looking to the Future

The Protein Highway – is an initiative to enhance cross-border collaboration among entrepreneurs, researchers and investors across the Canadian Prairies (Provinces of Alberta, Saskatchewan and Manitoba) and Upper Midwest/Great Plains region (Minnesota, North Dakota, Montana, Nebraska, South Dakota and Iowa) and stimulate economic growth and prosperity in innovative agricultural technology solutions to meet the ever-growing global demand for plant-derived protein.

Key activities of the Protein Highway include:

- Creating an innovation hub that facilitates collaboration among world class researchers to develop novel, value-added products from regional protein crops;
- Connecting ideas with entrepreneurs;
- Enabling companies for scale-up; and
- Showcasing regional opportunities to investors in agricultural innovation.



Protein Highway™

Network for plant-based protein innovation

The Possibilities



Manitoba pulse crops

+



**Manitoba Agri-Health
Research Network**

+



Minnesota health food company

=



Protein-rich, heart-
healthy chocolate
snack bar

INGREDIENTS

Bittersweet chocolate [unsweetened chocolate, sugar, cocoa butter, soy lecithin (an emulsifier), vanilla], almonds, **whole pinto bean flour**, chia seeds, oat bran, walnuts, dried cranberries (cranberries, apple juice concentrate, sunflower oil), raisins, flax seed, plant sterols, Saskatoon berries.

Building Products



- Encompasses everything from exterior construction to interior design.



Education and Training Partnerships

- Home to four Universities and three Colleges
 - Institutions are progressive, adaptable and open to the needs of business
- Apprenticeships and Cooperative Education
 - Co-op Education and Apprenticeship Tax Credit – the most comprehensive credit of its kind in Canada.
- SmartPark -- brings industry and academia together for technology commercialization



Energy (Electricity)

Manitoba's Energy Advantage:

- Among the lowest electricity rates in North America
- Clean, renewable hydroelectricity
- High system reliability
- Exceptional customer service
- Energy saving solutions and specialized expertise



Energy (Biofuels)

Ethanol – is an alternative fuel produced from grains which can be blended with gasoline to reduce greenhouse gas emissions.

Biodiesel – is a cleaner-burning diesel replacement fuel made from natural, renewable sources such as vegetable oils, animal fats or recycled cooking greases. In Manitoba, off-grade canola may become the primary feedstock.

Landfill Biogas Capture – methane from decomposing organic matter in landfills is a major source of greenhouse gas emissions. Landfill gas can be used as a fuel for electricity generation, transportation or a variety of industrial processes.

Farm Anaerobic Digesters – is a process in which bacteria break down manure components to produce biogas.



Environmental & Cleantech

- Renewable energy production
- Management of non-hazardous waste
- Management of industrial air pollution or flue gas
- Industrial wastewater treatment and municipal sewage treatment
- Remediation of ground water, surface water and leachate
- Remediation of soil, sediment and sludge
- Site remediation services and environmental emergency response services



Information Communications Technologies

Sales: \$1.2 billion
Exports: \$294.9 million
Companies: 1,815 active

Products:

- electronic components
- telecommunications equipment
- computer equipment
- Instrumentation
- packaged software

Services:

- telecommunications services
- health informatics
- geomatics
- software development and consulting
- broadband data transmission
- broadcast & digital media
- customer contact services



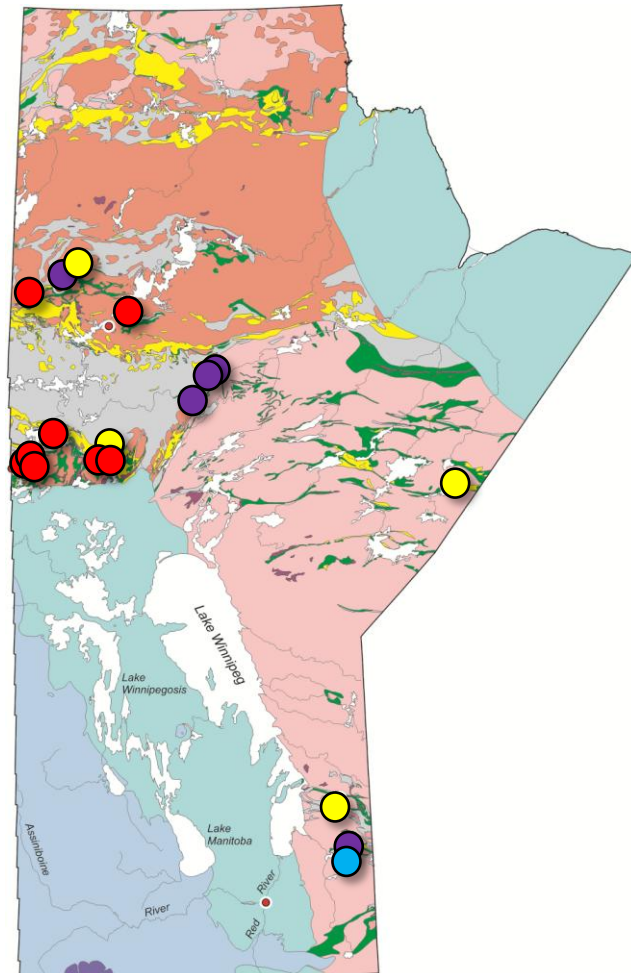
Life Sciences & Biotechnology

- Infectious diseases
- Cardiovascular & respiratory diseases
- Oncology
- Neurosciences
- Metabolism & nutrition
- Nutraceuticals & functional foods
- Cell Biology & gene technology
- Plant breeding
- Diagnostics & contract research







Mining and Minerals

- **3,200** direct employees (2015)
- **\$1.5 billion** in mineral production (2.7% of provincial GDP).
- **\$35.2 million** in annual exploration expenditures (2.1% of national total)
- **\$362.3 million** in capital expenditures in 2016 (6 companies)
- **\$90,000** average annual salary.



Manitoba's Known Significant Mineral Deposits

-  Nickel
-  Copper-Zinc- Silver-Gold
-  Gold-Silver
-  Cesium-Tantalum- Lithium

New Media

- Computer animation
- Visual effects
- Motion graphics
- Video game development
- Web apps
- Mobile apps
- Software development
- Interactive Digital Media Tax Credit



Research & Development

Industrial Technology Centre – provides technical research and testing for a variety of clients in aerospace, transportation, health, and energy.

Composites Innovation Centre – assists companies in the development of lightweight, high-strength composite materials used in aircraft, ground vehicles and equipment, healthcare, civil infrastructure and other manufacturing and construction applications.

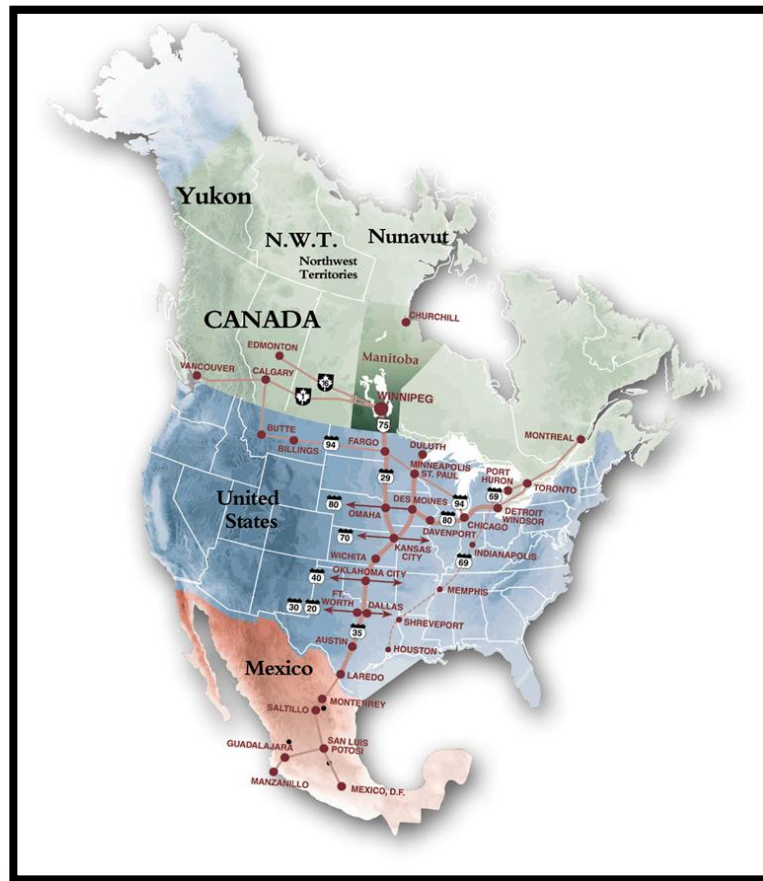
Vehicle Technology Centre – supports industry collaboration in the use of new technologies in the heavy vehicle manufacturing industry.

Food Development Centre – which undertakes research and development and related services to support Manitoba's food processing industry.

Western Canada Testing – designs, tests and helps develop machinery for equipment manufacturers.

Global Aerospace Centre for Icing and Environmental Research (GLACIER) – a cold-weather aerospace engine test centre in Thompson.

Transportation and Distribution



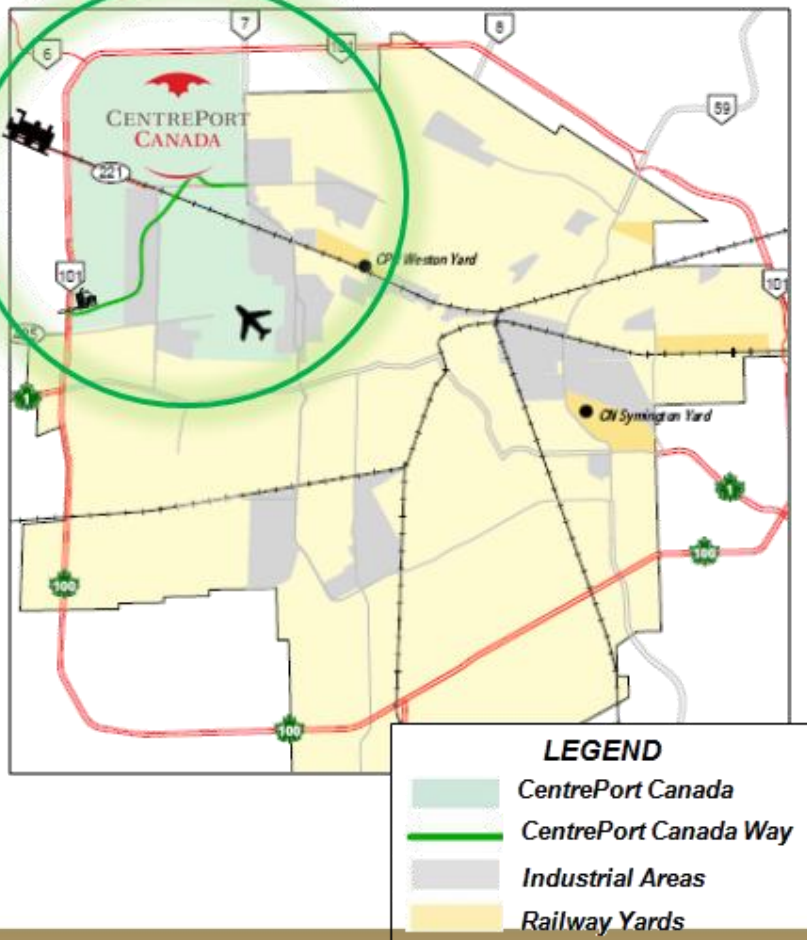
CentrePort: Canada's Centre for Global Trade

- CentrePort Canada, located in Winnipeg, Manitoba, offers 20,000 acres of high-quality industrial land, adjacent to a major urban centre and the Canada-US border, with on-site access to **tri-modal** transportation options.
- CentrePort Canada Inc. is building an integrated logistics and infrastructure platform to attract trade oriented business.



CentrePort Canada's Location

- Anchored by the James Armstrong Richardson International Airport. Located in the northwest quadrant of Winnipeg and Rosser.
- Ideally positioned to service resource-rich regions of North Dakota, Ontario, Saskatchewan, Alberta, southwestern & northern Manitoba & Nunavut.
- Focused on business attraction in six priority sectors:
 - Agribusiness
 - Composites Manufacturing
 - Mining / Energy
 - Biomedical
 - Regional Distribution
 - E-commerce



CentrePort Canada – Incentives for Business

Foreign Trade Zone

- CentrePort's Foreign Trade Zone program can help a company manage its inventory and cash flow.
- Duty deferral – duties are waived up front or rebated later.
- Sales tax relief – exemption from federal goods and services tax (GST).
- Customs bonded warehouse – sales tax and duty-free storage/distribution facilities.

Thank you.

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11th Floor - 259 Portage Avenue

Winnipeg, Manitoba, Canada R3B 3P4

Tel. (204) 945-2466 Fax: (204) 957-1793

Web site: www.manitoba-canada.com