

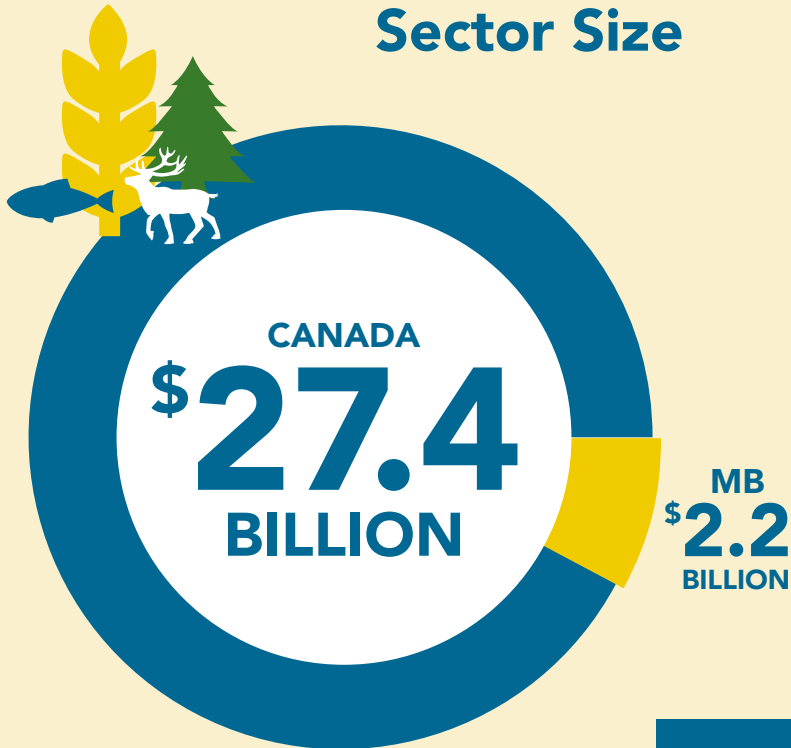


INDUSTRY SECTOR INSIGHTS

Agriculture, Forestry, Fishing and Hunting



Sector Size



The sector contributed over **\$27.4 billion** to Canada's overall GDP in 2017. Manitoba accounted for **\$2.2 billion** of this total.

Steady Output

2017	\$2.16 BILLION	+0.1%
2016	\$1.99 BILLION	+0.0%
2015	\$1.95 BILLION	+0.1%
2014	\$1.79 BILLION	-0.2%
2013	\$2.16 BILLION	

The sector saw **steady output from 2013 through 2017**, with only minor dips or increases in production due to the essential nature of the sector and the continuing demand for Manitoba's products.



Forestry & Logging Concentration

LQ 14.65*
(HIGH)

when compared relative to Manitoba

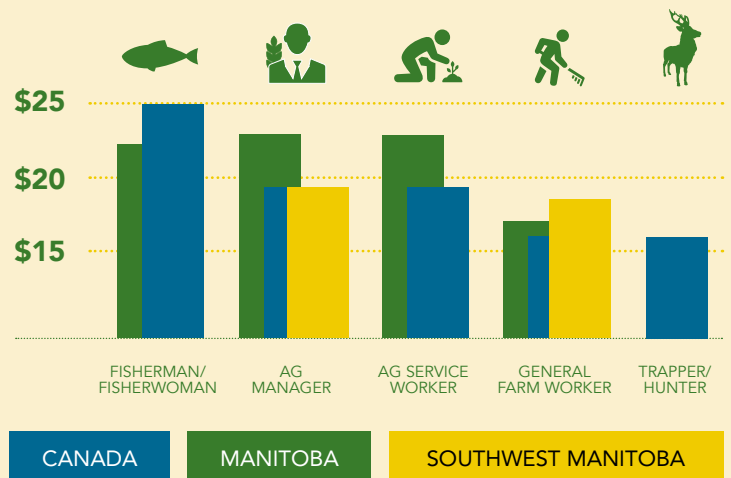
* **Location Quotient (LQ)** measures the concentration of **Agriculture, Forestry, Fishing and Hunting** businesses in **Neepawa** relative to other jurisdictions. An LQ of 1.25 and over suggests a high concentration of local activity in an industry in relation to the area with which it is being compared.

Employment



Approximately **6% of Manitoba's employed workforce** is in the sector – the 3rd largest percentage of all provinces.

Median Hourly Wages*

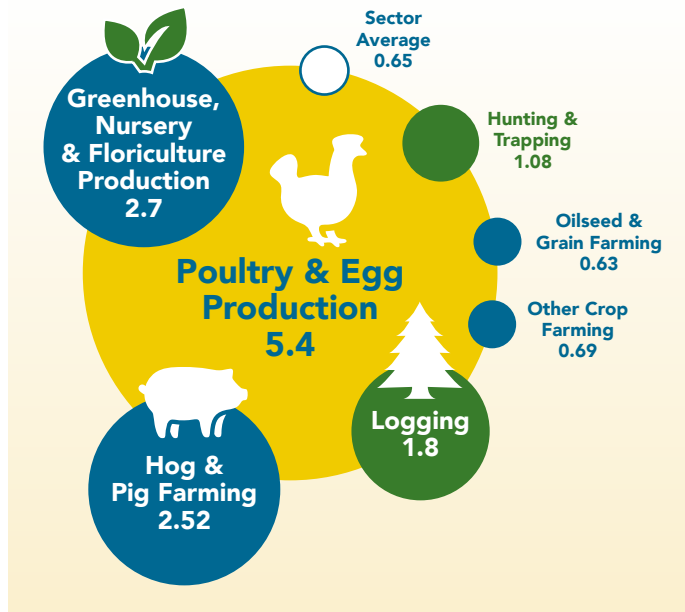


*Data for 2017

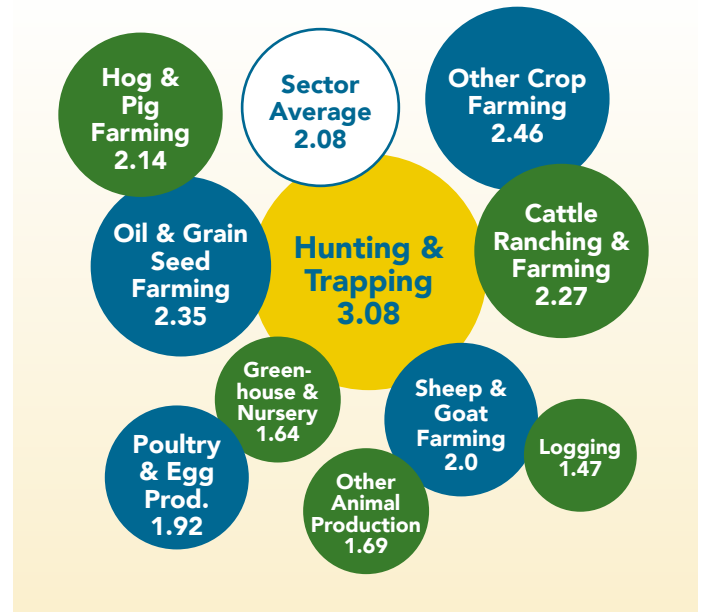
Business Establishment (2017)

Location Quotient (LQ) measures the concentration of **Agriculture, Forestry, Fishing and Hunting** businesses in Neepawa relative to other jurisdictions. An LQ of 1.25 and over suggests a high concentration of local activity in an industry in relation to the area with which it is being compared.

Neepawa relative to Division 15



Neepawa relative to Manitoba



Sector Trends and Outlook



Precision Farming

Precision farming is more integrated, easier to use and more valuable



Automation

Automation is being driven by labour shortages



Consolidation

Farms are expected to consolidate at a faster rate



Smart Agriculture

Real time data for decision making will be critical to the success of the farm and the food supply chain

Manitoba's Protein Strategy

Manitoba will be North America's protein supplier of choice, leading Canada in sustainable protein industry growth that benefits the profitability and competitiveness of Manitoba producers, processors and the provincial economy.

Major Sector Investments in Manitoba



\$400M

Roquette Pea Protein Processing Facility



\$176M

HyLife Foods Pork Processing Facility



\$50M

Parmalat Canada Dairy Processing Facility



\$460M

Simplot Potato Processing Facility Expansion

Core Clusters



95

Registered Businesses
in the Oilseed &
Grain Farming Sector

Neepawa is home to one
of the few sawmills in
southern Manitoba:

Stella Jones Inc.

Stella Jones Inc. purchased Prairie
Forest Products in February 2018.
Stella Jones is an international company
and leading producer and marketer of
pressure-treated wood products.



Sector Strengths & Opportunities

Growing Regional
Hub for Surrounding
Communities & Farms

+1000

New Residents
(2011-2016)

Near Large Cities
with Key Assets &
Attraction Potential:
Winnipeg – 175 km
Brandon – 72 km



Quality of Life &
Affordable Living



NEEPAWA QUICK FACTS

Neepawa is located in the southwestern region of Manitoba, Canada and is part of Canada Census Division 15. The community is situated at the junction of Highways 5 and 16 (Yellowhead Route), approximately 175 km west of Winnipeg.

Population (Town): 4,609 (2016)

Population (Trading Area): 21,000 (2016)

- Neepawa saw 27% growth in the last census— one of the fastest growing communities of its size in the province.
- 28% of Neepawa's population is newcomer. 25% of the population is Filipino (impact of HyLife Foods).
- CP Rail runs across the north of Neepawa with an active spur line.
- Neepawa hosts a local registered airport featuring a 3,500-foot runway to service air ambulance, crop and personal planes and small jets.

This **Industry Insights** is based on research completed in November 2018. Full text of the profile on which this fact sheet is based is available online at neepawa.ca/industry-profiles

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neepawa.ca