

SASKATCHEWAN RURAL FUTURES

Industry Cluster Assessment

June 2023



Project Proponent

In its role as the exclusive non-governmental organization dedicated to provincial community and economic development, the Saskatchewan Economic Development Alliance (SEDA) empowers communities and organizations with the necessary skills, knowledge, resources, and programs to foster a sustainable future. With a solution-oriented approach, SEDA endeavors to generate transformative breakthroughs by addressing market deficiencies and facilitating novel initiatives in collaboration with private, public, and non-profit partners.

SEDA is the prominent advocate for cluster development in Saskatchewan, driving collaborative initiatives to foster economic growth and innovation. Through our engagements with key stakeholders, we have undertaken significant projects commissioned by valued partners such as the Province of Saskatchewan (2008-2009) and, more recently, PrairiesCan (2021). These endeavors have enabled us to deliver comprehensive cluster development training programs both in-person and virtually, catering to a diverse range of participants at the provincial level.

Our commitment to equipping Saskatchewan professionals and leaders with the necessary skills and insights is underscored by the provision of valuable resources and ongoing coaching support. Through these resources, individuals and organizations gain access to essential knowledge and guidance, empowering them to navigate the intricacies of cluster development and drive sustainable economic success.

At SEDA, we remain dedicated to fostering robust and vibrant clusters across various sectors, promoting collaboration, innovation, and competitiveness. Our track record of delivering high-quality training programs and providing ongoing support solidifies our position as a trusted partner in cluster development, contributing to the growth and prosperity of the business landscape in Saskatchewan and beyond.

This project exemplifies SEDA's unwavering commitment to enhancing the competitiveness of pivotal sectors within the economy, through strategic collaborations. By effectively bridging the identified gaps in community economic development capacity at local and sub-regional levels, SEDA has employed cluster development principles to identify and promote cooperative networks of enterprises and partner organizations within sub-regions and province wide.

Project Partners

Leadership and support is being provided by the following organizations:

- City of Lloydminster
- City of Moose Jaw
- City of North Battleford
- City of Prince Albert
- City of Yorkton
- Humboldt and District Chamber of Commerce
- Mid-Sask Municipal Alliance (MSMA Region)
- MLTC Industrial Investments LP
- Ag-West Bio

Thank you to our funding partners:



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Executive Summary

Industry clusters and business networks are widely acknowledged as key drivers that stimulate and revitalize community and economic growth and bolster competitiveness in rural regions.

The objective of this research was to identify five potential 'micro-clusters' in the province and study their similarities, opportunities, and challenges. From data analysis and in-person interviews, this study provides the current context and insights from Saskatchewan businesses. By sharing these findings and recommendations SEDA hopes to build upon and expand the province's economic progress, investment attraction and community social fabric to drive sustainable community and economic development.

Industry interviews have revealed that **one out of every five anchor firms** are prepared for expansion, however, they face constraints in areas such as workforce and housing. Underscoring this illustrated opportunity for growth is the fact that according to 44% of respondents, job postings were not intended to replace departing employees but rather to establish entirely new positions in response to increased demand. An additional 30% of businesses indicated that facility growth and integration of new technologies were workforce hiring drivers.

While only two of the firms planning to expand are relocating outside their region, it is concerning that this is occurring due to lack of labour and suitable site availability. Considering this information, it is highly recommended that local communities and their respective organizations initiate a comprehensive program to meet these expansion goals and prevent the loss of existing employers.

Most respondents (58%) rated the overall **state of the workforce** as poor. Additionally, stability received a poor rating from 35% of respondents, while 22% expressed concerns about workforce quality.

Linked to industry growth potential is **workforce housing**. Employers and potential employees expressed the need for a three-stage housing approach to align with employment practices. This approach includes temporary housing to facilitate new employees' transition, short-term month-to-month housing as an intermediate solution until permanent housing options are available, and long-term housing options such as home ownership or long-term rentals. Housing availability and expansion plans can be effectively represented through the comprehensive map on the following page.



Community support emerged as a crucial factor for industry success. Respondents emphasized the importance of developing and implementing housing strategies, broadband strategies, and social strategies that aid in integrating new workers into the community effectively.

The significance of a robust **supply chain** in supporting both current operations and future sales was reinforced with respondents overwhelmingly recognizing logistics as the top priority at 34.3%, closely followed by the need for skilled contractors such as industrial electricians, power engineers, and supplier technicians.

The analysis conducted on our five micro-regions has revealed common challenges and opportunities which inform the following recommended action items:

Regional housing, broadband and immigration strategies: Action oriented planning is required to address significant gaps in community readiness and to support current and future economic growth.

Supply Chain Development: Foster collaborative supply chain and procurement practices at the local and regional levels including consideration to Indigenous procurement. Work proactively with key agencies to develop a rural supply chain for Small Nuclear Reactors and to establish uranium refining capability within the province.

Regional Business Retention and Expansion: Conducting outreach to industry on a sector-by-sector basis will ensure that business opportunities can be supported, and challenges mitigated.

Automation Transition Strategies: Work with industry associations and public sector partners to support businesses in planning for automation. Explore opportunities for circular manufacturing and forestry accelerator programs. Approach the Province of Saskatchewan to consider capital investment incentives.

Regional Workforce Development: Engage communities and stakeholders to develop regional training pipelines and attraction strategies with consideration given to Indigenous workforce development. Persistent workforce gaps are evident in all sectors, including community support sectors such as daycare and senior care. Solution focused approaches across sectors are required to ensure that industry and community continues to thrive.

Additional recommendations specific to each of the five micro-regions are found within this report. Identified opportunities in existing and emerging industry clusters will be explored in the next phase of this project to begin in July 2023.

To effectively address the identified gaps and drive sustainable economic development across our micro-regions, it is imperative that a consortium of regional stakeholders, associations, government entities, and strategic partners come together and sustain their engagement. It is through this shared commitment and proactive approach that we can unlock the full potential of our regions and drive prosperity for all stakeholders involved.

We, at SEDA, firmly believe that this current endeavor will contribute significantly to the advancement of community and economic development in Saskatchewan, fostering a conducive environment for sustainable growth and prosperity.

Project Overview

Industry clusters and business networks are widely acknowledged as key drivers that stimulate revitalized economic growth and bolster competitiveness in rural regions.

Within the context of this project, the term "clusters" encompasses the coexistence of both competitive and collaborative firms in concentrated areas, creating opportunities for shared competencies and mutually beneficial synergies. These industry clusters play a pivotal role in positioning regions as uniquely competitive for job creation, private investment, and as essential components of infrastructure networks.

In the current landscape, focusing on rural cluster development holds significant relevance for Saskatchewan. Shifting dynamics between businesses and communities, along with disruptions and evolving market forces, have impacted historical economic outcomes. These circumstances indicate an opportune time to build upon and expand Saskatchewan's economic progress by fostering strategic regional opportunities. By encouraging inter-firm cooperation and cultivating industry growth, we can establish a solid foundation for integrated initiatives that drive sustainable economic development.

When evaluating investment retention and attraction, without factoring in related issues, such as public service delivery and the impact of multiple governance structures, it is important to acknowledge that the presence of over 700 communities may inhibit their capacity to effectively support industry.

Efforts to encourage inter-community co-operation have failed to gain traction in the province. Saskatchewan stands apart in Canada and North America for having the highest number of municipalities with 781 plus 70 First Nations communities, surpassing the figures of 426 municipalities in Alberta and 137 in Manitoba when considered on a population basis.

Many of these community's face obstacles due to insufficient economies of scale and limited capacity to capitalize on regional competitive advantages. Consequently, they often find themselves on the fringes of the mainstream economy, lacking the ability to generate incremental growth in their local constituencies. By embracing inter-firm cooperation, industry can serve as a leading example, demonstrating the business rationale for broader collaboration within trading areas.

The project consists of two distinct phases and aims to strengthen rural industry clusters as a strategic approach to attracting, retaining, and expanding existing businesses.

The focus of the project extends to five specific micro-regions in Saskatchewan, where concentrated efforts will be directed to support and enhance the vitality of these economic ecosystems:

1. Lloydminster-North Battleford
2. Meadow Lake-Prince Albert
3. Humboldt-Jansen
4. Moose Jaw
5. Yorkton

Phase 1 - Opportunity Assessment 2022-23

This phase plays a critical role in laying the groundwork for cluster development, entailing vital economic analysis and extensive industry consultations to evaluate sector trends, challenges, and opportunities specific to each region. We have conducted comprehensive business interviews with leading anchor firms in key sectors, including agri-value, forestry, manufacturing, and mining, gathering valuable insights to assess the potential for advancing cluster development. These insights will serve as a foundation for strategic engagement with stakeholders in Phase 2, fostering a well-informed and collaborative approach to drive inter-firm cooperation and promote economic advancement.

Phase 2 - Mobilization 2023-25

Phase 2 aims to strengthen competitiveness and drive economic prosperity within the micro-regions through the development of strong and thriving industry clusters. This phase will involve active engagement with industry stakeholders and supporting institutions in each micro-region, with a focus on exploring priority challenges and opportunities. Through the development of strategic frameworks and action plans, our goal is to drive targeted initiatives that effectively address the identified priorities. Key emphasis will be placed on building the capacity of each industry cluster, including the allocation of appropriate resources and the implementation of structural enhancements to facilitate long-term growth and sustainability.

Methodology



To establish a comprehensive foundation of knowledge, our project team collaborated with Ratel Novus Consulting, leveraging their expertise in data-driven approaches, alongside direct stakeholder engagement and key external factors influencing Saskatchewan's economy.

During the assessment phase, we worked closely with local leadership partners who provided valuable recommendations for anchor firms, which served as the basis for our consultant's outreach efforts. Using a lead sheet, our consultant-initiated contact with these identified anchor firms via phone, inviting them to participate in the project. A total of 65 interviews were conducted with anchor firms across the five regions, following a structured questionnaire derived and adapted from SEDA's cluster development program. This questionnaire comprised a comprehensive set of 56 questions, carefully categorized into seven key areas of inquiry:

1. General Business Information.
2. Workforce.
3. Sales.
4. Facility and Operations.
5. Business Support, Infrastructure and Climate.
6. Supply Chain.
7. Final Open-Ended Questions.

These interviews were efficiently conducted using the TEAMS video conferencing platform, with approximately one hour allocated for each participant. The insights shared by the participants were meticulously captured and translated into quantitative data using IBM's Statistical Package for Social Sciences (SPSS). This systematic approach allowed us to transform participant responses into numerical, ordinal, or nominal data, providing a deep understanding of the opportunities and challenges present within each sector.

In addition to the primary data collected through interviews, our project team engaged in comprehensive secondary data analysis, evaluating the entire dataset as a unified provincial entity. Employing a range of foundational analytical tools, such as location quotient analysis, shift/share analysis, leading/lagging analysis, and industry targeting classification, our team examined select characteristics for each sub-region. Leveraging data supplied by Lightcast, these analytical approaches have been effectively applied to the regions, offering additional perspectives to support robust economic development strategies.

SWOT Snapshot

The symbiotic relationship between communities and businesses is inherent, dynamic, and mutually reliant.

Provincial Lens

The current global landscape is marked by emerging challenges, including political uncertainties and disruptions in supply chains, particularly in the food sector. However, amidst these challenges, Saskatchewan has a distinct opportunity to position itself as a hub for food security, manufacturing stability, and attracting global migration.

The province's stability is evident in its political climate, energy security, democratic social system, robust health system, and education system. These factors collectively establish Saskatchewan as a compelling choice for effectively addressing future challenges in an unpredictable world. With global political uncertainties prevailing, the agriculture, agri-food, and fertilizer markets are expected to remain resilient. The localized economic growth within these sectors will heavily rely on the availability of skilled labour and a consistent inventory of commodities.

Key drivers of Saskatchewan's economy: Agri-Value, Manufacturing, Mining, and Forestry sectors are well-represented by anchor firms across the five regions, boasting a substantial workforce and generating significant revenue. This underscores the pivotal role played by these sectors in driving economic development and enhancing the province's overall competitiveness.

In specific regions, noteworthy industry strengths have been identified:

- ⇒ Prince Albert-Meadow Lake and the broader boreal region have a strong presence in the forestry sector, leveraging their solid foundation in this industry.
- ⇒ Lloydminster and North Battleford exhibit emerging strengths in manufacturing and processing, presenting opportunities to diversify from mature industries like oil and gas.
- ⇒ Humboldt showcases a unique combination of resource mining and agricultural manufacturing, forming the economic backbone of the region.
- ⇒ Yorkton is recognized for its significant capabilities in commodity processing within the Agri-Value sector and agricultural manufacturing.

- ⇒ Moose Jaw demonstrates strengths in new entries to the food industry, industrial agri-value, and resource-supporting sectors, capitalizing on its robust utility and transportation infrastructure.

Climate change is expected to have a profound impact on various industries, and its implications for the future cannot be underestimated. Saskatchewan, based on early indicators, is well-positioned to capitalize on the effects of climate change and the vulnerabilities observed in other regions worldwide, particularly in the domains of food production and industrial manufacturing. This presents further opportunities for the province to leverage its strengths and foster sustainable economic growth.

KEY CHALLENGES

Changing Workforce. The changing workforce landscape, coupled with retirements and generational shifts, presents a growing challenge in attracting and retaining young workers. The new generation often has different expectations regarding working conditions, necessitating businesses to adapt their practices and create environments that align with these evolving needs.

Lack of interest in Leadership. There is a concerning trend of reduced interest among young workers in pursuing leadership positions. This issue is influenced by working conditions and cultural factors. To effectively manage the departure of experienced workers and ensure a seamless transition, organizations must focus on effective succession planning and knowledge transfer strategies.

Diversity and Inclusion. Respondents have emphasized the significance of promoting diversity and inclusion in the workplace. Indigenous employees bring invaluable generational knowledge and expertise to projects and tasks. With increasing immigration as a solution to labour issues, organizations must cultivate collaborative environments that embrace cultural differences and provide appropriate training to effectively manage diverse teams.

Industry 4.0¹ The cyclical nature of labour demand, influenced by commodity fluctuations, poses challenges for businesses. High turnover rates, especially in labour-intensive roles, can be mitigated through implementation of automation technologies. Automation not only addresses resistance in the labour market but also enables enterprises to adapt more efficiently to peak or seasonal demand and increase overall resilience.

¹ We are now in the fourth industrial revolution, also referred to as Industry 4.0. which is characterized by increasing automation and the employment of smart machines and smart production, data helps to produce goods more efficiently and productively across the value chain. Flexibility is improved so that manufacturers can better meet customer demands using mass customization—ultimately seeking to achieve efficiency with, in many cases, a lot size of one. By collecting more data from the factory floor and combining that with other enterprise operational data, a smart factory can achieve information transparency and better decisions.

One of the fears associated with the uptake of new technologies is the loss of jobs. However, if applied correctly, new technologies have the potential to make workplaces more inclusive and safer for workers, as well as increase their job satisfaction and well-being. As an example, AI-based technologies, as well as virtual and augmented reality tools, can be used to embrace more people with reduced mental abilities in the working environment. Similarly, mobile robots and exoskeletons have the potential to make certain tasks less physically demanding, allowing women to take on tasks that were previously reserved for men due to the required physical strength.

The added benefit of digitalizing industrial processes allows those living in distant regions to work remotely, increasing the resilience of production itself. Digital solutions and wearables could open new channels for alerting workers and their general practitioners about critical health conditions, both physical and mental, as well as supporting workers in adopting healthy behaviors in the workplace.

Housing. Persistent gaps in workforce housing call for innovative solutions. Addressing the challenges driven by fluctuating demand requires identifying creative marketplace solutions that promote stability and long-term economic benefits. The free market alone may not respond swiftly to construction demands, and commercial interests might not fully recognize the long-term returns on investment. Exploring avenues such as leveraging existing housing infrastructure for an expanded rental marketplace can optimize housing stock, align with sustainability goals, and reduce strain on new construction and infrastructure development.

Broadband. Insufficient broadband infrastructure, particularly in rural areas, poses significant challenges to individuals' quality of life and daily business operations. This limitation hampers modernization efforts in industries located in rural areas, hindering the adoption of advanced machinery, streamlined processes, and cloud-based networks. Robust broadband infrastructure is crucial for businesses to stay competitive, leverage cloud technologies, foster effective collaboration, and ensure up-to-date security measures and software updates.

Community Economic Capacity. While revenue transfers from the Province of Saskatchewan to municipalities has increased significantly (+ 513% since 2012), the allocation of these funds to support and grow local industries is not uniformly evident. Given the number of communities within the province, there is deficit of strategic action planning to support essential services such as basic infrastructure, housing and newcomer integration services.

Addressing gaps in the ecosystem, such as housing and newcomer strategies, is essential. To maximize industry potential, additional investment in business retention and expansion, supply chain development, and investment attraction is necessary.

Sector Assessment

AGRICULTURE AND AGRI-VALUE

The ongoing conflict between Ukraine and Russia has prompted food companies and the global supply chain to re-evaluate their strategies and prioritize more resilient supply chains that can withstand political disruptions. This situation presents significant opportunities for Canadian stakeholders in the agricultural sector, particularly those involved in supplying value-added products and raw commodities. Strong commodity pricing and robust sales at the farm gate are boosting producer confidence and positively impacting the machinery marketplace. The outlook for agricultural machinery in the next 24 months is closely tied to the pricing of key crop groups such as wheat, canola, and pulses. Barring any significant climate-related challenges, the market forecast for farmgate income is highly favourable, representing a notable improvement compared to previous years.

In the Agri-Value sector, there is a re-evaluation of the plant protein boom. Marketplaces are scaling back from the initial excitement, and both consumer packaged goods brands (CPGs) and startup companies that have not gained expected consumer traction are undergoing rationalization. One of the major challenges in the agri-food marketplace is food inflation, driven by soaring costs of raw materials and labour, while the availability of labour is trending downward. These factors are exerting price pressures and potentially leading to low-margin conditions for an industry grappling with inflationary challenges.

Saskatchewan is home to a diverse range of Agri-Value companies, including some relatively new players operating for five years or less. These companies may not have accumulated sufficient operational experience or encountered significant pain points that drive them towards collaboration with other entities. Most collaborations among these "new" Agri-Value companies, particularly those involved in plant fractionation of plant protein and new consumer products, primarily focus on technical areas aimed at addressing product-related issues. These collaborations often involve food scientists, technical laboratories, or product development centers. At their current stage of development, these companies may not yet possess the scale or pressing need in their operations to actively seek collaboration beyond product development.

Clusters, play a pivotal role in fostering collaboration on various topics, including transportation linkages, market access, global trade barriers, regional labour market development, and sector competitiveness. These associations of complementary industries can provide a platform for stakeholders to come together, share knowledge, address common challenges, and leverage collective resources for the benefit of the industry as a whole.



Challenges

Maximizing the value of co-products and by-products through optimal utilization

With the anticipated increase in pulse fractionation and canola crushing in the province, it becomes crucial to effectively utilize and extract value from the entire value chain, encompassing primary products, co-products, and by-products.

As pulse fractionation expands, there will be a higher production of starch within the system. Similarly, increased canola crushing will result in a surge in canola meal volume that requires appropriate management. Currently, there is a lack of localized industries capable of effectively utilizing starch and canola meal. Presently, the prevailing approach to valorizing starch involves selling it on commodity markets at spot prices.

Canola meal is primarily sold as livestock feed. However, the volume generated from crush plants exceeds the absorption capacity of the local marketplace, and this situation is expected to intensify with the introduction of new crush capacity in late 2024. It is important to recognize that such short-term solutions are heavily influenced by commodity prices and do not offer long-term, sustainable opportunities.



Opportunities

Harnessing the potential of industrial applications for starch and canola meal

While the market demand for pulse fibre and protein remains strong, the utilization of starches has been relatively limited. Noteworthy research led by Dr. Yongfeng Ai at the University of Saskatchewan is focused on developing resistant starch varieties and exploring the conversion of starch into non-food or industrial applications. These applications encompass a wide range of industries, including clothing fibres, construction materials, biogels, and the production of biodegradable and compostable plastics.

In the case of canola meal, companies such as Botaneco are actively engaged in isolating oleosomes for applications in the pharmaceutical and cosmetic sectors. Additionally, Canola meal finds application in aquafeed and the pet food industry, but its highest value opportunity lies in emerging bio-chemical applications as a viable substitute for petroleum-based industrial products. This includes the production of bio-oils, biofuels, and other bio-chemical feedstocks.

Significant research efforts are dedicated to transforming agri-value by-products and co-products into substitutes for traditional carbon-based industrial products. By exploring the circular utilization of Saskatchewan's agri-value products, there is a unique opportunity to contribute to a decarbonized world.

Furthermore, within the companion animal marketplace, canola meal holds potential opportunities. Its isolation of dietary fibre, protein, and trace amounts of diatomaceous earth make it an ideal raw material for the production of dog

treats or dog kibbles. Another niche opportunity lies in the extrusion of canola meal for companion animal treats.

An opportunity that may be relevant for large agri-food companies is the use of canola meal/cake, canola soap stock and oat hulls for generating green natural gas through anaerobic digestion. This can augment industry's own natural gas supply and meet and emergent market demand.

Through innovative research and strategic utilization, Saskatchewan's agri-value sector can unlock the full potential of starch and canola meal, creating value-added products for various industries and contributing to a sustainable and diversified economy.

MANUFACTURING

The evolving perception of manufacturing, mining, and forestry sectors as viable career paths have witnessed a significant decline on a global scale. These sectors are often regarded merely as convenient options for earning wages based on proximity, rather than fulfilling and impactful career choices. The prevailing image of repetitive and unfulfilling jobs within these sectors fails to align with the values and aspirations of today's youth, who prioritize freedom and happiness in their professional pursuits. The COVID-19 pandemic has further intensified this trend, resulting in historically low employment and retention rates within these industries.

However, on the international front, manufacturing is experiencing a resurgence driven by carryover demand from the pandemic. The concepts of reshoring and friend-shoring have emerged as prominent trends, driven by political and economic instability reminiscent of a modern-day Cold War. It is worth noting that this resurgence in manufacturing does not align seamlessly with the mounting pressure in the agricultural manufacturing sector. In 2022, the agricultural machinery market witnessed its highest recorded sales, and early dealership orders for 2023 indicate a potential surpassing of that record. One of the businesses interviewed reported an impressive year-over-year increase of 35% in sales from 2021 to 2022, with early dealer orders for the upcoming period skyrocketing by 90%. These post-pandemic years have become pivotal milestones for agricultural machinery and its sales.

While manufacturing historically enjoyed labour premiums, fierce competition from the mining sectors has eroded these premiums in several regions covered by our project. Moreover, the manufacturing labour force is experiencing rapid aging, and the avenues available to expand the labour pool are limited and scarce.

It is imperative for businesses and industry stakeholders to address these challenges head-on by reimagining the image of these sectors, highlighting the meaningful contributions they make to society, and creating attractive career pathways that align with the values and

aspirations of the younger generation. Additionally, efforts to revitalize the labour pool and invest in skill development are crucial to ensuring the long-term sustainability and competitiveness of these sectors in a rapidly changing global landscape.



Challenges

Lack of automation

The manufacturing sector in the province primarily focuses on agricultural machinery and supporting operations in potash and uranium mining, both of which are driven by commodity demand. However, the high demand has revealed a notable weakness in Saskatchewan's manufacturing sector - an over-reliance on manual processes.

While automation is not a panacea for all challenges, it holds great potential in addressing some of the issues related to labour fluctuations. Our manufacturing centers need to enhance their resiliency to effectively cope with changing demands. By modernizing machinery and adopting automation technologies, facility capabilities can be enhanced, and productivity can be adjusted to meet the fluctuating demands of the market.

Furthermore, automating production facilities will send a powerful message to our emerging workforce, indicating that manufacturing is a modern and dynamic profession. It will help dispel the negative image associated with working in outdated, dimly lit welding shops filled with dust, which is a relic of the past.

Embracing automation not only improves operational efficiency and flexibility but also demonstrates our commitment to innovation and technological advancements. It positions Saskatchewan's manufacturing sector as a forward-thinking and attractive career destination for the next generation of workers. By investing in automation, we can modernize our manufacturing capabilities, improve productivity, and create a more appealing and sustainable industry for years to come.



Opportunities

Friend-shoring and nearshoring

Despite concerted efforts, persistent supply chain challenges continue to impact businesses even two years after the onset of the pandemic. A primary contributing factor to these ongoing issues is the shortage of labour within overseas long supply chains. However, within these challenges lies an opportunity for larger manufacturers to explore and cultivate a local vendor base in close proximity to their facilities. By doing so, manufacturers can localize supply chain expenditures, mitigating some of the risks associated with disruptions in global supply chains.

Furthermore, the emergence of Small Modular Reactors (SMRs) presents an exciting avenue for firms specializing in industrial manufacturing and repair, particularly those operating within the mining and energy sectors. The unique

characteristics of SMRs lend themselves to the establishment of a robust provincial supply chain. Notably, Saskatchewan exhibits a higher level of public acceptance for SMRs compared to other provinces, providing a distinct advantage. By capitalizing on this momentum, Saskatchewan's industrial sector has the potential to position itself as a leader in supply chain expertise within the SMR domain.

Preliminary discussions have already commenced with the Saskatchewan Industrial and Mining Suppliers Association (SIMSA) to proactively prepare for the potential transition to a multi-billion-dollar supply chain associated with SMRs. By proactively engaging with industry stakeholders and fostering collaboration, we can effectively navigate the evolving landscape and seize the opportunities presented by friend-shoring and nearshoring. This strategic approach will strengthen our supply chains, enhance resilience, and solidify Saskatchewan's position as a leader in the industrial manufacturing sector.

FORESTRY

During the pandemic, the forestry sector experienced a significant surge in demand for board lumber, driven by home improvement projects. This resulted in record-high prices and a boom in the industry. However, as we move into 2023, we can anticipate a decline in the forestry sector as the demand for board lumber and forestry products becomes sensitive to inflationary pressures.

Similar to other commodity industries, forestry is undergoing its own version of climate migration, with board lumber contracts shifting eastward from British Columbia, which has traditionally been a stronghold for forestry products in Canada. However, the forestry sector continues to face challenges related to its public image. The perception of isolation, repetitive manual labour, and negative social license associated with tree harvesting has contributed to a less favorable image. Additionally, like the farming sector, forestry struggles to attract young adults who are increasingly less inclined to pursue careers in rural environments. Moreover, some forestry positions are seasonal and isolated in nature, further exacerbating the challenges.

In Saskatchewan, First Nations and Métis people constitute approximately 27% of the workforce in the forestry industry, representing the highest percentage of Indigenous forestry employees in any province. There is an opportunity to further grow this participation rate in conjunction with the deployment of new technologies and skills development.

While the overall forestry sector in Canada is projected to decline, Saskatchewan's forestry industry is expected to fare relatively well due to the favorable winds of climate change that align with our geographic positioning. These factors present opportunities for Saskatchewan's forestry sector to withstand broader industry trends and capitalize on emerging market

dynamics. By leveraging these advantages and addressing the challenges, we can position Saskatchewan as a resilient and thriving player in the forestry sector.



Challenges

Automation pivotal to address challenges and efficiencies

By embracing digital solutions and harnessing the power of Big Data, we can unlock significant benefits. Effective forest management requires a deep understanding of the current conditions of forested areas, identifying optimal harvesting locations, and detecting disease and pest pressures.

The adoption of digital technologies is crucial for gaining valuable insights across large tracts of land and enabling informed management decisions. However, there is currently a gap in forest management due to the lack of installed sensors and the inability to gather data from an Internet of Things (IoT) network. This limitation restricts the industry's ability to fully leverage the potential of Big Data for improved decision-making. Similarly, production facilities also face a data gap, as outdated machinery hinders the capture of performance data, limiting opportunities for optimizing production processes.

To overcome these challenges, it is imperative to invest in automation and modernization efforts. By implementing sensor networks and IoT technologies, we can collect real-time data on forest conditions, enabling precise decision-making and more efficient resource allocation. Upgrading production machinery to capture performance data facilitates process optimization, reducing downtime and enhancing overall productivity.

Furthermore, leveraging advanced analytics and artificial intelligence can enable predictive modeling and forecasting, helping to anticipate and mitigate risks in forest management and production processes. These technologies enable proactive decision-making, optimizing operations, and enhancing overall efficiency. By embracing automation and digital solutions, the forest management industry can unlock substantial value, improve sustainability practices, and pave the way for a more efficient and resilient future.

Automation to boost efficiency and alleviate challenging working conditions

Many job positions in the forestry sector involve physically demanding tasks, including repetitive heavy lifting that can lead to strain and fatigue. These conditions often contribute to high turnover rates and a negative perception of the industry.

By embracing automation solutions, we can effectively address these issues and improve working conditions for forestry workers. Automating tasks that require repetitive heavy lifting, such as carrying loads weighing up to 25 kg, can significantly reduce the physical strain on employees. This shift from manual labour to automated processes not only enhances worker safety and well-being but also helps to alleviate the burden of physically demanding tasks.

Moreover, automation contributes to improved productivity and operational efficiency. By eliminating the need for manual labour in certain tasks, workers can be redeployed to more skilled and strategic roles within forestry operations. This not only enhances overall productivity but also provides opportunities for workers to develop new skills and contribute to higher-value activities.

Furthermore, adopting automation technologies sends a strong message to potential employees and the broader workforce that the forestry sector is committed to creating a modern and inclusive work environment. By alleviating physically demanding tasks through automation, the industry can attract and retain talent, improving its image and reputation as an employer.

Overall, automation in the forestry sector presents an opportunity to enhance both productivity and working conditions. By reducing the reliance on manual labour for repetitive and physically demanding tasks, we can create a safer, more efficient, and more appealing workplace for forestry professionals.



Opportunities

Valorization of production residues for energy

The valorization of production residues in the forestry industry, particularly in Northern Saskatchewan, presents significant opportunities for energy generation and value-added uses. Left-over wood processing and logging residue, including log fuel piles, represent valuable sources of energy that can be effectively utilized in on-site power generation units.

The industry has recognized the potential of these residues and has started leveraging proven technology to generate localized power for production facilities. Moreover, surplus energy in the form of electricity can be sold back to the grid, creating additional revenue streams. Each production facility possesses the necessary capabilities and residue capacity to take advantage of this option, enabling them to contribute to increased community energy resilience. This localized energy provision not only supports de-carbonization efforts but also aligns with the principles of a circular economy.

Valorization of production residues for value-added uses

The valorization of production residues presents a compelling opportunity to unlock higher value uses for by-products generated in the sawmill process and wood residues. Instead of considering these materials as low-value waste, we can leverage them to create valuable commodities that contribute to the sustainability and profitability of the forestry sector.

One avenue for valorizing production residues is through the production of engineered wood products. By utilizing these residues as inputs, we can manufacture innovative wood-based materials that have a wide range of applications in construction, furniture, and other industries. Engineered wood

products offer enhanced performance characteristics and can command higher prices in the market, thereby increasing the value derived from these residues.

Another promising avenue is the conversion of production residues into bio-methanol, a versatile industrial chemical. Bio-methanol can serve as a sustainable alternative to traditional petroleum-based chemicals, finding applications in various industries such as pharmaceuticals, plastics, and solvents. By transforming wood residues into bio-methanol, we not only create a valuable product but also contribute to reducing dependence on fossil fuels and mitigating environmental impacts.

In cases where production facilities may not generate sufficient residues for large-scale energy transformation, exploring value-added solutions for these residues at the source becomes essential. Establishing processes and technologies within the production facilities to extract maximum value from these residues is crucial. This can involve optimizing the production processes to minimize waste generation, implementing technologies for on-site conversion into higher-value products, or exploring partnerships with nearby facilities to jointly valorize the residues.

It is important to consider the economic feasibility of transporting low-value commodities to other production facilities. In many cases, the cost of transportation may outweigh the potential benefits. Hence, it is imperative to find solutions for consumption or valorization of these residues at the source. By doing so, we can ensure economic viability and maximize the value potential of these materials.

Overall, the valorization of production residues presents a compelling opportunity to create higher-value products and contribute to the sustainability of the forestry sector. By diversifying the uses of these residues through the production of engineered wood products or bio-methanol, we can transform waste into valuable commodities and drive economic growth in the industry.

MINING

The Saskatchewan mining sector is a vital player in addressing two critical global needs: food and energy. In recent years, the industry has experienced a remarkable resurgence, with both fertilizer and uranium spot prices consistently rising since 2018.

Uranium, in particular, is undergoing a revitalization as global overstock levels have been significantly reduced. This, combined with a shifting perspective on nuclear energy as a sustainable and viable alternative, has led to a more positive outlook on the role of uranium in global energy markets and society as a whole. The integration of advanced technologies like Small Modular Reactors (SMRs) into the market will further shape public opinion and strengthen the position of uranium as a reliable source of baseload energy. This, in turn, supports the growth of green technologies such as wind and solar power.

In the fertilizer sector, global markets have been affected by ongoing conflicts between Ukraine, Russia, and Belarus, introducing a level of uncertainty. As a result, there is a potential for a correction in fertilizer prices in 2023. Producers worldwide have responded to the high prices experienced in 2022 by implementing measures such as precision farming or optimizing the volume of fertilizer applied per acre in 2023. This strategic approach aims to optimize input consumption and promote more efficient use of resources.

The Saskatchewan mining sector's contribution to meeting global food and energy needs is crucial. With uranium poised for continued growth and the fertilizer market adapting to current challenges, the industry is well-positioned to play a significant role in driving sustainable development and supporting the transition to greener technologies. As technological advancements and market dynamics continue to evolve, the Saskatchewan mining sector remains at the forefront, driving innovation and contributing to global progress.



Challenges

Automation of basic labour jobs

The mining sector is currently confronted with a substantial labour shortage due to increasing demand and an aging workforce. Additionally, younger generations are generally less inclined to pursue careers in underground mining, presenting a challenge for the industry. Recognizing the urgency of the situation, the mining industry has already made significant investments in automation and is expected to keep doing so.

Since 2005, when there was a rapid write-down of mining equipment and the removal of the capital tax, the industry has actively pursued automation investments to enhance operational efficiency and address the labour shortage. These investments have been instrumental in improving productivity, reducing costs, and creating safer working conditions.

Moreover, automation offers the opportunity to attract a new generation of workers who may be more interested in operating and managing advanced technology rather than engaging in physically demanding manual labour. By embracing automation, the mining industry can position itself as an innovative and technologically advanced sector, appealing to a broader pool of talent and ensuring its long-term sustainability.

Environmental Remediation

Environmental remediation is a critical imperative in the mining industry, particularly in Saskatchewan where the proliferation of potash mining activities has accentuated the challenge of managing mine tailings. These by-products of the mining process, akin to wood residues in the forestry sector, present a formidable environmental waste issue due to their high concentration of toxic chemicals. Addressing this challenge requires the implementation of effective and innovative mitigation strategies to ensure the sustainable management and treatment of these tailings.

As the demand for potash continues to rise, the responsible handling of mine tailings becomes increasingly vital. In response to this pressing concern, the mining industry in Saskatchewan is actively investing in research and development to identify advanced remediation technologies and methodologies. This commitment to innovation is driven by the recognition that sustainable environmental practices are not only a moral obligation but also a crucial factor in maintaining the industry's social license to operate and ensuring long-term viability.

Collaboration among mining companies, regulatory bodies, and environmental experts is essential to develop and implement effective remediation strategies. By leveraging the collective expertise and resources, innovative solutions can be deployed to address the environmental challenges associated with mine tailings. This includes exploring technologies such as filtration, sedimentation, and bioremediation to remove contaminants and restore affected areas to their natural state.

Furthermore, mining companies are embracing the principles of circular economy and sustainable resource management. Efforts are underway to explore opportunities for reusing or repurposing mine tailings, converting them into valuable resources rather than considering them as mere waste. This approach aligns with the broader objective of minimizing environmental impact and maximizing resource efficiency throughout the mining life cycle.



Opportunities

Next- Gen Fertilizers

The potash marketplace is currently undergoing a transformative phase characterized by innovation and the introduction of next-generation fertilizer blends. This represents a significant value-added approach within the mining sector, where fundamental research on plant nutrition is driving the optimization of fertilizer formulations at the source. The outcome of these advancements is the creation of more efficient and targeted products that deliver enhanced agricultural benefits.

By incorporating advanced fertilizers derived from this cutting-edge research, farmers can achieve optimal results while reducing the overall application rates. This not only improves the efficiency and effectiveness of fertilizer usage but also contributes to a decrease in the demand for raw potash resources. This alignment with the principles of the 4R revolution - focusing on the right source, right rate, right time, and right place for fertilizer application - plays a crucial role in controlling excessive fertilizer use and mitigating the environmental impact of fertilizer runoff.

As the potash marketplace continues to evolve, the focus on innovation and value-added approaches will remain paramount. By leveraging the latest research and

technologies, the mining sector can play a pivotal role in supporting sustainable agriculture and meeting the growing global demand for food production. The development of advanced fertilizer blends is a testament to the industry's commitment to driving positive change, fostering agricultural efficiency, and reducing the environmental footprint associated with traditional fertilizer practices.

Co-Location with SMRs

A prime example of industry innovation can be seen in the successful co-location of the Cory potash mine with a SaskPower project. This strategic collaboration harnesses the waste heat generated from a nearby power plant, converting it into steam to support mining operations. By leveraging this synergy, the partnership has achieved remarkable reductions in greenhouse gas emissions associated with mining activities, highlighting the significant environmental benefits derived from such collaborative efforts, which could be replicated elsewhere in the province.

Aligned with the province's strategic plan to transition towards cleaner and more sustainable energy sources, there is immense potential in exploring the co-location of Small Modular Reactors (SMRs) with large electricity consumers. This presents an exciting opportunity to further advance Saskatchewan's commitment to greener technologies and accelerate the transition away from coal-fired power generation.

The industry is fully dedicated to achieving net-zero emissions in the shortest possible time frame as part of their Environmental, Social, and Governance (ESG) commitments. Collaborating with heavy utility users and industry partners can play a pivotal role in supporting SaskPower's efforts to advance SMRs and other net-zero power generation investments. By working together, industry and utility sectors can drive the adoption of innovative technologies, maximize energy efficiency, and contribute to a sustainable future.

These strategic partnerships not only facilitate the reduction of carbon footprints but also demonstrate the business community's active participation in supporting sustainable practices and environmental stewardship. By embracing innovative solutions and pursuing net-zero goals, industries can position themselves as leaders in sustainability, strengthen their ESG profiles, and contribute to the overall prosperity and well-being of the province.

As Saskatchewan continues its journey towards a greener energy landscape, the co-location of SMRs and collaboration between industry and utility sectors hold immense potential.

Industry Interviews

'We are not in the manufacturing business anymore;
we are in the hiring business.'

This comprehensive summary of qualitative findings stems from an extensive series of 65 interviews conducted from December 2022 to April 2023. The primary objective of this research phase was to acquire valuable insights into the strengths and weaknesses of the specific sectors under examination. The organization of this section revolves around five core themes that served as the framework for the interviews: talent, trade, infrastructure, regulatory environment, and innovation. Notable key takeaways have been prominently emphasized within each subsection for quick reference. **For a detailed breakdown of the interview data, please consult Appendix F.**

Participants

MANUFACTURING – 28 companies. The majority of the manufacturers produced ag machinery, but the category also includes transportation, chemical and industrial focused firms.

AGRI-VALUE – 17 companies. Category includes finished consumer product, ingredients, non-human food and industrial non-food.

FORESTRY – 5 companies. Category includes lumber management, finished consumer goods, specialty wood products, secondary wood products and wood residues.

TECHNOLOGY – 2 companies. Category included B2B tech services and B2C consumer service.

MINING – 6 companies at 9 locations. Category includes aggregate and solution mining.

OIL AND GAS – 2 companies. Category includes petroleum and steam energy.

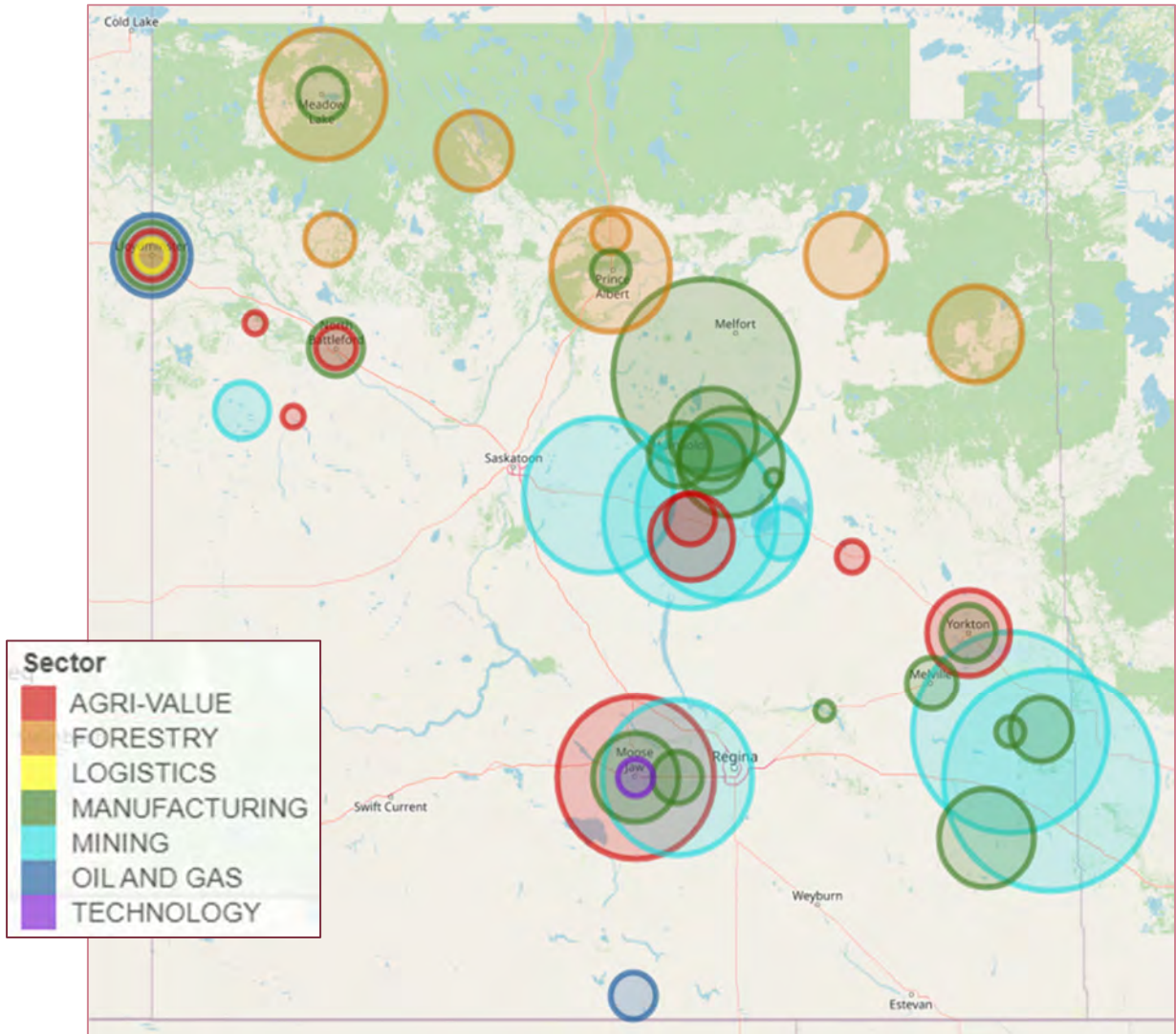
LOGISTICS – 5 companies. Category includes in-house tractor trailer and outside contract services.

Companies included in the study employ 8046 people. The largest number of participants in this study were from the manufacturing and agri-value sectors.

Provincial Distribution Map

The following map shows the location of each respondent. The intensity of staff sizing at each location is represented by bubble size and the corresponding colour indicates the sector associated with each intensity bubble. The distribution by colour of the various sectors and the proximity and concentration of the firms by sector are illustrated by colour and geographic distribution.

Figure 1. Distribution of Respondents by Sector on Provincial Map



KEY findings

WORKFORCE

Respondents consistently identified the most significant workforce challenge as the need to overcome negative perceptions of the work environment and the job itself. Furthermore, the limited availability of housing at all stages poses a substantial barrier to expanding the labour pool within their respective regions.

In interviews with business leaders, the prevailing theme highlighted the critical nature of the labour shortage experienced throughout the province. This pervasive issue overshadowed other human resource priorities, such as promoting diversity by including women, indigenous populations, and immigrants. In fact, diversifying the workforce ranked sixth among nine categories in terms of priority. While some respondents acknowledged the importance of expanding the labour pipeline and meeting strategic hiring objectives, operational challenges took precedence, resulting in reduced focus on these priorities.

Statements such as "We struggle to get resumes" and "Hiring is our number one focus...we are not in the manufacturing business anymore; we are in the hiring business!" underscore the urgency expressed by participants. The provincial demand for a skilled workforce is hampered by a lack of suitable candidates, leading to heightened competition among industries vying for limited resources. It is evident that addressing this issue requires a more comprehensive and multifaceted approach to ensure long-term sustainability.

Image Perception

The foremost challenge identified by interview respondents is the negative perception and image of their industry in the eyes of current and potential workers. This perception is rooted in conditions characterized by repetitive, physically demanding, dirty, odorous, and isolated work environments. Additionally, employers are faced with the need to provide flexibility in work schedules, catering to the growing demand for remote work options and accommodating employees' personal needs.

A closer examination of the data on image perception reveals that while it is a prevalent issue in manufacturing and agri-value sectors, it poses an even more significant challenge for the trucking, mining, and forestry industries within our smaller interview base. These industries face unique conditions, including dusty environments, isolated work settings, extended periods away from home, and demanding manual labour. Overcoming these challenges is particularly crucial for employers operating in these sectors.

Employment Positions

When businesses were questioned about the factors driving their job postings, it became apparent that “GROWTH IN DEMAND” is a primary catalyst. According to 44% of the respondents, job postings were not intended to replace departing employees but rather to establish entirely new positions in response to increased demand. An additional 30% of businesses indicated that facility growth and integration of new technologies were workforce hiring drivers.

Furthermore, interviewees emphasized that there was a mounting backlog in their hiring requirements. Thirty eight percent of respondents acknowledged that the number of unfilled positions was steadily rising, indicating a growing urgency to address their workforce needs.

Expansion Plans

In response to their expansion plans, a notable 18.4% of business respondents indicated that they are either in the process of expanding their operations or have intentions to do so in the near future. As a result, the demand for labour is steadily increasing, creating a need for suitable housing options to accommodate this growing workforce.

While only two of the firms planning to expand are relocating outside the region, it is concerning that this is occurring due to lack of labour and/or suitable site availability. Firms with headquarters outside of Canada are at more risk than regional owned enterprises.

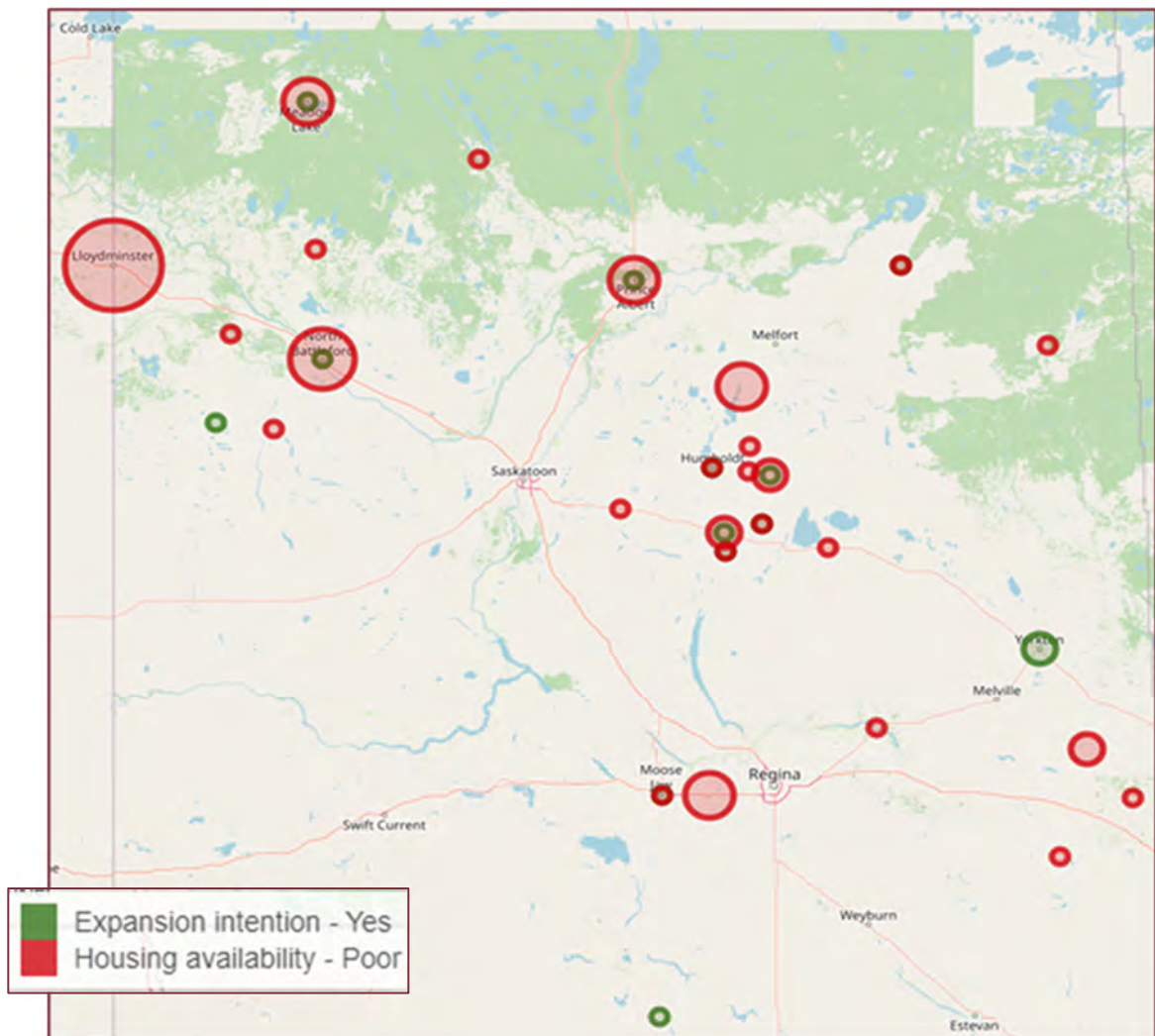
Both employers and potential employees are recognizing the importance of housing options that align with their employment practices. This has led to the identification of three distinct stages of housing requirements:

1. Temporary housing: This stage allows new employees to secure suitable housing in the community while they work through their probationary period. It provides a temporary solution to facilitate their transition into the new area.
2. Short-term housing: Once employees have determined that their new employment is a good fit for them and aligns with their family's goals, they seek short-term housing options on a month-to-month basis. This type of housing serves as a transitional arrangement until a permanent housing solution can be established or acquired over time.
3. Long-term housing options: The ultimate goal for employees is to have long-term housing stability, either through home ownership or long-term rental arrangements. This provides a sense of permanence and security for individuals and their families.

To illustrate the current situation, a map on the following page(Figure 2) highlights five specific locations where expansion is either ongoing or planned, while respondents have identified a lack of available housing in those areas.

This convergence of expansion plans and limited housing options exacerbates an existing problem in these locales. Consequently, it creates a higher potential for regional competition in attracting labour. This situation presents an opportunity for developers and landlords to strategically focus their efforts on fulfilling the increasing demand for housing in these areas.

Figure 2. Intersect of Expansion Intention with Poor Housing Availability



In addition to housing, respondents listed lack of operational labour as the primary constraint (27%) on expansion plans followed by:

- ⇒ securing trades and contractors (20%)
- ⇒ access to financial capital (14%)
- ⇒ access to machinery capital (11%)

Connectivity

When respondents were asked to rate the telecommunications services in the region, the question encompassed both cellular communication and broadband connectivity to their facilities. Surprisingly, a significant 58% of respondents indicated that the quality of telecommunications in the area ranged from fair to poor.

It is important to recognize that telecommunications infrastructure plays a crucial role in facilitating the transition to automation and robotics. Initiatives such as Industry 4.0, which aims to integrate advanced technologies into industrial processes, heavily rely on seamless connectivity. Without reliable and efficient telecommunications services, the installation of automated machines and the integration of various operations, including sales, maintenance, and machinery vendors, would be limited in their effectiveness.

To fully harness the potential of Industry 4.0 and achieve significant improvements in efficiency, it is imperative to have a robust, stable, and cyber-secure broadband connection. This connectivity will not only enable the integration of various systems and processes but also ensure the smooth and secure flow of data across different operational areas. By investing in a reliable telecommunications infrastructure, a substantial return on their investment can be expected and an unlocking of the full benefits of Industry 4.0, leading to enhanced productivity and competitiveness.

Sales

At the provincial level, both the Manufacturing and Agri-Value sectors in Saskatchewan are experiencing a positive trend in sales performance. Out of the 17 participants interviewed in the survey, an impressive 13 indicated that their sales were increasing, reflecting a favourable market environment.

Within the Manufacturing sector, the agricultural machinery market is currently thriving. Meeting the demands of dealers on-site is crucial for manufacturers as the seasonal nature of the farming business necessitates timely delivery of products. This ensures a steady flow of sales for parts, service, and cultivates brand loyalty. However, when examining the responses categorized by region, it is notable that the Prince Albert – Meadow Lake region demonstrates a significant drop in sales. None of the interview respondents in this region are involved in the robust sectors of agricultural manufacturing or agri-value food production.

On the other hand, the northern region's respondents reported sustained sales demand during the pandemic, primarily driven by the surge in home renovation projects and increased demand for forestry products. While the demand has subsided since the end of the pandemic, the overall outlook for the provincial forestry sector remains stable. This is attributed to the ongoing effects of climate change and the expansion of the pine beetle within the province of British Columbia (BC). The BC manufacturing industry has highlighted that pine beetle-infested wood creates finer dust, resulting in more combustible work environments. As a result, marketplace demand is expected to shift from BC and Alberta to Saskatchewan, which has been spared from the beetle infestation, leading to more stable sales of MPB-free wood for structural applications.

Respondents emphasized the vital role of the supply chain in supporting current and future sales. Logistics emerged as the top priority at 34.3%, highlighting the importance of efficient transportation and distribution channels. Additionally, contractors such as industrial electricians, power engineers, and supplier technicians were recognized as key contributors to sales success.

The collective feedback from the participants underscores the significance of sales growth, supply chain optimization, and strategic partnerships within the Manufacturing and Agri-Value sectors in Saskatchewan. By addressing regional variations, capitalizing on market opportunities, and ensuring a robust supply chain, businesses can position themselves for continued success and capitalize on the positive sales trajectory.

Facilities and Operations

As previously mentioned, several respondents are currently in the process of expanding their operations or have plans to do so in the near future. However, a significant constraint they face is the lack of in-house operational labour to support these expansion initiatives. Additionally, staffing and supporting new operations within a constrained labour market present an additional challenge.

Upon further analysis of the expansion locations, it is evident that every region has at least one respondent engaged in or planning expansion. Figure 2, the workforce map, illustrates that five sites will encounter difficulties in their expansion efforts due to poor housing availability as reported by the respondents.

The shortage of operational labour and the availability of tradespeople and contractors to support and complete the expansion emerged as the top two constraints identified by our respondents. In discussions about long-term operational needs, many interviewees expressed concerns regarding the recruitment of supervisors. One respondent explained, "They are not interested in the hassle. They prefer to do their jobs and go home." This highlights a potential

deeper gap in leadership and work culture, and there may be valuable opportunities to address this gap through leadership training and operational development.

Responses related to policy and process development were generally low, with only emerging interest in areas such as environmental policy and process selection. It is evident that a comprehensive approach to addressing operational challenges and fostering a supportive work environment will be crucial for successful expansion initiatives.

By recognizing and addressing the constraints related to operational labour, trade availability, and leadership development, businesses can position themselves to navigate the challenges of expansion and create an environment conducive to sustained growth. Additionally, exploring opportunities for policy and process development, particularly in areas of emerging interest, can contribute to overall operational efficiency and success.

Business Support Infrastructure and Climate

The survey encompassed a comprehensive set of 23 questions that sought the respondents' opinions on various aspects related to supports, infrastructure, and the general business climate. Among these questions, a distinct and cohesive grouping emerged, focusing on three critical areas: telecommunications (as discussed earlier in this report), workforce-related inquiries, and housing. It is noteworthy that these three categories generated a higher proportion of poor and fair responses overall.

Of particular concern, housing received the lowest ratings from the respondents, with an overwhelming 96% rating it as fair to poor. This indicates a significant gap and challenges in the availability and quality of housing options for businesses and their workforce.

The alignment of telecommunications, workforce, and housing as the primary areas of concern demonstrates the interconnectedness of these factors in the business landscape. A robust telecommunications infrastructure is essential for enabling effective communication, supporting automation and innovation, and facilitating remote work options. A skilled and available workforce is vital for meeting the demands of expanding operations and driving growth. However, without adequate and suitable housing options, businesses face obstacles in attracting and retaining talent, hindering their ability to maximize their potential.

The findings emphasize the need for strategic attention and collaborative efforts from government, industry stakeholders, and community partners to address these challenges. By prioritizing improvements in telecommunications infrastructure, workforce development, and housing availability, businesses can thrive in a supportive environment conducive to growth and prosperity.

Taking into account the insights provided by the respondents' feedback, it is crucial for decision-makers to recognize the significance of these issues and take proactive steps to address them. Through targeted investments, policy initiatives, and collaborative partnerships, we can work towards enhancing the business climate, attracting and retaining a skilled workforce, and creating housing solutions that meet the needs of both employers and employees.

Figure 3. Workforce Availability

	Good	Fair	Poor
Workforce availability	5%	28%	58%
Workforce stability	15 %	37%	35%
Workforce quality	22%	45%	22%

Supply Chain

With the exception of three respondents, it was evident that the majority of firms faced challenges with their supply chain. Figure 4 illustrates the supply chain purchases by region. The importance of a robust and efficient supply chain cannot be overstated, as it directly impacts a company's ability to operate smoothly and meet customer demands.

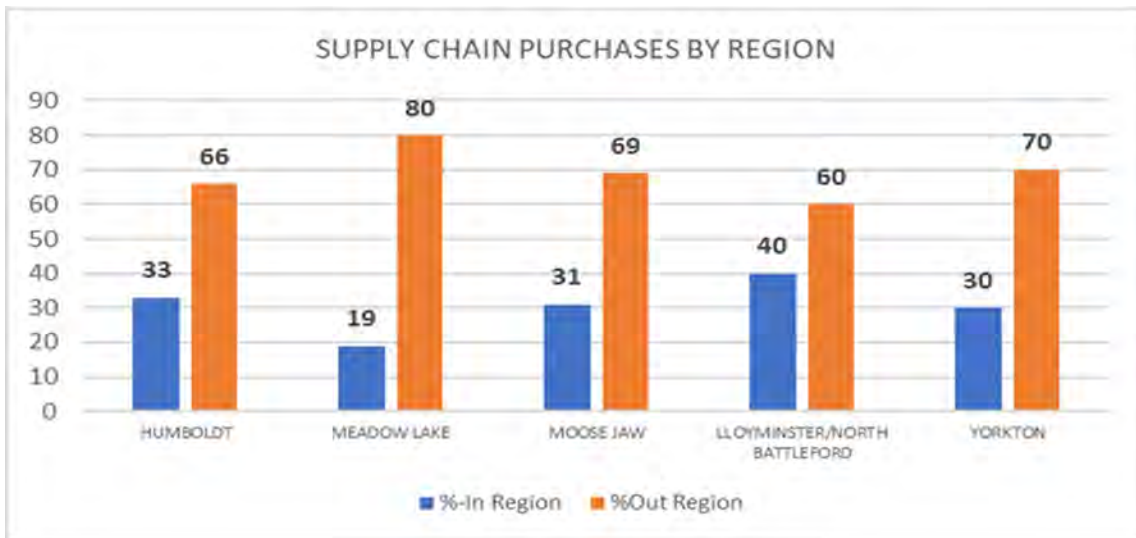
Interestingly, thirty-six percent of the interviewees acknowledged that they engaged in collaborations with other businesses, to varying degrees, when it came to supply chain purchases. This indicates a recognition among these companies of the benefits that can be derived from partnerships and cooperative efforts in addressing supply chain challenges.

Collaboration in the supply chain realm can bring several advantages, including enhanced purchasing power, shared resources and expertise, improved negotiation leverage with suppliers, and the ability to navigate logistical complexities more effectively. By pooling their resources and knowledge, businesses can overcome individual limitations and create a more resilient and efficient supply chain ecosystem.

However, it is worth noting that a significant portion of the firms still face supply chain issues, suggesting that there is room for improvement in this area. It is essential for businesses to explore avenues for collaboration, forge strategic partnerships, and leverage collective strengths to optimize their supply chain operations.

By actively engaging in clusters to seek opportunities to collaborate and share best practices within the supply chain, businesses can mitigate risks, improve operational efficiency, and gain a competitive edge in the marketplace. Engaging in cluster collaborative efforts demonstrates a proactive approach to addressing supply chain challenges and highlights a commitment to achieving excellence in the delivery of products and services.

Figure 4. Supply Chain Purchases by Region (Lightscape Data 2022)



The Supply Chain Collaboration Map (Figure 5) provides a visual representation of the collaboration activities among the respondents, with intensity bubbles indicating the occurrence of collaboration based on geography. It is evident from the map that certain anchor firms are actively engaged in supply chain collaboration, as represented by the green bubbles. These firms serve as valuable examples to inspire and encourage greater collaboration among those who have not yet adopted this strategy, as indicated by the red bubbles.

The areas where the bubbles overlap on the map present promising opportunities to initiate discussions and explore the potential for collaboration. These intersections serve as focal points where businesses can come together to identify common interests, shared goals, and collaborative solutions that can enhance the efficiency and effectiveness of their supply chains.

The current high dependence on goods sourced from outside our provincial region poses significant risks and strains on the ability of industries to meet their commercial objectives of production, service, and delivery. By fostering greater supply chain collaboration, businesses can reduce their reliance on external sources and build stronger regional networks that support local economies and enhance supply chain resilience.

Collaboration within the supply chain brings numerous benefits, including increased agility, improved cost efficiencies, reduced lead times, enhanced product quality, and better risk management. It enables businesses to leverage shared resources, expertise, and capabilities, leading to improved competitiveness and customer satisfaction.

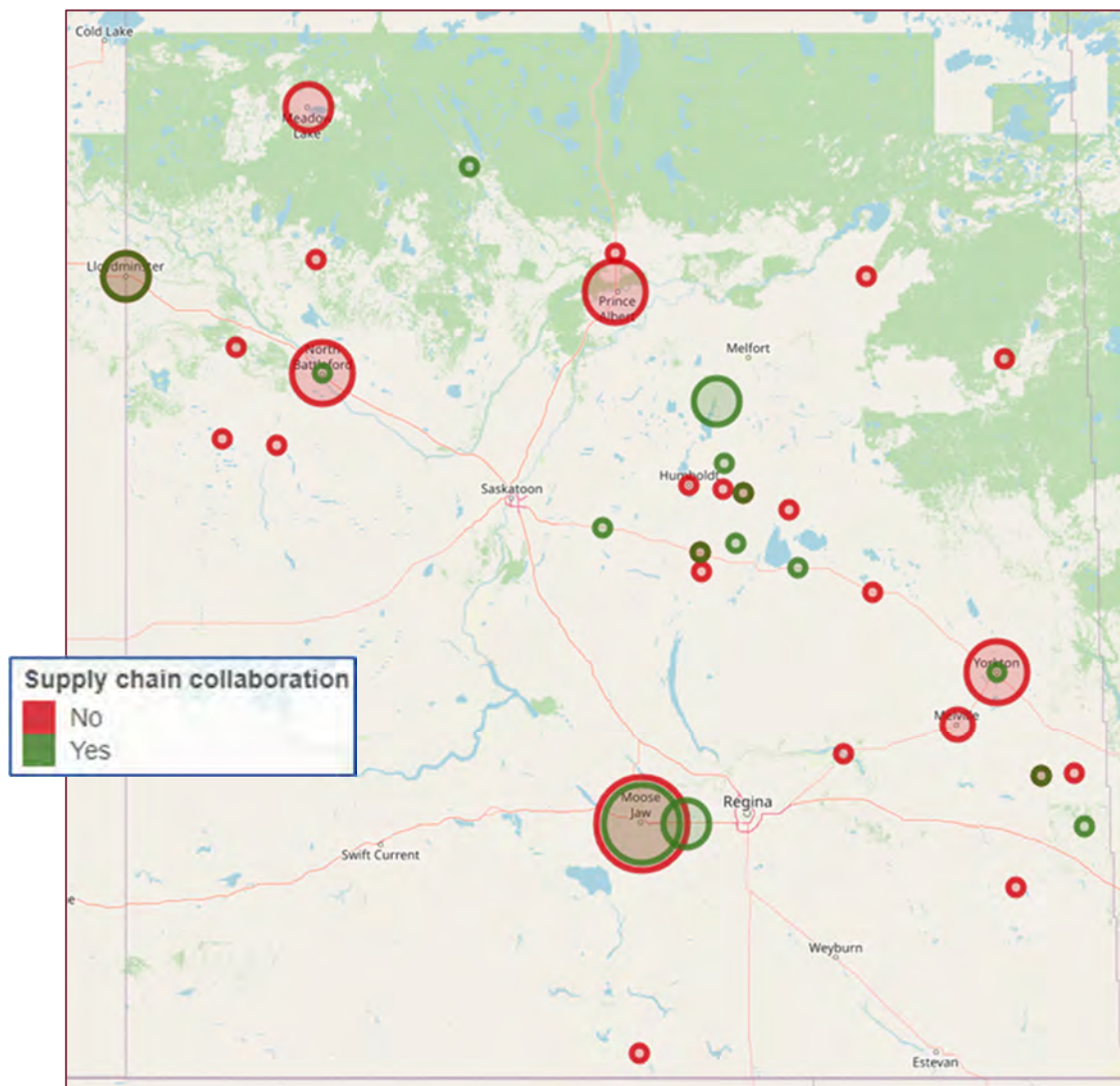
By leveraging the existing examples of successful supply chain collaboration represented by the green bubbles on the map, businesses can learn from best practices, replicate successful

models, and foster a culture of collaboration within their own operations. This will not only strengthen their supply chains but also contribute to the overall growth and prosperity of the regional business ecosystem.

Initiating discussions and exploring opportunities for supply chain collaboration is a proactive step towards reducing risks, enhancing operational capabilities, and driving sustainable growth. By working together, businesses can create a more resilient and robust supply chain network that is capable of meeting the evolving demands of the market and ensuring long-term success.

It is crucial for businesses to recognize the importance of reducing dependence on external sources and embracing collaboration as a strategic imperative. Through collaborative efforts, industries can strengthen their supply chains, minimize vulnerabilities, and build a foundation for sustainable growth and competitiveness.

Figure 5. Provincial Supply Chain Collaboration Map



Business Growth Supports

Based on the insights provided by business respondents, it is evident that their communities can play a crucial role in supporting their growth and success. To effectively support businesses, the development and implementation of specific strategies are essential. The key areas highlighted by respondents include:

1. **Housing strategies:** The number one request by 60% of the business respondents. Addressing the housing shortage and ensuring the availability of suitable housing options is of paramount importance. 52% of businesses interviewed rated housing as poor and another 30% considered it fair. By developing comprehensive housing strategies, communities can attract and retain a skilled workforce, provide stable accommodation for employees, and create an environment conducive to business growth.
2. **Broadband strategies:** Prioritized by 51% of businesses interviewed as an area in which the community could provide support (58% of respondents rated their telecommunications service as fair or poor). Access to reliable and high-speed broadband infrastructure is critical for businesses to thrive in today's digital age. By prioritizing the development of broadband strategies, communities can provide businesses with the necessary connectivity to support their operations, drive innovation, and capitalize on emerging technologies.
3. **Social strategies for transitioning new workers:** Ranked third with 32% of respondents, assisting new workers in integrating into the community is essential for their successful transition and long-term retention. Communities can develop social strategies that facilitate the integration of newcomers, provide support networks, and foster a sense of belonging. This can help alleviate challenges associated with relocation and contribute to a positive work environment.

Additionally, supply chain and labour were identified as primary constraints to growth by the interviewees. Communities can address these challenges by fostering a supportive business ecosystem, facilitating collaboration among stakeholders, and implementing initiatives to attract and develop a skilled labour force. By strengthening the supply chain and addressing labour constraints, communities can create an environment conducive to business growth and success.

In conclusion, by focusing on housing strategies, broadband strategies, and social strategies for new workers, communities can provide the necessary support for businesses to thrive. By addressing supply chain and labour constraints, communities can create an environment that fosters growth, attracts investment, and enhances economic prosperity. Collaborative efforts between businesses, community leaders, and government entities are crucial to implementing these strategies and ensuring the long-term success of businesses and communities alike.

Assessment by Region



The insights gathered from the interviews with businesses in each region have undergone thorough assessment and integration, complemented by data analysis employing widely recognized economic development analysis tools, including the following:

Location Quotient (LQ): The Location Quotient is a robust tool used to assess the degree of specialization within a specific geographic area. Industries with location quotients below 0.75 are classified as having low concentration or specialization, while those between 0.75 and 1.25 are considered to have medium concentration. High specialization is indicated by location quotients exceeding 1.25. The presence and strength of a regional industry cluster are determined by its higher concentration compared to national and provincial levels.

Shift/Share Analysis: The Shift/Share Analysis provides valuable insights into the extent to which job changes in a particular region are attributed to unique competitive advantages of that region. By isolating the "competitive effect," this analysis quantifies job changes within a regional industry that cannot be accounted for by broader trends.

Leading/Lagging Analysis: An alternative approach to evaluating industry sectors is through Leading/Lagging Analysis, which examines their employment growth in relation to overall employment growth at the provincial or regional level. "Leading" industries exhibit a growth rate surpassing the overall employment growth, while "lagging" industries experience slower growth.

Industry Targeting Classification System: The Industry Targeting Classification System combines and interprets the results of Leading/Lagging Analysis, taking into account factors such as location quotient, overall provincial growth, and relative local growth. This comprehensive system aids in identifying industries that warrant targeted focus and investment opportunities.

Please refer to Appendices C and D for a comprehensive regional analysis, including detailed information on formulas and their interpretation. This section provides in-depth insights into the analysis conducted and serves as a valuable resource for a more thorough understanding of the findings.

Humboldt Region

Humboldt has historically demonstrated a high degree of industry specialization in the agriculture and manufacturing sectors. When comparing the region to the province (Figures 6 and 7), we see that the manufacturing sector (LQ 1.32) is on par with other regions in the province with a medium concentration of industry players but is experiencing slower growth within the region compared to the provincial average.

Compared to the Canadian average (Figure 8), the overall manufacturing sector within the region exhibits low specialization, but several sub-sectors and industry groups do show a projected trend of stability or growth continuing until 2028. However, when assessed alongside business interview data, it is recommended that business retention efforts within the manufacturing sector be prioritized.

As a result, the region shows a strong potential for job growth in industries associated with agriculture (LQ 2.64) and mining (LQ 1.81), when viewed in the provincial and national context.



STRENGTHS

- Established supply chain and distribution network.
- Firms are well connected to the local economy and anchors of their communities.
- Iron Triangle agglomeration has been in place for 60 years.



WEAKNESSES

- Proximity to Saskatoon. Service providers and labour will tolerate commuting to the city for employment.
- Despite proximity to each other, working collaborative relationships have not formed. Informal good corporate neighbour relations. No tangible discussion on mutual benefits.
- Homogeneity of region's manufacturers: common cycles.
- Housing is severely lacking.
- Labour shortages are consistent with staff transitioning between firms.
- Adversarial relationship with the larger mining anchors.
- Ag sector is cyclical.



OPPORTUNITIES

- Automation to alleviate labour issues. Circular and green adaptations to production.
- Collaboration to deal with common supply chain challenges. Working together to manage common vendors and find cost reductions in shared capacity and supplier availability will assist all firms to prosper.
- Regional shoring of supply chain. Opportunities for firms to aggregate their divided demand and develop a localized supplier.
- Collaboration to share production capacities. More exploration of potential sub-contractor relationships between firms.
- Collaboration to share specialized and regulatory training. Examples: safety courses; Train the Trainer.



THREATS

- Shortage of labour, pressure to increase output and the presence of a new major employer could easily create labour animosity among firms. Tensions rise as resources become scarce.
- The pace of automation must quicken. Manufacturing is not the draw it once was to the labour market.



GAPS

- Industry 4.0 is being constrained by a deficit of capital and external support for operations. There is a lack of technicians in the area to support digitization. Industrial electricians in the region are in short supply.
- The region needs a regional housing strategy. No single community is going to solve this issue in isolation. The onboarding of labour demand for the new Jansen mine will exacerbate this issue.
- Ag machinery cluster. The Iron Triangle has existed for almost 60 years, and there has been no lasting formal cooperative entity. There are multiple sports leagues in the region, but no regional manufacturing council despite having one of the strongest rural industry agglomerations in the country.

Figure 6. Humboldt Region Industry Location Quotient to Saskatchewan 2023 Lighcast Dataset

Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Location Quotient Analysis

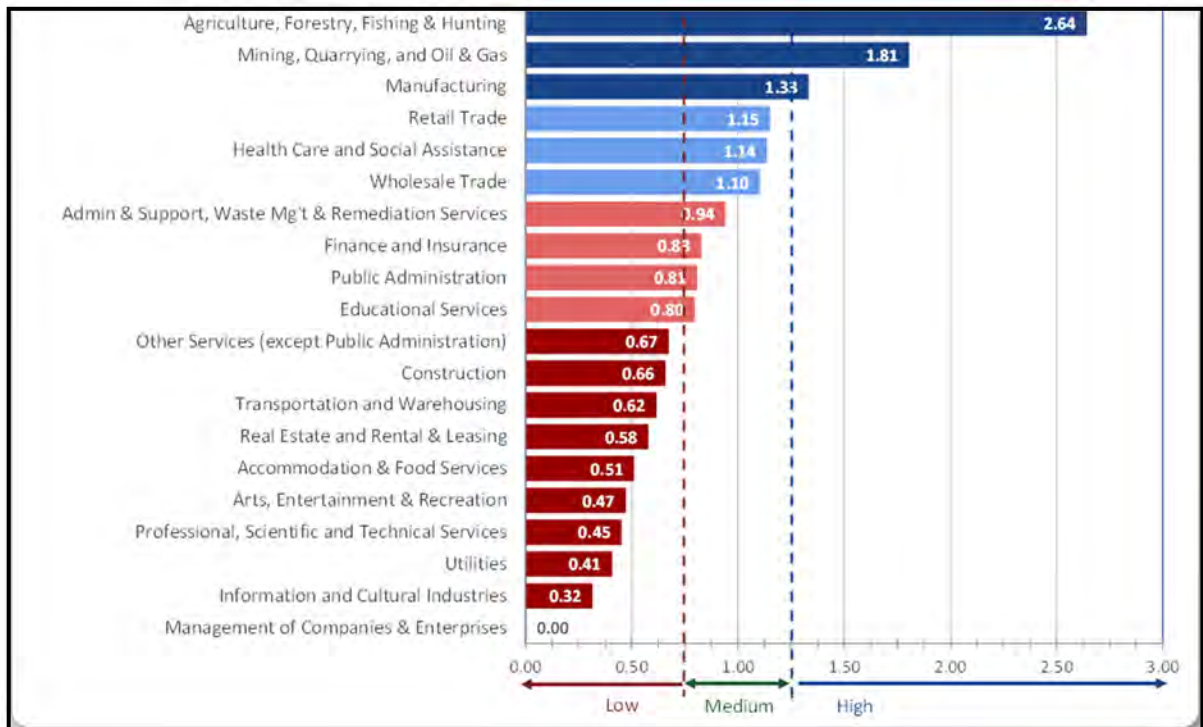


Figure 7. Humboldt Region Industry Classification System Analysis 2018-2023

Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Industry Targeting Classification Analysis

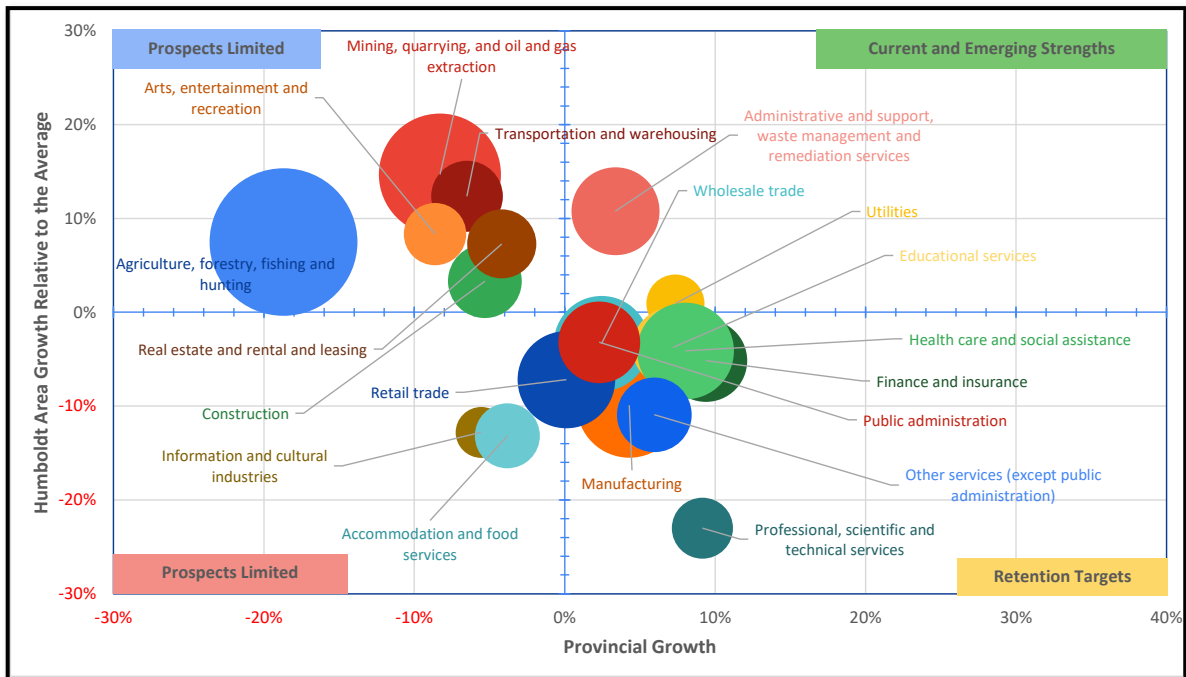


Figure 8. Humboldt Region Industry Location Quotient Target Sectors Region-Canada 2022-2028 Lightcast Dataset

NAICS ²	Description	2022 Location Quotient	2028 Location Quotient
11	Agriculture, forestry, fishing and hunting	9.46	9.72
2123	Non-metallic mineral mining and quarrying	30.23	28.33
213	Support activities for mining, and oil and gas extraction	3.71	4.29
31-33	Manufacturing	.74	.78
311	Food manufacturing	2.0	2.1
3112	Grain and oilseed milling	7.7	8.6
3116	Meat product manufacturing	6.1	6.3
3252	Resin, synthetic rubber, and artificial and synthetic fibres and filaments manufacturing	11.1	12.0
3273	Cement and concrete product manufacturing	1.6	1.5
333	Machinery manufacturing	2.5	2.6
3331	Agricultural, construction & mining machinery manufacturing	2.2	2.3
3362	Motor vehicle body and trailer manufacturing	9.7	10.6

² NAICS: The North American Industry Classification System (NAICS) is the standard used in classifying businesses among the three North American countries. NAICS is based on a production-oriented concept, meaning that it groups establishments into industries according to similarity in the processes used to produce goods or services. Sector: 2-digit code; Subsector: 3-digit code; Industry Group: 4-digit code.

Lloydminster-North Battleford Region

With its exceptional infrastructure encompassing roads, rail, and internet connectivity, the region possesses a unique advantage for the intersection of emerging deep tech and the agri-value and petroleum industries, positioning it well for the green energy future.

When compared to the rest of Canada, this region demonstrates a highly positive competitive effect (reflecting job change resulting from distinctive competitive advantages) in mining (LQ 6.5) and agriculture (LQ 3.5). In comparison to the national average, the Animal Food manufacturing sector (NAICS 3111) exhibits a current location quotient (LQ) of 2.85 (2022) and is projected to increase to 3.31 by 2028. This significant specialization supports the proposed development of an animal-companion micro cluster. Moreover, the region boasts a strong concentration of oil and gas support activities (LQ 10.9), projected to remain stable with an LQ of 9.65 in 2028 when compared to the country as a whole.

Manufacturing emerges as a current and emerging strength within this region, further enhancing its economic landscape.



STRENGTHS

- Strong industrial base existing to support oil and gas.
- Superior infrastructure. Roads, rail, and internet within the communities of Lloydminster and North Battleford.
- Established economic development teams in place in Lloydminster and North Battleford.
- Strong industrial Agri-value base forming in the broader region.



WEAKNESSES

- Residuals of oil and gas economy in the area. Labour force adjustment to new emergent sector required.
- Shortage of labour and housing.
- Loss of welding at Northwest College is hurting localized training.



OPPORTUNITIES

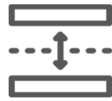
- Industrial Agri-Value. Opportunity to take advantage of the Agri-value sector and leverage current petroleum economy with canola crush for biodiesel sent to Cenovus plant from Clavet and Lloydminster.
- Hybrid Agri-value. As both livestock and grain Agri-value are present there is a potential to support the emerging trend of hybrid meat-plant food formulations becoming popular in the CPG marketplace.
- Opportunity to convert canola meal crush from the Lloydminster and/or Clavet facilities into companion kibble and treats if a processor could be anchored in the North Battleford location. An existing food processing location is still available for use.
- The manufacturing base in the region has a long history of working in the energy sector and particularly with specialty steels. The large petroleum facility will keep this core capability strong in the province and make it an ideal region to strategize

for a significant portion of the supply chain when SMRs contracting starts.



THREATS

- Ongoing reputation of both communities and the region for drug use and criminal activity.
- As de-carbonization of the petroleum industry continues the region will lose labour with highly skilled capability in specialty metals. These are the raw materials of the technologies of the green economy for wind turbines and SMRs.



GAPS

- Agri-Value anchor firms are spread through a larger footprint and a regional strategy around Agri-Value must be developed and supported.
- Using technology to bridge the petroleum economy and the Agri-Value economy can support a green energy future that leverages petroleum and plant based commodities.

Figure 9. Lloydminster-North Battleford Region Industry Classification 2018-2023

Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Industry Targeting Classification Analysis

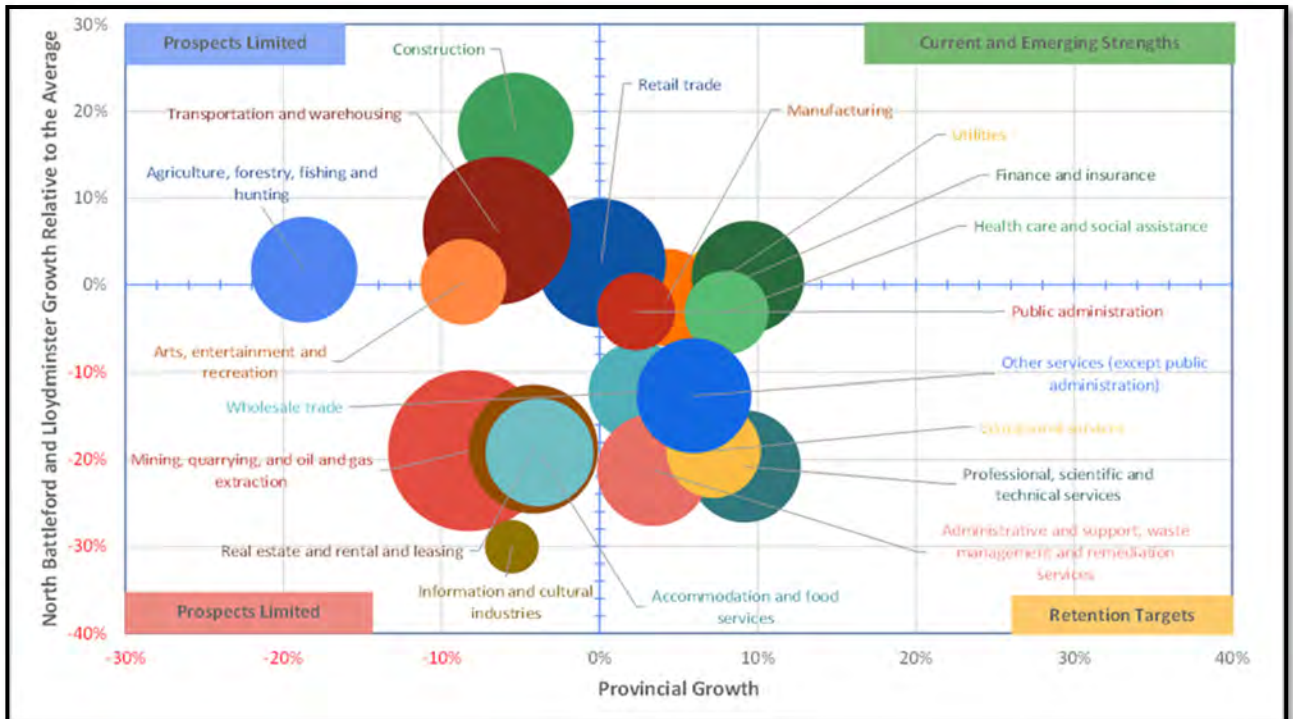


Figure 10. Lloydminster-North Battleford Region Location Quotient Target Sectors Region-Canada 2022-2028 Lightcast Dataset.

NAICS	Description	2022 Location Quotient	2028 Location Quotient
11	Agriculture, forestry, fishing and hunting	3.48	3.56
21	Mining, quarrying, and oil and gas extraction	6.57	6.03
211	Oil and gas extraction	8.51	8.50
213	Support activities for mining, and oil and gas extraction	10.97	9.65
3111	Animal food manufacturing	2.85	3.31
3112	Grain and oilseed milling	10.18	10.64
3331	Agricultural, construction, mining machinery manufacturing	5.68	6.21
4842	Specialized freight trucking	9.04	9.48

Moose Jaw Region

Benefiting from a resilient transportation infrastructure and an energy grid that caters to industrial needs, Moose Jaw is excellently situated to foster the growth of its processing and manufacturing sector supported by applied agricultural programs via Saskatchewan Polytechnic

When compared to the province, Moose Jaw takes the lead in key sectors such Transportation, Warehousing, Accommodations and Food Services. Manufacturing, Professional, Scientific and Technical Services, Utilities, and Waste Management and Remediation Services illustrate current and emerging strengths within the region, further solidifying the foundation for the advancement of its two micro-clusters.

Moreover, on a national scale, Moose Jaw exhibits a positive competitive effect in the manufacturing sector, underscoring its potential and attractiveness for business growth and investment.



STRENGTHS

- Strong entrepreneurial population base with youthful leadership and community culture.
- Robust energy grid and transportation infrastructure.
- Close regional proximity to large industrial anchor firms.
- Part of the Rural and Northern Immigration Pilot.
- Many of the firms are relatively new with no history of inter-firm competition.
- The CP Railyard, NATO Flying Training Centre and strong Tourism sector are all strengths.



WEAKNESSES

- Competitive wage conditions may cause smaller Agri-value processors to exit.
- Owner and management succession imminent.
- A focus on immigrant attraction will require attention to transitional services and retention supports.
- Proximity to Regina contributes to a portion of the working population not residing in the community.
- Training and upskilling are needed for newcomers.
- Strong access to immigrant community may delay transition to modern production like Industry 4.0.
- Communities outside of Moose Jaw suffer from lack of housing and poor broadband.



OPPORTUNITIES

- Connecting Agri-Value to the strong tourism sector.
- Collaboration to cross-market baskets of goods and services in the agri-value tourism industry.
- Small agri-value firms have flexibility and can cluster together into a strong cohesive unit.
- Large anchor firms in Belle Plaine can form a micro-cluster to support their needs on not only supply chain, but also basic

operational needs such as equipment transfers, safety protocols and shared training



THREATS

- Shortage of skilled labour particularly industrial skilled labour such as power engineers and industrial electricians. In the provincial economy all firms with a requirement for power engineers are facing scarcity of supply.
- Strong entrepreneurial segment of the community is looking for more transparency and community engagement from the city. Their business activism is a strength, and opportunity, but also a threat that could lead to dissatisfaction if they are not engaged.
- With smaller entrepreneurial firms the ability to pick up stakes and move is much easier.



GAPS

- Respondents have stated there is no community group or cluster for them to work with on industry issues.
- Larger anchor firms are looking for a broadband strategy for their facilities outside of the city.
- The group of three large manufacturing companies in Belle Plaine are discussing more opportunities to collaborate since they are in close proximity to each other.

Figure 11. Moose Jaw Region Industry Classification 2018 to 2023

Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Industry Targeting Classification Analysis

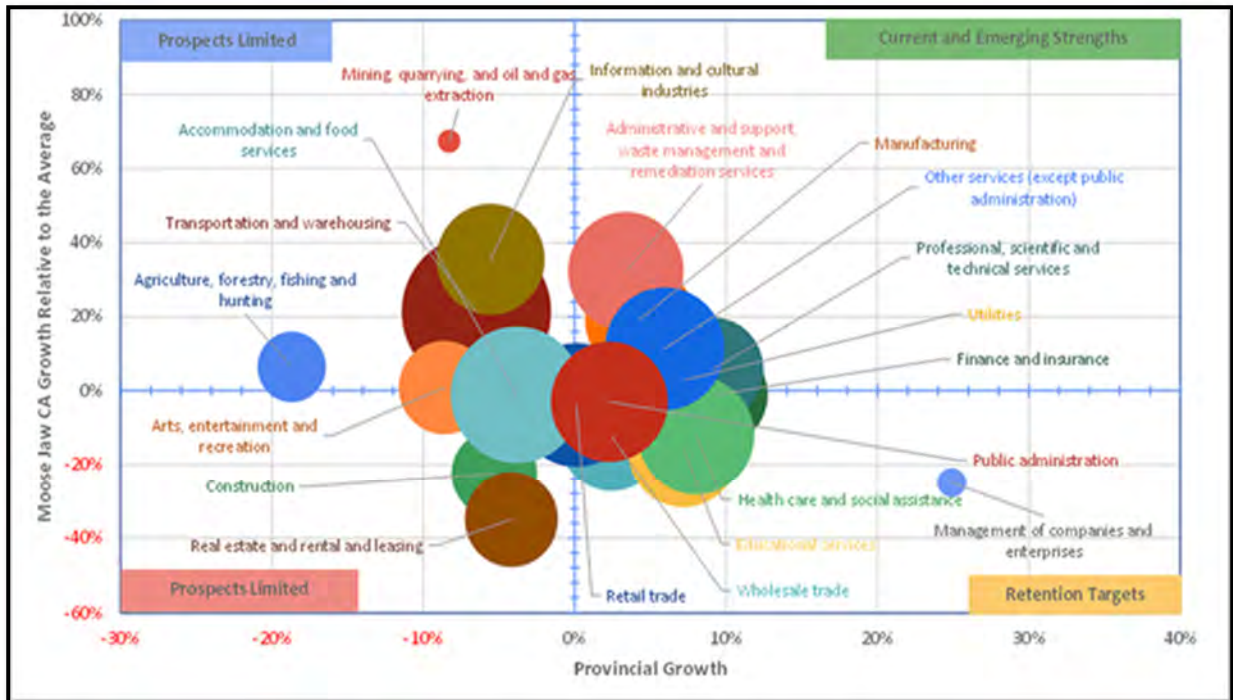


Figure 12: Moose Jaw Region Location Quotient Target Sectors Region-Canada 2022-2028 Lightcast Dataset.

NAICS	Description	2022 Location Quotient	2028 Location Quotient
11	Agriculture, forestry, fishing, and hunting	1.41	1.36
115	Support activities for agriculture and forestry	1.13	1.08
6112	Community colleges and C.E.G.E.P. s	3.44	3.23
6115	Technical and trade schools	4.14	4.22
3116	Meat product manufacturing	3.52	3.71
324	Petroleum and coal product manufacturing	3.80	4.55
3272	Glass and glass product manufacturing	3.60	4.21
333	Machinery manufacturing	1.63	1.83
3333	Commercial and service industry machinery manufacturing	12.70	14.99
4842	Specialized freight trucking	2.89	3.10
4882	Support activities for rail transportation	11.50	11.08

Meadow Lake- Prince Albert Region

The Meadow Lake and Prince Albert region offer significant economic advantages stemming from their abundant natural resources, including forestry, mining, and agriculture. Additionally, their strategic locations provide convenient access to crucial highway transportation routes.

Prince Albert retains a strong LQ in forestry, logging, and forestry products, as compared to the country. Within the Saskatchewan market, manufacturing, utilities, and educational services are two areas of projected growth as depicted in Figure 13. Supporting data highlights the region's competitive edge and potential for continued economic prosperity.

When compared to the national average, Meadow Lake maintains a stable Location Quotient (LQ) of 4.0 in Agriculture, Forestry, Fishing, and Hunting. Moreover, it demonstrates projected growth in manufacturing, as depicted in Figure 15. Within the provincial context, Meadow Lake emerges as an industry leader with an LQ of 3.67 in Manufacturing, further solidifying its position as a key player in the sector.



STRENGTHS

- Abundant natural resources, such as forestry, mining, and agriculture.
- The forestry industry in the Prince Albert-Meadow Lake region has an existing forestry resource management cluster.
- Many of the firms that are predominantly Indigenous owned and operated, showcasing cultural alignment.
- There is a strong emphasis on Indigenous hiring practices, reflecting a commitment to fostering inclusivity and diversity within the industry and within resource activity in Indigenous territory.
- A productive working relationship has been established with the regulatory authority, ensuring compliance, and facilitating smooth operations.
- The cluster benefits from Power Purchase Agreements (PPA) with SaskPower, enabling the sale of power back to the grid, enhancing economic viability.



WEAKNESSES

- Recruitment and retention pose challenges to local industries as they lack appeal to younger generations who prioritize comfortable and technologically advanced work environments.
- The absence of rail infrastructure hampers cost-effective transportation of products to the market.
- The northern regions face a severe housing shortage, which needs to be addressed to support industry growth.
- There is a shortage of local trades to support heavy industry operations in the northern areas.
- Post-pandemic demand is anticipated to decline in 2023, potentially impacting sales within the industry.



OPPORTUNITIES

- Efforts to increase the utilization of waste wood products for localized industrial heating and the resale of excess energy to SaskPower are being made through the NorSask Bioenergy Centre.
- Forestry 4.0, spearheaded by FP Innovations, aims to introduce automation and autonomy in the industry to address shortages of truck drivers and heavy equipment operators. Successful tests were conducted at Tolko in 2019.
- The agricultural sector specifically around Meadow Lake presents opportunities for expansion and diversification. Encouraging the development of value-added agricultural processing, promoting local food production, and exploring niche markets can contribute to the growth of the agri-food industry and create employment opportunities.
- There is a growing focus on converting low-value wood and operational residues into engineered wood products (EWP), offering higher value and revenue opportunities while promoting sustainable practices (greener carbon equation by converting waste into EWP).
- Digitization presents an opportunity to attract young adults to forestry by demonstrating its modern, technical aspects.



THREATS

- Climate change, forest fires, and migration of the Mountain Pine Beetle pose challenges.
- Global trade wars impact the competitiveness of the forestry sector.
- The industry faces stiff competition for labour from the mining sector in the northern regions, as the mining industry offers stronger benefit programs.
- The forestry sector has been relatively slow in modernizing and adopting digital technologies. Younger workers are less tolerant of the working conditions in forestry, and the industry suffers from an image problem among younger generations.
- While Meadow Lake has made progress in diversifying its economy, it still heavily relies on resource-based industries like forestry, mining, and agriculture. This dependence on a few sectors can make the region vulnerable to fluctuations in commodity prices and market demand.



GAPS

- Engaging Indigenous youth, who are targeted as the current and future workforce, presents a significant challenge for forestry companies in the region.
- An engagement disconnect exists between the employed labour force and productivity output. Issues such as excessive cell phone use during working hours among younger employees.
- The modernization of equipment and digitization of workstations in sawmills are crucial to address the disengagement and image problems faced by the forestry industry, while also unlocking production efficiencies and potential cost reductions.

Figure 13. Prince Albert Industry Classification 2018 to 2023

Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Industry Targeting Classification Analysis

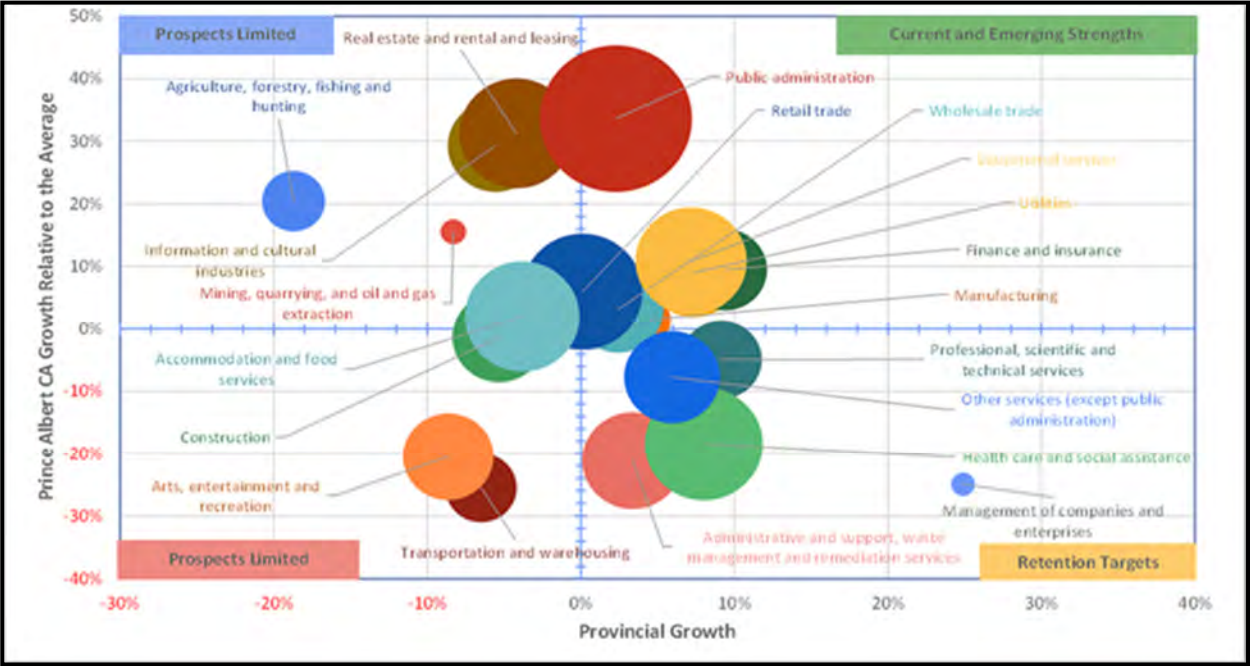


Figure 14. Prince Albert Location Quotient Target Sectors Region-Canada 2022-2028 Lighcast Dataset.

NAICS	Description	2022 Location Quotient	2028 Location Quotient
113	Forestry and logging	2.31	2.57
1132	Forest nurseries and gathering of forest products	3.00	3.41
1133	Logging	2.34	2.60
6112	Community colleges and C.E.G.E.P.s	1.75	1.72
6115	Technical and trade schools	4.58	5.07

Figure 15. Meadow Lake Industry Classification 2018 to 2023

Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Industry Targeting Classification Analysis

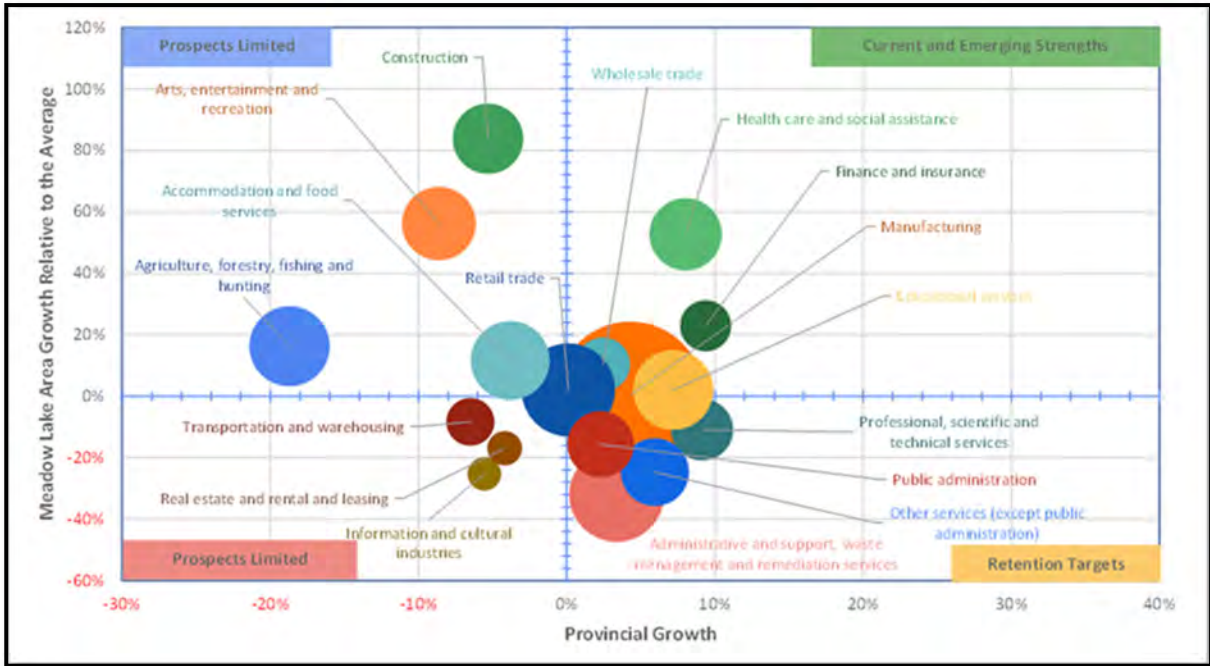


Figure 16. Meadow Lake Location Quotient Target Sectors Region-Canada 2022-2028

NAICS	Description	2022 Location Quotient	2028 Location Quotient
11	Agriculture, forestry, fishing and hunting	3.92	4.05
113	Forestry and logging	7.54	7.14
1133	Logging	8.10	7.74
1153	Support activities for forestry	9.90	8.44
31-33	Manufacturing	2.08	1.95
321	Wood product manufacturing	24.56	24.38
3211	Sawmills and wood preservation	20.69	20.91
3212	Veneer, plywood, and engineered wood product manufacturing	78.32	75.49
3219	Other wood product manufacturing	2.59	2.75
322	Paper manufacturing	15.44	14.97
3221	Pulp, paper and paperboard mills	35.10	34.28
3111	Animal food manufacturing	4.0	4.0

Yorkton Region

The region's agricultural sector is a key strength, characterized by diverse cultivation of grains, oilseeds, and specialty crops. With the presence of agricultural businesses, processing facilities, and a well-developed infrastructure, Yorkton is poised for further growth and success.

When compared nationally, the region demonstrates a high Location Quotient (LQ) of 7.0 in Mining, Quarrying, Oil and Gas, as well as an (LQ) of 3.2 in Agriculture, Forestry, Fishing, and Hunting. These figures reflect the region's significant specialization and competitive advantage in these sectors. Furthermore, the positive competitive effect observed in all of these industries, along with Manufacturing, underscores Yorkton's ability to excel and outperform its peers.

Within the provincial context, the Yorkton region emerges as a leader across all of these industries. Its strong agricultural foundation, coupled with notable concentrations in sectors such as mining, quarrying, oil and gas, and retail, positions the region as a thriving economic hub. The Yorkton Region offers promising employment opportunities and serves as a magnet for businesses seeking to capitalize on its vibrant industries.



STRENGTHS

- Yorkton is located in a prime agricultural region characterized by fertile soil and a favorable climate, fostering a thriving agricultural sector with a diverse range of crops.
- The region serves as a traditional grain commodity transfer site, benefitting from the convergence of highways, utilities, and rail lines, providing convenient access to both domestic and international markets, including the United States and overseas destinations.
- The logistics systems in rail transportation are robust, facilitating efficient movement of agricultural commodities.
- Yorkton boasts a strong industrial agri-value base, with key players such as LDF and Richardson executing expansion plans to increase Canola crush capacity, contributing to value-added processing.
- The presence of anchor firms in the agri-value and mining sectors enhances the economic landscape of Yorkton.
- The local Community College plays a pivotal role in supporting education and training initiatives, equipping individuals with the skills required for the workforce.
- Yorkton has demonstrated success in attracting and integrating immigrants to address labour needs, particularly in essential industries.

WEAKNESSES

- The region faces challenges such as rental and housing shortages, shortage of skilled labour, and inadequate broadband connectivity in outlying areas.
- Apathy among industry firms regarding clustering and limited recent marketing efforts by the community hinder the realization of potential synergies and promotion of Yorkton's strengths.
- The dispersed nature of the regional agri-manufacturing base presents challenges for clustering and collaboration, further exacerbated by geographic constraints and lack of shared localized vendor bases.
- The logistics systems in road transport are suboptimal, posing difficulties in accessing reefers and storage vans.

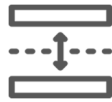
OPPORTUNITIES

- The substantial volume of Canola crushed (over 4M tonnes) in Yorkton presents an opportunity to explore value-added uses for Canola meal beyond livestock feed, particularly in the US and Asian markets.
- With established market access, Yorkton is well-positioned to venture into aquaculture feed and companion animal markets with excess Canola meal, subject to securing a processor.
- Increasing agri-value production positions the region as an excellent choice for establishing a logistics center serving east-central Saskatchewan.
- A group is being formed to investigate Ag-Tech opportunities in the region to foster innovation and growth in the agricultural sector.

THREATS

- Yorkton's economy is susceptible to fluctuations in commodity prices, exchange rates, and global market conditions, particularly in the agriculture sector, warranting careful consideration and risk management strategies.
- The announced expansions of crushing facilities will generate additional pressure on the labour force, necessitating workforce planning and development initiatives.
- Expanding crush capacity will require securing additional water resources to capitalize on the opportunities presented by increased Canola crush activities and accommodate other value-added players.
- Immigration remains crucial for addressing the demographic challenges faced by the community, to ensure a sustainable labour force.
- Lack of succession options for businesses in the region may lead to closures, highlighting the importance of succession planning and business continuity strategies.

GAPS



- o The community needs a comprehensive strategy to transition from a commodity staging and shipping community to a value-added processing hub. Currently, only two community value-added processors produce Consumer Packaged Goods (CPG) products, signaling the need for further diversification and expansion in this area.

Figure 17. Yorkton Industry Classification 2018 to 2023

Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Industry Targeting Classification Analysis

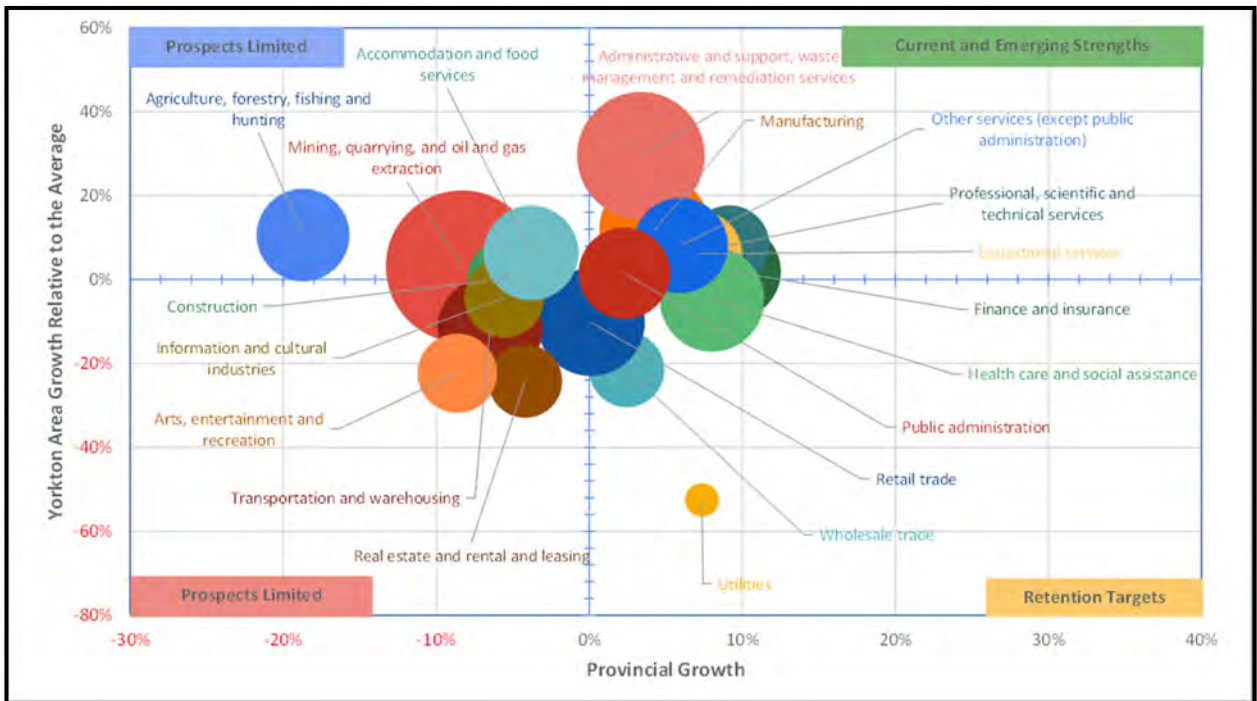


Figure 18. Yorkton Region Location Quotient Target Sectors Region-Canada 2022-2028

NAICS	Description	2022 Location Quotient	2028 Location Quotient
11	Agriculture, forestry, fishing and hunting	3.19	3.39
21	Mining, quarrying, and oil and gas extraction	7.10	6.94
212	Mining and quarrying (except oil and gas)	14.88	14.43
2123	Non-metallic mineral mining and quarrying	42.94	42.50
213	Support activities for mining, and oil and gas extraction	4.41	4.52
4183	Agricultural supplies merchant wholesalers	5.09	3.93
3112	Grain and oilseed milling	10.07	10.10
3116	Meat product manufacturing	5.36	5.88
3273	Cement and concrete product manufacturing	3.44	3.73
333	Machinery manufacturing	2.39	2.56
3331	Agricultural, construction and mining machinery manufacturing	10.13	11.14

Recommendations

The assessment process has revealed critical challenges and opportunities that are common across our five micro-regions, highlighting a noticeable gap between community and industry.

To foster industry growth and support a thriving economy, ongoing interaction and collaboration with industry are of utmost importance. The development of robust supply chains, establishment of new businesses, and attraction of investments all hinge upon our ability to closely understand and address the needs of the industry.

Our conversations with anchor firms in each region further emphasize the significance of local and regional economic development. One in five anchor firms interviewed expressed their intentions to expand or plan for expansion, underscoring the dynamic nature of businesses and their potential to drive growth beyond their current communities.

Creating networks or clusters that bring together industry players proves to be an effective strategy for business retention and expansion. Encouraging inter-firm cooperation not only fuels the regional economy but also generates sustainable employment opportunities and fosters innovation. Furthermore, clusters help position specific regions as uniquely competitive, attracting jobs and private investment while serving as key contributors to the development and expansion of infrastructure.

1. Regional Housing Strategies

- Conduct a comprehensive housing needs assessment, including workforce demographics. If necessary, hire external experts to assist with the assessment.
- Optimize existing housing resources to address short-term surge demand.
- Develop inclusive workforce housing strategies based on the findings of the housing needs assessment, utilizing a three-phase housing approach. Pay specific attention to affordable housing options and housing for seniors.
- Institute a developer attraction strategy to attract potential investment partners.
- Explore community-based housing business models to meet regional housing needs.

2. Regional Broadband Strategies

- Engage regional stakeholders using SEDA's Connected Saskatchewan Program to develop a robust broadband strategy that addresses the future needs of both industries and residents. Recognize that broadband infrastructure is not only essential for rural lifestyle but also a critical component of the region's economic prosperity.

3. Indigenous Workforce Development

- Establish regional partnerships and strategies for Indigenous training, skills development, and employment.
- Explore supply chain opportunities for Indigenous procurement.
- Prioritize Indigenous inclusion and economic reconciliation as key objectives for industry, government, and economic development.

4. Regional Immigration Planning

- Collaborate with ecosystem stakeholders to create cohesive immigration attraction strategies, including language and transitional support services.

5. Automation Transition Strategies

- Work with industry associations and public sector partners to support regional industries in planning for automation. Develop adaptable transition models that consider required technologies, economic factors, regulatory compliance, and organizational processes.
- Discuss with the Province of Saskatchewan the possibility of rapid write-downs for automation investments.
- Explore opportunities for circular manufacturing and forestry accelerator programs. With technology advances and investments now being made in the green economy, potential to scale up existing manufacturing while supporting decarbonization targets aligns with a much-needed transition to Industry 4.0

6. Regional Workforce Development Plans

- Engage regional ecosystems to develop training and attraction strategies for key industry and community support sectors. Ensure the involvement of Indigenous workforce development organizations, First Nations, Tribal Councils, Metis organizations, and training institutions.
- Evaluate the creation of a regional workforce pipeline that encompasses middle (grades 8-9) and secondary schools, post-secondary training institutions, and industry.

7. Establish a Regional Business Retention and Expansion (BRE) Program

- Industry interviews have revealed that one out of every five anchor firms are prepared for expansion, while two of these businesses are relocating outside the region and/or province. Focused interaction with industry is required to mitigate potential closure/relocation of firms and associated impact on the regional and provincial economies. Identifying and leveraging opportunities for growth will come from primary interaction with businesses along with support from their local and regional ecosystem.
- It is highly recommended that local communities and their respective organizations swiftly initiate a comprehensive program to conduct interviews with businesses. A

sector-by-sector approach is advised to ensure thorough coverage. SEDA stands ready to provide valuable resources and coaching support to facilitate this initiative.

8. Regional Supply Chain Development

- Foster collaborative supply chain and procurement practices at the local and regional levels. Seek opportunities for technical support through engagement with industry associations and specialists.

9. SMR Supply Chain Development

- Proactively engage regional industry, sector associations such as SIMSA, and public sector partners to foster the development of a rural Small Modular Reactors (SMRs) supply chain.
- Saskatchewan and Canada do not have uranium refining capacity. Uranium mined in Saskatchewan will be sent to the USA to be processed and then shipped back to be used as fuel. Refining capacity could add to the supply chain and could support Canada's domestic energy security.

Region Specific Recommendations

HUMBOLDT Region

The Iron Triangle has always been renowned for its intense competitiveness among manufacturers and various entities. The agricultural machinery business, with its seasonal nature, combined with the cyclical fluctuations in commodity markets that drive production demand, presents significant challenges for manufacturers. Their primary objective is to efficiently move products while minimizing unnecessary financial burdens.

The region's strength lies in the density of its firms. However, past attempts at inter-firm collaboration in non-competitive areas have not endured. Currently, most firms face substantial challenges in labour availability and supply chain management, compounded by an aging workforce and company ownership transitions. While there may be competition for labour among firms, there is also potential to work together on common priorities such as human resource support and supply chain development.

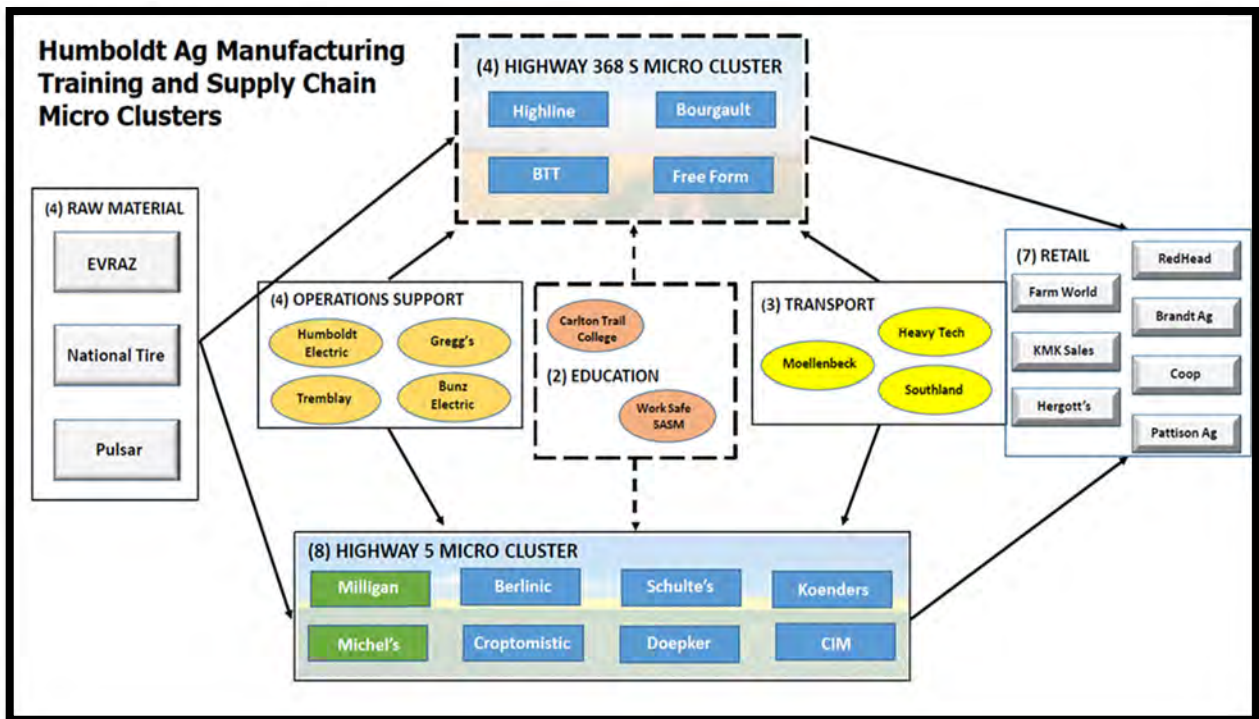
Recommendations:

1. Collaborate with ecosystem partners to foster inter-firm cooperation within the two identified micro-clusters shown in the accompanying maps. Developing initiatives in non-competitive areas, such as training programs, can lay the foundation for expanded opportunities focused on process improvements within the region.

- Given the critical importance of Industry 4.0, these clusters should naturally strive to ensure long-term resilience for individual businesses and the collective industry. Drawing inspiration from the Digital Manufacturing Accelerator launched by Canadian Manufacturers & Exporters (CME) in Manitoba in 2022, supported by the Government of Canada, it is recommended to establish an Iron Triangle 4.0 accelerator.

This initiative, led by a regional Iron Triangle industry association in collaboration with ecosystem stakeholders and aligned with federal and provincial economic priorities, would drive digital and green production transformation. It is suggested to involve Carlton Trail College and include an Industry Education Council within this initiative.

Figure 19. Humboldt Region Ag Manufacturing Training & Supply Chain Micro Clusters



LLOYDMINSTER NORTH BATTLEFORD Region

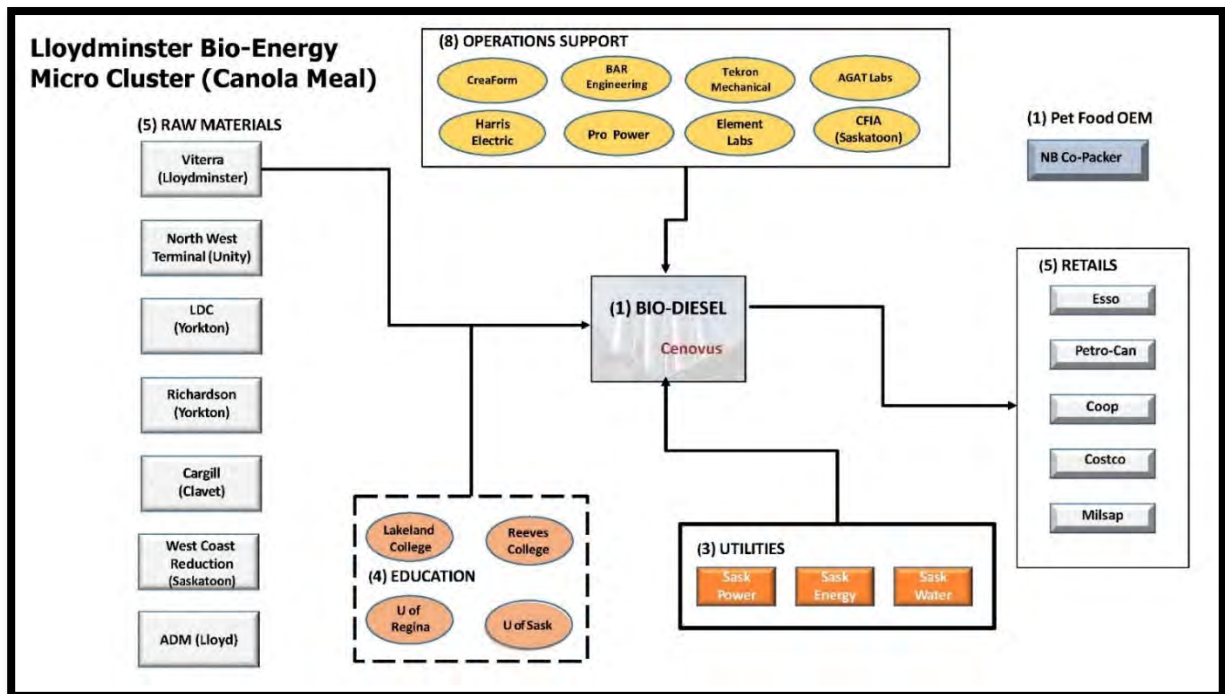
Lloydminster recommendations:

- Collaborate with ecosystem partners to harness the existing supply chain centered around Cenovus, as highlighted in the cluster map provided. There is significant potential to cluster current biofuels, including bio-chemicals and industrial bio-products, by utilizing the increasing supply of canola crush meal, rendered animal products, and aged alcohol production from the nearby Northwest Terminal in Unity. This opportunity arises if there is a decrease in demand for distillery spirits. Presently, all livestock meal is exported to China, but this presents an opportunity to employ

patented Transesterification, converting vegetable oils with alcohol from Unity. The Northwest Terminal currently sells its production exclusively to a whiskey manufacturer, but through NorthWest Bio Products, they have the capability to produce alcohol for the ethanol and bio-diesel industry.

2. Much of the infrastructure required to advance this potential cluster is already in place. However, additional facilities will be necessary to support the production of ethanol and biodiesels. This would establish two locations in the province, Regina and Lloydminster, to cater to the growing demand for biodiesel.
3. Local project leads should explore attraction strategies aimed at independent entrepreneurs and investors, encouraging them to co-locate with local crush facilities and capitalize on the increasing inventory of by-products.
4. The by-products resulting from the upgrader's process could potentially be transferred to West Coast Reduction for further processing of leftover fiber. The processed material can then be shipped to a pet food formulator and production facility, along with the existing supply of distiller's dried grains with solubles (DDGS), which are currently sold in the livestock marketplace. This micro-region exchange of co-products and by-products optimizes the value chain and fosters a closed circular economy within the agriculture and agri-value marketplace, benefiting both plant-based and animal-based protein sectors.

Figure 20. Lloydminster Bio-Energy Micro Cluster - Canola meal (Proposed)

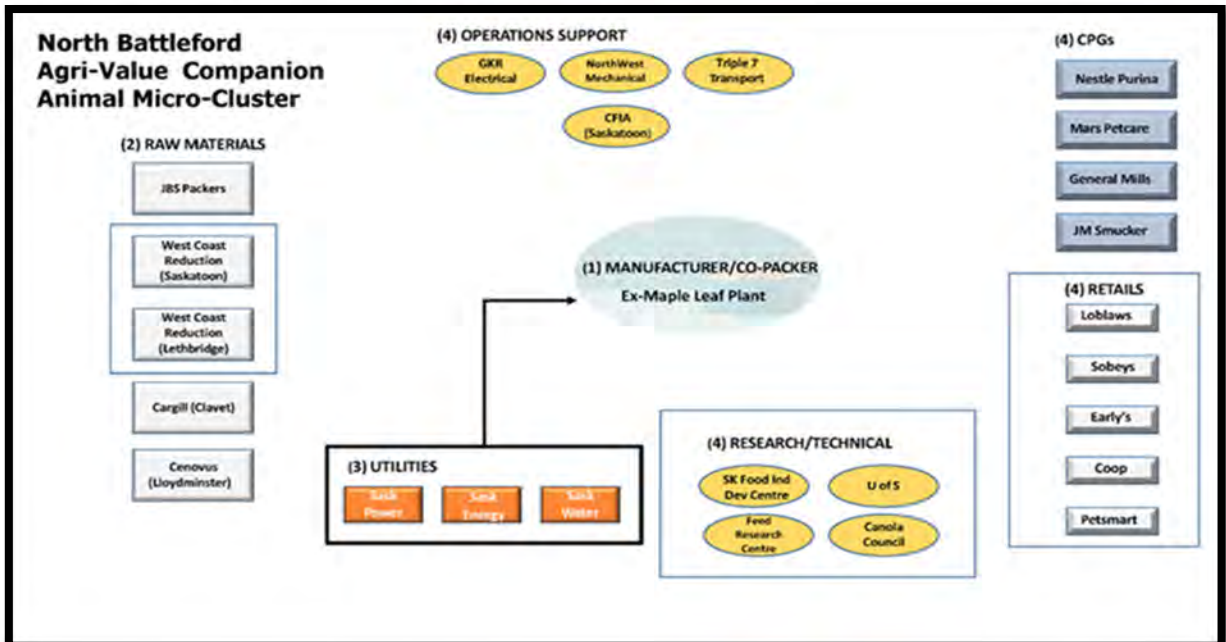


North Battleford recommendations:

1. An exceptional business opportunity awaits the development of a companion animal agri-value system centered around the vacant Maple Leaf plant. By forging inter-regional partnerships with Yorkton and the Saskatoon regions, a robust supply chain can be established to bolster this endeavor. The global pet food original equipment manufacturers (OEMs) are actively seeking excess co-packing capacity and a more secure source of raw materials to meet the growing demands of the companion animal food and snacks market.
2. The region boasts research expertise and centralized access to abundant co-product and by-product raw materials, providing strong support for a commercial enterprise in specialty agri-value. This initiative presents an opportunity to explore novel applications and tap into the expanding supplies of plant starch and canola meal, which are currently undervalued in the livestock marketplace.

By capitalizing on these strengths, they can position themselves as key players in the thriving companion animal industry, meeting the needs of pet food OEMs while unlocking the potential of underutilized resources.

Figure 21. North Battleford Agri-Value Companion Animal Cluster(Proposed)



MOOSE JAW Region

Recommendations:

Support the local ecosystem and its emerging small group of entrepreneurs in the agri-value space to incubate as a micro-cluster. These operations, apart from Donald's Fine Foods, are in similar stages of development and offer complementary product mixes. With most of their suppliers within geographic reach, there is an opportunity for this cluster to collaborate on marketing efforts to scale up and increase volume in their enterprises. Additionally, leveraging the branding of Moose Jaw, this micro-cluster could contribute to an agri-value tourism campaign.

This micro-cluster has the potential to establish an early lead in the provincial startup and SME agri-value space, which is currently under-capitalized. Other entities throughout the province can look to this cluster as an industry advocate and a model for replication. It is recommended that this cluster engage with Ag-West Bio's Prairie Food Link as a potential collaborative micro-cluster, utilizing the network and programming offered by Prairie Food Link. The strength of this Moose Jaw cluster lies in the community's entrepreneurial and youthful spirit, aligning with emerging lifestyle and health choices. Saskatchewan lacks a convergence of youth-driven agri-value startups.

In addition, Moose Jaw possesses a smaller micro-cluster with a focused scope. Operating from their location at Belle Plaine, this industrial facility cluster can provide mutual support in areas such as safety protocols, shared procurement opportunities for plant shutdowns, general area maintenance, and ongoing training available locally.

Building on the demonstrated cooperation in these areas, the micro-cluster can approach the nearby K+S potash mine in Bethune to explore opportunities for operational support. The potential of such a cluster extends beyond shared operational tasks to collaborative procurement, benefiting the entire region. As a longer-term goal, the creation of a shared supply chain depot, owned by the cluster, can address issues of long lead times and sporadic supply, further enhancing operational efficiency.

Figure 22. Belle Plaine Safety, Procurement and Training Micro Cluster

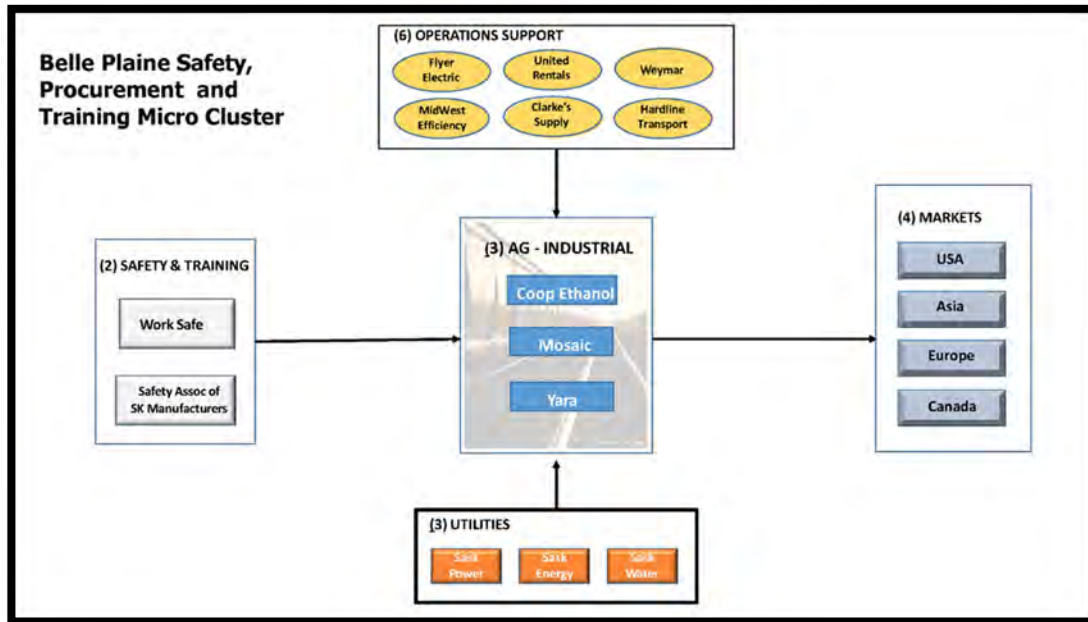
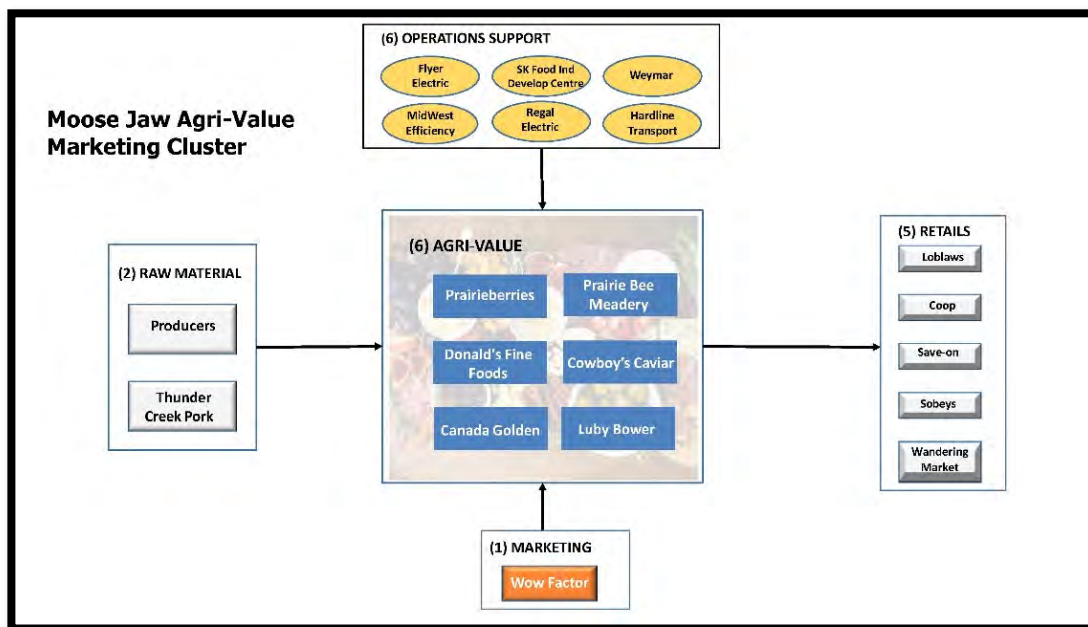


Figure 23. Moose Jaw Agri Value Marketing Cluster



MEADOW LAKE - PRINCE ALBERT Region

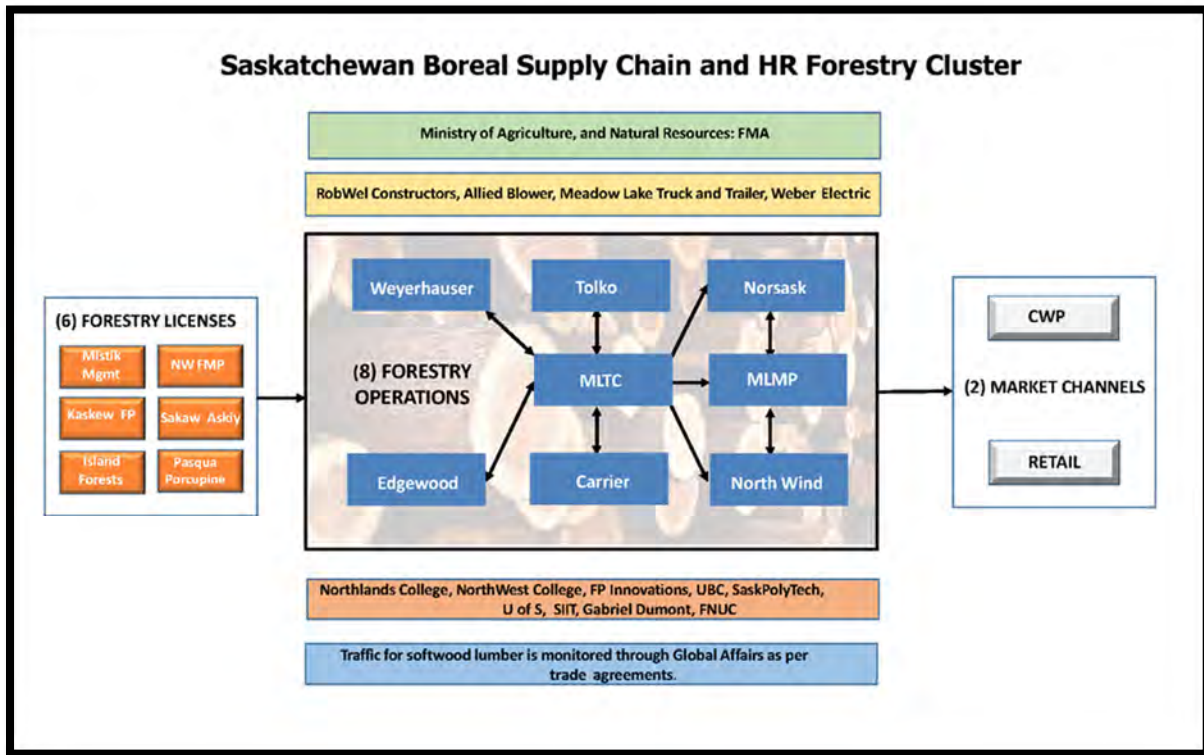
Recommendations:

1. Work with the existing forestry cluster operating in the Boreal region, extending into northwest Saskatchewan and east to the Manitoba border. This group is actively engaged in regulatory work with the province and associated stakeholders. There is an immediate potential for the cluster to address operational issues such as sector promotion, supply chain optimization, logistics, facilities modernization, and HR retention challenges. Leveraging the existing infrastructure and partnerships, this cluster can become operational swiftly and effectively.
2. The forestry cluster in this region has a significant opportunity to capitalize on both levels of public-funded support and utilize industry 4.0 and automation technologies to transform the core nature of on-floor work processes. As a cluster and a regional community that prioritizes the well-being of the indigenous workforce, it is essential to leverage the sector's homogeneity and exert all efforts to improve conditions for these individuals. Close collaboration with the regulatory cluster is recommended to ensure that revenues and sustainability are integrated into agreements, enabling the industry to progress and embrace modernization.
3. As previously recommended for the Humboldt Region, further consideration of a circular or green accelerator is recommended. An accelerator program has potential to explore ways to eliminate waste by reusing and recycling materials and goods and increasing efficacy via integration of cyber-physical systems, product life-cycle management, life-cycle assessment, and augmented reality. Identifying opportunities for waste heat and cold valorization to support decarbonization targets also has potential by auditing the industrial process and defining alternative cost-effective scenarios based on new technologies.

Potential partnerships in a rural industry accelerator program could include Saskatchewan Polytechnic; Prairie Agricultural Machinery Institute (Humboldt Region); Government of Canada and Province of Saskatchewan.

4. Linked to the development of a green cluster accelerator is the significant opportunities accompanying valorization of production residues. They hold potential for energy generation and value-added uses providing further diversification opportunities within the cluster.

Figure 24. Boreal Region Supply Chain and Forestry Cluster



YORKTON Region

Recommendation

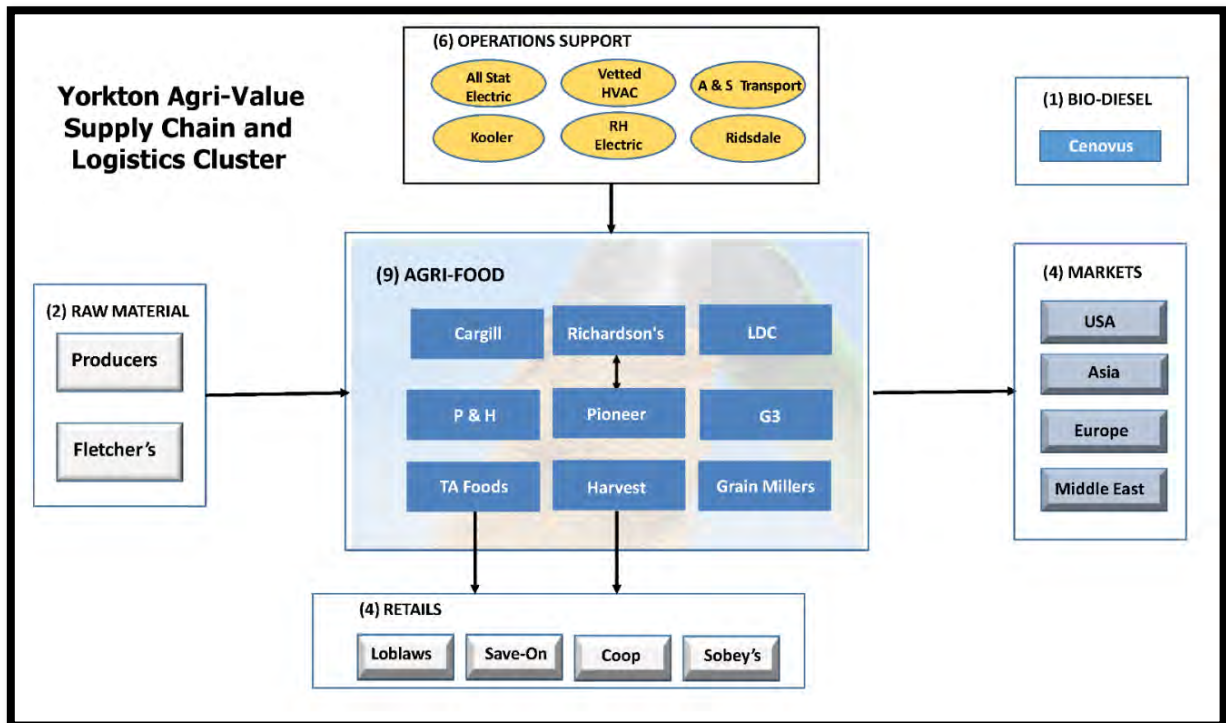
1. Collaborate with the well-established group of companies in the large-scale commodity processing sector, known for their expertise in solving individual operational challenges. In contrast, the smaller agri-food firms are relatively younger and in the process of developing their scale.
2. A common issue faced by all these companies is supply chain, particularly in the realm of logistics. However, an emerging threat looms over the local industries with the anticipated significant increase in canola crush activity within the region and the province. While there will be markets for the primary product, oil, for food and bio-fuel applications, the concern lies in the surplus canola meal resulting from this heightened crush activity. Typically, these excess by-products find their way into the US and Asian livestock feed markets. However, the market for canola meal could face challenges if an oversupply situation occurs due to the increased demand for canola oil in the green fuel sector.

It is in the best interest of the large traditional producers to collaborate with the community of small producers and foster working relationships that emphasize collaboration between large and small agri-value entities.

3. The regions of North Battleford and Regina will also be grappling with the issue of excess canola meal in the coming years. Initiating discussions to secure critical partners for offloading the excess supply must begin promptly, and the regional message should be clear in anticipating potential gaps and working towards positive outcomes for this potential cluster group. This cluster would focus on supply chain and logistics, with a specific emphasis on forging partnerships to establish an emerging aquafeed and companion animal feed industry. Notably, there are significant nutritional advantages for dog food utilizing canola meal and its inherent functional properties, particularly its absorbable high-quality proteins.

4. Furthermore, it is recommended to explore attraction strategies aimed at entrepreneurs and investors to co-locate with local crush facilities and capitalize on the growing inventory of valuable by-products.

Figure 25. Yorkton Agri-Value Supply Chain and Logistics Cluster



Next Steps



Cluster Strategy Next Steps

To drive industry cluster-based economic development, effective coordination, relationship nurturing, and partnerships across industry groups and jurisdictions are crucial. In line with our strong commitment to action, SEDA presents the following steps to support the mobilization of the clusters identified in this report:

July to August 2023:

- Determine the feasibility of adopting a consortia approach aimed at collectively addressing identified common challenges. Engage in discussions with regional project partners to gauge their willingness to collaborate. If a shared interest is identified, support the partners in formulating an action plan to propel them forward.
- The relevance of undertaking further BRE within the micro-regions is underscored by the interview findings outlined within this assessment report. SEDA will approach the Province of Saskatchewan and the Government of Canada to discuss support for a province wide BRE program, with priority given to the five project micro-regions.

July to December 2023:

- Activate cluster interventions in two micro-regions: the Boreal Forestry Cluster and the Humboldt Region Manufacturing Micro-clusters.
- Facilitate roundtable discussions among cluster stakeholders and supporting organizations within each regional ecosystem. Present the assessment findings, underscore potential opportunities, and propose strategies to overcome existing barriers and gaps.
- Drive cluster action planning sessions to address common challenges and identify specific initiatives and projects that will foster cluster growth and enhance competitiveness.
- Encourage robust collaboration and networking among cluster participants, ensuring tangible progress is made on the defined action items.

October 2023 to March 2024:

- Activate cluster interventions in the Yorkton Agri-Value Supply Chain and Logistics Cluster.
- Organize roundtable discussions involving cluster stakeholders and supporting organizations within the ecosystem. Share the assessment findings, emphasize opportunities, and propose effective strategies to tackle barriers and gaps.
- Conduct cluster action planning sessions designed to address shared challenges and identify initiatives and projects that will drive cluster growth and enhance competitiveness.

- Foster a culture of collaboration and networking among cluster participants, empowering them to ensure the progress of action items.

April 2024 to September 2024:

- Activate cluster interventions and prioritize business development efforts in the remaining micro-regions, including Moose Jaw, Lloydminster, and North Battleford.
- Collaborate closely with local project partners to determine the most suitable steps, which may involve organizing roundtable discussions with stakeholders and supporting organizations in each regional ecosystem. The subsequent course of action will be determined in consultation with the local project leads.

Ongoing Activities from July 2023 to March 2025:

- Provide continuous support and guidance to project leads and clusters as they implement their action plans. Continuously monitor progress, extending assistance whenever necessary, and attentively track the achievement of milestones.
- Facilitate regular communication and foster a collaborative environment to maintain the momentum generated and nurture a supportive ecosystem.
- Support the development of informal or formal cluster structures within each region, tailoring cluster business models to align with the unique needs and objectives of the respective industries.

SEDA is committed to actively driving the implementation of these steps, working closely with the project leads and stakeholders involved. By following this strategic timeline and maintaining a strong focus on execution, we will propel the growth and competitiveness of the identified clusters, fostering economic development and long-term prosperity for the regions involved.

Appendix A

SWOT SUMMARY BY SECTOR

	FORESTRY	MINING	MANUFACTURING	AGRI-VALUE
STRENGTHS ASSETS	<ul style="list-style-type: none"> Existing regulatory cluster in sector. Close collaborative working relationship within the sector. There is a young population base for labour force in region. Economic opportunity for the local Indigenous population. Strong collaboration with educational institutions in the province for labour training and research. 	<ul style="list-style-type: none"> In 2022 Saskatchewan was leading exporter of Potash. Has a provincial association, an industry association, and a supplier association. Well developed rail logistics infrastructure from mine to port. Strong sector marketing desk for potash. Infrastructure to respond to global market demands. Safest and most advanced producers and exporters in the world for both Potash and Uranium. Both sectors, Potash and Uranium, are heavily engaged in inclusion and diversity within local communities. Destination opportunity for women and indigenous employment. Biggest employer of graduates from provincial universities in STEM related degrees. 	<ul style="list-style-type: none"> Well established in the province and in their communities. Some pockets of tight concentration - Iron Triangle in Humboldt region. The ag machinery market is currently experiencing high demand. Provincial ag manufacturing community is world leading in specific implement classes and the development of innovation within these implements. Logistics and supply chain partners are well developed. 	<ul style="list-style-type: none"> Existing commodity base is a strong foundation for the industry. Existing infrastructure for commodities can be used for development and shipment of products. World class leading research institution in U of S. Home to Protein Industries Canada. Leading funder of value-added industry collaboration. Entrepreneurial community. Much of the industry is new with young leaders. Saskatchewan Food Industry Development Center great incubator for value-added products and technologies.

INDUSTRY RELATED CHALLENGES

- Industry has image problem among youth.
- High turnover in sector.
- Housing near production facilities.
- Climate change is altering operational season and affecting the forest.
- Poor rail access.
- Poor broadband.
- Slow pace in automation.
- Application of innovation limited by lack of broadband.
- Industry R&D focus on BC and Quebec regions.
- Working conditions still require significant amounts of hard labour.
- US housing market drives the industry.
- Localized challenges to logging access.
- Upcoming years may see lower demand as world and US housing markets soften due to inflation.
- Pandemic years considered high water marks for global demand of lumber. There will be a natural reduction in demand as consumer home improvement projects have been completed.

- Industry still has an image problem associated in working in isolation; in underground shafts and in dusty and dirty conditions.
- Housing near mine sites.
- Environmental waste at site with mine tailings.
- Energy intensive process.
- Water intensive process.
- Potash is associated with environmental issues in the pollution of surface water through farming.
- Geopolitics disrupting supply and market access.
- ESG pressures.

- Manufacturing is not a desired employment destination among youth.
- High turnover now combined with long time employee retirements affecting the efficiency of operations.
- Wage premiums typically enjoyed by manufacturing is being eroded as other sectors are closing or have closed the gap.
- Housing near rural production centres.
- Slow pace of automation.
- Significant portion of supply chain outside of region and country.
- Industry tends to work independently. Not a significant amount of collaboration in the industry.
- Competitive within the sector for unskilled labour and skilled labour.

- Current infrastructure spread over a large geography based on commodity distribution.
- Shortage of labour. Both unskilled and skilled. Especially production millwrights.
- High food inflation. High costs in raw materials.
- Much of the industry is new to the food supply chain.
- Consumer preferences are changing rapidly, and making value added products that appeal to new tastes is difficult.
- Shortage of food development and incubating spaces.
- The growth in commodity production in the province is creating pressures to deal with the co-products and by-products of increased food production.
- Many of the first iterations of value-added products have not been successful in the consumer marketplace. Need more refined food science research to improve functionality and appeal.
- Far removed from the bulk of the consumer marketplace in large urban centres of west coast, central Canada and USA.

INDUSTRY RELATED OPPORTUNITIES

- | | | | |
|--|---|--|---|
| <ul style="list-style-type: none"> • Canadian softwood lumber is highly regarded as the most environmentally friendly in the world. • Turning waste wood products into energy for production and the energy grid. Production facilities now becoming bio-refineries. • Newly developed engineered wood products created from waste wood. • Engineered wood replacing cement in some industrial applications and allowing taller wood buildings. • Greener technology. • Research in cellulose and lignin for biotech applications with waste product for bio-fuels, bio-plastics and value-added chemicals. • Automation to increase efficiency, modernize facilities and improve working conditions. | <ul style="list-style-type: none"> • Developer of cutting-edge technology solution in tele-remote connectivity and edge computing technology. • Highly engaged in research and development in automation. • New solution mine technologies not incorporating the use of tailing ponds. • Uranium as one of the world's solutions for green energy. • Development of the SMR and co-locating with a mine site to reduce energy carbon footprint. • Use of non-radioactive waste rock to build infrastructure, roads and embankments, instead going to landfill. • Development of technologically advanced fertilizers as part of the 4R program to reduce fertilizer use in farming and excess runoff into surface water - lakes and ponds. • Geopolitical turmoil due to the Ukraine - Russia war is providing market demand opportunity for both potash and uranium. | <ul style="list-style-type: none"> • Friendshoring and nearshoring of supply chain will provide opportunities to develop in-region suppliers. • Industry 4.0 + 5.0 • Shared procurement collaboration in bulk and co-purchases to move up in priority for supply. | <ul style="list-style-type: none"> • Driving the food circular economy by valorizing the co-products and by-products. Starch. Canola meal. • Taking food fractions into industry applications where regulatory hurdles are not such a challenge. • Bioproducts market. Bio-fuels, bio-plastics and bio-chemicals. • More co-location of facilities. |
|--|---|--|---|

Appendix B

Cluster Maps

Humboldt Region

HIGHWAY 368 S MICROCLUSTER

HIGHWAY 5 MICROCLUSTER

Lloydminster – North Battleford Region

BIO-ENERGY MICRO CLUSTER (CANOLAMEAL)

AGRI-VALUE COMPANION ANIMAL MICRO-CLUSTER

Meadow Lake- Prince Albert Region

SASKATCHEWAN BOREAL SUPPLY CHAIN AND HR FORESTRY CLUSTER

Moose Jaw Region

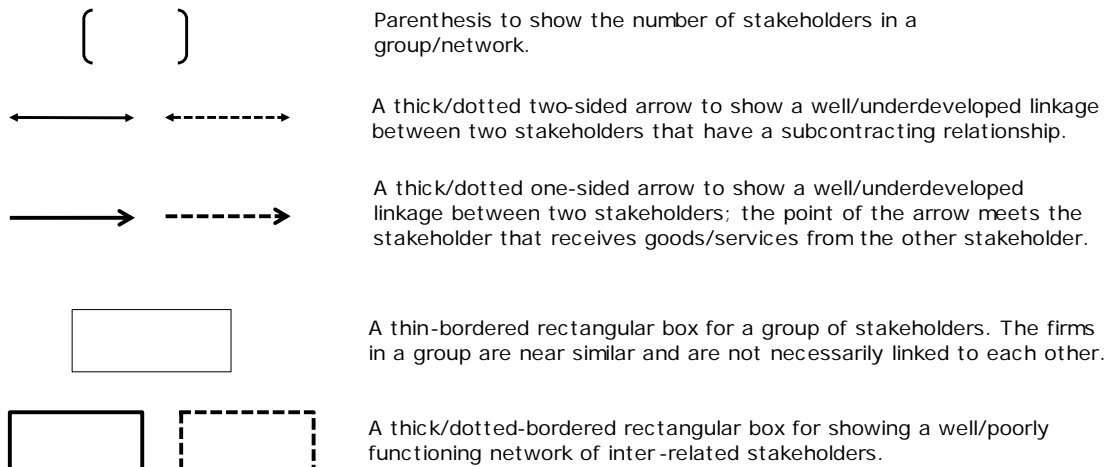
AGRI-VALUE MARKETING CLUSTER

BELLE PLAINE SAFETY, PROCUREMENT AND TRAINING MICROCLUSTER

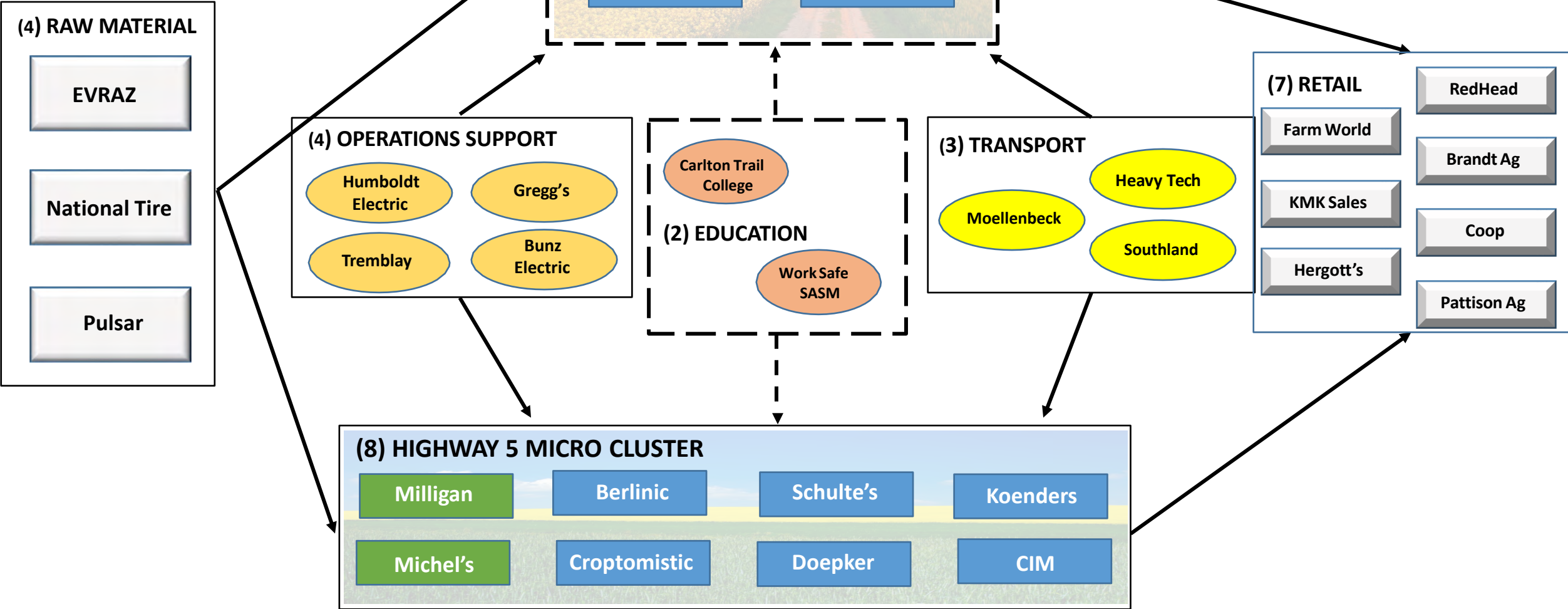
Yorkton Region

AGRI VALUE SUPPLY CHAIN AND LOGISTICS CLUSTER

Connecting the actors



Humboldt Ag Manufacturing Training and Supply Chain Micro Clusters



Lloydminster Bio-Energy Micro Cluster (Canola Meal)

(5) RAW MATERIALS

- Viterra (Lloydminster)
- North West Terminal (Unity)
- LDC (Yorkton)
- Richardson (Yorkton)
- Cargill (Clavet)
- West Coast Reduction (Saskatoon)
- ADM (Lloyd)

(8) OPERATIONS SUPPORT

- CreaForm
- BAR Engineering
- Tekron Mechanical
- AGAT Labs
- Harris Electric
- Pro Power
- Element Labs
- CFIA (Saskatoon)

(1) Pet Food OEM

- NB Co-Packer

(1) BIO-DIESEL

Cenovus

(5) RETAILS

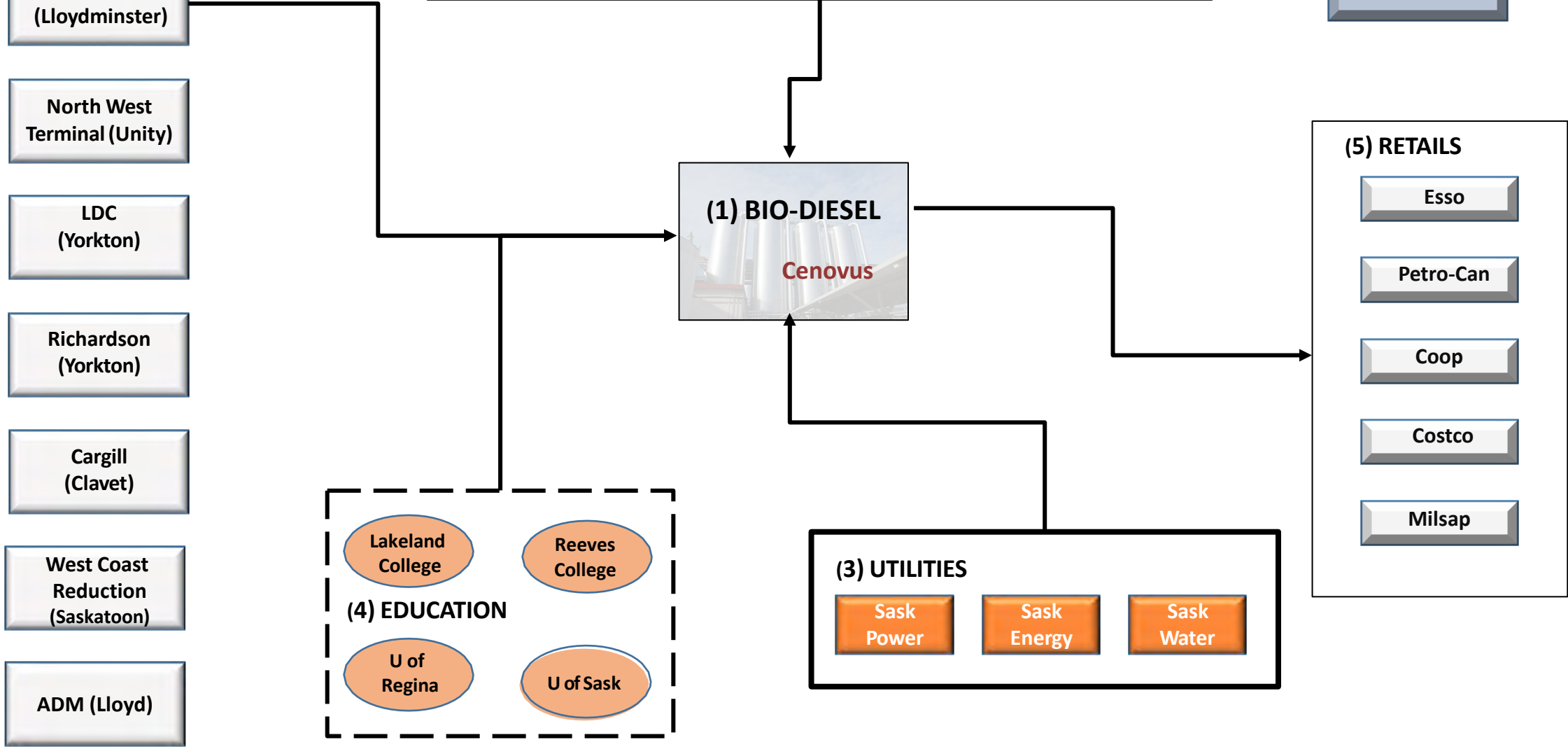
- Esso
- Petro-Can
- Coop
- Costco
- Milsap

(4) EDUCATION

- Lakeland College
- Reeves College
- U of Regina
- U of Sask

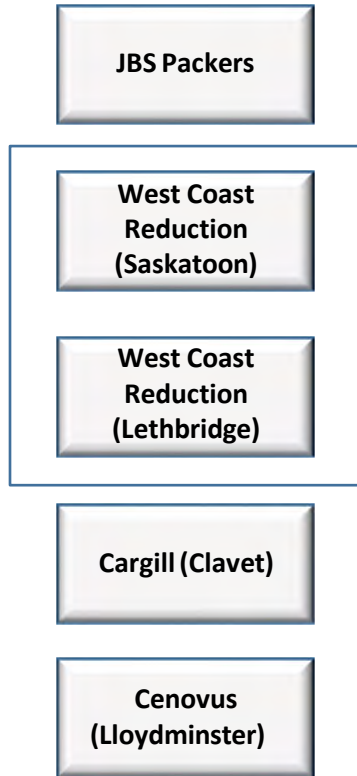
(3) UTILITIES

- Sask Power
- Sask Energy
- Sask Water

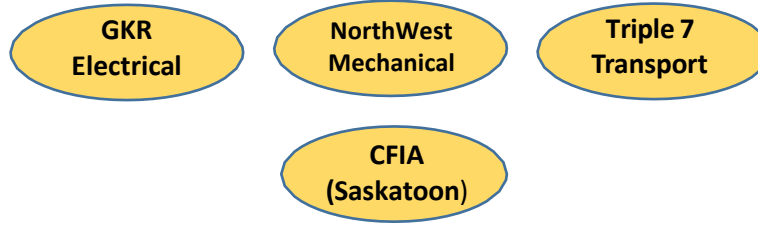


North Battleford Agri-Value Companion Animal Micro-Cluster

(2) RAW MATERIALS

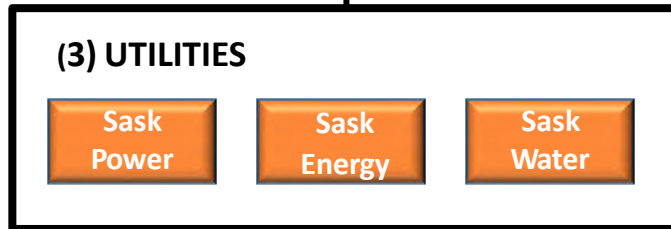


(4) OPERATIONS SUPPORT

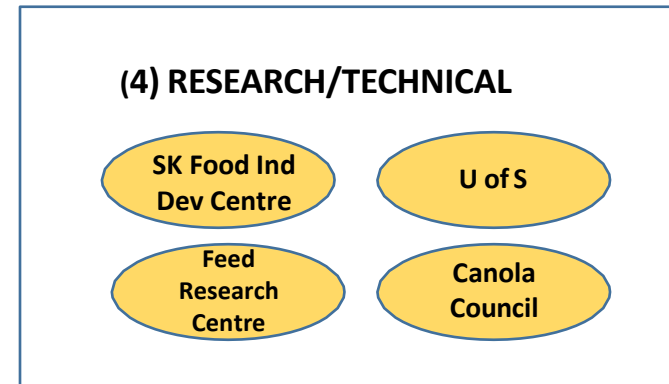


(1) MANUFACTURER/CO-PACKER Ex-Maple Leaf Plant

(3) UTILITIES



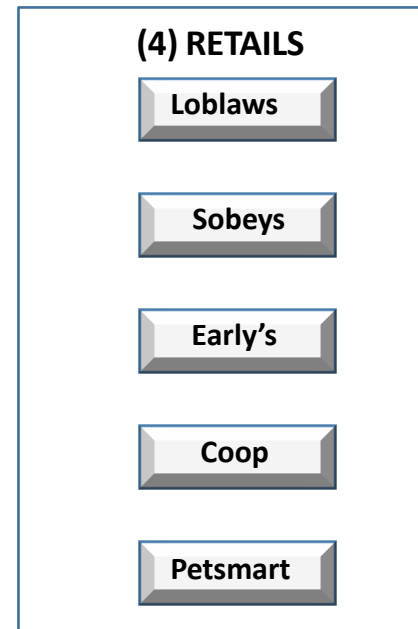
(4) RESEARCH/TECHNICAL



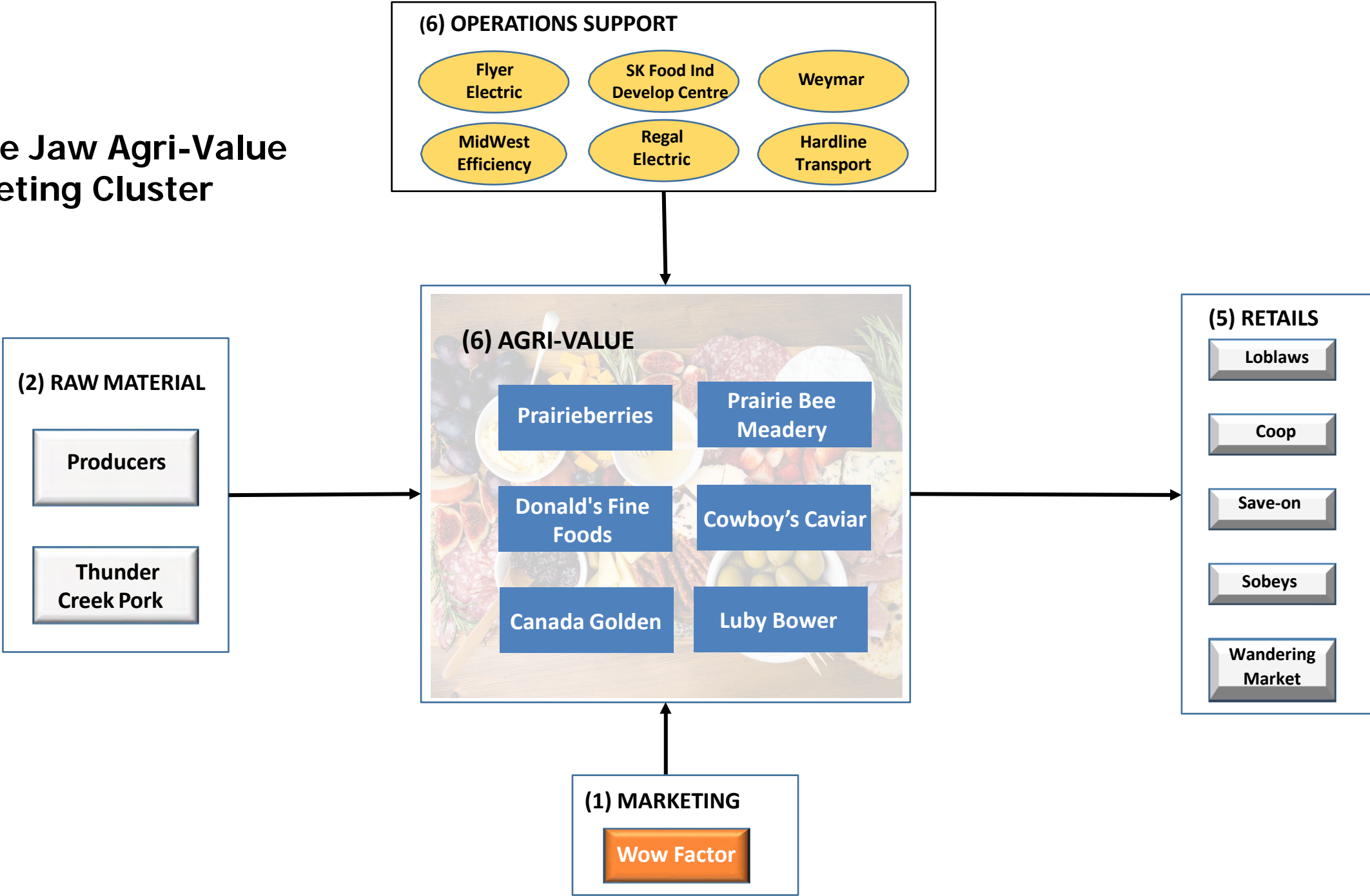
(4) CPGs



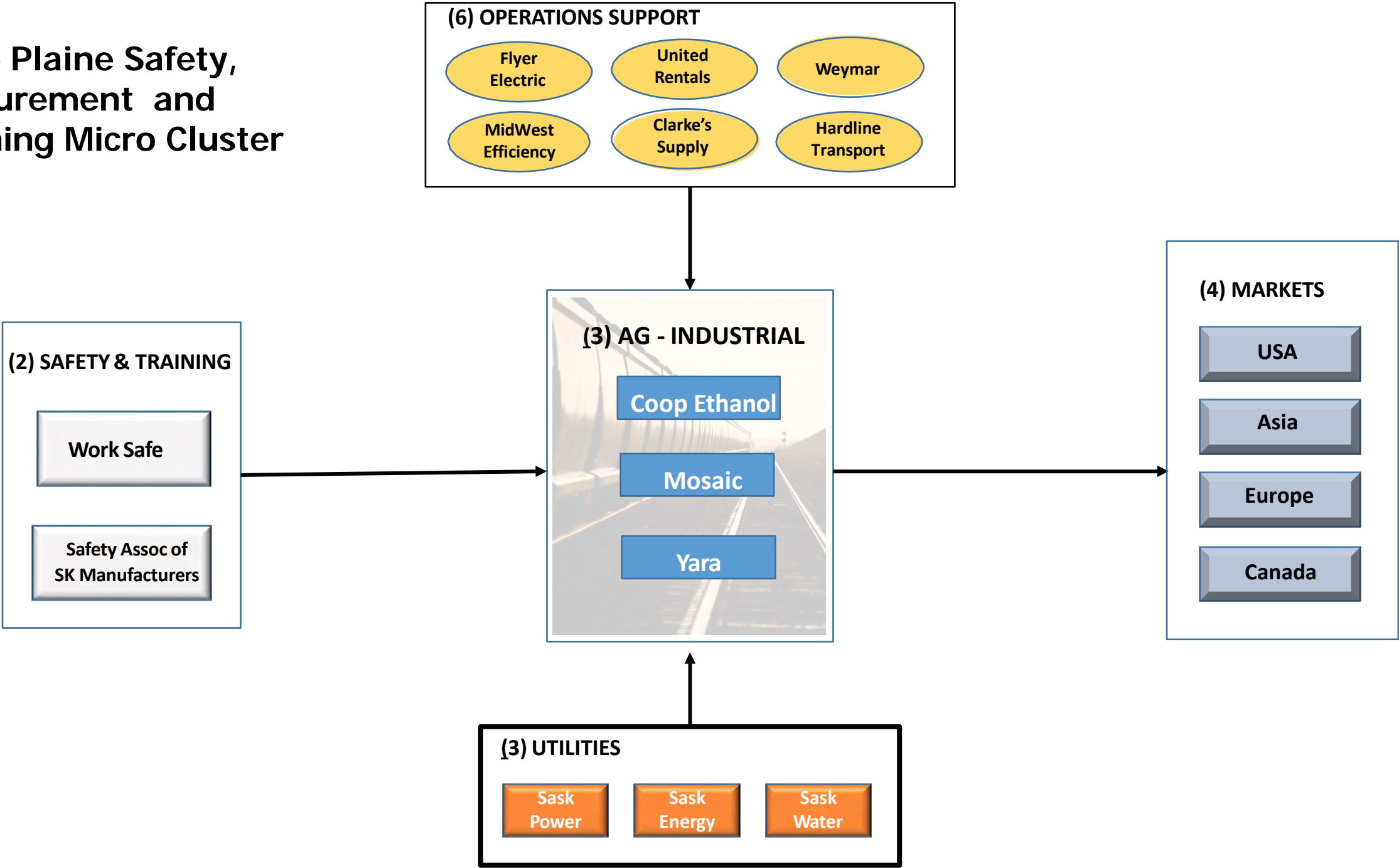
(4) RETAILS



Moose Jaw Agri-Value Marketing Cluster



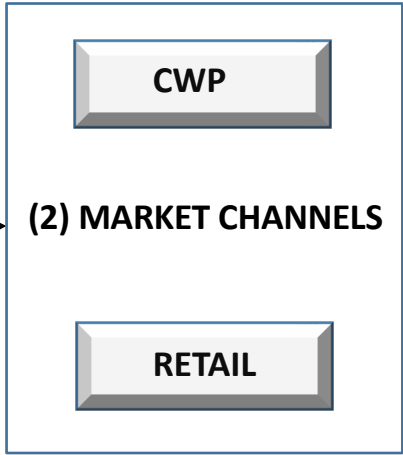
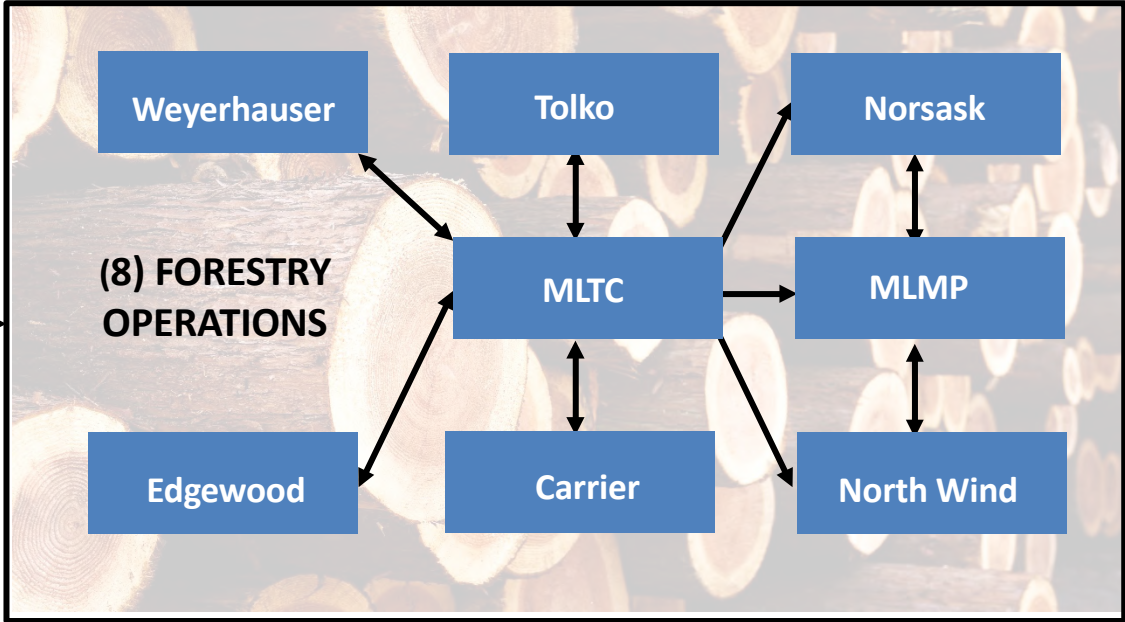
Belle Plaine Safety, Procurement and Training Micro Cluster



Saskatchewan Boreal Supply Chain and HR Forestry Cluster

Ministry of Agriculture, and Natural Resources: FMA

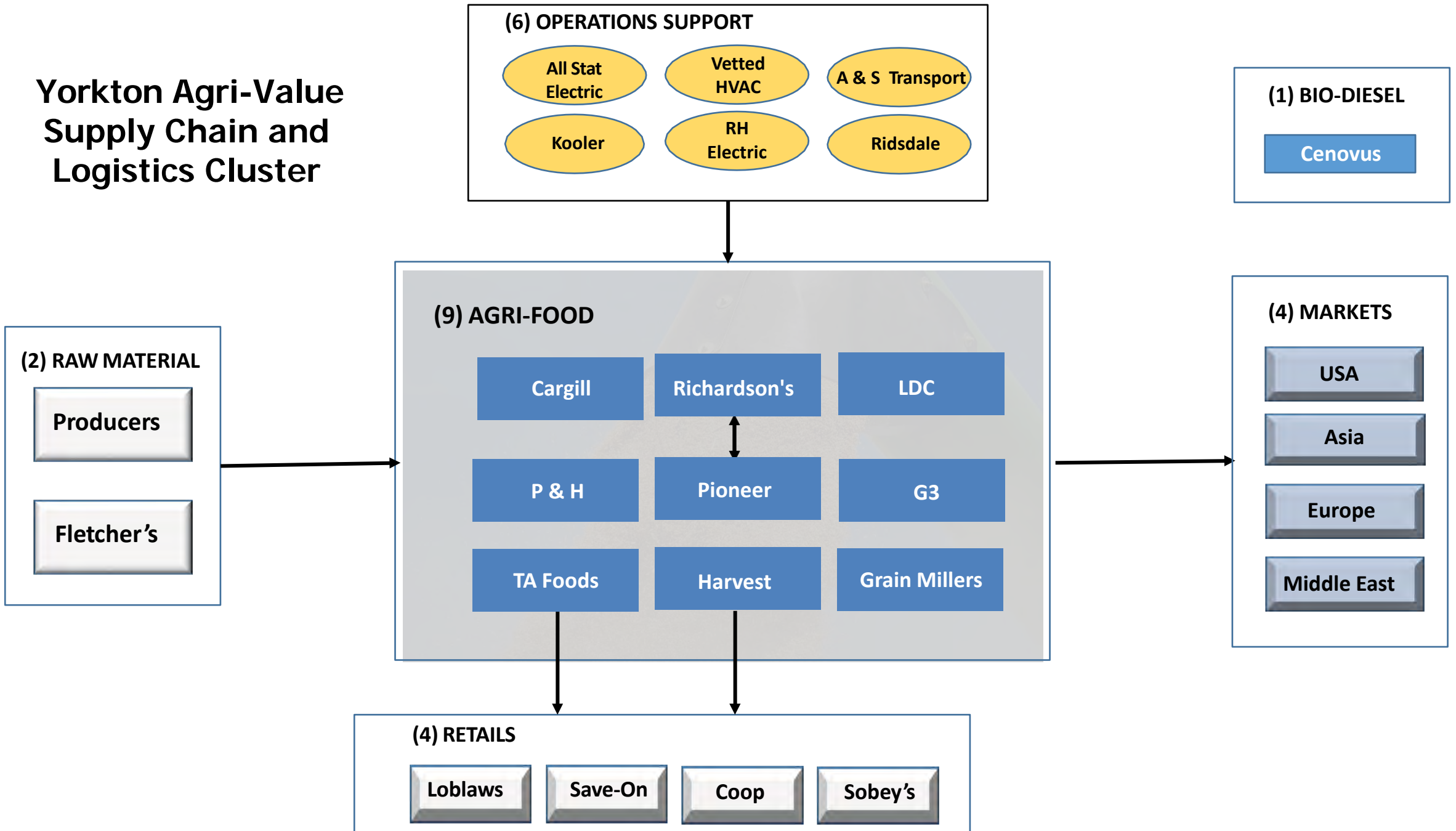
RobWel Constructors, Allied Blower, Meadow Lake Truck and Trailer, Weber Electric



Northlands College, NorthWest College, FP Innovations, UBC, SaskPolyTech, U of S, SIIT, Gabriel Dumont, FNUC

Traffic for softwood lumber is monitored through Global Affairs as per trade agreements.

Yorkton Agri-Value Supply Chain and Logistics Cluster



Appendix C

STATISTICAL ANALYSIS REGION-PROVINCE

Industry Recognized Economic Base Analysis Analytical Tools

Economic Developers collectively worked with site selectors to establish standards for collection and presentation of comprehensive community investment profiles as developed by the International Economic Development Council (IEDC). Another economic development challenge was trying to quantify and interpret the advantages and competitive position of the local development service area. Associate Professor Dr. Emanuel Carvalho (University of Waterloo) developed a particular form of economic base analysis for communities to assess and guide development activities. Dr. Carvalho is part of the University of Waterloo team that delivers the nationally accredited Economic Development Program for the Economic Developers Association of Canada (EDAC).

The tools rely on regular statistical information on employment by industry in the labour market. While national, provincial, and Census Metropolitan Area (CMA) data is regularly available in regular Statistics

Canada labour force surveys, smaller centres rely on census data collected every five years.

A series of analytical tools consider select demographic characteristics used in location quotient analysis, shift/share analysis, leading/lagging analysis, and industry targeting classification to determine business sector competitive advantages and focus business retention and attraction efforts. These methods of analysis have been applied to the communities and regions to provide additional perspective to support economic development. Refer to the end of this section for a detailed background on economic statistical analysis formulas and for statistical analysis output data using each of the economic base analysis tools.

The data used in shift/share analysis, leading/lagging analysis, and industry targeting classification relies on data supplied from Lightcast for select communities within each targeted region for 2018 and 2023.

Location Quotient

A location quotient identifies the level of specialization in a geographic area. In simple terms it measures the concentration of certain industry sectors in the base location relative to the comparison economy. Concentrations of an industry

with location quotients below 0.75 are considered low, between 0.75 and 1.25 are medium, and greater than 1.25 is rated high. A broader description of the formula in detail and interpretation of location quotient values is included later in this document.

Shift / Share Analysis

Shift / share analysis looks at change of employment in a particular industry in a community from one time period to the next to determine whether the change is similar in other regions. The change is viewed as the sum of three parts: the provincial effect plus the industry effect plus the regional effect. The

provincial effect considers what the employment in the sector was in the sector locally in the previous time period multiplied by the overall change in employment provincially over the two time periods. The industry effect considers what the employment in the sector was in the sector locally in the previous

time period multiplied by the difference in the change in the sector provincially less the overall change in employment provincially over the two time periods. The regional effect considers what the employment in the sector was in the sector locally in the previous time period multiplied by the difference

Regional Shift / Share Findings

A positive regional effect means the industry is doing better than would be expected given the situation for that particular industry in the province as a whole. A negative regional effect means that the sector is doing more poorly than would be expected.

Leading / Lagging Analysis

Another way to look at the different industry sectors is to examine their employment growth relative to growth in overall employment at either the provincial or regional level. Industries which are “leading” have a growth rate in excess of the rate of growth in total employment and those that are “lagging” are growing more slowly.

Provincial Sector Relative Growth is the change in growth in the sector from one time period to the next at the provincial level subtracting the overall growth

Industry Targeting

The Industry Targeting Classification System is another way to interpret Leading / Lagging Analysis. Location quotient, overall provincial growth, and relative local growth are combined for analysis.

The industry target classification is displayed in a bubble graph. The size of the circles represents the location quotient, that is, the relative size of the sector. Those to the left of the vertical axis are considered as having limited prospects because the industries are declining provincially. If they are small, they have additional challenges and if they are below the horizontal axis, they also suffer from declining competitiveness.

in the change in the sector locally less the overall change in employment in the sector provincially over the two time periods. The sum of these three effects yields overall employment growth in the sector and in the region from 2018 to 2023. The end of this section describes the shift / share formula in detail.

in employment for the province in the same time period. Local Sector Relative Growth is the change in growth in the sector from one time period to the next at the local level subtracting the overall growth in employment in the sector at the provincial level in the same time period. Comparisons of this information and location quotients are done using the Carvalho Classification System. The end of this section describes the formula in detail and interpretation of leading/lagging values.

The industry groups that fall within the lower right quadrant are classified as retention targets (if large enough) because they are growing provincially but more slowly in the region. Smaller industry groups in this quadrant of the graph are deemed to have limited prospects.

The industry groups which fall in the upper right quadrant are growing provincially and leading growing in the region. That makes them current strengths if they are large and emerging strengths if they are smaller.

The end of this section describes the formula in detail and interpretation of targeting values.

Data sources: Definition of Regions**Humboldt**

- Semans (in Saskatchewan)
- Mount Hope No. 279 (in Saskatchewan)
- Foam Lake No. 276 (in Saskatchewan)
- Foam Lake (in Saskatchewan)
- Elfros No. 307 (in Saskatchewan)
- Elfros (in Saskatchewan)
- Big Quill No. 308 (in Saskatchewan)
- Wynyard (in Saskatchewan)
- Prairie Rose No. 309 (in Saskatchewan)
- Jansen (in Saskatchewan)
- Leroy No. 339 (in Saskatchewan)
- Leroy (in Saskatchewan)
- Lakeside No. 338 (in Saskatchewan)
- Watson (in Saskatchewan)
- Quill Lake (in Saskatchewan)
- Lakeview No. 337 (in Saskatchewan)
- Wadena (in Saskatchewan)
- Muskowekwan 85 (in Saskatchewan)
- Gordon 86 (in Saskatchewan)
- Day Star 87 (in Saskatchewan)
- Poorman 88 (in Saskatchewan)
- Fishing Lake 89 (in Saskatchewan)
- Beardy's and Okemasis 96 and 97A (in Saskatchewan)
- Muskowekwan 85-17 (in Saskatchewan)
- Muskowekwan 85-26 (in Saskatchewan)
- Muskowekwan 85-33 (in Saskatchewan)
- Muskowekwan 85-28 (in Saskatchewan)
- Muskowekwan 85-29 (in Saskatchewan)
- Muskowekwan 85-23 (in Saskatchewan)
- Muskowekwan 85-12 (in Saskatchewan)
- Muskowekwan 85-24 (in Saskatchewan)
- Muskowekwan 85-22 (in Saskatchewan)
- Muskowekwan 85-27 (in Saskatchewan)
- Muskowekwan 85-10 (in Saskatchewan)
- Muskowekwan 85-1 (in Saskatchewan)
- Muskowekwan 85-8 (in Saskatchewan)
- Muskowekwan 85-15 (in Saskatchewan)
- Muskowekwan 85-2A (in Saskatchewan)
- Muskowekwan 85-31 (in Saskatchewan)
- Fishing Lake 89A (in Saskatchewan)
- Osborne No. 310 (in Saskatchewan)
- Drake (in Saskatchewan)
- Lanigan (in Saskatchewan)
- Watrous (in Saskatchewan)
- Wolverine No. 340 (in Saskatchewan)
- Ponass Lake No. 367 (in Saskatchewan)
- Rose Valley (in Saskatchewan)
- Spalding No. 368 (in Saskatchewan)
- Spalding (in Saskatchewan)
- St. Peter No. 369 (in Saskatchewan)
- Englefeld (in Saskatchewan)
- Muenster (in Saskatchewan)
- Humboldt No. 370 (in Saskatchewan)
- Humboldt (in Saskatchewan)
- Beardy's 97 and Okemasis 96 (in Saskatchewan)
- Beardy's and Okemasis 96 and 97B (in Saskatchewan)

Lloydminster-North Battleford

- Buckland No. 491
- Prince Albert No 461
- Big River No 555
- Moose Range No 486
- Meadow Lake No 588
- Hudson Bay No 394
- Red Pheasant 108 (in Saskatchewan)
- Mosquito 109 (in Saskatchewan)
- Sweet Grass 113 (in Saskatchewan)
- Sweet Grass 113-M16 (in Saskatchewan)
- Buffalo No. 409 (in Saskatchewan)
- Wilkie (in Saskatchewan)
- Unity (in Saskatchewan)
- Marsden (in Saskatchewan)
- Hillsdale No. 440 (in Saskatchewan)
- Cut Knife No. 439 (in Saskatchewan)
- Cut Knife (in Saskatchewan)
- Poundmaker 114 (in Saskatchewan)
- Little Pine 116 (in Saskatchewan)
- Sweet Grass 113-L6 (in Saskatchewan)

- Meota No. 468 (in Saskatchewan)
- Metinota (in Saskatchewan)
- Aquadeo (in Saskatchewan)
- Meota (in Saskatchewan)
- Turtle River No. 469 (in Saskatchewan)
- Edam (in Saskatchewan)
- Paynton No. 470 (in Saskatchewan)
- Paynton (in Saskatchewan)
- Eldon No. 471 (in Saskatchewan)
- Maidstone (in Saskatchewan)
- Waseca (in Saskatchewan)
- Wilton No. 472 (in Saskatchewan)
- Lashburn (in Saskatchewan)
- Marshall (in Saskatchewan)
- Britannia No. 502 (in Saskatchewan)
- Onion Lake 119-1 (in Saskatchewan)
- Min-A-He-Quo-Sis 116C (in Saskatchewan)
- Lloydminster (Part) (in Alberta)

Meadow Lake – Prince Albert

- Meadow Lake (in Saskatchewan)
- Meadow Lake No. 588 (in Saskatchewan)
- Prince Albert Census Division

Moose Jaw

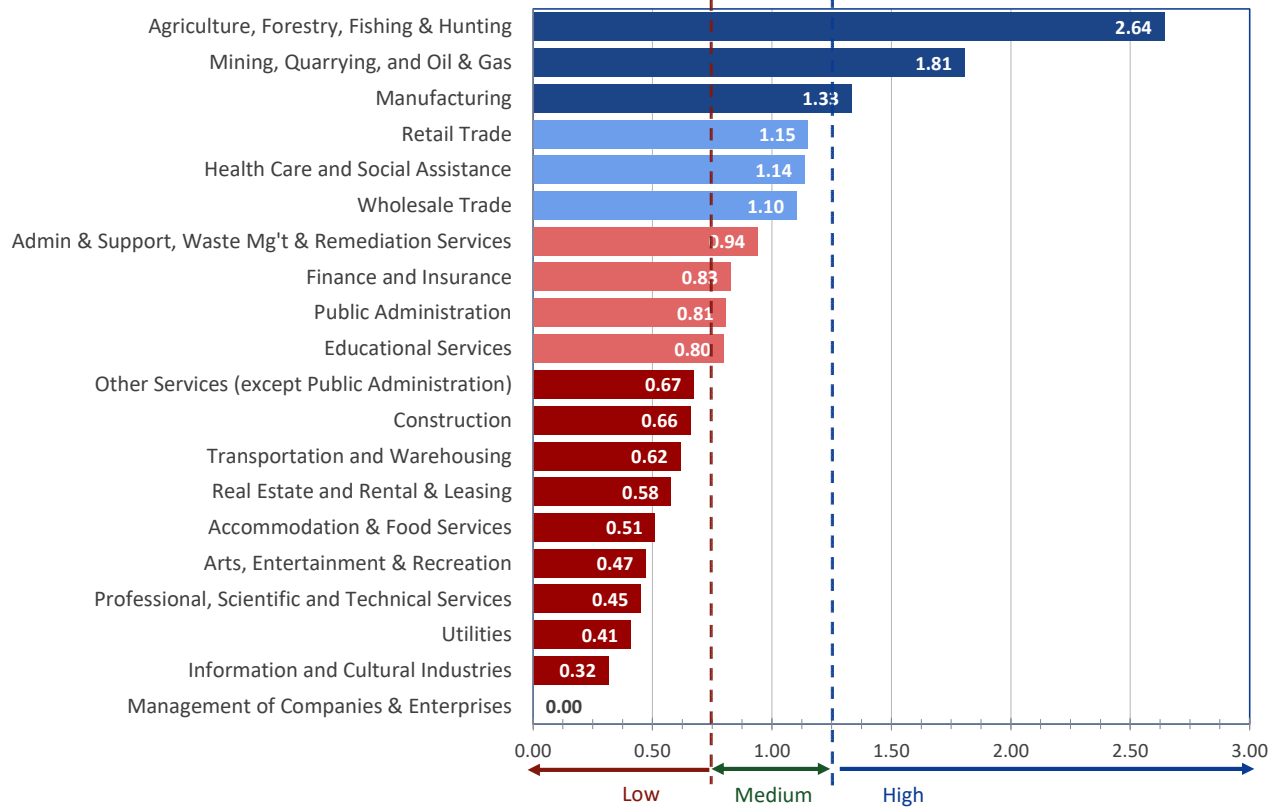
- Moose Jaw Census Division

Yorkton

- Fertile Belt No. 183 (in Saskatchewan)
- Esterhazy (in Saskatchewan)
- Atwater (in Saskatchewan)
- Bangor (in Saskatchewan)
- Stockholm (in Saskatchewan)
- Grayson No. 184 (in Saskatchewan)
- Dubuc (in Saskatchewan)
- Grayson (in Saskatchewan)
- Cana No. 214 (in Saskatchewan)
- Melville (in Saskatchewan)
- Saltcoats No. 213 (in Saskatchewan)
- Ochapowace 71 (in Saskatchewan)
- Ochapowace 71-10 (in Saskatchewan)
- Ochapowace 71-54 (in Saskatchewan)
- Ochapowace 71-26 (in Saskatchewan)
- Ochapowace 71-70 (in Saskatchewan)
- Ochapowace 71-7 (in Saskatchewan)
- Ochapowace 71-18 (in Saskatchewan)
- Ochapowace 71-51 (in Saskatchewan)
- Ochapowace 71-44 (in Saskatchewan)
- Yorkton (in Saskatchewan)
- Canora (in Saskatchewan)
- Cote No. 271 (in Saskatchewan)
- Kamsack (in Saskatchewan)
- Cote 64 (in Saskatchewan)
- Keeseekoose 66 (in Saskatchewan)
- Keeseekoose 66A (in Saskatchewan)
- Keeseekoose 66-CA-04 (in Saskatchewan)
- Keeseekoose 66-CA-05 (in Saskatchewan)
- Keeseekoose 66-CA-06 (in Saskatchewan)
- Keeseekoose 66-KE-04 (in Saskatchewan)
- Keeseekoose 66-KE-05 (in Saskatchewan)

HUMBOLDT REGION

Humboldt Area Industry Location Quotient to Saskatchewan 2023 Lightcast Dataset



Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Location Quotient Analysis

Compared to Saskatchewan the Humboldt Region has:

High industry concentration of employment in:

Agriculture, Forestry, Fishing & Hunting ▪ Mining Quarrying and Oil and Gas ▪ Manufacturing.

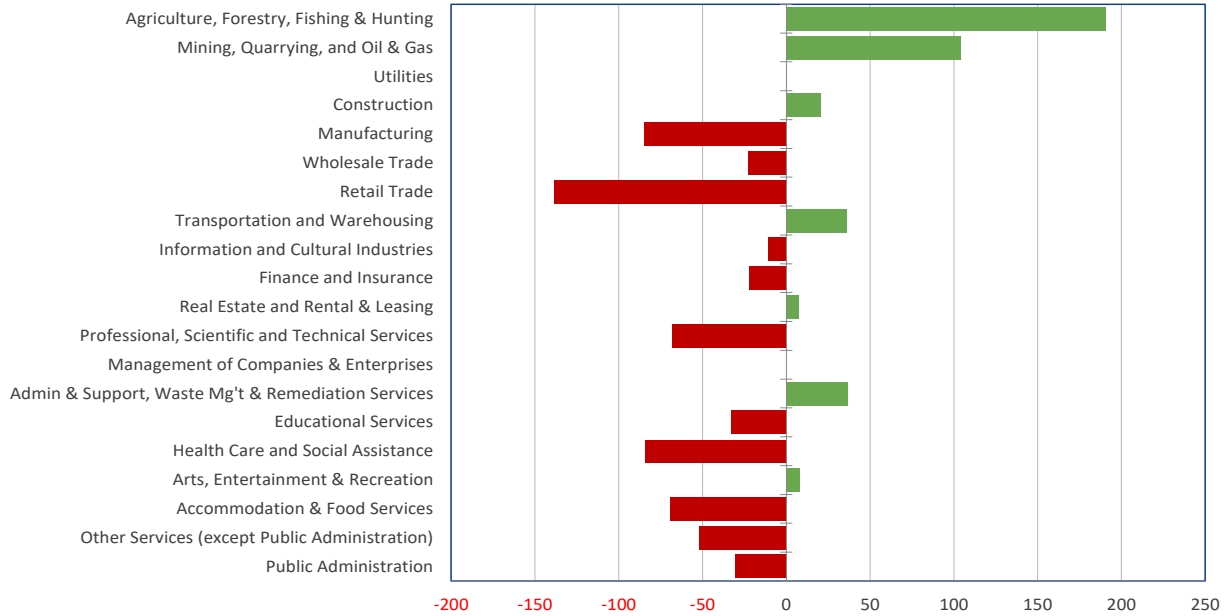
Medium industry concentrations for:

Retail Trade ▪ Health Care and Social Assistance ▪ Wholesale Trade ▪ Admin and Support, Waste Mtg and Remediation Services ▪ Finance and Insurance ▪ Public Administration ▪ Educational Services

Low industry concentrations for:

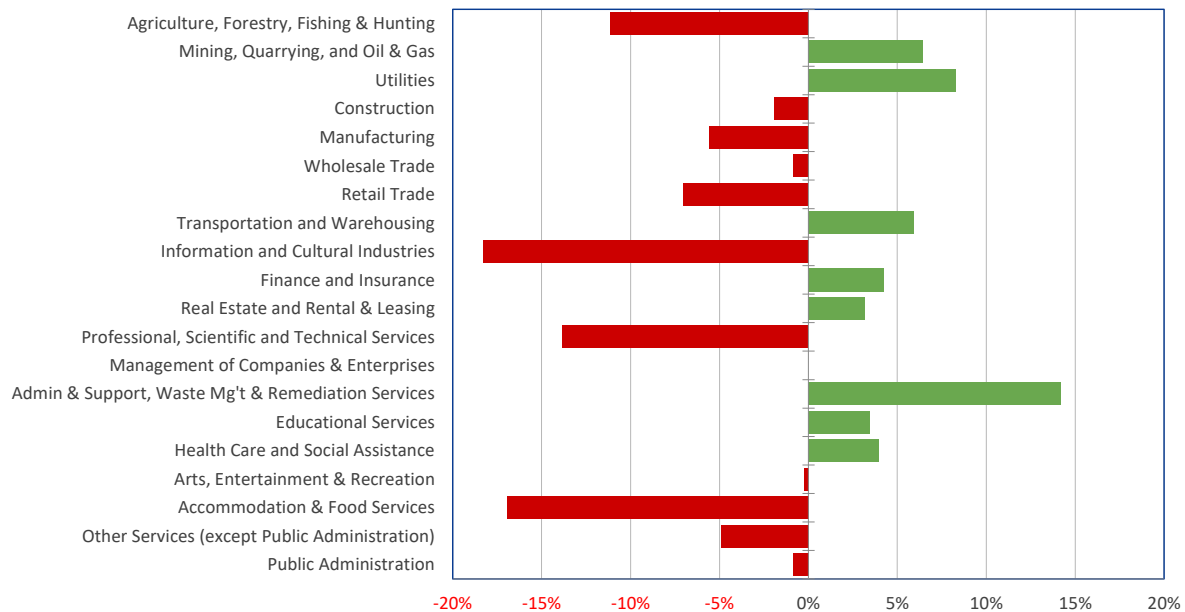
Other Services (except Public Administration) ▪ Construction ▪ Transportation and Warehousing ▪ Real Estate and Rental and Leasing ▪ Accommodation & Food Services ▪ Arts, Entertainment & Recreation ▪ Professional, Scientific and Technical Services ▪ Utilities and Information and Cultural Industries.

Humboldt Area Shift Share Absolute Regional Effects from 2018 to 2023



Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Shift / Share Analysis

Humboldt Area Shift Share Regional Effect in % from 2018 to 2023



Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Shift / Share Analysis

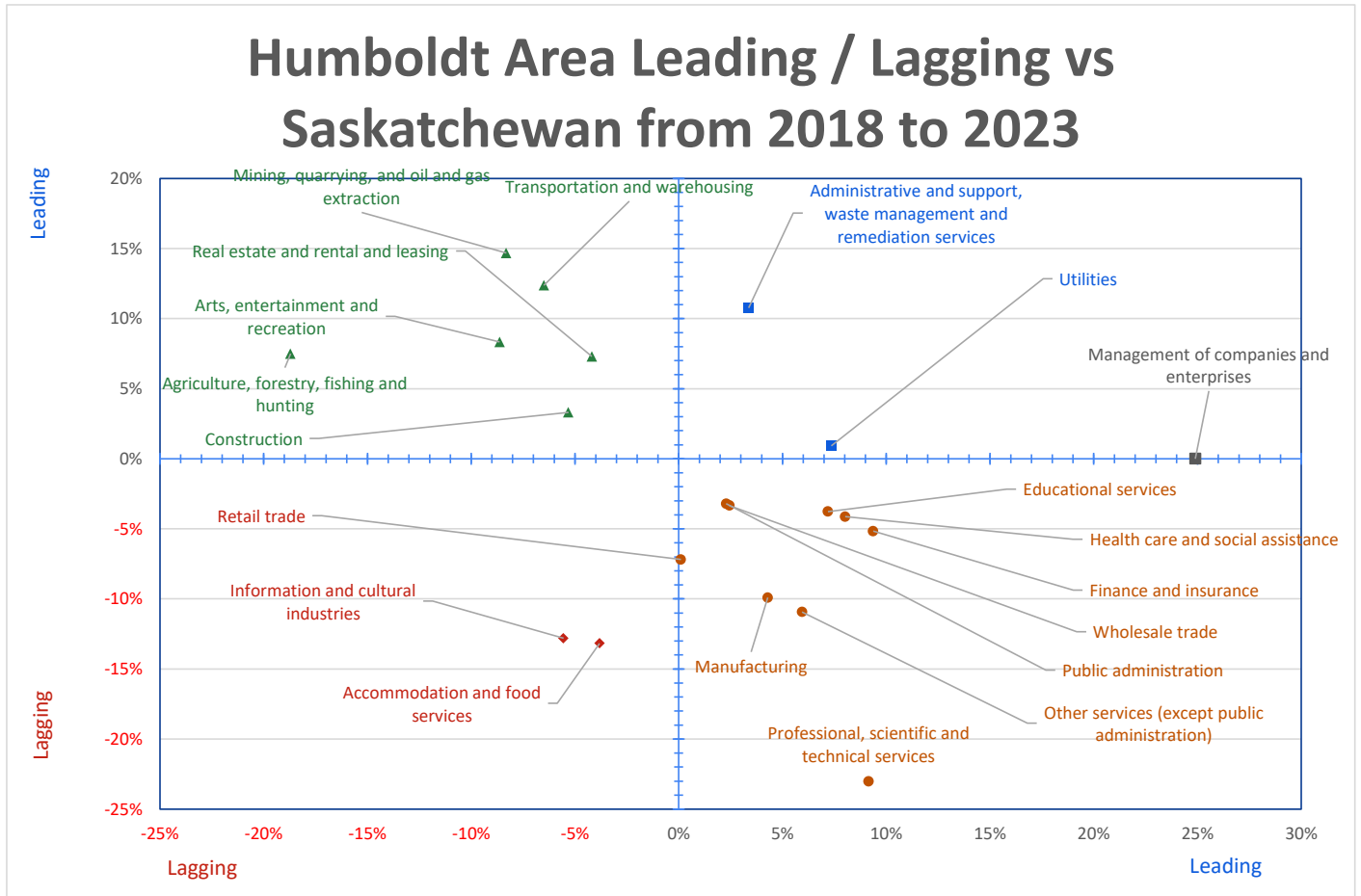
Compared to provincial employment growth Humboldt Region has:

A high regional effect with local industry employment growth between 2018 and 2023 in:

Mining, Quarrying and Oil and Gas sectors ■ Transportation and Warehousing ■ Real Estate, Rental and Leasing ■ Administrative and Support, Waste Management and Remediation Services industry sectors.

A positive regional effect with local industry employment growth between 2018 and 2023 in:

Agriculture, Forestry, Fishing & Hunting ■ Utilities ■ Construction ■ Finance and Insurance ■ Administrative and Support, Waste Management and Remediation Services ■ Health Care and Social Assistance ■ Arts, Entertainment & Recreation industry sectors.



Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Leading / Lagging Analysis

Compared to Saskatchewan Humboldt region has:

Leading local and Leading Provincial Relative Growth in:

Administrative and Support, Waste Management and Remediation Services ■ Utilities industry sectors.

Leading local and Lagging Provincial Relative Growth in:

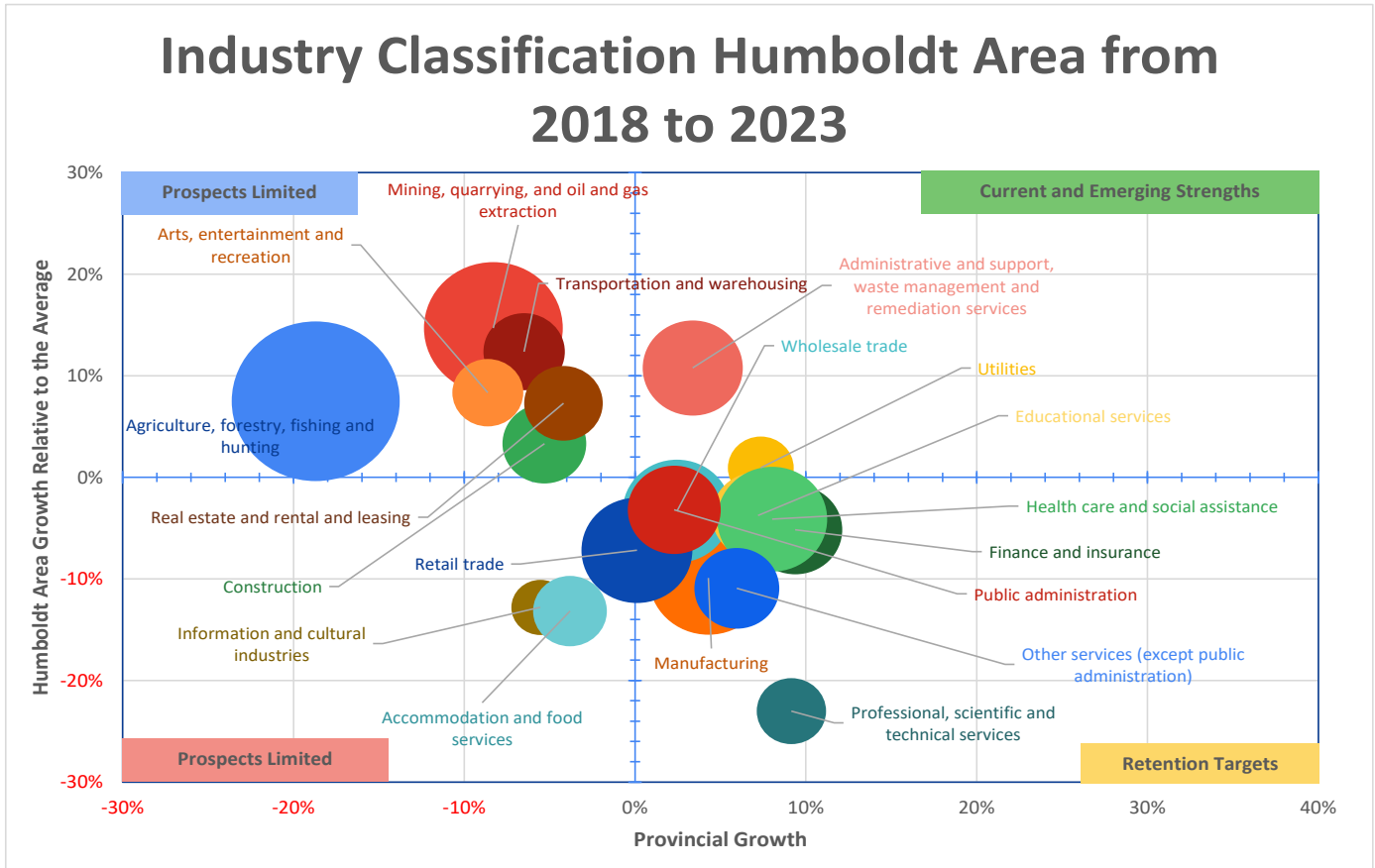
Mining, Quarrying and Oil and Gas ■ Transportation and Warehousing ■ Arts, Entertainment & Recreation ■ Real Estate and Rental and Leasing ■ Construction industry sectors.

Lagging local and Leading Provincial Relative Growth in:

Wholesale Trade ▪ Public Administration ▪ Educational Services ▪ Health Care and Social Assistance ▪ Finance and Insurance ▪ Manufacturing ▪ Other Services (except Public Administration) ▪ Professional, Scientific and Technical Services industry sectors.

Lagging local and Lagging Provincial Relative Growth in:

Retail Trade ▪ Information and Cultural Industries ▪ Accommodation & Food Services.



Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Industry Targeting Classification Analysis

Compared to Saskatchewan Humboldt region has:

Current and Emerging Strengths in:

Admin and Support Waste Mtg and Remediation Services ▪ Utilities industry sectors.

Retention Targets in:

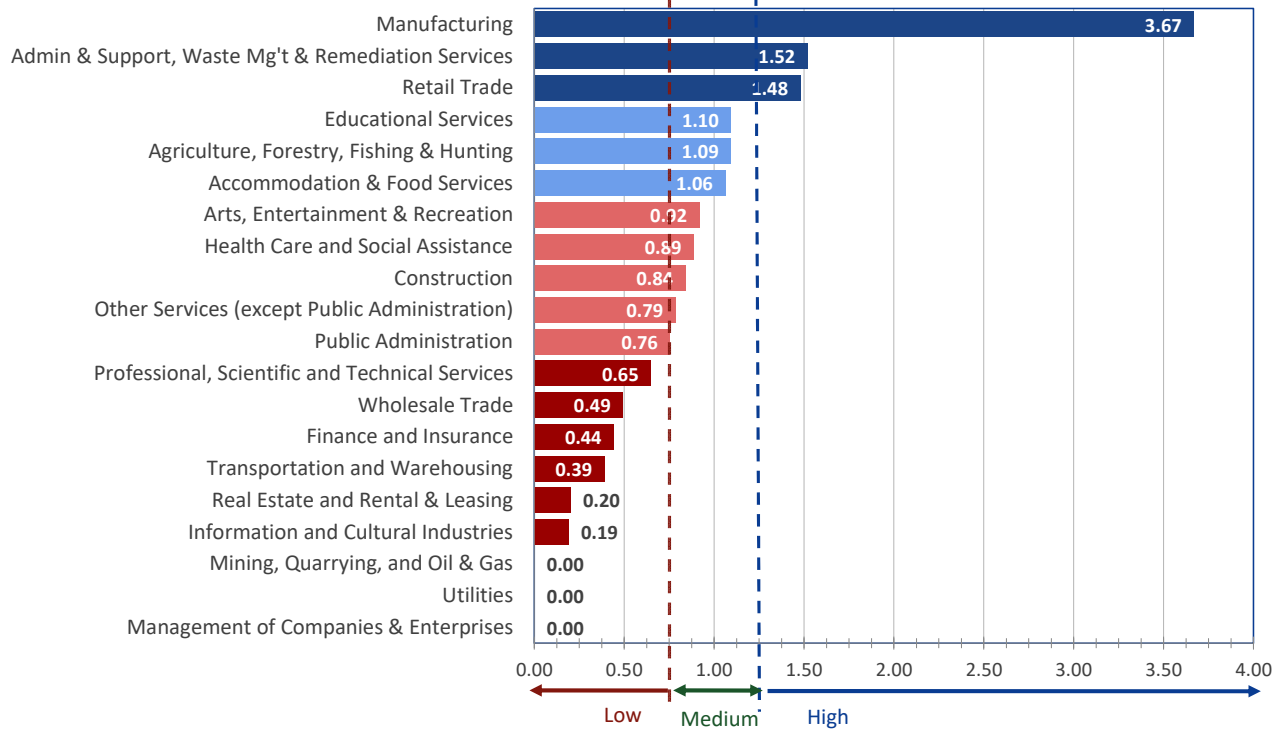
Wholesale Trade ▪ Public Administration ▪ Educational Services ▪ Health Care and Social Assistance ▪ Finance and Insurance ▪ Manufacturing ▪ Other Services (except Public Administration) ▪ Professional, Scientific and Technical Services ▪ Retail Trade industry sectors.

Limited Prospects in:

Mining, Quarrying and Oil and Gas ▪ Transportation and Warehousing ▪ Arts, Entertainment & Recreation ▪ Agriculture, Forestry, Fishing & Hunting ▪ Real Estate and Rental and Leasing ▪ Construction ▪ Accommodation & Food Services ▪ Information and Cultural Industries industry sectors.

MEADOW LAKE-PRINCE ALBERT REGION

Meadow Lake Area Industry Location Quotient to Saskatchewan 2023 Lightcast Dataset



Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Location Quotient Analysis

Compared to Saskatchewan the Meadow Lake Region has:

High industry concentration of employment in:

Manufacturing ▪ Admin and Support, Waste Mtg and Remediation Services ▪ Retail Trade.

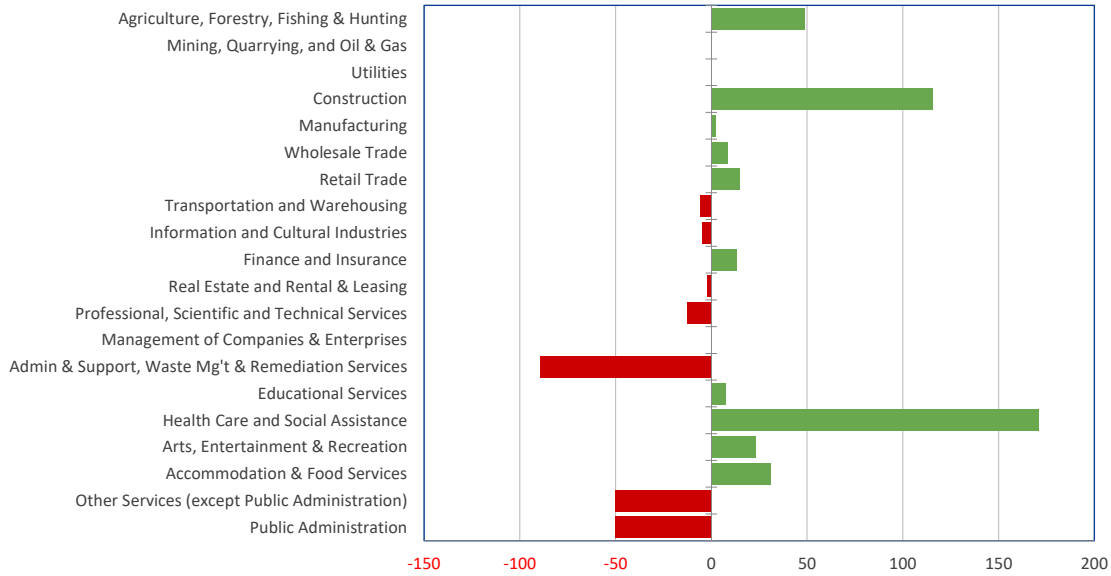
Medium industry concentrations for:

Educational Services ▪ Agriculture, Forestry, Fishing & Hunting ▪ Accommodation & Food Services ▪ Arts, Entertainment & Recreation ▪ Health Care and Social Assistance ▪ Construction ▪ Other Services (except Public Administration) ▪ Public Administration.

Low industry concentrations for:

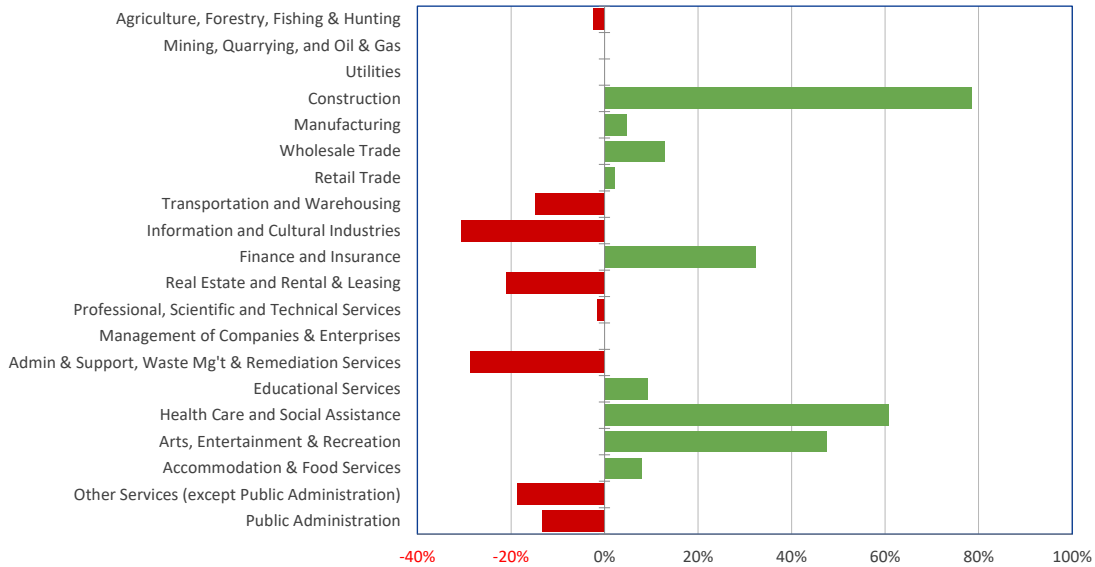
Professional, Scientific and Technical Services ▪ Wholesale Trade ▪ Finance and Insurance ▪ Transportation and Warehousing ▪ Real Estate and Rental and Leasing ▪ Information and Cultural Industries ▪ Mining Quarrying and Oil and Gas ▪ Utilities ▪ Management of Companies & Enterprises.

Meadow Lake Area Shift Share Absolute Regional Effects from 2018 to 2023



Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Shift / Share Analysis

Meadow Lake Area Shift Share Regional Effect in % from 2018 to 2023



Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Shift / Share Analysis

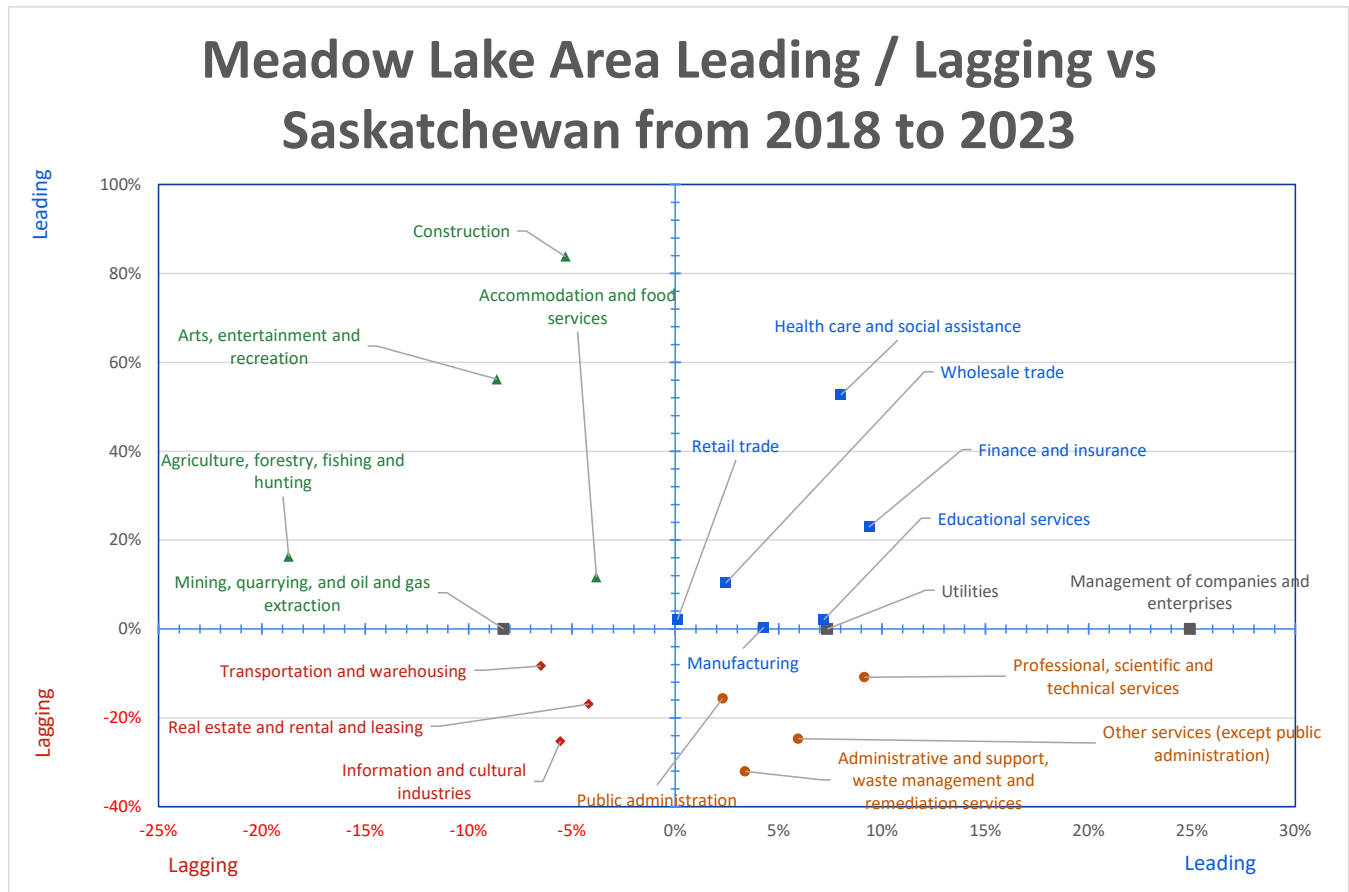
Compared to provincial employment growth Meadow Lake Region has:

A high regional effect with local industry employment growth between 2018 and 2023 in:

Construction ▪ Manufacturing ▪ Wholesale Trade ▪ Retail Trade ▪ Finance and Insurance ▪ Educational Services ▪ Health Care and Social Assistance ▪ Arts, Entertainment & Recreation ▪ Accommodation & Food Services industry sectors.

A positive regional effect with local industry employment growth between 2018 and 2023 in:

Agriculture, Forestry, Fishing & Hunting industry sectors.



Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Leading / Lagging Analysis

Compared to Saskatchewan Meadow Lake region has:

Leading local and Leading Provincial Relative Growth in:

Health Care and Social Assistance ▪ Finance and Insurance ▪ Wholesale Trade ▪ Retail Trade ▪ Educational Services ▪ Manufacturing industry sectors.

Leading local and Lagging Provincial Relative Growth in:

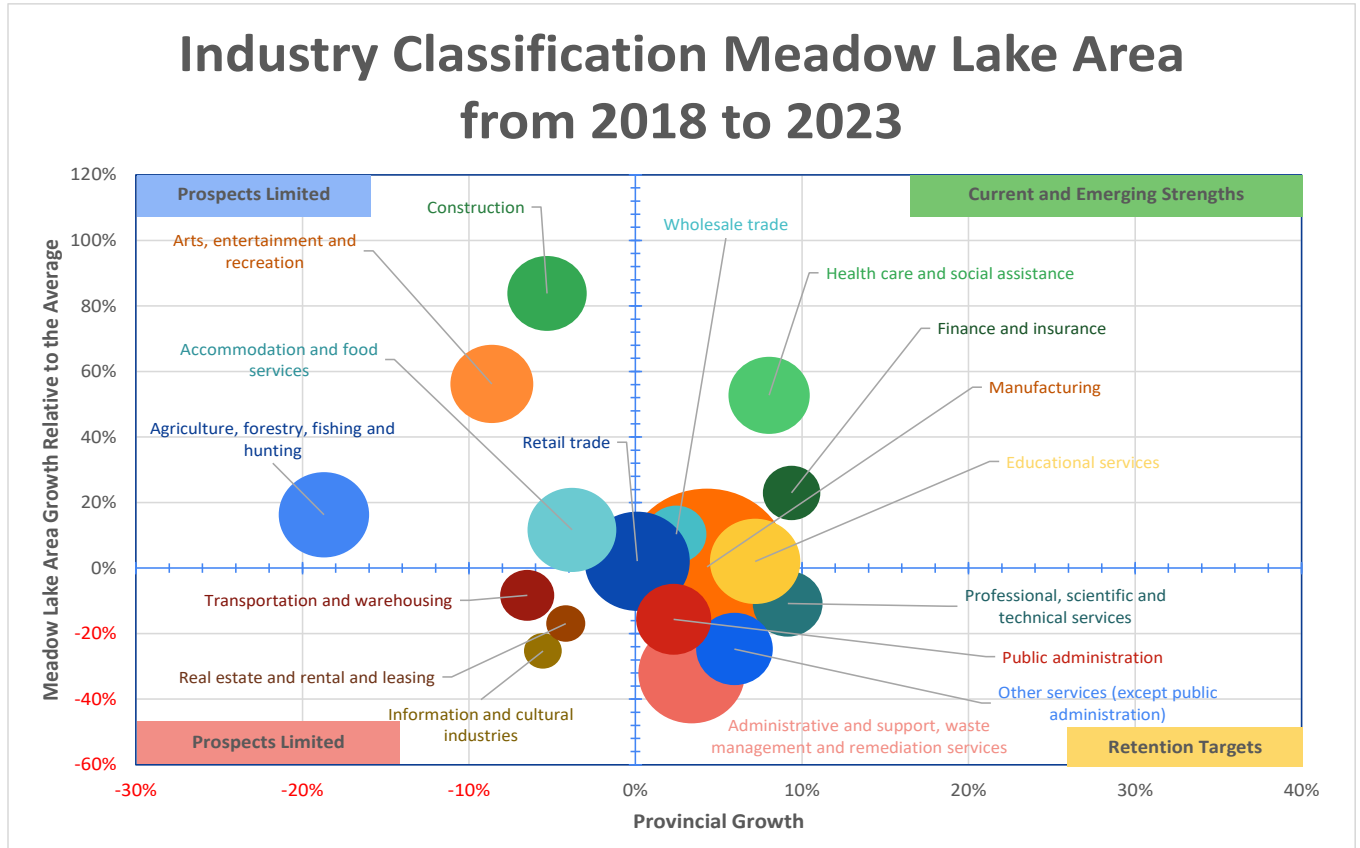
Construction ▪ Arts, Entertainment & Recreation ▪ Agriculture, Forestry, Fishing & Hunting ▪ Accommodation & Food Services industry sectors.

Lagging local and Leading Provincial Relative Growth in:

Professional, Scientific and Technical Services industry sectors ▪ Public Administration ▪ Other Services (except Public Administration) ▪ Admin and Support Waste Mtg and Remediation Services industry sectors.

Lagging local and Lagging Provincial Relative Growth in:

Transportation and Warehousing ▪ Real Estate and Rental and Leasing ▪ Information and Cultural Industries ▪ Accommodation & Food Services.



Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Industry Targeting Classification Analysis

Compared to Saskatchewan Meadow Lake region has:

Current and Emerging Strengths in:

Health Care and Social Assistance ▪ Professional, Scientific and Technical Services ▪ Finance and Insurance ▪ Manufacturing ▪ Educational Services ▪ Utilities ▪ Wholesale Trade industry sectors.

Retention Targets in:

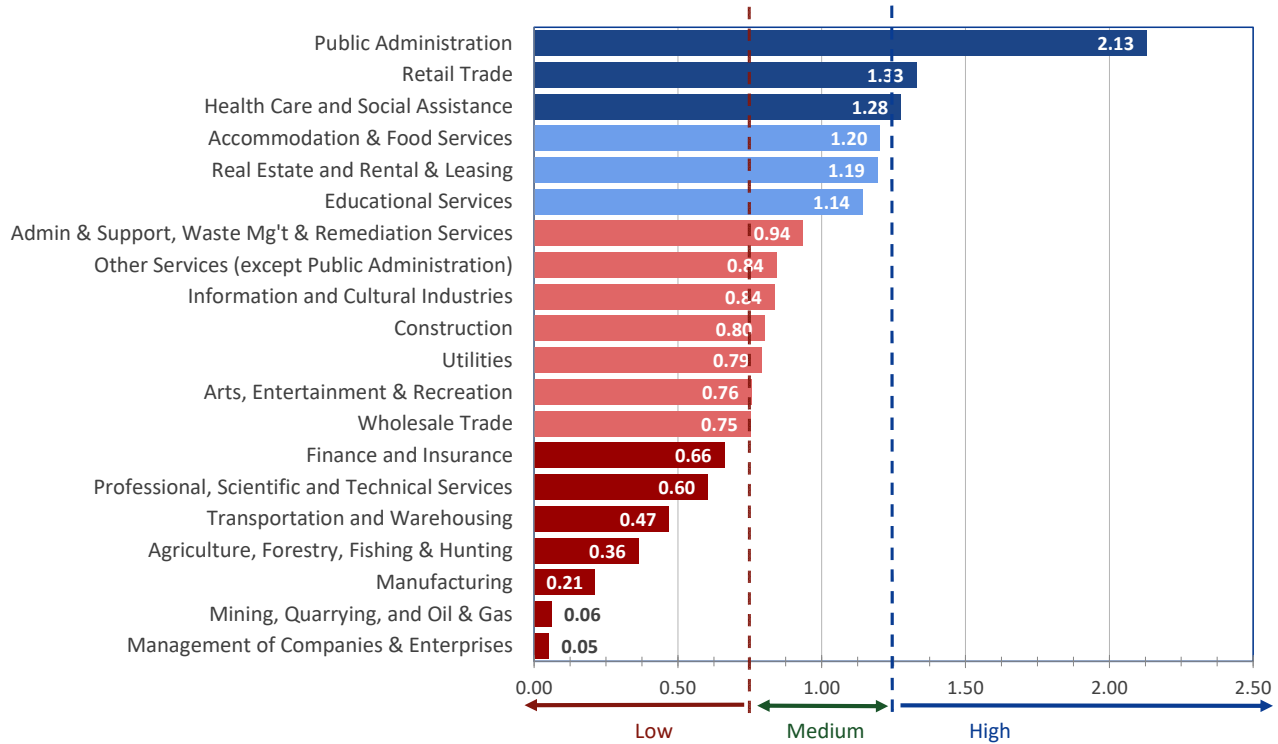
Retail Trade ▪ Professional, Scientific and Technical Services ▪ Public Administration ▪ Educational Services ▪ Other Services (except Public Administration) ▪ Admin and Support Waste Mtg and Remediation Services industry sectors.

Limited Prospects in:

Construction ▪ Arts, Entertainment and Recreation ▪ Accommodation & Food Services ▪ Agriculture Mining, Quarrying and Oil and Gas ▪ Transportation and Warehousing ▪ Real Estate and Rental and Leasing ▪ Information and Cultural Industries industry sectors.

PRINCE ALBERT

Prince Albert CA Industry Location Quotient to Saskatchewan 2023 Lightcast Dataset



Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Location Quotient Analysis

Compared to Saskatchewan the Prince Albert Region has:

High industry concentration of employment in:

Public Administration ▪ Retail Trade ▪ Health Care and Social Assistance.

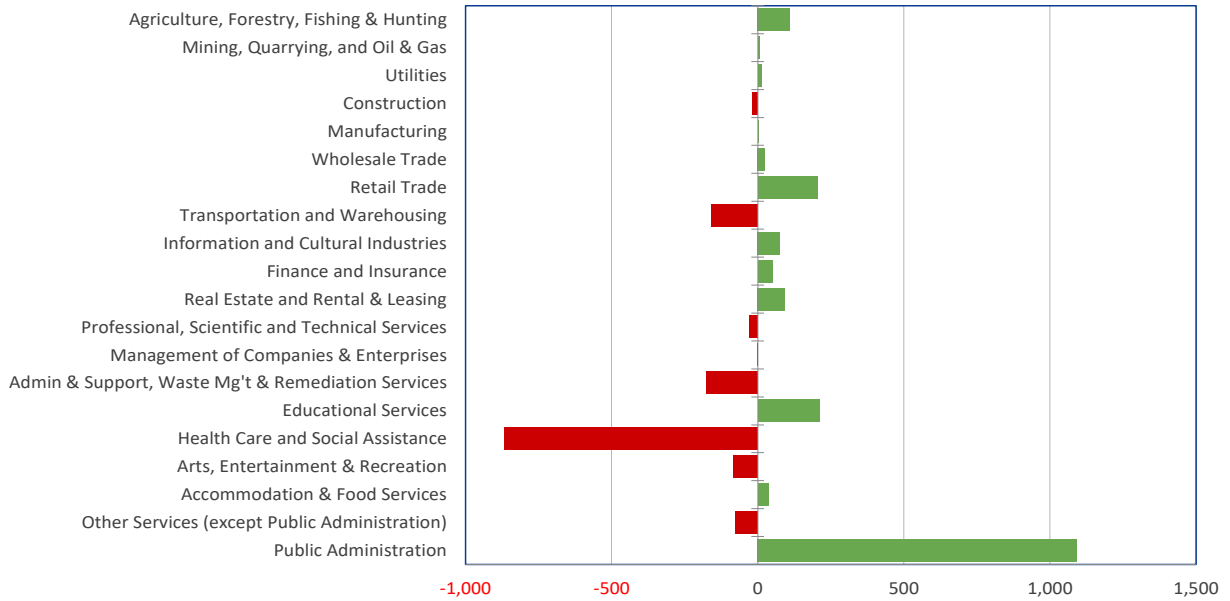
Medium industry concentrations for:

Accommodation & Food Services ▪ Real Estate and Rental and Leasing ▪ Educational Services ▪ Admin and Support, Waste Mtg and Remediation Services ▪ Other Services (except Public Administration) ▪ Information and Cultural Industries ▪ Construction ▪ Utilities ▪ Arts, Entertainment & Recreation ▪ Wholesale Trade

Low industry concentrations for:

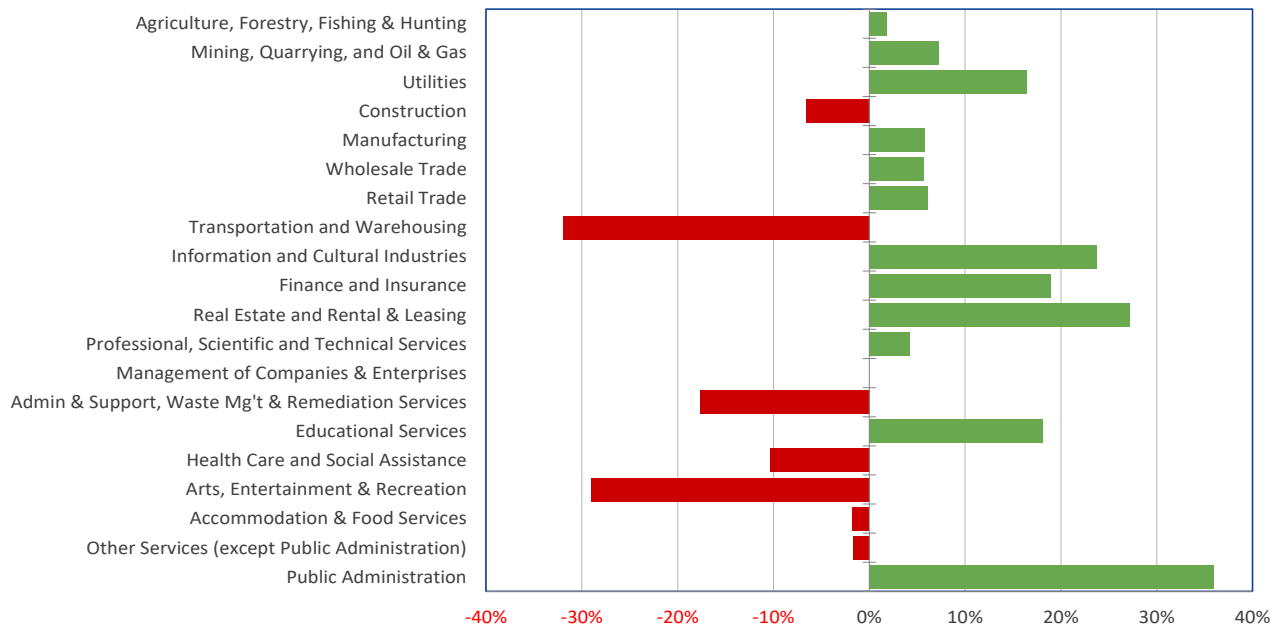
Finance and Insurance ▪ Professional, Scientific and Technical Services Agriculture, Forestry, Fishing & Hunting ▪ Transportation and Warehousing Management of Companies & Enterprises ▪ Agriculture, Forestry, Fishing & Hunting ▪ Manufacturing ▪ Mining, Quarrying and Oil and Gas ▪ Management of Companies & Enterprises.

Prince Albert CA Shift Share Absolute Regional Effects from 2018 to 2023



Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Shift / Share Analysis

Prince Albert CA Shift Share Regional Effect in % from 2018 to 2023



Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Shift / Share Analysis

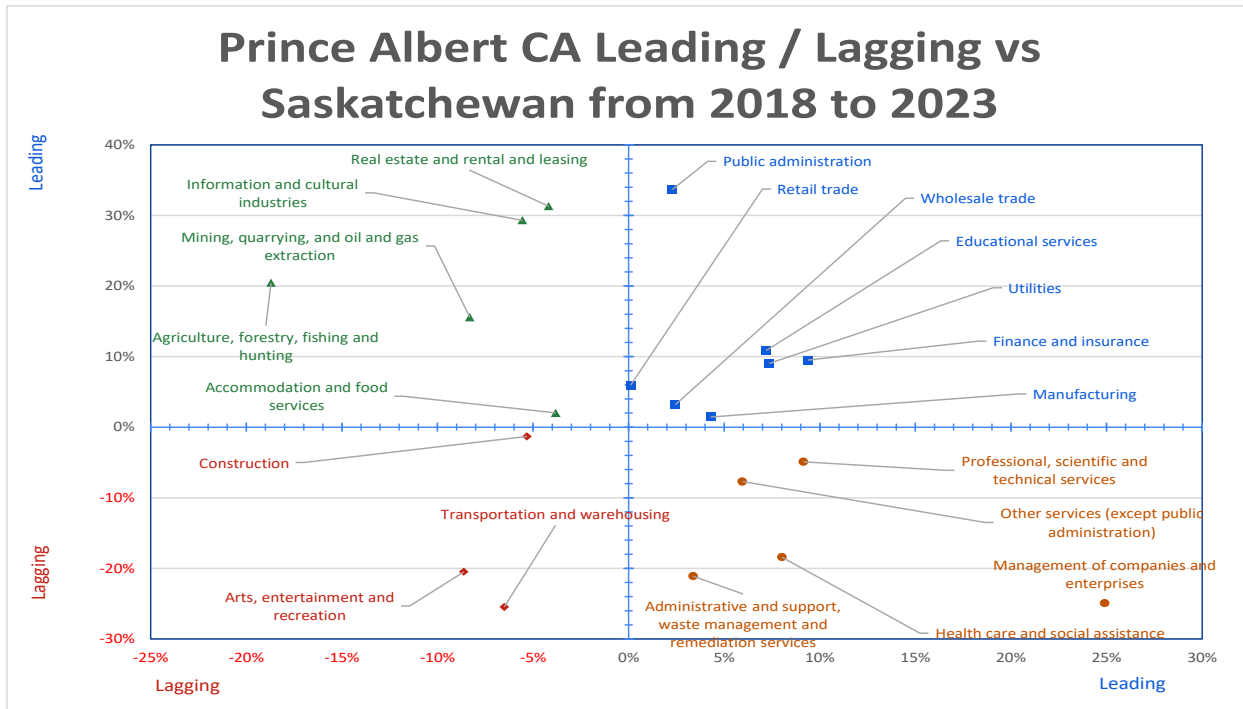
Compared to provincial employment growth Prince Albert Region has:

A high regional effect with local industry employment growth between 2018 and 2023 in:

- Agriculture, Forestry, Fishing & Hunting
- Mining, Quarrying and Oil and Gas sectors
- Utilities
- Wholesale Trade
- Retail Trade
- Information and Cultural Industries
- Finance and Insurance
- Real Estate and Rental and Leasing
- Educational Services
- Accommodation & Food Services
- Public Administration industry sectors.

A positive regional effect with local industry employment growth between 2018 and 2023 in:

- Manufacturing
- Professional, Scientific and Technical Services industry sectors.



Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Leading / Lagging Analysis

Compared to Saskatchewan Prince Albert region has:

Leading local and Leading Provincial Relative Growth in:

- Public Administration
- Educational Services
- Finance and Insurance
- Utilities
- Retail Trade
- Wholesale Trade
- Manufacturing industry sectors.

Leading local and Lagging Provincial Relative Growth in:

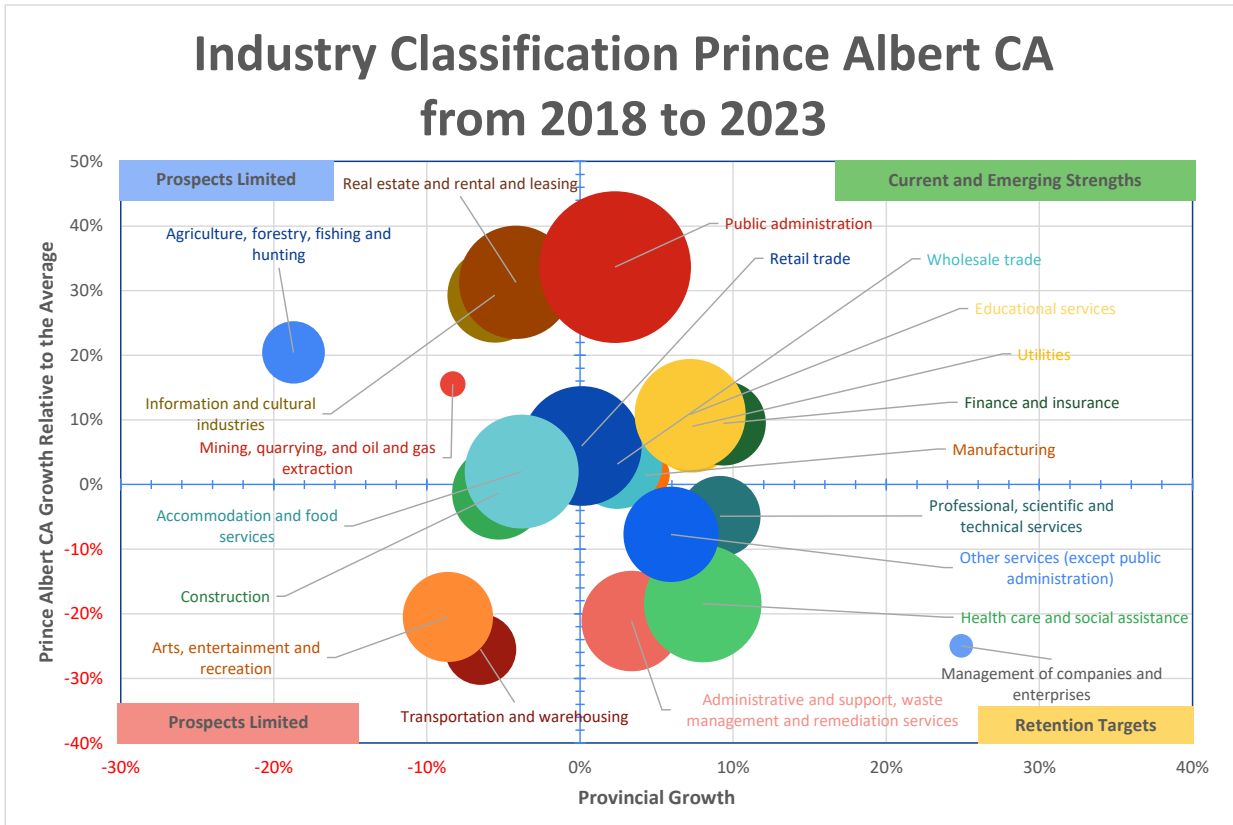
- Real Estate and Rental and Leasing
- Information and Cultural Industries
- Mining, Quarrying and Oil and Gas
- Agriculture, Forestry, Fishing & Hunting
- Accommodation & Food Services industry sectors.

Lagging local and Leading Provincial Relative Growth in:

- Professional, Scientific and Technical Services
- Other Services (except Public Administration)
- Health Care and Social Assistance
- Administrative and Support, Waste Management and Remediation Services
- Management of Companies & Enterprises industry sectors.

Lagging local and Lagging Provincial Relative Growth in:

- Construction
- Arts, Entertainment & Recreation industry sectors.
- Transportation and Warehousing



Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Industry Targeting Classification Analysis

Compared to Saskatchewan Prince Albert region has:

Current and Emerging Strengths in:

- Public Administration
- Educational Services
- Finance and Insurance
- Wholesale Trade
- Manufacturing industry sectors.

Retention Targets in:

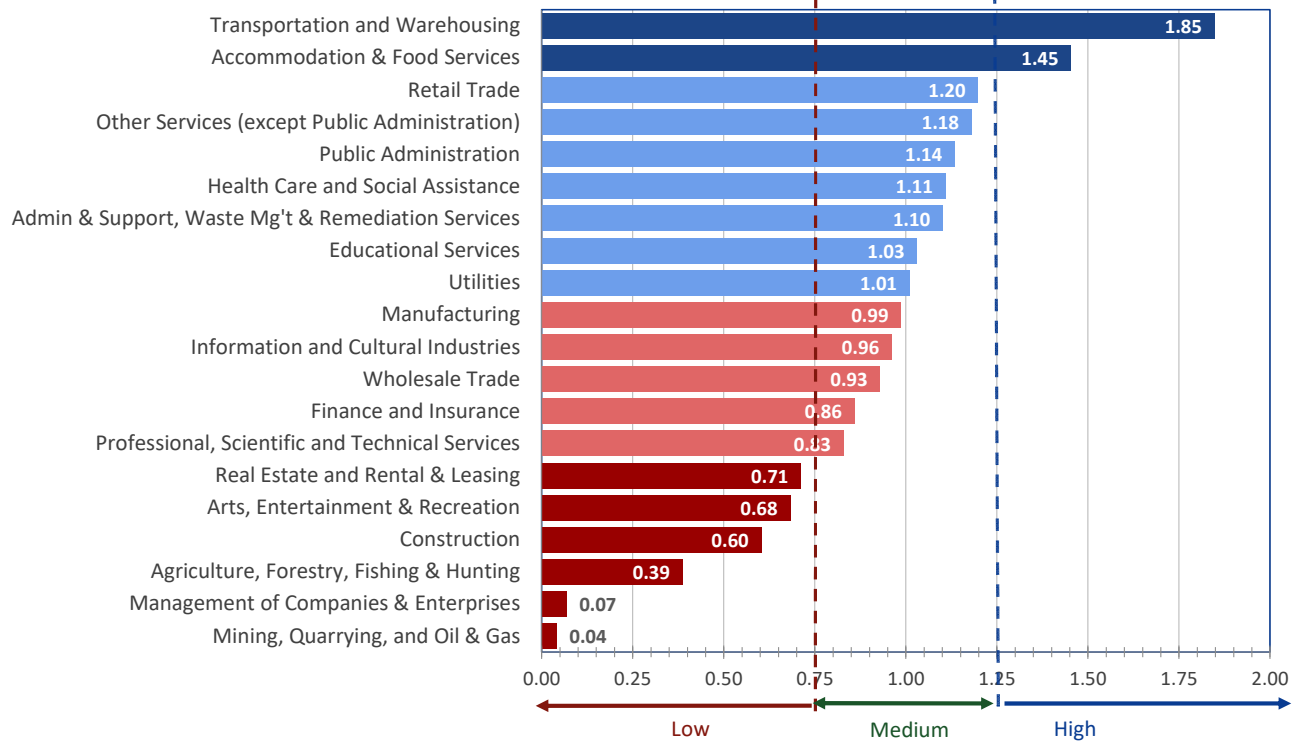
- Professional, Scientific and Technical Services
- Other Services (except Public Administration)
- Health Care and Social Assistance
- Admin and Support Waste Mtg and Remediation Services
- Management of Companies & Enterprises industry sectors.

Limited Prospects in:

- Real Estate and Rental and Leasing
- Information and Cultural Industries
- Mining, Quarrying and Oil and Gas
- Accommodation & Food Services
- Construction
- Arts, Entertainment & Recreation
- Transportation and Warehousing industry sectors.

MOOSE JAW REGION

Moose Jaw CA Industry Location Quotient to Saskatchewan 2023 Lightcast Dataset



Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Location Quotient Analysis

Compared to Saskatchewan the Moose Jaw Region has:

High industry concentration of employment in:

Transportation and Warehousing ▪ Accommodation & Food Services.

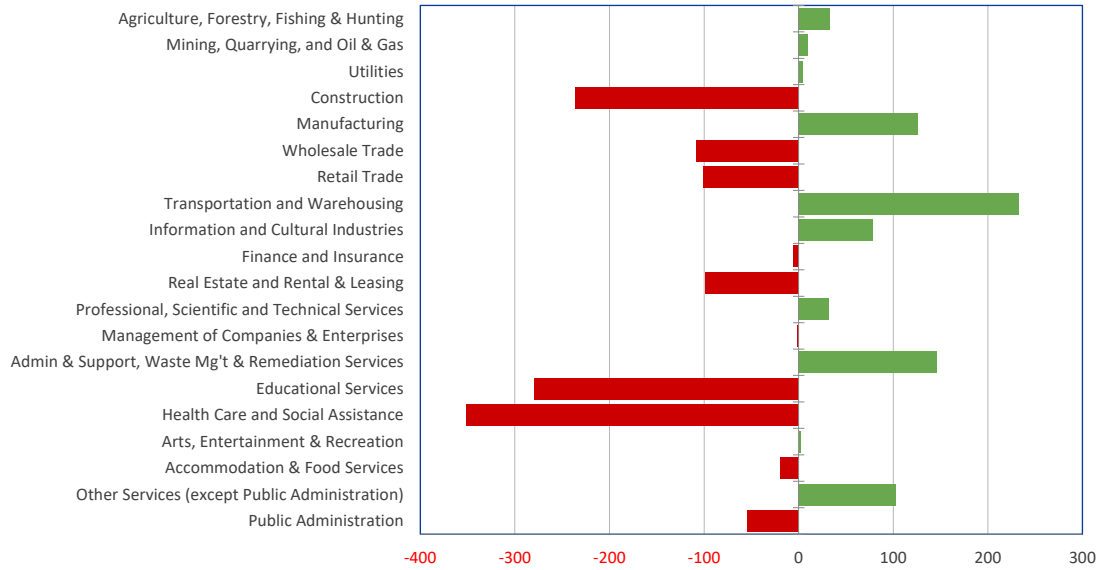
Medium industry concentrations for:

Retail Trade ▪ Other Services (except Public Administration) ▪ Public Administration ▪ Health Care and Social Assistance ▪ Admin and Support, Waste Mtg and Remediation Services ▪ Educational Services ▪ Utilities ▪ Manufacturing ▪ Information and Cultural Industries ▪ Wholesale Trade ▪ Finance and Insurance ▪ Professional, Scientific and Technical Services.

Low industry concentrations for:

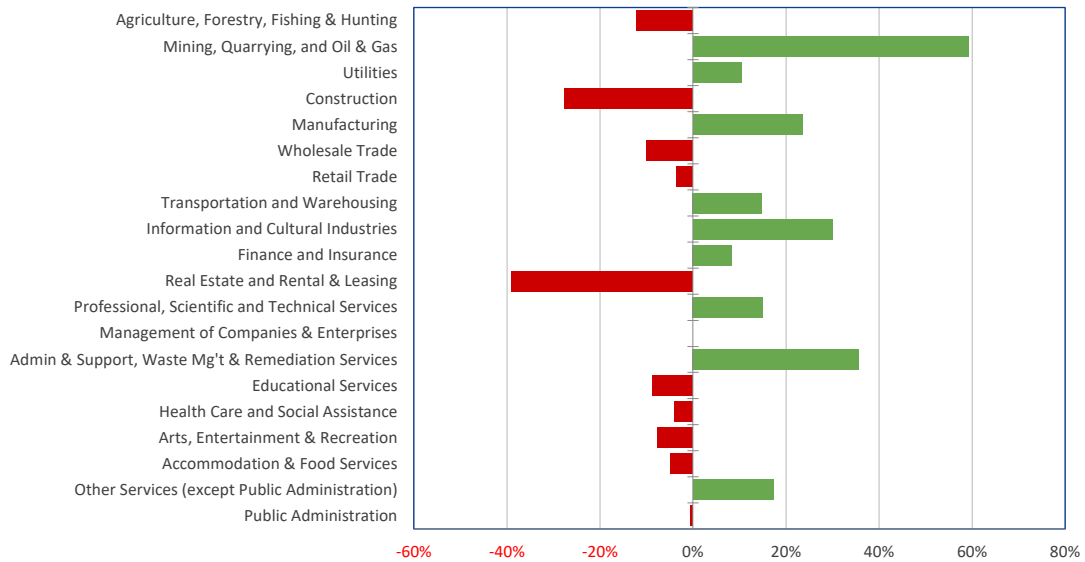
Real Estate and Rental and Leasing ▪ Arts, Entertainment & Recreation ▪ Construction ▪ Agriculture, Forestry, Fishing & Hunting ▪ Management of Companies & Enterprises ▪ Mining, Quarrying and Oil and Gas.

Moose Jaw CA Shift Share Absolute Regional Effects from 2018 to 2023



Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Shift / Share Analysis

Moose Jaw CA Shift Share Regional Effect in % from 2018 to 2023



Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Shift / Share Analysis

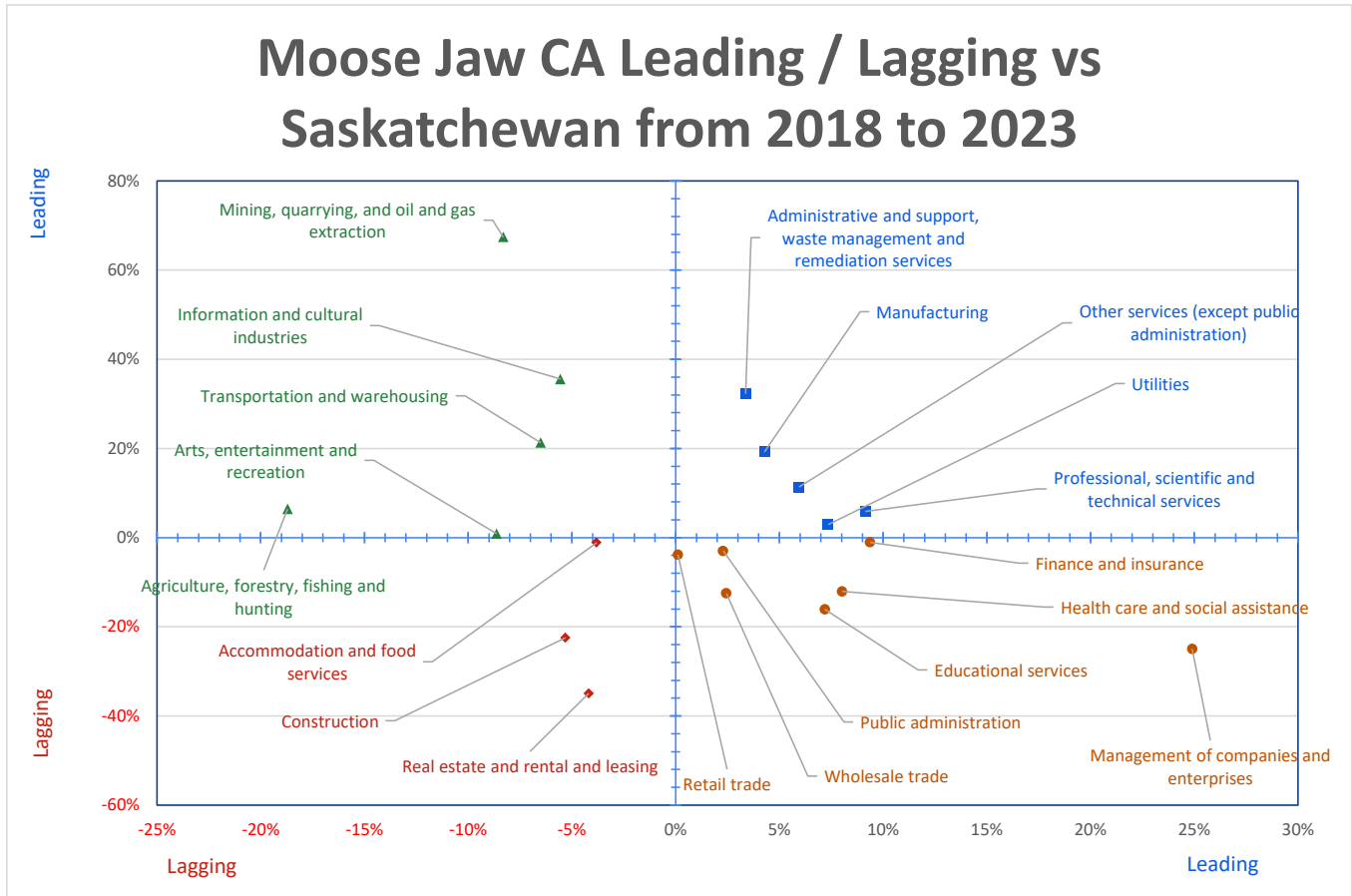
Compared to provincial employment growth Moose Jaw Region has:

A high regional effect with local industry employment growth between 2018 and 2023 in:

Mining, Quarrying and Oil and Gas sectors ■ Utilities ■ Manufacturing ■ Transportation and Warehousing ■ Information and Cultural Industries ■ Administrative and Support, Waste Management and Remediation Services ■ Other Services (except Public Administration).

A positive regional effect with local industry employment growth between 2018 and 2023 in:

Agriculture, Forestry, Fishing & Hunting ■ Arts, Entertainment & Recreation industry sectors ■ Finance and Insurance.



Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Leading / Lagging Analysis

Compared to Saskatchewan Moose Jaw region has:

Leading local and Leading Provincial Relative Growth in:

Administrative and Support, Waste Management and Remediation Services ■ Manufacturing ■ Other Services (except Public Administration) ■ Professional, Scientific and Technical Services ■ Utilities industry sectors.

Leading local and Lagging Provincial Relative Growth in:

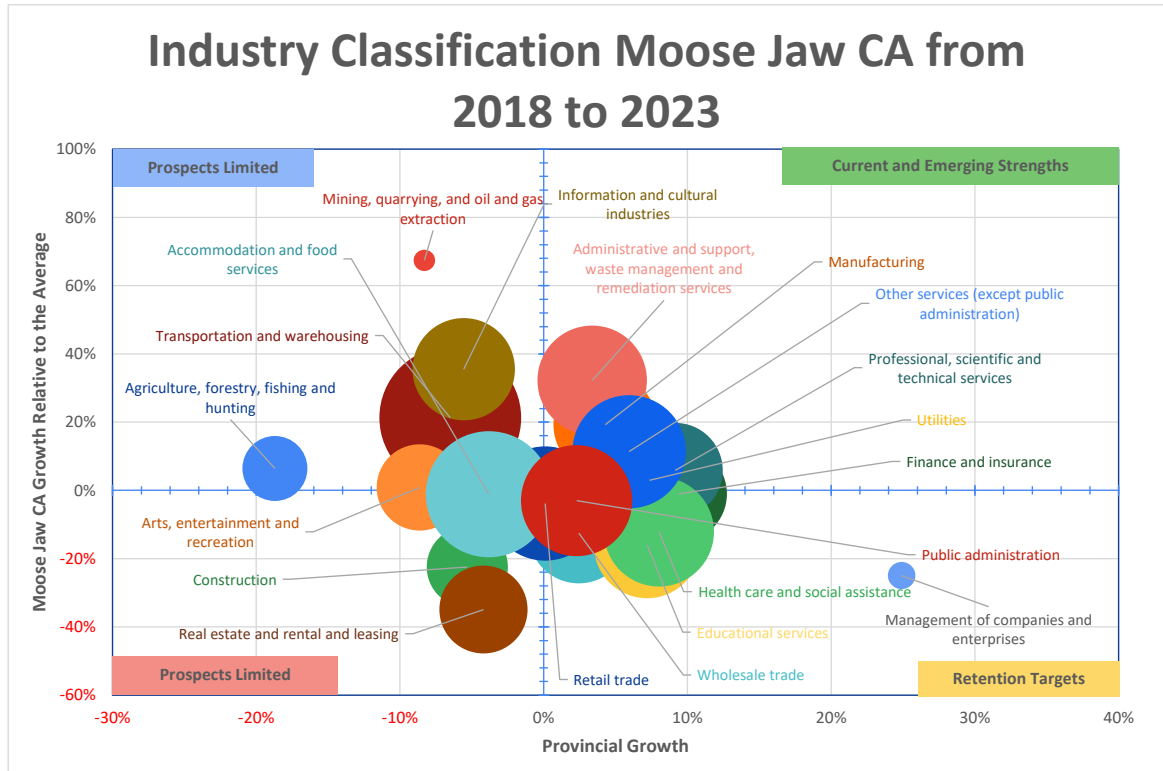
Mining, Quarrying and Oil and Gas ■ Information and Cultural Industries ■ Transportation and Warehousing ■ Agriculture, Forestry, Fishing & Hunting ■ Arts, Entertainment & Recreation industry sectors.

Lagging local and Leading Provincial Relative Growth in:

Finance and Insurance ■ Public Administration ■ Retail Trade ■ Wholesale Trade ■ Health Care and Social Assistance ■ Educational Services Management of Companies & Enterprises industry sectors.

Lagging local and Lagging Provincial Relative Growth in:

Accommodation & Food Services ■ Construction ■ Real Estate and Rental and Leasing industry sectors.



Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Industry Targeting Classification Analysis

Compared to Saskatchewan Moose Jaw region has:

Current and Emerging Strengths in:

Admin and Support Waste Mtg and Remediation Services ■ Manufacturing ■ Other Services (except Public Administration) ■ Professional, Scientific and Technical Services ■ Utilities ■ Finance and Insurance industry sectors.

Retention Targets in:

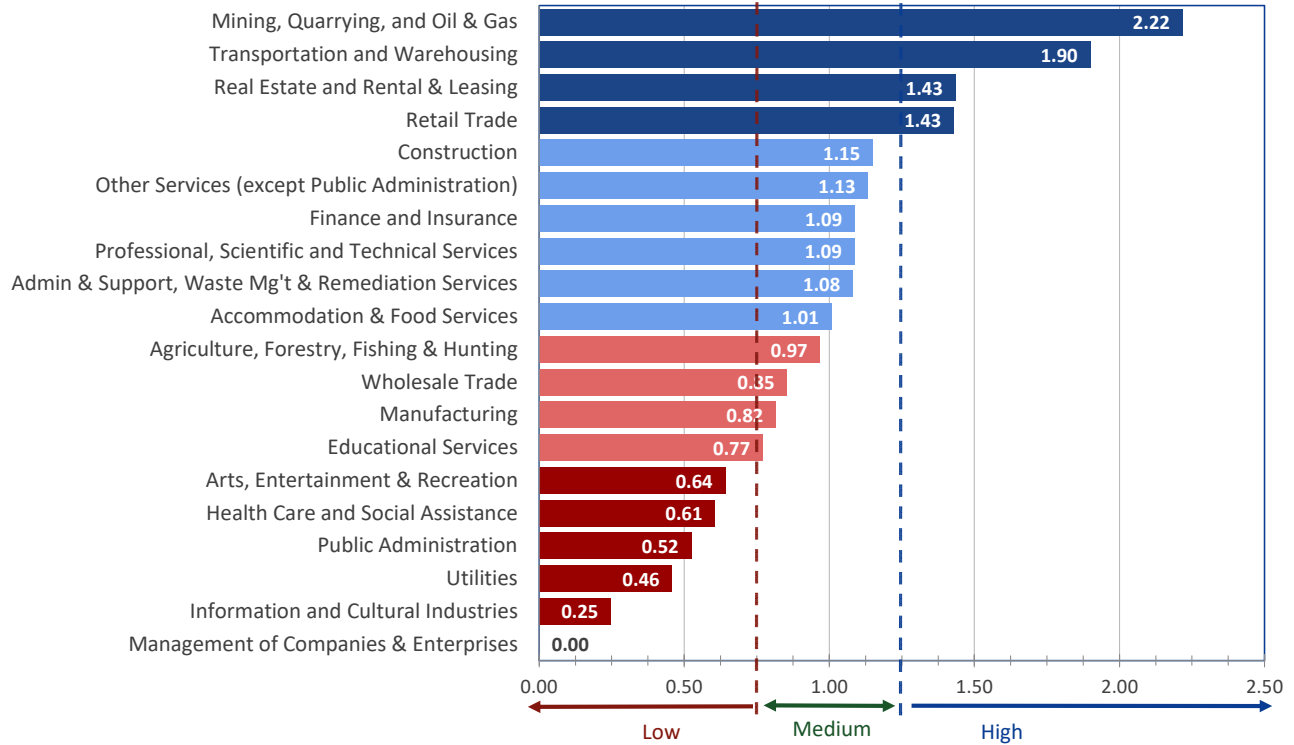
Public Administration ■ Retail Trade ■ Wholesale Trade ■ Health Care and Social Assistance ■ Educational Services ■ Finance and Insurance ■ Management of Companies & Enterprises industry sectors.

Limited Prospects in:

Mining, Quarrying and Oil and Gas ■ Accommodation & Food Services ■ Information and Cultural Industries ■ Transportation and Warehousing ■ Agriculture, Forestry, Fishing & Hunting ■ Arts, Entertainment & Recreation ■ Construction ■ Real Estate and Rental and Leasing industry sectors.

LLOYDMINSTER - NORTH BATTLEFORD REGION

North Battleford and Lloydminster Area Industry Location Quotient to Saskatchewan 2023 Lightcast Dataset



Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Location Quotient Analysis

Compared to Saskatchewan the North Battleford and Lloydminster Region has:

High industry concentration of employment in:

Mining, Quarrying and Oil and Gas ■ Transportation and Warehousing ■ Real Estate and Rental and Leasing ■ Retail Trade.

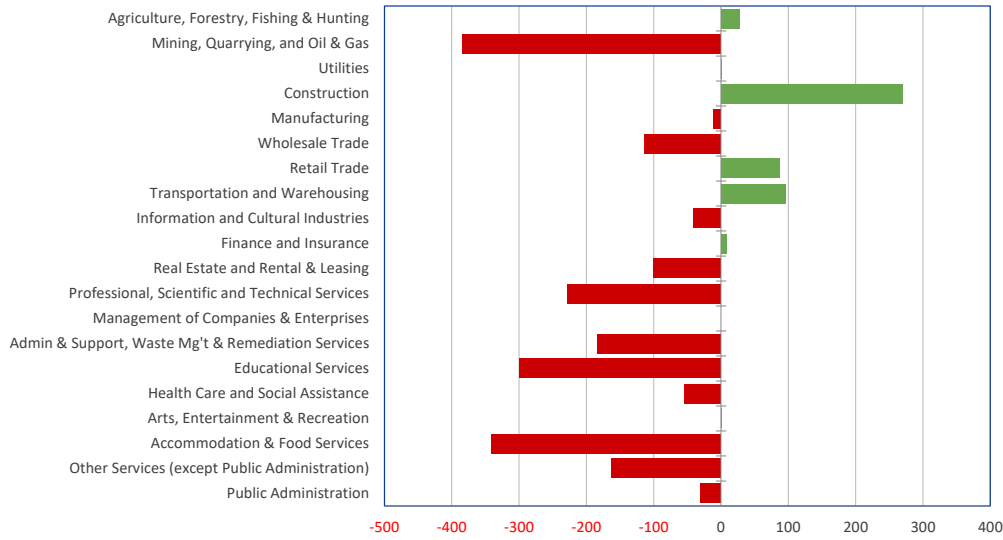
Medium industry concentrations for:

Construction ■ Other Services (except Public Administration) ■ Finance and Insurance ■ Professional, Scientific and Technical Services ■ Admin and Support, Waste Mtg and Remediation Services ■ Accommodation & Food Services ■ Agriculture, Forestry, Fishing & Hunting ■ Wholesale Trade ■ Manufacturing ■ Educational Services.

Low industry concentrations for:

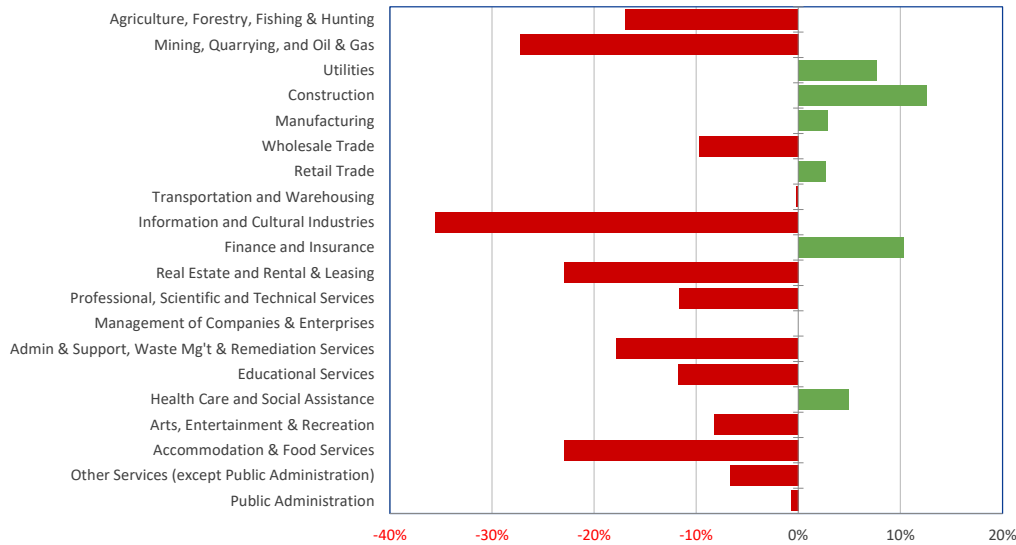
Arts, Entertainment & Recreation ■ Health Care and Social Assistance ■ Public Administration ■ Utilities ■ Information and Cultural Industries.

North Battleford and Lloydminster Area Shift Share Absolute Regional Effects from 2018 to 2023



Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Shift / Share Analysis

North Battleford and Lloydminster Area Shift Share Regional Effect in % from 2018 to 2023



Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Shift / Share Analysis

Compared to provincial employment growth North Battleford and Lloydminster Region has:

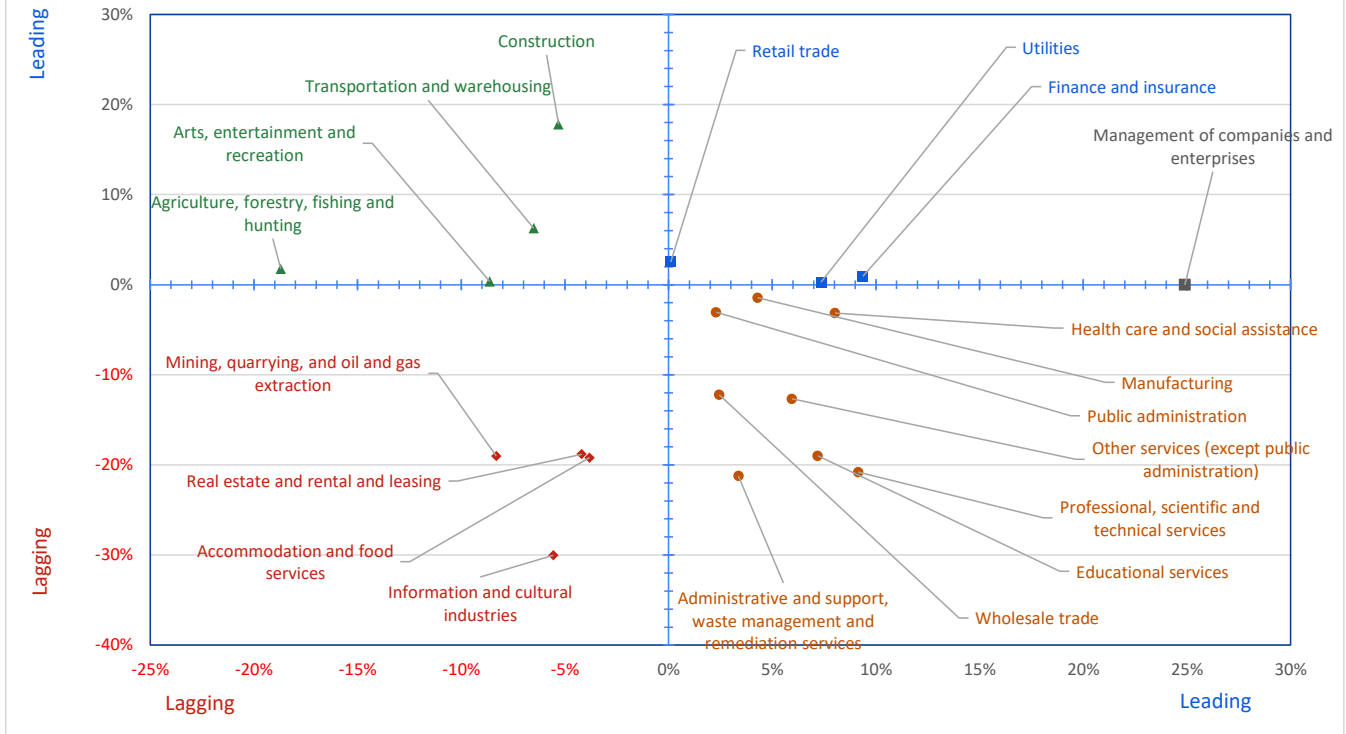
A high regional effect with local industry employment growth between 2018 and 2023 in:

Construction ■ Retail Trade ■ Finance and Insurance industry sectors.

A positive regional effect with local industry employment growth between 2018 and 2023 in:

Agriculture, Forestry, Fishing & Hunting ■ Utilities ■ Manufacturing ■ Transportation and Warehousing ■ Health Care and Social Assistance ■

North Battleford and Lloydminster Area Leading / Lagging vs Saskatchewan from 2018 to 2023



Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Leading / Lagging Analysis

Compared to Saskatchewan North Battleford and Lloydminster region has:

Leading local and Leading Provincial Relative Growth in:

Retail Trade ■ Finance and Insurance ■ Utilities industry sectors.

Leading local and Lagging Provincial Relative Growth in:

Construction ■ Transportation and Warehousing ■ Agriculture, Forestry, Fishing & Hunting ■ Arts, Entertainment & Recreation industry sectors.

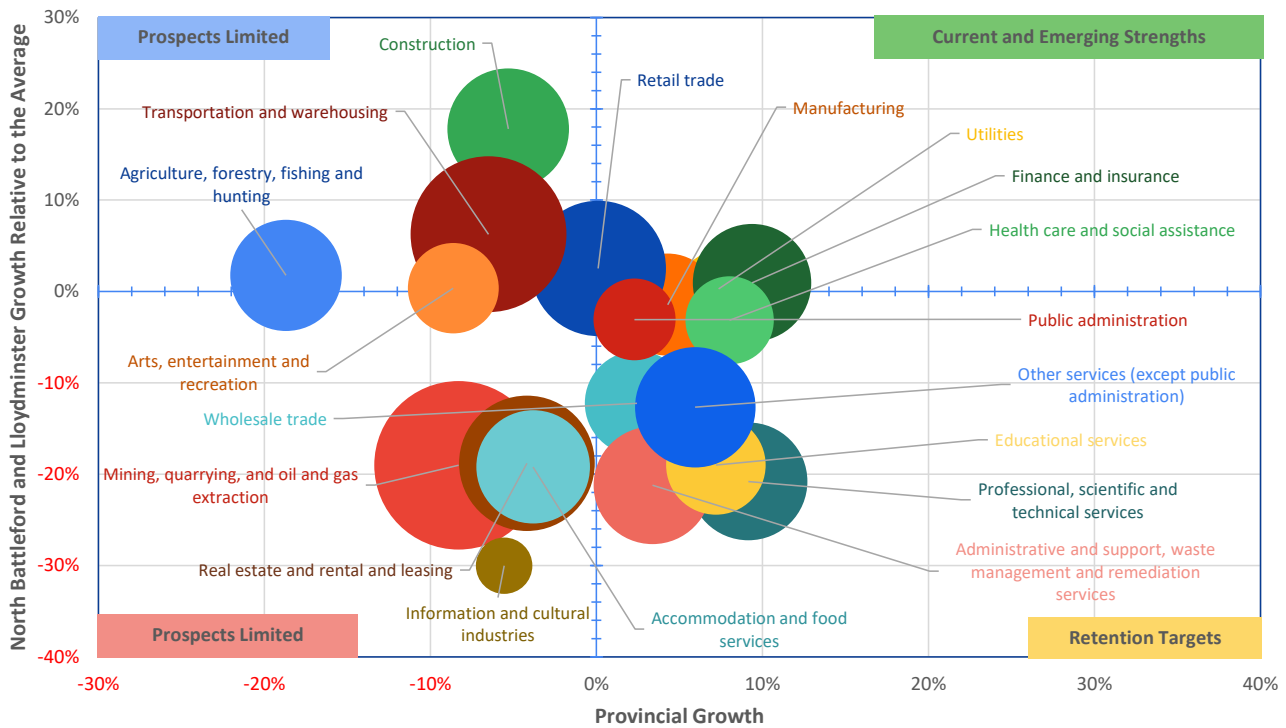
Lagging local and Leading Provincial Relative Growth in:

Manufacturing ■ Health Care and Social Assistance ■ Public Administration ■ Wholesale Trade ■ Other Services (except Public Administration) ■ Educational Services ■ Professional, Scientific and Technical Services ■ Administrative and Support, Waste Management and Remediation Services industry sectors.

Lagging local and Lagging Provincial Relative Growth in:

Mining, Quarrying and Oil and Gas ■ Real Estate and Rental and Leasing ■ Accommodation & Food Services ■ Information and Cultural Industries industry sectors.

Industry Classification North Battleford and Lloydminster Area from 2018 to 2023



Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Industry Targeting Classification Analysis

Compared to Saskatchewan North Battleford and Lloydminster region has:

Current and Emerging Strengths in:

Retail Trade ■ Finance and Insurance ■ Manufacturing ■ Utilities ■ Health Care and Social Assistance industry sectors.

Scientific and Technical Services ■ industry sectors.

Retention Targets in:

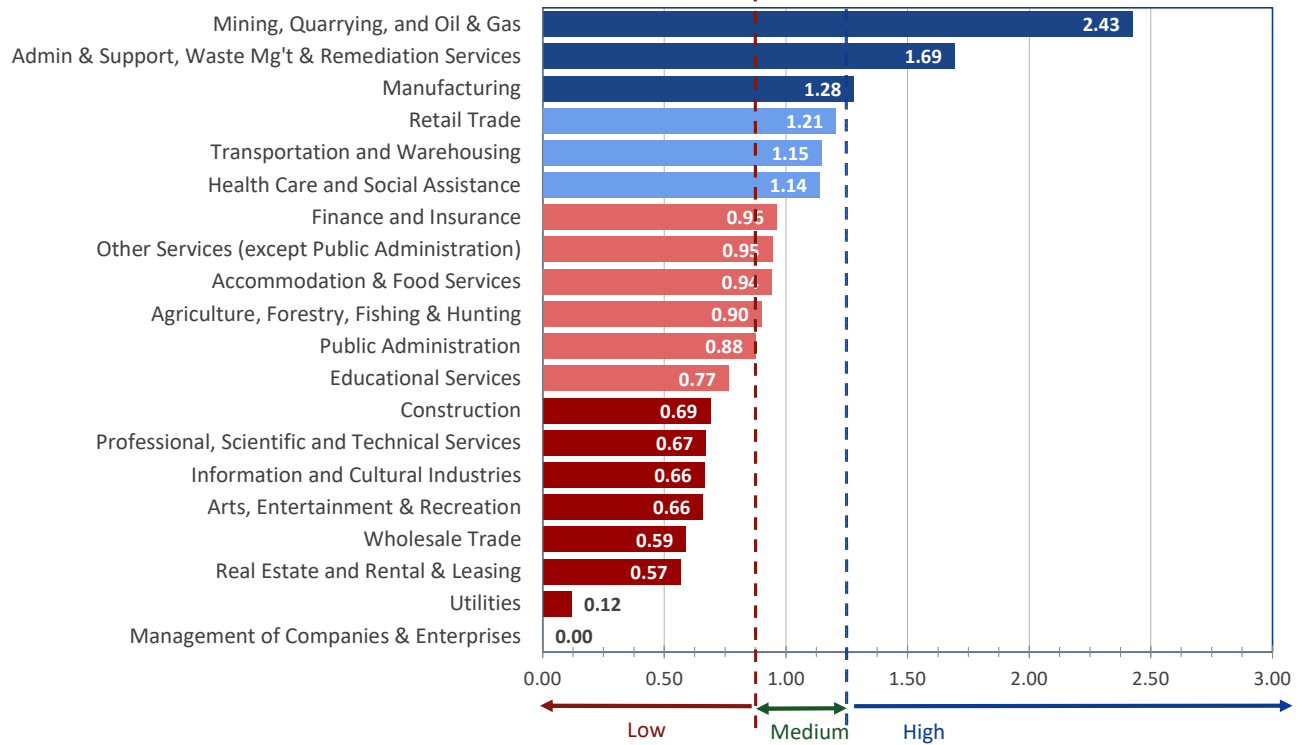
Public Administration ■ Other Services (except Public Administration) ■ Wholesale Trade ■ Educational Services ■ Professional, Scientific and Technical Services ■ Finance and Insurance ■ Admin and Support Waste Mtg and Remediation Services industry sectors.

Limited Prospects in:

Construction ■ Transportation and Warehousing ■ Agriculture, Forestry, Fishing & Hunting ■ Arts, Entertainment & Recreation ■ Mining, Quarrying and Oil and Gas ■ Real Estate and Rental and Leasing ■ Accommodation & Food Services ■ Information and Cultural Industries industry sectors.

YORKTON REGION

Yorkton Area Industry Location Quotient to Saskatchewan 2023 Lightcast Dataset



Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Location Quotient Analysis

Compared to Saskatchewan the Yorkton Region has:

High industry concentration of employment in:

Mining, Quarrying and Oil and Gas ▪ Admin and Support, Waste Mtg and Remediation Services ▪ Manufacturing.

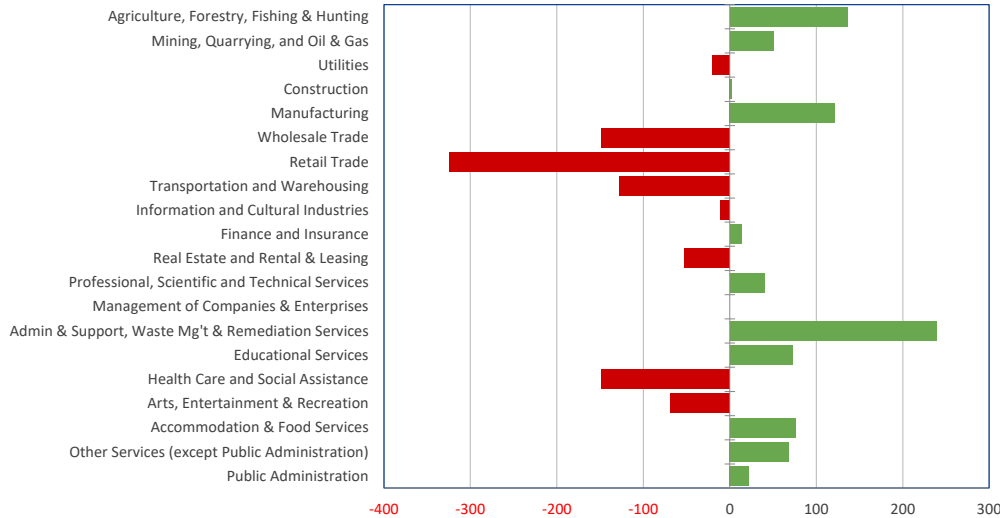
Medium industry concentrations for:

Retail Trade ▪ Transportation and Warehousing ▪ Health Care and Social Assistance ▪ Finance and Insurance ▪ Other Services (except Public Administration) ▪ Accommodation & Food Services ▪ Agriculture, Forestry, Fishing & Hunting ▪ Public Administration.

Low industry concentrations for:

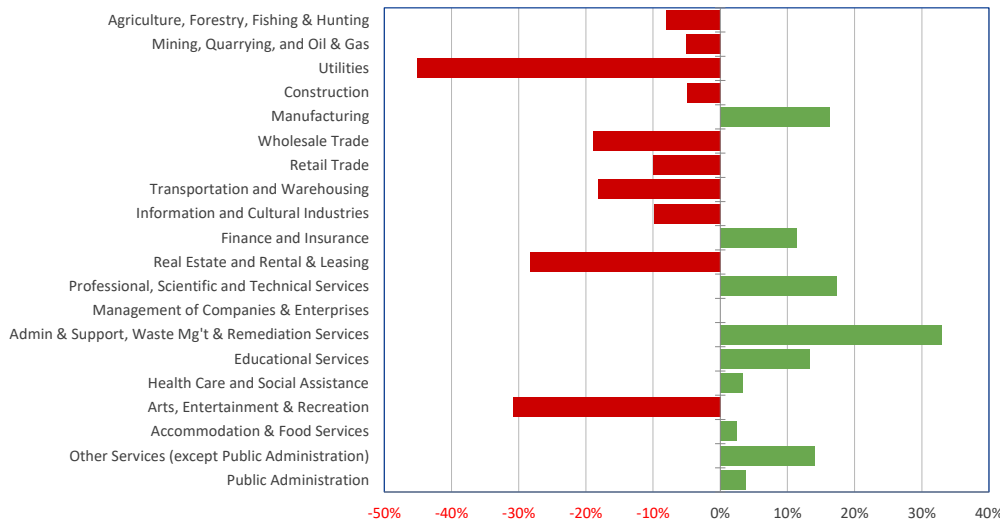
Educational Services ▪ Construction ▪ Professional, Scientific and Technical Services ▪ Information and Cultural Industries ▪ Arts, Entertainment & Recreation ▪ Wholesale Trade ▪ Real Estate and Rental and Leasing ▪ Utilities ▪ Management of Companies & Enterprises.

Yorkton Area Shift Share Absolute Regional Effects from 2018 to 2023



Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Shift / Share Analysis

Yorkton Area Shift Share Regional Effect in % from 2018 to 2023



Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Shift / Share Analysis

Compared to provincial employment growth Yorkton Region has:

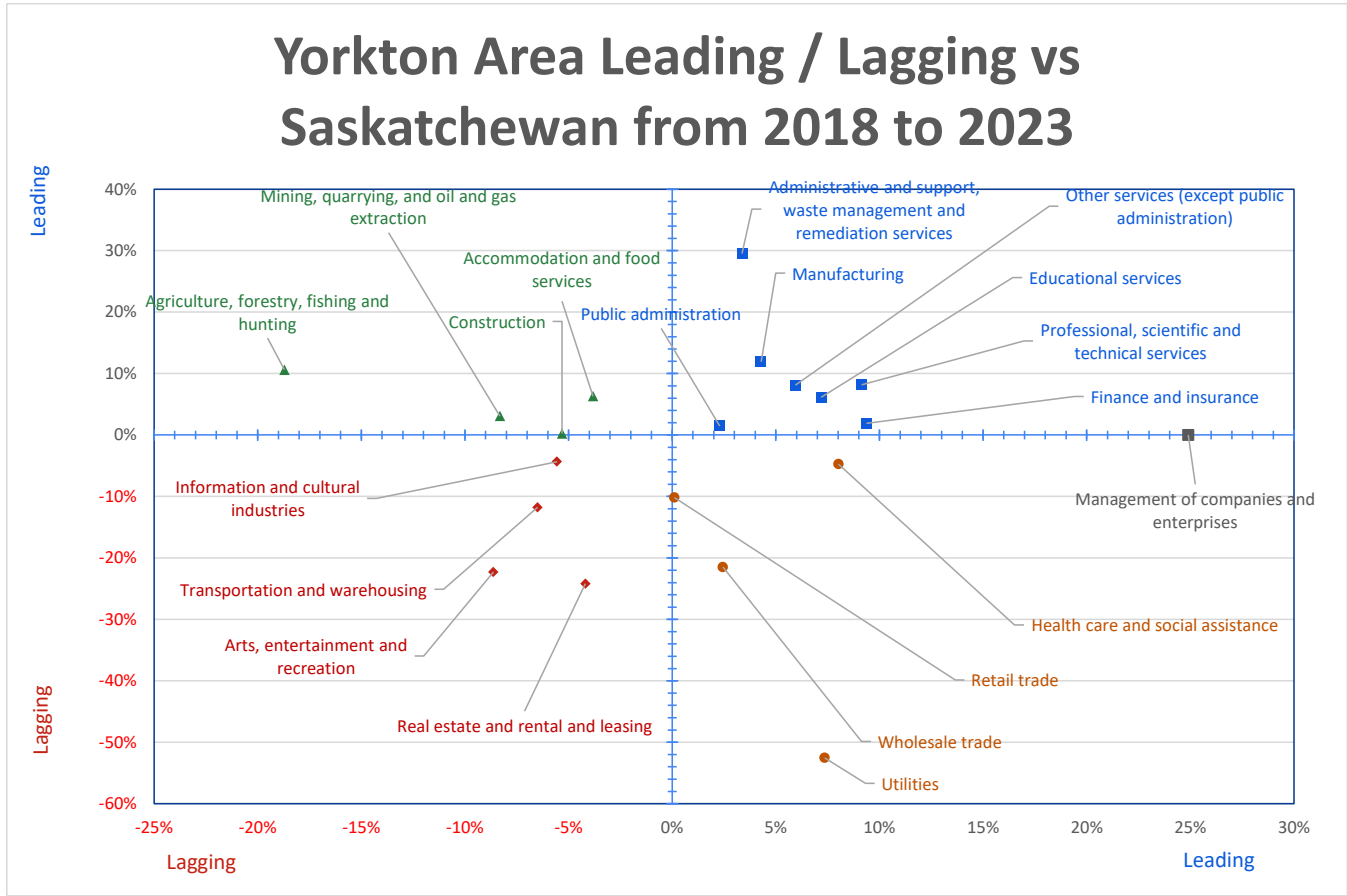
A high regional effect with local industry employment growth between 2018 and 2023 in:

- Manufacturing
- Finance and Insurance
- Transportation and Warehousing
- Professional, Scientific and Technical Services
- Administrative and Support, Waste Management and Remediation Services
- Educational Services

▪ Accommodation & Food Services ▪ Other Services (except Public Administration) ▪ Public Administration industry sectors.

A positive regional effect with local industry employment growth between 2018 and 2023 in:

Agriculture, Forestry, Fishing & Hunting ▪ Mining, Quarrying and Oil and Gas sectors ▪ Health Care and Social Assistance industry sectors.



Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Leading / Lagging Analysis

Compared to Saskatchewan Yorkton region has:

Leading local and Leading Provincial Relative Growth in:

Administrative and Support, Waste Management and Remediation Services ▪ Manufacturing ▪ Other Services (except Public Administration) ▪ Professional, Scientific and Technical Services ▪ Educational Services ▪ Educational Services industry ▪ Public Administration industry sectors.

Leading local and Lagging Provincial Relative Growth in:

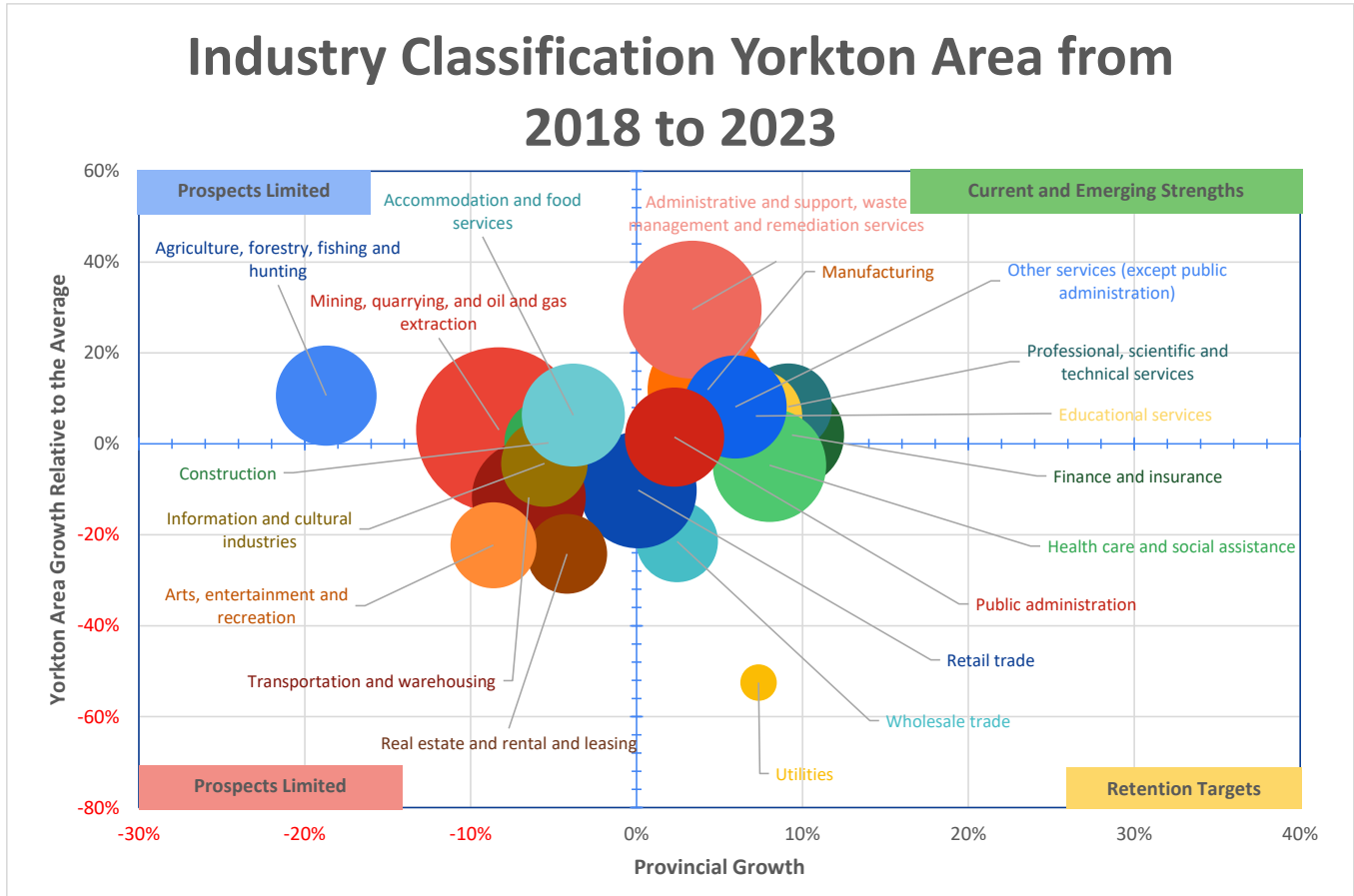
Agriculture, Forestry, Fishing & Hunting ▪ Accommodation & Food Services ▪ Mining, Quarrying and Oil and Gas ▪ Construction industry sectors.

Lagging local and Leading Provincial Relative Growth in:

Health Care and Social Assistance ▪ Retail Trade ▪ Educational Services ▪ Wholesale Trade ▪ Utilities industry sectors.

Lagging local and Lagging Provincial Relative Growth in:

Information and Cultural Industries ▪ Transportation and Warehousing ▪ Arts, Entertainment & Recreation ▪ Real Estate and Rental and Leasing industry sectors.



Charts Prepared by Preferred Choice based on client supplied regional and Saskatchewan Industry employment data from Lightcast for select communities for 2018 and 2023 utilizing Industry Targeting Classification Analysis

Compared to Saskatchewan Yorkton region has:

Current and Emerging Strengths in:

Admin and Support Waste Mtg and Remediation Services ▪ Manufacturing ▪ Other Services (except Public Administration) ▪ Professional, Scientific and Technical Services ▪ Educational Services ▪ Public Administration ▪ Finance and Insurance industry sectors.

Retention Targets in:

Health Care and Social Assistance ▪ Retail Trade ▪ Wholesale Trade ▪ Utilities industry sectors.

Limited Prospects in:

Accommodation & Food Services ▪ Agriculture, Forestry, Fishing & Hunting ▪ Mining, Quarrying and Oil and Gas ▪ Construction ▪ Information and Cultural Industries ▪ Arts, Entertainment & Recreation ▪ Transportation and Warehousing ▪ Real Estate and Rental and Leasing industry sectors.

Economic Statistical Analysis Methodology Background

The Economic Developers Association of Canada (EDAC) has a longstanding partnership with the University of Waterloo for delivery of the nationally accredited Economic Development Program. Associate Professor Dr. Emanuel Carvalho (University of Waterloo) developed a particular form of economic base analysis for communities to assess and guide development activities. A series of analytical tools consider select demographic characteristics used in location quotient analysis, shift / share analysis, leading / lagging analysis, and industry targeting classification to determine business sector competitive advantages and focus business retention and attraction efforts.

A challenge of this type of analysis is data availability for smaller centres. National, provincial, and Census Metropolitan Area (CMA) data is regularly available from Statistics Canada labour force surveys prepared monthly and provide annual data for industry employment. Census Agglomerations (CAs) rely on census data collected every five years. Some statistics can be collected in special data runs at a larger regional level. Given the smaller community size for CAs the level of fluctuation in one sector from one time period to the next can significantly vary compared to larger CMAs with significantly higher population and labour force, annual data availability and thus less variation or better data integrity from time to time.

Location Quotient

A location quotient identifies the level of specialization in a geographic area. In simple terms it measures the concentration of certain industry sectors in the base location relative to the comparison economy. In mathematical terms, the location quotient for each individual sector is where:

$$LQ_{SECT} = \frac{LocEMPL_{SECT}}{LocEMPL} \div \frac{CompEMPL_{SECT}}{CompEMPL}$$

LQ_{SECT} = the location quotient for an industry sector

$LocEMPL_{SECT}$ = employment in the industry sector in the local community

$LocEMPL$ = total employment in the local community

$CompEMPL_{SECT}$ = employment in the industry sector in the comparison community or economy

$CompEMPL$ = total employment in the comparison community or economy

The interpretation of location quotients is simply a measure of employment concentration in a base location or local community compared to another location or a larger regional, provincial, or national geography. Industry groups that dominate in the community will have higher location quotients and ones that are relatively scarce will have lower location quotients. The table below shows the range of possible location quotients arising from the formula and their suggested interpretation. Note that a low (or high) location quotient doesn't necessarily mean the industry group is small (or large), unimportant (or important) in the community, just that it is less so (or more so) than in the comparison location as a whole.

Exhibit 00.01 - Interpretation of Location Quotients		
Location Quotient	Label	Interpretation
less than 0.75	Low	Local community needs are probably not being met by the sector resulting in an import of goods and services in this sector.
0.75 to 1.24	Medium	Most local needs are being met by the sector. The region will probably be both importing and exporting goods and services in this sector.
1.25 to 4.99	High	The sector is serving needs beyond the border, exporting goods and services in this sector to other regions or provinces.
More than 5.00	Very High	This is indicative of a very high level of local dependence on the sector, typically in a “single-industry” community.

Source: Information provided by Preferred Choice based on the Economic Developers Association of Canada (EDAC) the University of Waterloo Economic Development Program Location Quotient Analysis

Shift / Share Analysis

If a particular industry is growing or declining, an automatic question that arises is whether or not the decline is “natural” in the sense that it is growing or declining in other regions as well. Shift/share analysis attempts to answer this question by breaking down the change in employment by industry group into three components.

1. The first component is growth or decline arising from general employment growth. If employment is generally increasing in the province as a whole, one would expect it to be increasing in the local community or region and the sector as well. This is referred to as the provincial effect and is calculated for a particular sector as follows:

$$PE_{SECT} = EMP11_{SECT} \times \Delta SKEMP$$

where $EMP11_{SECT}$ is the 2018 employment level in the sector in the community and $\Delta SKEMP$ is the percentage change in overall employment between 2018 and 2023 in Saskatchewan as a whole.

2. The second component is growth or decline arising from the nature of the industry. If employment in a particular industry group is expanding or declining generally in the province as a whole, one would expect it to be expanding or declining in that sector in the region as well. This is referred to as the industry effect and is calculated for a particular sector as follows:

$$IE_{SECT} = EMP11_{SECT} \times [\Delta SKEMP_{SECT} - \Delta SKEMP]$$

where $EMP11_{SECT}$ is the 2018 employment level in the sector in the community, $\Delta SKEMP_{SECT}$ is the change in employment in the sector between 2018 and 2023 in Saskatchewan, and $\Delta SKEMP$ is the percentage change in overall employment between 2018 and 2023 in Saskatchewan.

3. The third component is the residual and is the growth or decline arising from the specifics of the industry within the region or community. This is referred to as the regional effect and is the most interesting for analysis purposes. It is calculated as follows:

$$RE_{SECT} = EMP11_{SECT} \times [\Delta EMP_{SECT} - \Delta SKEMP_{SECT}]$$

where EMP_{11SECT} is the 2018 employment level in the sector in the region, ΔEMP_{SECT} is the percentage change in that sector's employment between 2018 and 2023 in the region and $\Delta SKEMP_{SECT}$ is the percentage change in that sector's employment between 2018 and 2023 in Saskatchewan as a whole.

The sum of these three effects yields overall employment growth in the sector and in the region from 2018 to 2023. The equations simply attribute the change to the three effects which could be considered as follows:

$$\begin{array}{ccccccc}
 EMP_{16SECT} & - & EMP_{11SECT} & = & PE_{SECT} & + & IE_{SECT} & + & RE_{SECT} \\
 \text{Change in Sector Employment (from} & & & & \text{Provincial} & & \text{Industry Effect} & & \text{Regional Effect} \\
 \text{2018 to 2023)} & & & & \text{Effect} & & & &
 \end{array}$$

A positive regional effect means the industry is doing better than would be expected given the situation for that particular industry in the province as a whole. A negative regional effect means that the sector is doing more poorly than would be expected.

Leading / Lagging Analysis

Another way to look at the different industry sectors is to examine their employment growth relative to growth in overall employment at either the provincial or regional level. Industries which are "leading" have a growth rate in excess of the rate of growth in total employment and those that are "lagging" are growing more slowly. The provincial sector relative growth ($ProvRG_{SECT}$) is:

$$ProvRG_{SECT} = \Delta EMP_{SECT} - \Delta SKEMP$$

where $\Delta EMPL_{SECT}$ is change in employment in the industry group at the provincial level and $\Delta SASKEMP$ is the overall growth in employment in the province. Positive numbers indicate that the sector is growing more quickly than the provincial average.

The local sector relative growth ($LocRG_{SECT}$) is the difference between the growth in the sector at the local level and the provincial growth in the same sector:

$$LocRG_{SECT} = \Delta LocEMPL_{SECT} - \Delta EMP_{SECT}$$

where $\Delta LocEMPL_{SECT}$ is change in employment in the industry group in the local community and ΔEMP_{SECT} is the growth in employment in the sector provincially. Positive numbers indicate that the sector is growing more quickly in the region than it is provincially.

A comparison between the local indicator and the provincial indicator is combined with the location quotient to yield an overall assessment of the sector. The classification system is shown is known as the Carvalho Classification, named after Professor Emanuel Carvalho from the University of Waterloo.

Exhibit 00.02 - Carvalho Classification System			
PSRG	LocRG _{SECT}	Location Quotient	Classification
Leading	Leading	High (> 1.25)	Driving
		Medium (0.75 to 1.25)	Accelerating
		Low (<.0.75)	Rising
Lagging	Leading	High (> 1.25)	Evolving
		Medium (0.75 to 1.25)	Transitional
		Low (<.0.75)	Moderate
Leading	Lagging	High (> 1.25)	Promising
		Medium (0.75 to 1.25)	Yielding
		Low (<.0.75)	Modest
Lagging	Lagging	High (> 1.25)	Challenging
		Medium (0.75 to 1.25)	Vulnerable
		Low (<.0.75)	Marginal

Source: Information provided by Preferred Choice based on the Economic Developers Association of Canada (EDAC) the University of Waterloo Economic Development Program Leading / Lagging Analysis

The categories are meant to be descriptive. For example, consider an industry which is dominant at the community level, that is, has a high location quotient. If the industry is lagging in Saskatchewan but leading in the community it is considered as “evolving”. If the industry is leading in both Saskatchewan and the community, it is “driving”. If the industry is leading in Saskatchewan but lagging in the community, it is classified as “promising”. And finally, if growth is lagging at both the local and provincial level, it is considered as “challenging”.

Some sectors may easily be classified into two different ways because they are near the border in terms of their relative growth, that is, LocRG_{SECT} is near zero.

The thirteen industry groups can be placed in a sector graph indicating their relative classifications. Sectors in the upper right quadrant are classified using positive terms. Those in the lower left quadrant are classified in negative terms. Industry groups in the upper left quadrant are generally classified as in a state of evolution and those in the lower right quadrant have mixed classifications depending on their size.

Industry Targeting

There are a number of ways to summarize the indicators for the individual industry groups including the classification scheme used for Leading / Lagging Analysis. Another way is the industry targeting classification. This system is based on three indicators - the location quotient, overall (rather than relative) growth at the provincial level, and the relative local growth (LocRG_{SECT}) from the leading/lagging analysis. The classification scheme is known as the Industry Targeting Classification System. The wording of the categories suggests the kinds of prospects for growth that one might expect in the future so the classification scheme attempts to be forward-looking.

The targeting classification scheme makes at least two implicit assumptions that are open to question. Firstly, the categories implicitly assume that employment growth at the provincial level is a measure of success for the industry group. If the industry is growing provincially and not doing so in the region, for example, then it is assumed that the sector has limited prospects or is a retention target.

Secondly, there is a bias toward large sectors; relatively small industry groups can be classified as an emerging strength but most are dismissed as having a “weak base”. This is partly an artefact of the industry classifications

used. One can have, for example, a small manufacturing sector which will be dismissed as having a weak base whereas some sub-sector such as food processing may be large in the region and be classified as a high priority retention target.

Exhibit 00.03 - Industry Targeting Classification System			
LocRG_{SECT}	Provincial Growth	Location Quotient	Classification
Leading	Positive	Medium or High (> 0.75)	Current strength
		Low (<.0.75)	Emerging strength
	Negative	Medium or High (> 0.75)	Prospects limited by external trends
		Low (<.0.75)	Prospects limited by external trends and weak base
Lagging	Positive	Medium or High (> 0.75)	High priority retention target
		Low (<.0.75)	Prospects limited by weak base and declining competitiveness
	Negative	Medium or High (> 0.75)	Prospects limited by external trends and declining competitiveness
		Low (<.0.75)	Prospects limited overall

Source: Information provided by Preferred Choice based on the Economic Developers Association of Canada (EDAC) the University of Waterloo Economic Development Program Industry Targeting Classification Analysis

The industry target classification is displayed in a bubble graph. The size of the circles represents the location quotient, that is, the relative size of the sector. Those to the left of the vertical axis are considered as having limited prospects because the industries are declining provincially. If they are small, they have additional challenges and if they are below the horizontal axis, they also suffer from declining competitiveness.

The industry groups that fall within the lower right quadrant are classified as retention targets (if large enough) because they are growing provincially but more slowly in the region. Smaller industry groups in this quadrant of the graph are deemed to have limited prospects.

The industry groups which fall in the upper right quadrant are growing provincially and leading growing in the region. That makes them current strengths if they are large and emerging strengths if they are smaller.

Another way to look at the sectors is to use business terminology. Industry groups in the upper right quadrant are increasing their “market share” in an expanding market. Those in the upper left are also increasing their market share but in a declining market. Those in the lower right are losing market share in an expanding market. Those in the lower left quadrant are losing market share in a declining market.

Appendix D

STATISTICAL ANALYSIS REGION-CANADA

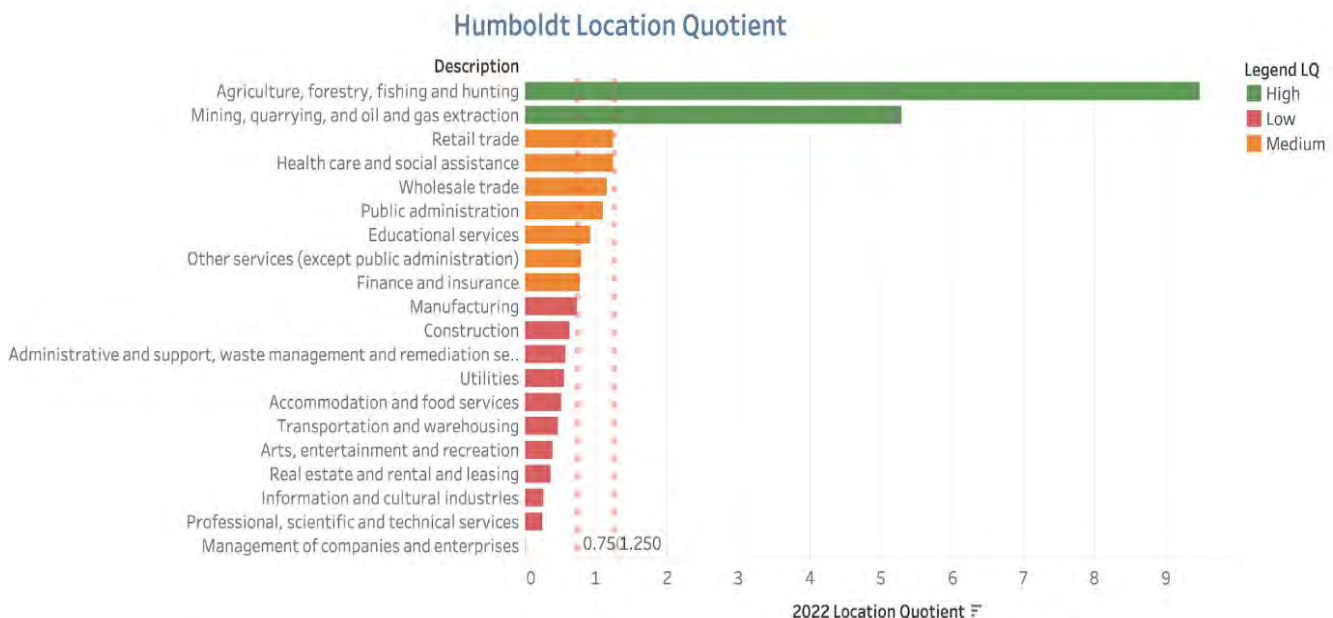
Location Quotient

A location quotient identifies the level of specialization in a geographic area. In simple terms it measures the concentration of certain industry sectors in the base location relative to the comparison economy. Concentrations of an industry with location quotients below 0.75 are considered low, between 0.75 and 1.25 are medium, and greater than 1.25 is rated high.

Competitive Effect

Shift-share analysis using a national context has been based on data computed and provided from Lightcast using 2018-2013 data. The regional competitive effect indicates how much of the job change within a given region is the result of some unique competitive advantage of the region. This is because the competitive effect, by definition, measures the job change that occurs within a regional industry that cannot be explained by broader trends (i.e. the National Growth Effect and the Industrial Mix Effect). It's important to note that this effect can be positive even if regional employment is declining. This would indicate that regional employment is declining less than national employment.

Humboldt Region



Average of 2022 Location Quotient for each Description. Color shows details about Legend LQ. The data is filtered on Description (Inds (Location Quotient (Region-Canada) 2016-2028)_ML), which keeps 20 of 398 members.

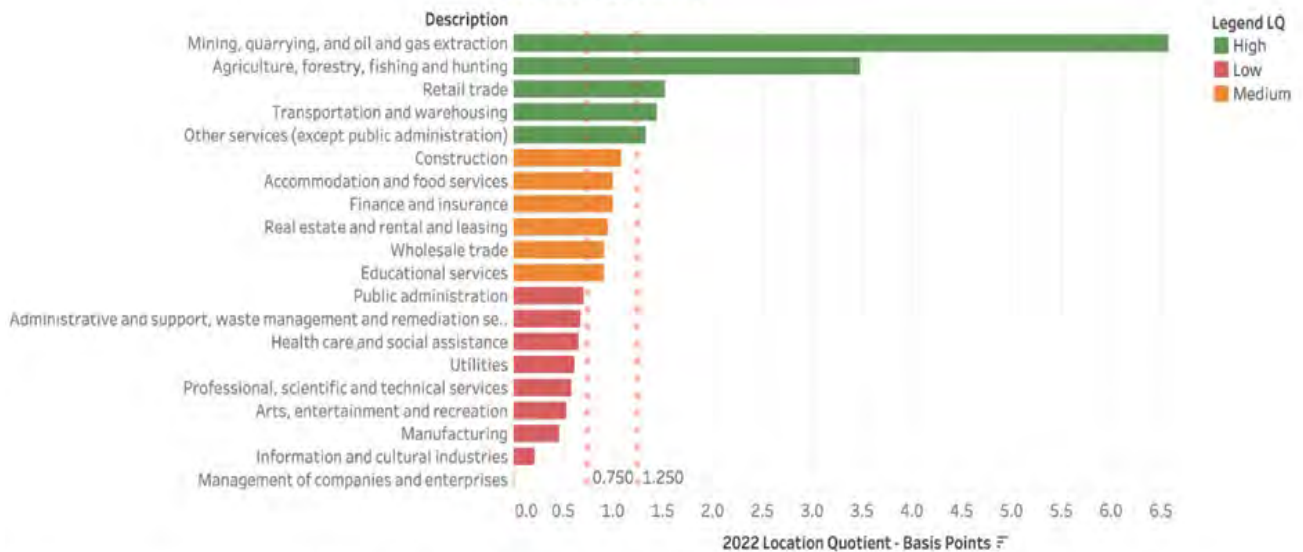
Humboldt Competitive Effect



Average of Competitive Effect for each Description. Color shows details about Legend LQ. The data is filtered on Description (Inds (Location Quotient (Region-Canada) 2016-2028)_ML), which keeps 20 of 398 members.

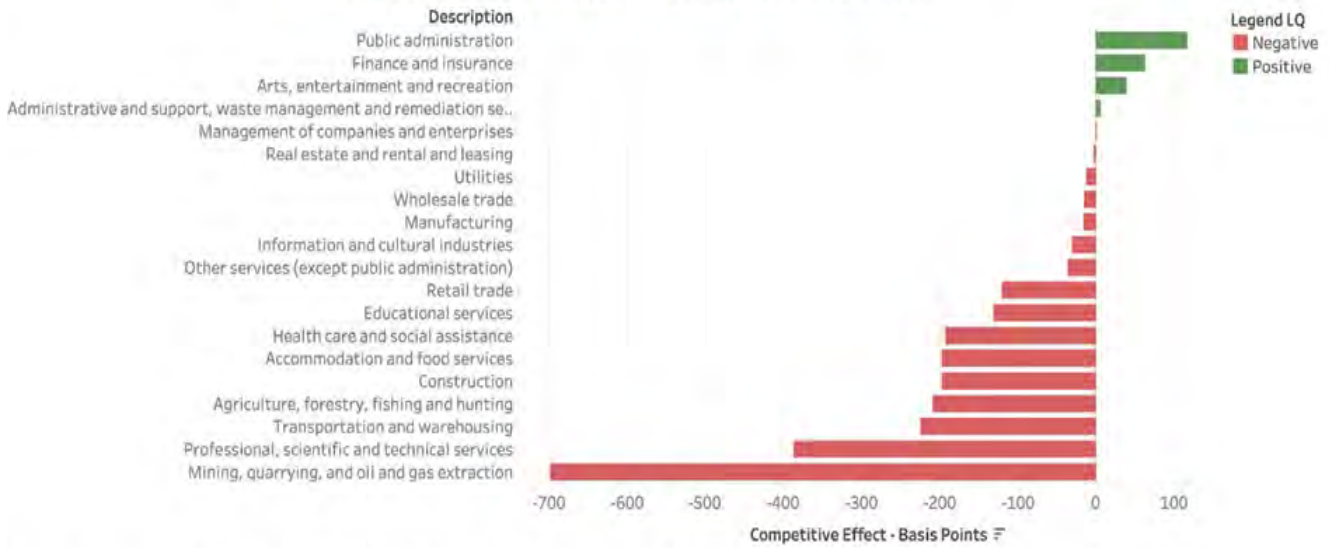
Lloydminster-North Battleford Region

North Battleford and Lloydminster Location Quotient



Average of 2022 Location Quotient for each Description. Color shows details about Legend LQ. The data is filtered on Description (Inds (Location Quotient (Region-Canada) 2016-2028)_ML), which keeps 20 of 398 members.

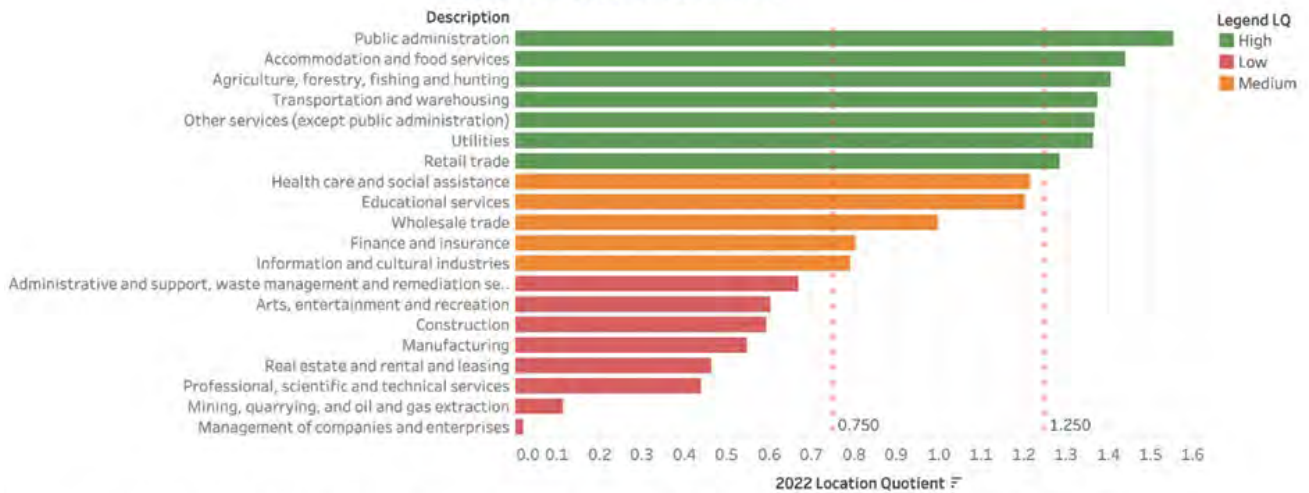
North Battleford and Lloydminster Competitive Effect



Average of Competitive Effect for each Description. Color shows details about Legend LQ. The data is filtered on Description (Inds (Location Quotient (Region-Canada) 2016-2028)_ML), which keeps 20 of 398 members.

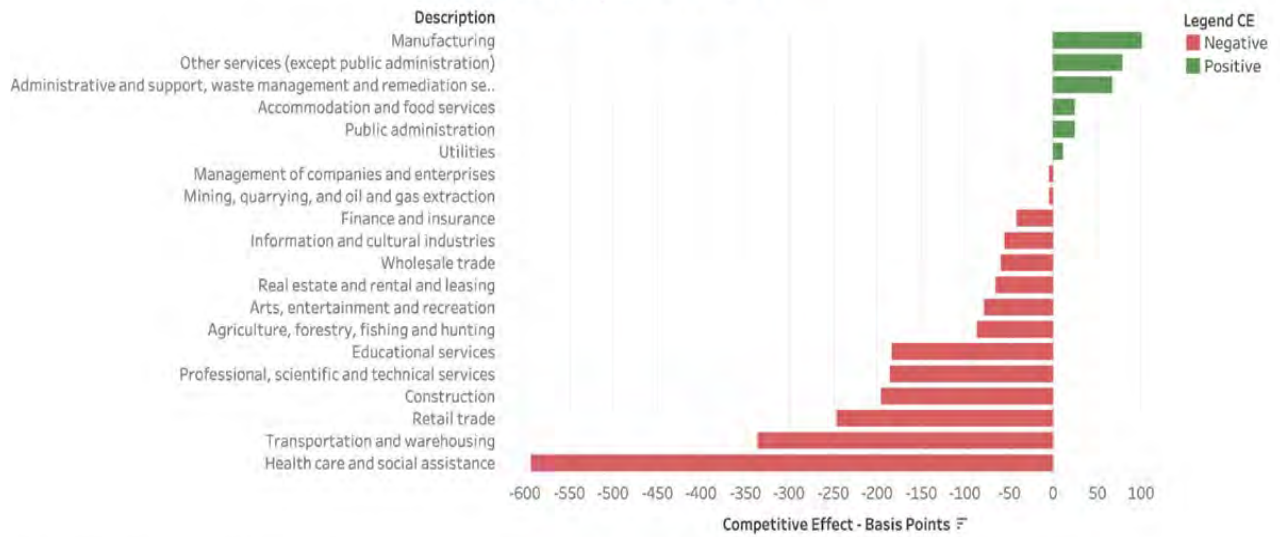
Moose Jaw

Moose Jaw Location Quotient



Average of 2022 Location Quotient for each Description. Color shows details about Legend LQ. The data is filtered on Description (Inds (Location Quotient (Region-Canada) 2016-2028)_ML), which keeps 20 of 398 members.

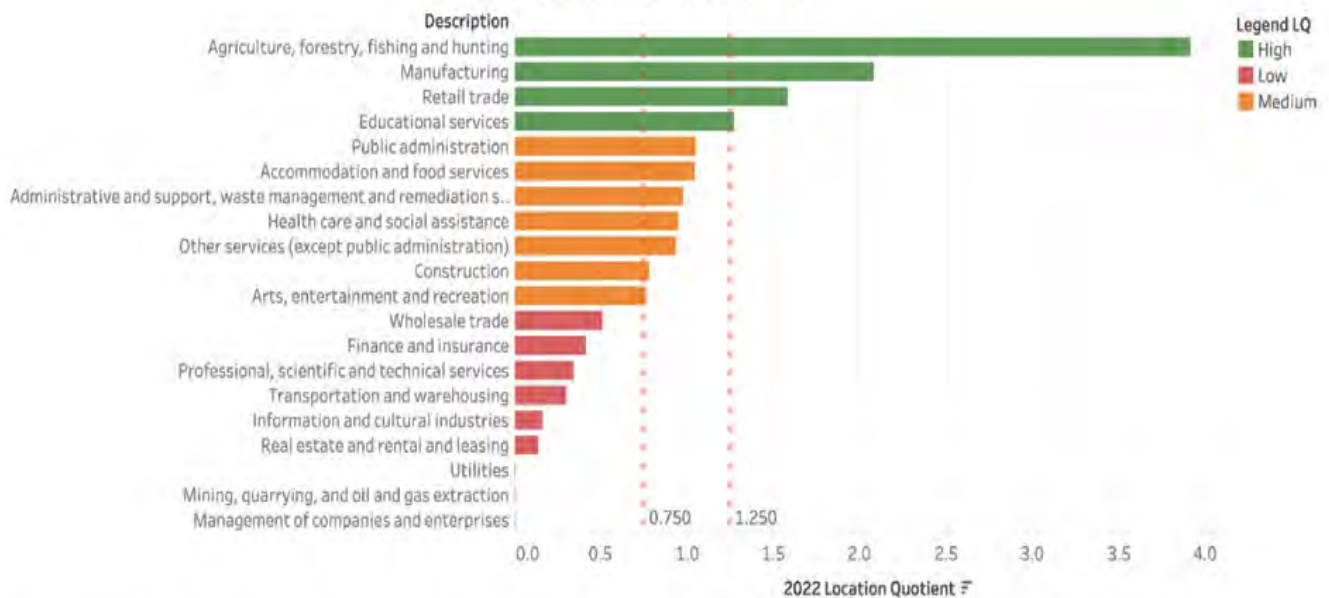
Moose Jaw Competitive Effect



Sum of Competitive Effect for each Description. Color shows details about Legend CE. The data is filtered on Description (Inds (Location Quotient (Region-Canada) 2016-2028)_ML), which keeps 20 of 398 members.

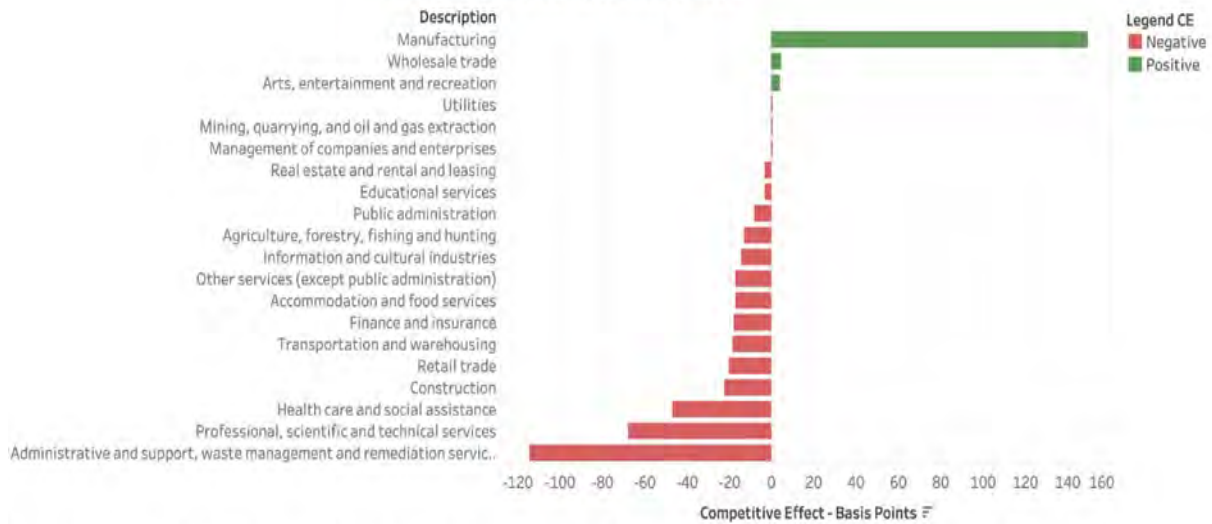
Meadow Lake

Meadow Lake Location Quotient



Average of 2022 Location Quotient for each Description. Color shows details about Legend LQ. The view is filtered on Description, which keeps 20 of 398 members.

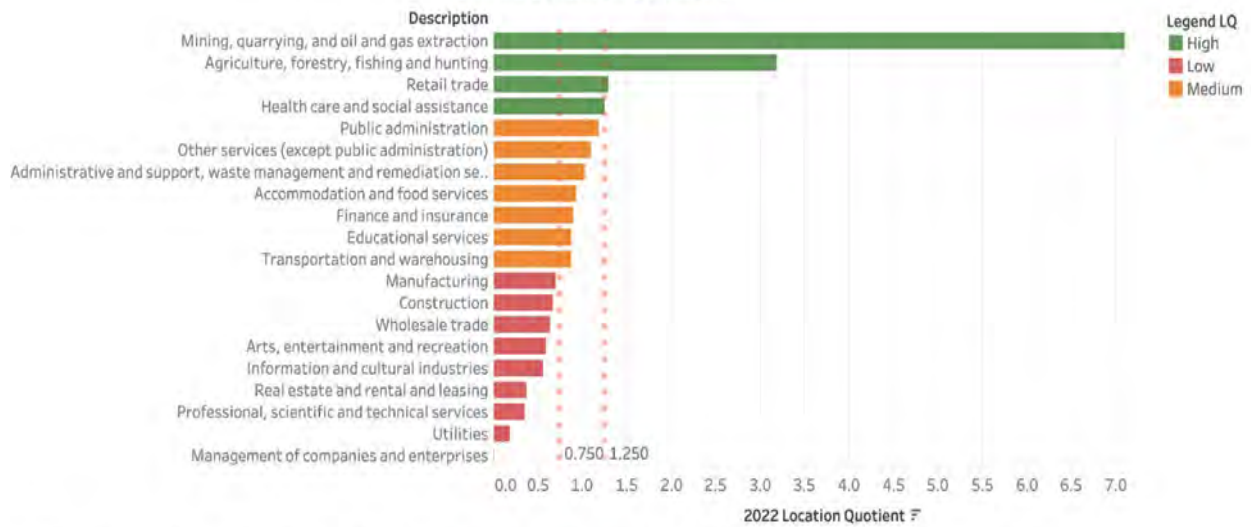
Meadow Lake Competitive Effect



Average of Competitive Effect for each Description. Color shows details about Legend CE. The data is filtered on Description (Inds (Location Quotient (Region-Canada) 2016-2028)_ML), which keeps 20 of 398 members.

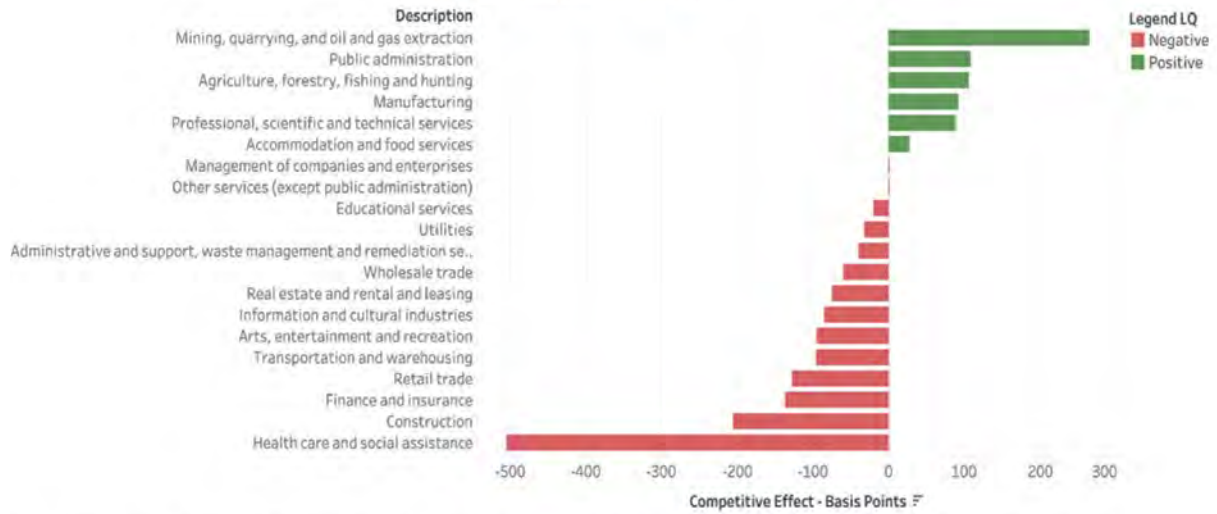
Yorkton

Yorkton Location Quotient



Average of 2022 Location Quotient for each Description. Color shows details about Legend LQ. The data is filtered on Description (Inds (Location Quotient (Region-Canada) 2016-2028)_ML), which keeps 20 of 398 members.

Yorkton Competitive Effect



Average of Competitive Effect for each Description. Color shows details about Legend LQ. The data is filtered on Description (Inds (Location Quotient (Region-Canada) 2016-2028)_ML), which keeps 20 of 398 members.

Appendix E

Supply Chain Imports by NAICS

Humboldt Region

NAICS	Purchases from	In-region Purchases	% In-region Purchases	Imported Purchases	% Imported Purchases	Total Purchases
1110	Farms	\$154,213,992	98.9%	\$1,683,127	1.1%	\$155,897,119
2211	Electric power generation, transmission and distribution	\$715,668	1.9%	\$36,816,654	98.1%	\$37,532,322
3253	Pesticide, fertilizer and other agricultural chemical manufacturing	\$1,091,710	2.9%	\$36,047,591	97.1%	\$37,139,301
3241	Petroleum and coal product manufacturing	\$6,548,677	21.0%	\$24,628,107	79.0%	\$31,176,784
5221	Depository credit intermediation	\$13,648,691	46.8%	\$15,528,836	53.2%	\$29,177,526
3111	Animal food manufacturing	\$620,096	2.2%	\$27,851,222	97.8%	\$28,471,318
3251	Basic chemical manufacturing	\$13,679,753	49.5%	\$13,966,355	50.5%	\$27,646,108
2111	Oil and gas extraction	\$0	0.0%	\$23,586,675	100.0%	\$23,586,675
5311	Lessors of real estate	\$7,835,797	37.6%	\$13,021,016	62.4%	\$20,856,813
3116	Meat product manufacturing	\$17,804,017	99.4%	\$100,968	0.6%	\$17,904,985
3331	Agricultural, construction and mining machinery manufacturing	\$11,718,294	66.4%	\$5,933,508	33.6%	\$17,651,803
5241	Insurance carriers	\$139,135	0.8%	\$16,506,923	99.2%	\$16,646,058
5412	Accounting, tax preparation, bookkeeping and payroll services	\$4,418,669	32.0%	\$9,392,605	68.0%	\$13,811,274
4841	General freight trucking	\$539,166	4.0%	\$12,966,952	96.0%	\$13,506,118
3261	Plastic product manufacturing	\$929,973	7.4%	\$11,580,015	92.6%	\$12,509,989
5411	Legal services	\$1,015,264	8.3%	\$11,218,856	91.7%	\$12,234,120
2131	Support activities for mining, and oil and gas extraction	\$3,229,913	26.6%	\$8,918,230	73.4%	\$12,148,142
5413	Architectural, engineering and related services	\$1,333,844	11.1%	\$10,679,228	88.9%	\$12,013,072
6221	General medical and surgical hospitals	\$8,860,711	76.2%	\$2,761,526	23.8%	\$11,622,237
5415	Computer systems design and related services	\$0	0.0%	\$11,392,311	100.0%	\$11,392,311
5617	Services to buildings and dwellings	\$3,426,469	30.1%	\$7,939,079	69.9%	\$11,365,548
5173	Wired and wireless telecommunications carriers(except satellite)	\$824,174	8.6%	\$8,750,929	91.4%	\$9,575,102
3112	Grain and oilseed milling	\$7,037,331	74.9%	\$2,361,174	25.1%	\$9,398,505
4842	Specialized freight trucking	\$1,445,190	15.5%	\$7,906,935	84.5%	\$9,352,125
3254	Pharmaceutical and medicine manufacturing	\$0	0.0%	\$9,123,235	100.0%	\$9,123,235
2382	Building equipment contractors	\$3,044,784	34.7%	\$5,721,232	65.3%	\$8,766,016
5416	Management, scientific and technical consulting services	\$0	0.0%	\$8,725,008	100.0%	\$8,725,008
5611	Office administrative services	\$0	0.0%	\$8,225,777	100.0%	\$8,225,777
9130	Local, municipal and regional public administration	\$3,709,972	49.3%	\$3,808,175	50.7%	\$7,518,146

Saskatchewan Economic Development Alliance

5419	Other professional, scientific and technical services	\$1,315,497	18.9%	\$5,645,172	81.1%	\$6,960,669
3391	Medical equipment and supplies manufacturing	\$0	0.0%	\$6,689,313	100.0%	\$6,689,313
5511	Management of companies and enterprises	\$0	0.0%	\$6,666,457	100.0%	\$6,666,457
1150	Support activities for farms	\$2,652,526	40.8%	\$3,844,249	59.2%	\$6,496,775
2123	Non-metallic mineral mining and quarrying	\$6,344,075	100.0%	\$0	0.0%	\$6,344,075
3363	Motor vehicle parts manufacturing	\$0	0.0%	\$6,240,678	100.0%	\$6,240,678
3311	Iron and steel mills and ferro-alloy manufacturing	\$0	0.0%	\$6,092,622	100.0%	\$6,092,622
5239	Other financial investment activities	\$433,186	7.3%	\$5,510,093	92.7%	\$5,943,279
5222	Non-depository credit intermediation	\$1,765,527	30.8%	\$3,969,408	69.2%	\$5,734,935
3222	Converted paper product manufacturing	\$0	0.0%	\$5,647,584	100.0%	\$5,647,584
3323	Architectural and structural metals manufacturing	\$996,514	17.8%	\$4,607,957	82.2%	\$5,604,471
3339	Other general-purpose machinery manufacturing	\$536,913	9.6%	\$5,067,247	90.4%	\$5,604,160
4821	Rail transportation	\$1,071,918	19.4%	\$4,449,769	80.6%	\$5,521,687
5613	Employment services	\$313,277	5.7%	\$5,149,554	94.3%	\$5,462,831
5324	Commercial and industrial machinery and equipment rental and leasing	\$1,228,777	22.6%	\$4,216,156	77.4%	\$5,444,933
7225	Full-service restaurants and limited-service eating places	\$1,282,371	24.2%	\$4,021,004	75.8%	\$5,303,375
4921	Couriers	\$0	0.0%	\$5,210,169	100.0%	\$5,210,169
4172	Construction, forestry, mining, and industrial machinery, equipment and supplies merchant wholesalers	\$1,520,165	29.6%	\$3,611,838	70.4%	\$5,132,003
3329	Other fabricated metal product manufacturing	\$0	0.0%	\$5,000,959	100.0%	\$5,000,959
5616	Investigation and security services	\$1,741,609	35.8%	\$3,126,526	64.2%	\$4,868,135
4931	Warehousing and storage	\$396,039	8.7%	\$4,144,521	91.3%	\$4,540,560
5418	Advertising, public relations, and related services	\$191,702	4.3%	\$4,219,044	95.7%	\$4,410,746
5614	Business support services	\$296,443	6.7%	\$4,113,685	93.3%	\$4,410,128
3273	Cement and concrete product manufacturing	\$3,588,171	83.3%	\$720,876	16.7%	\$4,309,047
8113	Commercial and industrial machinery and equipment (except automotive and electronic) repair and maintenance	\$1,365,371	32.0%	\$2,903,986	68.0%	\$4,269,357
6111	Elementary and secondary schools	\$1,577,063	37.3%	\$2,650,254	62.7%	\$4,227,317
4173	Computer and communications equipment and supplies merchant wholesalers	\$0	0.0%	\$4,216,427	100.0%	\$4,216,427
3345	Navigational, measuring, medical and control instruments manufacturing	\$0	0.0%	\$4,199,278	100.0%	\$4,199,278
3259	Other chemical product manufacturing	\$0	0.0%	\$4,150,882	100.0%	\$4,150,882
3231	Printing and related support activities	\$0	0.0%	\$4,130,459	100.0%	\$4,130,459
4441	Building material and supplies dealers	\$1,757,100	42.7%	\$2,357,324	57.3%	\$4,114,424
4179	Other machinery, equipment and supplies merchant wholesalers	\$0	0.0%	\$3,976,827	100.0%	\$3,976,827
9120	Provincial and territorial public administration	\$1,270,615	32.6%	\$2,622,019	67.4%	\$3,892,634
4111	Farm product merchant wholesalers	\$1,418,498	36.8%	\$2,439,571	63.2%	\$3,858,069
5331	Lessors of non-financial intangible assets (except copyrighted works)	\$0	0.0%	\$3,856,882	100.0%	\$3,856,882
5619	Other support services	\$1,807,005	47.2%	\$2,020,806	52.8%	\$3,827,811
3252	Resin, synthetic rubber, and artificial and synthetic fibres and filaments manufacturing	\$3,739,418	98.0%	\$75,507	2.0%	\$3,814,925
3262	Rubber product manufacturing	\$0	0.0%	\$3,757,180	100.0%	\$3,757,180
3353	Electrical equipment manufacturing	\$0	0.0%	\$3,674,724	100.0%	\$3,674,724
2381	Foundation, structure, and building exterior contractors	\$691,489	19.0%	\$2,956,245	81.0%	\$3,647,734
4885	Freight transportation arrangement	\$0	0.0%	\$3,618,434	100.0%	\$3,618,434
3359	Other electrical equipment and component manufacturing	\$0	0.0%	\$3,579,945	100.0%	\$3,579,945
2389	Other specialty trade contractors	\$1,501,875	42.3%	\$2,044,917	57.7%	\$3,546,792
3324	Boiler, tank and shipping container manufacturing	\$0	0.0%	\$3,544,954	100.0%	\$3,544,954
5629	Remediation and other waste management services	\$840,753	24.3%	\$2,626,088	75.7%	\$3,466,841

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3314	Non-ferrous metal (except aluminum) production and processing	\$0	0.0%	\$3,459,365	100.0%	\$3,459,365
5231	Securities and commodity contracts intermediation and brokerage	\$940,533	27.2%	\$2,515,217	72.8%	\$3,455,751
4131	Food merchant wholesalers	\$0	0.0%	\$3,305,526	100.0%	\$3,305,526
6231	Nursing care facilities	\$2,564,180	80.9%	\$605,058	19.1%	\$3,169,239
4189	Other miscellaneous merchant wholesalers	\$0	0.0%	\$3,140,168	100.0%	\$3,140,168
5621	Waste collection	\$471,986	15.2%	\$2,625,788	84.8%	\$3,097,774
4163	Lumber, millwork, hardware and other building supplies merchant wholesalers	\$105,492	3.5%	\$2,887,024	96.5%	\$2,992,515
5111	Newspaper, periodical, book and directory publishers	\$1,209,738	41.1%	\$1,737,036	58.9%	\$2,946,774
2371	Utility system construction	\$0	0.0%	\$2,875,126	100.0%	\$2,875,126
4881	Support activities for air transportation	\$0	0.0%	\$2,830,976	100.0%	\$2,830,976
8139	Business, professional, labour and other membership organizations	\$134,103	4.7%	\$2,692,800	95.3%	\$2,826,902
5321	Automotive equipment rental and leasing	\$0	0.0%	\$2,671,889	100.0%	\$2,671,889
4884	Support activities for road transportation	\$0	0.0%	\$2,660,501	100.0%	\$2,660,501
4121	Petroleum and petroleum products merchant wholesalers	\$0	0.0%	\$2,659,316	100.0%	\$2,659,316
5622	Waste treatment and disposal	\$1,594,422	60.7%	\$1,033,603	39.3%	\$2,628,026
6211	Offices of physicians	\$445,329	17.1%	\$2,163,340	82.9%	\$2,608,669
4161	Electrical, plumbing, heating and air-conditioning equipment and supplies merchant wholesalers	\$0	0.0%	\$2,604,769	100.0%	\$2,604,769
2122	Metal ore mining	\$708,006	27.6%	\$1,861,234	72.4%	\$2,569,240
2383	Building finishing contractors	\$298,146	11.6%	\$2,269,010	88.4%	\$2,567,156
3119	Other food manufacturing	\$1,734,292	68.0%	\$814,634	32.0%	\$2,548,926
3334	Ventilation, heating, air-conditioning and commercial refrigeration equipment manufacturing	\$0	0.0%	\$2,515,563	100.0%	\$2,515,563
3327	Machine shops, turned product, and screw, nut and bolt manufacturing	\$170,368	6.8%	\$2,334,501	93.2%	\$2,504,869
5223	Activities related to credit intermediation	\$0	0.0%	\$2,484,585	100.0%	\$2,484,585
9112	Other federal services (9112-9119)	\$534,028	22.4%	\$1,855,154	77.6%	\$2,389,181
5191	Other information services	\$305,147	12.8%	\$2,073,774	87.2%	\$2,378,921
6241	Individual and family services	\$1,636,328	68.9%	\$736,952	31.1%	\$2,373,280
5182	Data processing, hosting, and related services	\$0	0.0%	\$2,355,461	100.0%	\$2,355,461
3332	Industrial machinery manufacturing	\$0	0.0%	\$2,343,803	100.0%	\$2,343,803
4911	Postal service	\$1,348,748	57.6%	\$990,827	42.4%	\$2,339,575
7211	Traveller accommodation	\$750,142	32.5%	\$1,560,999	67.5%	\$2,311,141
4184	Chemical (except agricultural) and allied product merchant wholesalers	\$0	0.0%	\$2,299,093	100.0%	\$2,299,093
8111	Automotive repair and maintenance	\$963,591	42.0%	\$1,330,045	58.0%	\$2,293,636
3121	Beverage manufacturing	\$0	0.0%	\$2,272,125	100.0%	\$2,272,125
4861	Pipeline transportation of crude oil	\$0	0.0%	\$2,239,187	100.0%	\$2,239,187
3219	Other wood product manufacturing	\$0	0.0%	\$2,196,931	100.0%	\$2,196,931
6214	Out-patient care centres	\$1,966,841	89.9%	\$221,650	10.1%	\$2,188,490
4183	Agricultural supplies merchant wholesalers	\$2,082,321	95.2%	\$104,213	4.8%	\$2,186,534
4145	Pharmaceuticals, toiletries, cosmetics and sundries merchant wholesalers	\$0	0.0%	\$2,155,620	100.0%	\$2,155,620
3312	Steel product manufacturing from purchased steel	\$0	0.0%	\$2,110,290	100.0%	\$2,110,290
3399	Other miscellaneous manufacturing	\$268,760	12.8%	\$1,827,810	87.2%	\$2,096,570
4182	Paper, paper product and disposable plastic product merchant wholesalers	\$0	0.0%	\$2,043,492	100.0%	\$2,043,492
2212	Natural gas distribution	\$951,801	46.9%	\$1,076,144	53.1%	\$2,027,945
4191	Business-to-business electronic markets, and agents and brokers	\$133,162	6.6%	\$1,884,827	93.4%	\$2,017,989
4461	Health and personal care stores	\$1,067,874	53.3%	\$936,455	46.7%	\$2,004,329
4471	Gasoline stations	\$1,069,549	54.0%	\$912,911	46.0%	\$1,982,460
4181	Recyclable material merchant wholesalers	\$747,483	37.8%	\$1,227,800	62.2%	\$1,975,283

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3369	Other transportation equipment manufacturing	\$0	0.0%	\$1,889,794	100.0%	\$1,889,794
2373	Highway, street and bridge construction	\$510,821	27.2%	\$1,367,847	72.8%	\$1,878,668
4451	Grocery stores	\$872,370	49.0%	\$909,503	51.0%	\$1,781,873
6233	Community care facilities for the elderly	\$789,065	45.6%	\$941,831	54.4%	\$1,730,896
6113	Universities	\$42,475	2.5%	\$1,679,634	97.5%	\$1,722,110
4883	Support activities for water transportation	\$0	0.0%	\$1,705,154	100.0%	\$1,705,154
5151	Radio and television broadcasting	\$761,730	45.5%	\$914,088	54.5%	\$1,675,818
4862	Pipeline transportation of natural gas	\$0	0.0%	\$1,674,855	100.0%	\$1,674,855
4152	New motor vehicle parts and accessories merchant wholesalers	\$0	0.0%	\$1,655,512	100.0%	\$1,655,512
3336	Engine, turbine and power transmission equipment manufacturing	\$0	0.0%	\$1,618,907	100.0%	\$1,618,907
4411	Automobile dealers	\$777,276	48.6%	\$820,653	51.4%	\$1,597,929
4811	Scheduled air transportation	\$0	0.0%	\$1,578,636	100.0%	\$1,578,636
3256	Soap, cleaning compound and toilet preparation manufacturing	\$0	0.0%	\$1,561,584	100.0%	\$1,561,584
6244	Child day-care services	\$1,013,323	65.2%	\$541,347	34.8%	\$1,554,670
3211	Sawmills and wood preservation	\$0	0.0%	\$1,548,808	100.0%	\$1,548,808
5179	Other telecommunications	\$0	0.0%	\$1,539,502	100.0%	\$1,539,502
6212	Offices of dentists	\$924,541	61.6%	\$577,286	38.4%	\$1,501,827
3342	Communications equipment manufacturing	\$701,385	46.8%	\$797,344	53.2%	\$1,498,730
3279	Other non-metallic mineral product manufacturing	\$647,046	44.2%	\$816,907	55.8%	\$1,463,953
5313	Activities related to real estate	\$155,594	10.8%	\$1,291,445	89.2%	\$1,447,039
3115	Dairy product manufacturing	\$0	0.0%	\$1,431,339	100.0%	\$1,431,339
5112	Software publishers	\$17,033	1.2%	\$1,358,014	98.8%	\$1,375,047
5121	Motion picture and video industries	\$20,119	1.5%	\$1,301,609	98.5%	\$1,321,728
5612	Facilities support services	\$0	0.0%	\$1,315,784	100.0%	\$1,315,784
4151	Motor vehicle merchant wholesalers	\$0	0.0%	\$1,310,467	100.0%	\$1,310,467
3333	Commercial and service industry machinery manufacturing	\$0	0.0%	\$1,308,078	100.0%	\$1,308,078
3255	Paint, coating and adhesive manufacturing	\$0	0.0%	\$1,288,986	100.0%	\$1,288,986
4831	Deep sea, coastal and Great Lakes water transportation	\$0	0.0%	\$1,260,257	100.0%	\$1,260,257
6213	Offices of other health practitioners	\$831,358	66.6%	\$417,214	33.4%	\$1,248,572
4854	School and employee bus transportation	\$885,891	73.3%	\$323,086	26.7%	\$1,208,977
5615	Travel arrangement and reservation services	\$138,826	11.6%	\$1,056,492	88.4%	\$1,195,318
4529	Other general merchandise stores	\$521,287	44.5%	\$649,462	55.5%	\$1,170,749
3152	Cut and sew clothing manufacturing	\$0	0.0%	\$1,161,887	100.0%	\$1,161,887
8134	Civic and social organizations	\$79,034	6.9%	\$1,074,531	93.1%	\$1,153,565
4171	Farm, lawn and garden machinery and equipment merchant wholesalers	\$927,121	81.1%	\$215,603	18.9%	\$1,142,725
2379	Other heavy and civil engineering construction	\$0	0.0%	\$1,140,344	100.0%	\$1,140,344
3335	Metalworking machinery manufacturing	\$108,861	9.6%	\$1,021,484	90.4%	\$1,130,345
3272	Glass and glass product manufacturing	\$446,474	41.2%	\$636,080	58.8%	\$1,082,553
6223	Specialty (except psychiatric and substance abuse) hospitals	\$555,999	52.7%	\$499,041	47.3%	\$1,055,040
3212	Veneer, plywood and engineered wood product manufacturing	\$0	0.0%	\$1,012,543	100.0%	\$1,012,543
5414	Specialized design services	\$0	0.0%	\$1,004,785	100.0%	\$1,004,785
6216	Home health care services	\$650,190	64.8%	\$353,364	35.2%	\$1,003,553
3344	Semiconductor and other electronic component manufacturing	\$0	0.0%	\$998,340	100.0%	\$998,340
3313	Alumina and aluminum production and processing	\$0	0.0%	\$994,748	100.0%	\$994,748
4162	Metal service centres	\$522,135	53.1%	\$461,642	46.9%	\$983,777
7139	Other amusement and recreation industries	\$494,685	51.3%	\$469,854	48.7%	\$964,539

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3371	Household and institutional furniture and kitchen cabinet manufacturing	\$471,973	50.8%	\$457,158	49.2%	\$929,131
6232	Residential developmental handicap, mental health and substance abuse facilities	\$550,625	59.7%	\$372,014	40.3%	\$922,639
4521	Department stores	\$77,763	8.5%	\$838,736	91.5%	\$916,500
5152	Pay and specialty television	\$0	0.0%	\$878,754	100.0%	\$878,754
5417	Scientific research and development services	\$104,030	12.3%	\$740,162	87.7%	\$844,191
3117	Seafood product preparation and packaging	\$0	0.0%	\$839,563	100.0%	\$839,563
6219	Other ambulatory health care services	\$712,044	85.2%	\$123,698	14.8%	\$835,742
5322	Consumer goods rental	\$0	0.0%	\$828,879	100.0%	\$828,879
6239	Other residential care facilities	\$485,267	61.3%	\$305,906	38.7%	\$791,173
4922	Local messengers and local delivery	\$0	0.0%	\$774,949	100.0%	\$774,949
3362	Motor vehicle body and trailer manufacturing	\$617,397	80.3%	\$151,383	19.7%	\$768,779
3118	Bakeries and tortilla manufacturing	\$60,335	7.9%	\$706,678	92.1%	\$767,012
4141	Textile, clothing and footwear merchant wholesalers	\$0	0.0%	\$762,003	100.0%	\$762,003
3149	Other textile product mills	\$0	0.0%	\$761,816	100.0%	\$761,816
3221	Pulp, paper and paperboard mills	\$121,988	16.4%	\$624,086	83.6%	\$746,074
5312	Offices of real estate agents and brokers	\$0	0.0%	\$732,060	100.0%	\$732,060
8132	Grant-making and giving services	\$0	0.0%	\$722,509	100.0%	\$722,509
2213	Water, sewage and other systems	\$413,749	57.9%	\$300,537	42.1%	\$714,286
8114	Personal and household goods repair and maintenance	\$0	0.0%	\$704,227	100.0%	\$704,227
3114	Fruit and vegetable preserving and specialty food manufacturing	\$0	0.0%	\$700,393	100.0%	\$700,393
3132	Fabric mills	\$0	0.0%	\$658,586	100.0%	\$658,586
6112	Community colleges and C.E.G.E.P.s	\$108,974	16.9%	\$535,726	83.1%	\$644,701
8123	Dry cleaning and laundry services	\$0	0.0%	\$637,838	100.0%	\$637,838
8112	Electronic and precision equipment repair and maintenance	\$0	0.0%	\$632,489	100.0%	\$632,489
3322	Cutlery and hand tool manufacturing	\$0	0.0%	\$603,130	100.0%	\$603,130
4543	Direct selling establishments	\$294,826	50.0%	\$294,254	50.0%	\$589,081
4889	Other support activities for transportation	\$0	0.0%	\$584,139	100.0%	\$584,139
8133	Social advocacy organizations	\$210,154	36.6%	\$363,276	63.4%	\$573,431
3364	Aerospace product and parts manufacturing	\$0	0.0%	\$557,143	100.0%	\$557,143
4144	Personal goods merchant wholesalers	\$0	0.0%	\$554,025	100.0%	\$554,025
3326	Spring and wire product manufacturing	\$0	0.0%	\$533,957	100.0%	\$533,957
3341	Computer and peripheral equipment manufacturing	\$291,161	57.4%	\$215,760	42.6%	\$506,921
4541	Electronic shopping and mail-order houses	\$0	0.0%	\$504,495	100.0%	\$504,495
6243	Vocational rehabilitation services	\$371,167	73.6%	\$132,893	26.4%	\$504,060
6215	Medical and diagnostic laboratories	\$124,477	25.2%	\$368,570	74.8%	\$493,047
2372	Land subdivision	\$0	0.0%	\$485,687	100.0%	\$485,687
4481	Clothing stores	\$18,645	3.9%	\$465,343	96.1%	\$483,988
3315	Foundries	\$0	0.0%	\$480,137	100.0%	\$480,137
6222	Psychiatric and substance abuse hospitals	\$357,611	76.8%	\$108,179	23.2%	\$465,790
4143	Home furnishings merchant wholesalers	\$0	0.0%	\$463,328	100.0%	\$463,328
4882	Support activities for rail transportation	\$278,073	60.6%	\$180,627	39.4%	\$458,700
3351	Electric lighting equipment manufacturing	\$0	0.0%	\$441,246	100.0%	\$441,246
4853	Taxi and limousine service	\$153,497	35.0%	\$285,121	65.0%	\$438,619
7121	Heritage institutions	\$84,907	21.6%	\$307,913	78.4%	\$392,821
4431	Electronics and appliance stores	\$59,364	15.2%	\$330,463	84.8%	\$389,827
3113	Sugar and confectionery product manufacturing	\$0	0.0%	\$384,013	100.0%	\$384,013

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5323	General rental centres	\$0	0.0%	\$382,925	100.0%	\$382,925
7223	Special food services	\$26,046	6.8%	\$355,166	93.2%	\$381,212
3141	Textile furnishings mills	\$0	0.0%	\$367,034	100.0%	\$367,034
4539	Other miscellaneous store retailers	\$25,976	7.1%	\$340,705	92.9%	\$366,682
1141	Fishing	\$0	0.0%	\$353,418	100.0%	\$353,418
3274	Lime and gypsum product manufacturing	\$0	0.0%	\$350,212	100.0%	\$350,212
5269	Other funds and financial vehicles	\$0	0.0%	\$349,497	100.0%	\$349,497
4442	Lawn and garden equipment and supplies stores	\$185,758	54.1%	\$157,515	45.9%	\$343,273
3321	Forging and stamping	\$0	0.0%	\$342,376	100.0%	\$342,376
4812	Non-scheduled air transportation	\$0	0.0%	\$339,123	100.0%	\$339,123
4413	Automotive parts, accessories and tire stores	\$127,055	37.8%	\$209,263	62.2%	\$336,318
5261	Pension funds	\$0	0.0%	\$330,627	100.0%	\$330,627
3325	Hardware manufacturing	\$0	0.0%	\$323,399	100.0%	\$323,399
3328	Coating, engraving, cold and heat treating and allied activities	\$0	0.0%	\$311,331	100.0%	\$311,331
3122	Tobacco manufacturing	\$0	0.0%	\$310,359	100.0%	\$310,359
4132	Beverage merchant wholesalers	\$0	0.0%	\$294,891	100.0%	\$294,891
4421	Furniture stores	\$0	0.0%	\$289,004	100.0%	\$289,004
5122	Sound recording industries	\$0	0.0%	\$286,299	100.0%	\$286,299
4832	Inland water transportation	\$0	0.0%	\$282,603	100.0%	\$282,603
3361	Motor vehicle manufacturing	\$0	0.0%	\$281,202	100.0%	\$281,202
4453	Beer, wine and liquor stores	\$128,123	45.7%	\$152,037	54.3%	\$280,160
8121	Personal care services	\$125,209	45.0%	\$152,860	55.0%	\$278,069
1133	Logging	\$0	0.0%	\$271,372	100.0%	\$271,372
3352	Household appliance manufacturing	\$0	0.0%	\$265,036	100.0%	\$265,036
8122	Funeral services	\$0	0.0%	\$263,928	100.0%	\$263,928
3271	Clay product and refractory manufacturing	\$0	0.0%	\$262,405	100.0%	\$262,405
7113	Promoters (presenters) of performing arts, sports and similar events	\$0	0.0%	\$256,990	100.0%	\$256,990
7112	Spectator sports	\$0	0.0%	\$253,137	100.0%	\$253,137
4142	Home entertainment equipment and household appliance merchant wholesalers	\$0	0.0%	\$236,450	100.0%	\$236,450
6242	Community food and housing, and emergency and other relief services	\$0	0.0%	\$234,124	100.0%	\$234,124
4452	Specialty food stores	\$74,871	33.1%	\$151,505	66.9%	\$226,376
3343	Audio and video equipment manufacturing	\$0	0.0%	\$225,997	100.0%	\$225,997
7132	Gambling industries	\$0	0.0%	\$224,399	100.0%	\$224,399
7111	Performing arts companies	\$0	0.0%	\$220,332	100.0%	\$220,332
3133	Textile and fabric finishing and fabric coating	\$0	0.0%	\$218,586	100.0%	\$218,586
4511	Sporting goods, hobby and musical instrument stores	\$12,669	5.9%	\$203,186	94.1%	\$215,856
4852	Interurban and rural bus transportation	\$0	0.0%	\$207,992	100.0%	\$207,992
5242	Agencies, brokerages and other insurance related activities	\$187,369	90.2%	\$20,342	9.8%	\$207,710
4855	Charter bus industry	\$0	0.0%	\$203,393	100.0%	\$203,393
4412	Other motor vehicle dealers	\$87,620	43.4%	\$114,444	56.6%	\$202,063
4422	Home furnishings stores	\$0	0.0%	\$191,862	100.0%	\$191,862
4859	Other transit and ground passenger transportation	\$100,080	53.1%	\$88,419	46.9%	\$188,499
3159	Clothing accessories and other clothing manufacturing	\$0	0.0%	\$175,616	100.0%	\$175,616
6116	Other schools and instruction	\$8,084	4.6%	\$166,585	95.4%	\$174,668
5232	Securities and commodity exchanges	\$0	0.0%	\$149,775	100.0%	\$149,775
7224	Drinking places (alcoholic beverages)	\$59,402	39.9%	\$89,463	60.1%	\$148,864

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8131	Religious organizations	\$94,673	66.2%	\$48,439	33.8%	\$143,113
2121	Coal mining	\$0	0.0%	\$141,956	100.0%	\$141,956
5211	Monetary authorities - central bank	\$0	0.0%	\$140,316	100.0%	\$140,316
3372	Office furniture (including fixtures) manufacturing	\$0	0.0%	\$139,037	100.0%	\$139,037
1153	Support activities for forestry	\$0	0.0%	\$130,221	100.0%	\$130,221
4532	Office supplies, stationery and gift stores	\$49,237	38.2%	\$79,495	61.8%	\$128,732
3162	Footwear manufacturing	\$0	0.0%	\$127,082	100.0%	\$127,082
3346	Manufacturing and reproducing magnetic and optical media	\$0	0.0%	\$124,382	100.0%	\$124,382
5174	Satellite telecommunications	\$0	0.0%	\$123,676	100.0%	\$123,676
4153	Used motor vehicle parts and accessories merchant wholesalers	\$0	0.0%	\$111,902	100.0%	\$111,902
3131	Fibre, yarn and thread mills	\$0	0.0%	\$109,568	100.0%	\$109,568
4533	Used merchandise stores	\$0	0.0%	\$108,452	100.0%	\$108,452
8129	Other personal services	\$8,289	7.7%	\$99,885	92.3%	\$108,174
4851	Urban transit systems	\$5,634	5.2%	\$102,239	94.8%	\$107,872
3365	Railroad rolling stock manufacturing	\$0	0.0%	\$101,589	100.0%	\$101,589
4133	Cigarette and tobacco product merchant wholesalers	\$0	0.0%	\$99,035	100.0%	\$99,035
3151	Clothing knitting mills	\$0	0.0%	\$88,220	100.0%	\$88,220
3366	Ship and boat building	\$0	0.0%	\$80,003	100.0%	\$80,003
4871	Scenic and sightseeing transportation, land	\$0	0.0%	\$78,601	100.0%	\$78,601
4482	Shoe stores	\$0	0.0%	\$77,017	100.0%	\$77,017
7212	Recreational vehicle (RV) parks and recreational camps	\$10,572	14.6%	\$62,078	85.4%	\$72,651
9111	Defence services	\$0	0.0%	\$71,105	100.0%	\$71,105
3379	Other furniture-related product manufacturing	\$0	0.0%	\$64,472	100.0%	\$64,472
7213	Rooming and boarding houses	\$0	0.0%	\$62,738	100.0%	\$62,738
3169	Other leather and allied product manufacturing	\$0	0.0%	\$59,845	100.0%	\$59,845
6115	Technical and trade schools	\$0	0.0%	\$59,365	100.0%	\$59,365
4872	Scenic and sightseeing transportation, water	\$0	0.0%	\$59,229	100.0%	\$59,229
7115	Independent artists, writers and performers	\$0	0.0%	\$50,709	100.0%	\$50,709
7131	Amusement parks and arcades	\$0	0.0%	\$48,840	100.0%	\$48,840
6117	Educational support services	\$0	0.0%	\$48,701	100.0%	\$48,701
4483	Jewellery, luggage and leather goods stores	\$7,266	15.6%	\$39,176	84.4%	\$46,442
4542	Vending machine operators	\$0	0.0%	\$44,896	100.0%	\$44,896
4513	Book stores and news dealers	\$0	0.0%	\$34,214	100.0%	\$34,214
4869	Other pipeline transportation	\$0	0.0%	\$32,647	100.0%	\$32,647
6114	Business schools and computer and management training	\$0	0.0%	\$32,217	100.0%	\$32,217
4531	Florists	\$0	0.0%	\$29,232	100.0%	\$29,232
7114	Agents and managers for artists, athletes, entertainers and other public figures	\$0	0.0%	\$25,575	100.0%	\$25,575
3161	Leather and hide tanning and finishing	\$0	0.0%	\$17,770	100.0%	\$17,770
1132	Forest nurseries and gathering of forest products	\$0	0.0%	\$10,263	100.0%	\$10,263
1131	Timber tract operations	\$0	0.0%	\$6,101	100.0%	\$6,101
1142	Hunting and trapping	\$0	0.0%	\$2,717	100.0%	\$2,717

Meadow Lake

NAICS	Purchases from	In-region Purchases	% In-region Purchases	Imported Purchases	% Imported Purchases	Total Purchases
1133	Logging	\$13,272,201	19.9%	\$53,477,324	80.1%	\$66,749,525
3211	Sawmills and wood preservation	\$11,696,486	28.5%	\$29,367,629	71.5%	\$41,064,116
2211	Electric power generation, transmission and distribution	\$0	0.0%	\$20,600,951	100.0%	\$20,600,951
3212	Veneer, plywood and engineered wood product manufacturing	\$18,449,933	100.0%	(\$0)	(0.0%)	\$18,449,933
4841	General freight trucking	\$335,878	2.8%	\$11,670,824	97.2%	\$12,006,702
1110	Farms	\$4,620,598	43.1%	\$6,108,111	56.9%	\$10,728,709
3221	Pulp, paper and paperboard mills	\$9,431,035	90.8%	\$956,260	9.2%	\$10,387,296
3252	Resin, synthetic rubber, and artificial and synthetic fibres and filaments manufacturing	\$0	0.0%	\$9,627,732	100.0%	\$9,627,732
5221	Depository credit intermediation	\$1,862,200	19.7%	\$7,613,999	80.3%	\$9,476,200
3241	Petroleum and coal product manufacturing	\$0	0.0%	\$9,280,638	100.0%	\$9,280,638
3251	Basic chemical manufacturing	\$0	0.0%	\$8,593,905	100.0%	\$8,593,905
4842	Specialized freight trucking	\$2,241,137	27.0%	\$6,072,738	73.0%	\$8,313,875
5311	Lessors of real estate	\$1,511,711	19.8%	\$6,139,366	80.2%	\$7,651,078
3261	Plastic product manufacturing	\$0	0.0%	\$7,146,007	100.0%	\$7,146,007
1153	Support activities for forestry	\$5,304,793	80.5%	\$1,285,132	19.5%	\$6,589,925
5241	Insurance carriers	\$649,198	11.1%	\$5,190,701	88.9%	\$5,839,899
6221	General medical and surgical hospitals	\$1,046,777	18.7%	\$4,555,129	81.3%	\$5,601,906
4821	Rail transportation	\$0	0.0%	\$5,373,667	100.0%	\$5,373,667
3219	Other wood product manufacturing	\$717,712	13.6%	\$4,547,151	86.4%	\$5,264,863
3222	Converted paper product manufacturing	\$0	0.0%	\$4,818,489	100.0%	\$4,818,489
3254	Pharmaceutical and medicine manufacturing	\$0	0.0%	\$4,283,421	100.0%	\$4,283,421
5511	Management of companies and enterprises	\$0	0.0%	\$4,191,764	100.0%	\$4,191,764
5413	Architectural, engineering and related services	\$204,699	5.0%	\$3,891,972	95.0%	\$4,096,671
5412	Accounting, tax preparation, bookkeeping and payroll services	\$902,970	23.7%	\$2,912,731	76.3%	\$3,815,701
4885	Freight transportation arrangement	\$0	0.0%	\$3,699,797	100.0%	\$3,699,797
5617	Services to buildings and dwellings	\$389,549	10.7%	\$3,255,755	89.3%	\$3,645,304
3112	Grain and oilseed milling	\$1,560,884	43.2%	\$2,053,940	56.8%	\$3,614,824
3259	Other chemical product manufacturing	\$0	0.0%	\$3,366,048	100.0%	\$3,366,048
5415	Computer systems design and related services	\$82,258	2.5%	\$3,258,742	97.5%	\$3,341,001
5416	Management, scientific and technical consulting services	\$0	0.0%	\$3,237,768	100.0%	\$3,237,768
5611	Office administrative services	\$2,340,571	73.1%	\$860,611	26.9%	\$3,201,182
2111	Oil and gas extraction	\$0	0.0%	\$3,117,660	100.0%	\$3,117,660
4881	Support activities for air transportation	\$0	0.0%	\$2,894,633	100.0%	\$2,894,633
4831	Deep sea, coastal and Great Lakes water transportation	\$0	0.0%	\$2,796,935	100.0%	\$2,796,935
4884	Support activities for road transportation	\$0	0.0%	\$2,720,325	100.0%	\$2,720,325
5411	Legal services	\$287,861	10.6%	\$2,427,416	89.4%	\$2,715,277
3339	Other general-purpose machinery manufacturing	\$0	0.0%	\$2,696,368	100.0%	\$2,696,368
4441	Building material and supplies dealers	\$243,916	9.1%	\$2,432,678	90.9%	\$2,676,594
9130	Local, municipal and regional public administration	\$446,630	17.1%	\$2,159,648	82.9%	\$2,606,279
5173	Wired and wireless telecommunications carriers(except satellite)	\$0	0.0%	\$2,605,786	100.0%	\$2,605,786
1132	Forest nurseries and gathering of forest products	\$0	0.0%	\$2,524,411	100.0%	\$2,524,411

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3363	Motor vehicle parts manufacturing	\$0	0.0%	\$2,434,504	100.0%	\$2,434,504
3262	Rubber product manufacturing	\$0	0.0%	\$2,399,142	100.0%	\$2,399,142
3323	Architectural and structural metals manufacturing	\$0	0.0%	\$2,329,351	100.0%	\$2,329,351
5331	Lessors of non-financial intangible assets (except copyrighted works)	\$0	0.0%	\$2,321,811	100.0%	\$2,321,811
4163	Lumber, millwork, hardware and other building supplies merchant wholesalers	\$0	0.0%	\$2,294,315	100.0%	\$2,294,315
4921	Couriers	\$0	0.0%	\$2,218,046	100.0%	\$2,218,046
3335	Metalworking machinery manufacturing	\$0	0.0%	\$2,202,072	100.0%	\$2,202,072
3116	Meat product manufacturing	\$0	0.0%	\$2,177,820	100.0%	\$2,177,820
3111	Animal food manufacturing	\$2,034,253	94.8%	\$110,969	5.2%	\$2,145,222
2382	Building equipment contractors	\$623,329	29.5%	\$1,492,899	70.5%	\$2,116,228
7225	Full-service restaurants and limited-service eating places	\$539,187	26.4%	\$1,504,867	73.6%	\$2,044,054
3353	Electrical equipment manufacturing	\$0	0.0%	\$2,024,250	100.0%	\$2,024,250
5239	Other financial investment activities	\$0	0.0%	\$2,007,597	100.0%	\$2,007,597
4161	Electrical, plumbing, heating and air-conditioning equipment and supplies merchant wholesalers	\$54,198	2.7%	\$1,942,838	97.3%	\$1,997,036
3253	Pesticide, fertilizer and other agricultural chemical manufacturing	\$0	0.0%	\$1,954,830	100.0%	\$1,954,830
3314	Non-ferrous metal (except aluminum) production and processing	\$0	0.0%	\$1,933,507	100.0%	\$1,933,507
5419	Other professional, scientific and technical services	\$1,305,583	67.6%	\$625,684	32.4%	\$1,931,266
5222	Non-depository credit intermediation	\$0	0.0%	\$1,928,845	100.0%	\$1,928,845
4931	Warehousing and storage	\$0	0.0%	\$1,919,747	100.0%	\$1,919,747
5613	Employment services	\$793,391	42.5%	\$1,072,785	57.5%	\$1,866,177
5418	Advertising, public relations, and related services	\$0	0.0%	\$1,849,801	100.0%	\$1,849,801
4883	Support activities for water transportation	\$0	0.0%	\$1,743,496	100.0%	\$1,743,496
3231	Printing and related support activities	\$0	0.0%	\$1,708,175	100.0%	\$1,708,175
5324	Commercial and industrial machinery and equipment rental and leasing	\$0	0.0%	\$1,617,894	100.0%	\$1,617,894
3391	Medical equipment and supplies manufacturing	\$0	0.0%	\$1,610,416	100.0%	\$1,610,416
6111	Elementary and secondary schools	\$638,378	39.8%	\$964,740	60.2%	\$1,603,118
5616	Investigation and security services	\$254,119	16.3%	\$1,304,573	83.7%	\$1,558,692
6231	Nursing care facilities	\$1,260,645	82.5%	\$266,925	17.5%	\$1,527,570
3255	Paint, coating and adhesive manufacturing	\$0	0.0%	\$1,509,840	100.0%	\$1,509,840
5614	Business support services	\$153,524	10.2%	\$1,355,175	89.8%	\$1,508,699
1131	Timber tract operations	\$0	0.0%	\$1,500,613	100.0%	\$1,500,613
2212	Natural gas distribution	\$0	0.0%	\$1,452,892	100.0%	\$1,452,892
3336	Engine, turbine and power transmission equipment manufacturing	\$0	0.0%	\$1,451,464	100.0%	\$1,451,464
5619	Other support services	\$0	0.0%	\$1,359,378	100.0%	\$1,359,378
3329	Other fabricated metal product manufacturing	\$0	0.0%	\$1,335,295	100.0%	\$1,335,295
8113	Commercial and industrial machinery and equipment (except automotive and electronic) repair and maintenance	\$359,572	27.2%	\$960,005	72.8%	\$1,319,577
4189	Other miscellaneous merchant wholesalers	\$0	0.0%	\$1,315,274	100.0%	\$1,315,274
5629	Remediation and other waste management services	\$0	0.0%	\$1,278,632	100.0%	\$1,278,632
9120	Provincial and territorial public administration	\$734,225	57.5%	\$543,181	42.5%	\$1,277,406
4172	Construction, forestry, mining, and industrial machinery, equipment and supplies merchant wholesalers	\$144,212	11.3%	\$1,131,484	88.7%	\$1,275,696
6211	Offices of physicians	\$192,903	15.3%	\$1,064,472	84.7%	\$1,257,376
3359	Other electrical equipment and component manufacturing	\$0	0.0%	\$1,243,401	100.0%	\$1,243,401
5242	Agencies, brokerages and other insurance related activities	\$1,101,506	89.7%	\$126,239	10.3%	\$1,227,746
5111	Newspaper, periodical, book and directory publishers	\$0	0.0%	\$1,197,025	100.0%	\$1,197,025
5231	Securities and commodity contracts intermediation and brokerage	\$0	0.0%	\$1,167,328	100.0%	\$1,167,328
6241	Individual and family services	\$793,520	69.4%	\$350,398	30.6%	\$1,143,918

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5621	Waste collection	\$0	0.0%	\$1,142,514	100.0%	\$1,142,514
4131	Food merchant wholesalers	\$0	0.0%	\$1,135,771	100.0%	\$1,135,771
3332	Industrial machinery manufacturing	\$0	0.0%	\$1,081,763	100.0%	\$1,081,763
9112	Other federal services (9112-9119)	\$252,943	23.7%	\$815,593	76.3%	\$1,068,536
5321	Automotive equipment rental and leasing	\$0	0.0%	\$1,065,647	100.0%	\$1,065,647
6214	Out-patient care centres	\$532,444	50.5%	\$522,406	49.5%	\$1,054,850
4173	Computer and communications equipment and supplies merchant wholesalers	\$0	0.0%	\$1,048,105	100.0%	\$1,048,105
3331	Agricultural, construction and mining machinery manufacturing	\$0	0.0%	\$1,039,319	100.0%	\$1,039,319
8111	Automotive repair and maintenance	\$550,263	55.2%	\$445,926	44.8%	\$996,189
4179	Other machinery, equipment and supplies merchant wholesalers	\$0	0.0%	\$988,546	100.0%	\$988,546
3121	Beverage manufacturing	\$0	0.0%	\$971,863	100.0%	\$971,863
5622	Waste treatment and disposal	\$374,348	38.6%	\$594,915	61.4%	\$969,262
4184	Chemical (except agricultural) and allied product merchant wholesalers	\$0	0.0%	\$962,986	100.0%	\$962,986
4811	Scheduled air transportation	\$0	0.0%	\$958,152	100.0%	\$958,152
4145	Pharmaceuticals, toiletries, cosmetics and sundries merchant wholesalers	\$0	0.0%	\$947,691	100.0%	\$947,691
3334	Ventilation, heating, air-conditioning and commercial refrigeration equipment manufacturing	\$0	0.0%	\$941,045	100.0%	\$941,045
8139	Business, professional, labour and other membership organizations	\$0	0.0%	\$939,478	100.0%	\$939,478
4183	Agricultural supplies merchant wholesalers	\$212,096	23.2%	\$703,744	76.8%	\$915,840
7211	Traveller accommodation	\$250,616	27.4%	\$663,828	72.6%	\$914,444
2123	Non-metallic mineral mining and quarrying	\$0	0.0%	\$912,814	100.0%	\$912,814
5191	Other information services	\$0	0.0%	\$911,714	100.0%	\$911,714
3327	Machine shops, turned product, and screw, nut and bolt manufacturing	\$0	0.0%	\$903,307	100.0%	\$903,307
4121	Petroleum and petroleum products merchant wholesalers	\$0	0.0%	\$900,861	100.0%	\$900,861
2381	Foundation, structure, and building exterior contractors	\$88,811	10.1%	\$791,799	89.9%	\$880,609
3311	Iron and steel mills and ferro-alloy manufacturing	\$0	0.0%	\$874,995	100.0%	\$874,995
2389	Other specialty trade contractors	\$0	0.0%	\$856,241	100.0%	\$856,241
4182	Paper, paper product and disposable plastic product merchant wholesalers	\$0	0.0%	\$855,926	100.0%	\$855,926
4911	Postal service	\$23,688	2.8%	\$831,355	97.2%	\$855,043
3345	Navigational, measuring, medical and control instruments manufacturing	\$0	0.0%	\$840,583	100.0%	\$840,583
6233	Community care facilities for the elderly	\$0	0.0%	\$834,290	100.0%	\$834,290
3256	Soap, cleaning compound and toilet preparation manufacturing	\$0	0.0%	\$828,009	100.0%	\$828,009
4181	Recyclable material merchant wholesalers	\$154,990	18.7%	\$672,366	81.3%	\$827,356
3399	Other miscellaneous manufacturing	\$0	0.0%	\$806,790	100.0%	\$806,790
4152	New motor vehicle parts and accessories merchant wholesalers	\$219,761	27.4%	\$580,881	72.6%	\$800,641
5182	Data processing, hosting, and related services	\$0	0.0%	\$796,074	100.0%	\$796,074
4862	Pipeline transportation of natural gas	\$0	0.0%	\$788,351	100.0%	\$788,351
4191	Business-to-business electronic markets, and agents and brokers	\$0	0.0%	\$759,754	100.0%	\$759,754
4162	Metal service centres	\$0	0.0%	\$754,247	100.0%	\$754,247
6244	Child day-care services	\$136,187	18.2%	\$613,163	81.8%	\$749,349
4471	Gasoline stations	\$269,803	36.3%	\$473,117	63.7%	\$742,921
6212	Offices of dentists	\$413,787	57.2%	\$310,092	42.8%	\$723,879
4411	Automobile dealers	\$272,470	37.7%	\$449,602	62.3%	\$722,072
4461	Health and personal care stores	\$190,775	26.5%	\$529,477	73.5%	\$720,251
3119	Other food manufacturing	\$362,541	51.4%	\$342,753	48.6%	\$705,295
2371	Utility system construction	\$320,461	46.2%	\$373,631	53.8%	\$694,092
5151	Radio and television broadcasting	\$120,346	17.6%	\$564,832	82.4%	\$685,178

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3369	Other transportation equipment manufacturing	\$0	0.0%	\$683,150	100.0%	\$683,150
6113	Universities	\$0	0.0%	\$653,073	100.0%	\$653,073
3115	Dairy product manufacturing	\$0	0.0%	\$640,229	100.0%	\$640,229
4151	Motor vehicle merchant wholesalers	\$8,032	1.3%	\$625,738	98.7%	\$633,770
4111	Farm product merchant wholesalers	\$0	0.0%	\$632,756	100.0%	\$632,756
4832	Inland water transportation	\$0	0.0%	\$627,192	100.0%	\$627,192
2383	Building finishing contractors	\$0	0.0%	\$619,744	100.0%	\$619,744
3273	Cement and concrete product manufacturing	\$0	0.0%	\$607,248	100.0%	\$607,248
6213	Offices of other health practitioners	\$263,328	43.8%	\$338,482	56.2%	\$601,810
2131	Support activities for mining, and oil and gas extraction	\$0	0.0%	\$599,166	100.0%	\$599,166
4889	Other support activities for transportation	\$0	0.0%	\$597,274	100.0%	\$597,274
5121	Motion picture and video industries	\$83,190	14.2%	\$501,510	85.8%	\$584,700
5112	Software publishers	\$0	0.0%	\$520,971	100.0%	\$520,971
4451	Grocery stores	\$323,780	62.2%	\$196,511	37.8%	\$520,291
5223	Activities related to credit intermediation	\$0	0.0%	\$512,408	100.0%	\$512,408
6223	Specialty (except psychiatric and substance abuse) hospitals	\$0	0.0%	\$508,528	100.0%	\$508,528
5313	Activities related to real estate	\$0	0.0%	\$504,624	100.0%	\$504,624
3333	Commercial and service industry machinery manufacturing	\$0	0.0%	\$499,760	100.0%	\$499,760
4529	Other general merchandise stores	\$72,703	14.8%	\$417,994	85.2%	\$490,697
4854	School and employee bus transportation	\$66,620	13.6%	\$421,560	86.4%	\$488,180
3366	Ship and boat building	\$0	0.0%	\$484,799	100.0%	\$484,799
6216	Home health care services	\$178,734	37.0%	\$304,978	63.0%	\$483,712
3324	Boiler, tank and shipping container manufacturing	\$0	0.0%	\$476,204	100.0%	\$476,204
4882	Support activities for rail transportation	\$0	0.0%	\$469,014	100.0%	\$469,014
5612	Facilities support services	\$0	0.0%	\$467,277	100.0%	\$467,277
2122	Metal ore mining	\$0	0.0%	\$459,540	100.0%	\$459,540
2373	Highway, street and bridge construction	\$26,599	5.9%	\$426,936	94.1%	\$453,534
3279	Other non-metallic mineral product manufacturing	\$0	0.0%	\$452,097	100.0%	\$452,097
6232	Residential developmental handicap, mental health and substance abuse facilities	\$403,003	90.6%	\$41,708	9.4%	\$444,711
5179	Other telecommunications	\$0	0.0%	\$418,963	100.0%	\$418,963
6219	Other ambulatory health care services	\$360,066	89.4%	\$42,761	10.6%	\$402,827
5615	Travel arrangement and reservation services	\$0	0.0%	\$400,728	100.0%	\$400,728
4521	Department stores	\$45,943	12.0%	\$338,190	88.0%	\$384,133
8134	Civic and social organizations	\$0	0.0%	\$383,370	100.0%	\$383,370
6239	Other residential care facilities	\$144,941	38.0%	\$236,404	62.0%	\$381,344
5414	Specialized design services	\$0	0.0%	\$377,006	100.0%	\$377,006
3326	Spring and wire product manufacturing	\$0	0.0%	\$373,611	100.0%	\$373,611
2213	Water, sewage and other systems	\$0	0.0%	\$373,593	100.0%	\$373,593
3152	Cut and sew clothing manufacturing	\$0	0.0%	\$361,464	100.0%	\$361,464
3342	Communications equipment manufacturing	\$0	0.0%	\$347,997	100.0%	\$347,997
4141	Textile, clothing and footwear merchant wholesalers	\$0	0.0%	\$335,005	100.0%	\$335,005
3272	Glass and glass product manufacturing	\$0	0.0%	\$334,313	100.0%	\$334,313
3118	Bakeries and tortilla manufacturing	\$168,675	50.6%	\$164,406	49.4%	\$333,081
5417	Scientific research and development services	\$0	0.0%	\$330,829	100.0%	\$330,829
4922	Local messengers and local delivery	\$0	0.0%	\$329,907	100.0%	\$329,907
7139	Other amusement and recreation industries	\$194,013	62.5%	\$116,395	37.5%	\$310,407

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3325	Hardware manufacturing	\$0	0.0%	\$303,729	100.0%	\$303,729
3371	Household and institutional furniture and kitchen cabinet manufacturing	\$0	0.0%	\$291,561	100.0%	\$291,561
4171	Farm, lawn and garden machinery and equipment merchant wholesalers	\$121,870	42.9%	\$162,185	57.1%	\$284,055
1150	Support activities for farms	\$0	0.0%	\$282,518	100.0%	\$282,518
3117	Seafood product preparation and packaging	\$0	0.0%	\$279,291	100.0%	\$279,291
2379	Other heavy and civil engineering construction	\$0	0.0%	\$275,294	100.0%	\$275,294
5152	Pay and specialty television	\$0	0.0%	\$258,861	100.0%	\$258,861
3114	Fruit and vegetable preserving and specialty food manufacturing	\$0	0.0%	\$256,314	100.0%	\$256,314
5312	Offices of real estate agents and brokers	\$80,633	31.6%	\$174,657	68.4%	\$255,290
3149	Other textile product mills	\$0	0.0%	\$252,234	100.0%	\$252,234
5322	Consumer goods rental	\$0	0.0%	\$246,291	100.0%	\$246,291
4861	Pipeline transportation of crude oil	\$0	0.0%	\$246,207	100.0%	\$246,207
6112	Community colleges and C.E.G.E.P.s	\$42,314	17.3%	\$202,175	82.7%	\$244,489
4144	Personal goods merchant wholesalers	\$0	0.0%	\$243,570	100.0%	\$243,570
6243	Vocational rehabilitation services	\$24,867	10.2%	\$218,090	89.8%	\$242,956
3364	Aerospace product and parts manufacturing	\$0	0.0%	\$240,891	100.0%	\$240,891
8132	Grant-making and giving services	\$0	0.0%	\$240,115	100.0%	\$240,115
3312	Steel product manufacturing from purchased steel	\$0	0.0%	\$238,356	100.0%	\$238,356
6215	Medical and diagnostic laboratories	\$0	0.0%	\$237,648	100.0%	\$237,648
3344	Semiconductor and other electronic component manufacturing	\$0	0.0%	\$233,915	100.0%	\$233,915
4543	Direct selling establishments	\$153,802	66.8%	\$76,562	33.2%	\$230,365
6222	Psychiatric and substance abuse hospitals	\$0	0.0%	\$224,510	100.0%	\$224,510
4442	Lawn and garden equipment and supplies stores	\$49,098	22.0%	\$174,215	78.0%	\$223,312
3313	Alumina and aluminum production and processing	\$0	0.0%	\$218,894	100.0%	\$218,894
3132	Fabric mills	\$0	0.0%	\$218,055	100.0%	\$218,055
8114	Personal and household goods repair and maintenance	\$0	0.0%	\$217,663	100.0%	\$217,663
4812	Non-scheduled air transportation	\$0	0.0%	\$205,830	100.0%	\$205,830
4143	Home furnishings merchant wholesalers	\$0	0.0%	\$203,696	100.0%	\$203,696
3341	Computer and peripheral equipment manufacturing	\$0	0.0%	\$202,416	100.0%	\$202,416
4541	Electronic shopping and mail-order houses	\$0	0.0%	\$197,287	100.0%	\$197,287
8112	Electronic and precision equipment repair and maintenance	\$0	0.0%	\$195,490	100.0%	\$195,490
8133	Social advocacy organizations	\$0	0.0%	\$190,571	100.0%	\$190,571
4853	Taxi and limousine service	\$70,013	37.3%	\$117,726	62.7%	\$187,739
4481	Clothing stores	\$29,198	17.9%	\$134,259	82.1%	\$163,457
3322	Cutlery and hand tool manufacturing	\$0	0.0%	\$161,040	100.0%	\$161,040
4539	Other miscellaneous store retailers	\$0	0.0%	\$155,281	100.0%	\$155,281
4413	Automotive parts, accessories and tire stores	\$66,647	43.9%	\$85,328	56.1%	\$151,975
8123	Dry cleaning and laundry services	\$0	0.0%	\$150,492	100.0%	\$150,492
3113	Sugar and confectionery product manufacturing	\$0	0.0%	\$147,985	100.0%	\$147,985
4431	Electronics and appliance stores	\$44,193	29.9%	\$103,519	70.1%	\$147,712
7223	Special food services	\$0	0.0%	\$146,929	100.0%	\$146,929
7121	Heritage institutions	\$9,061	6.8%	\$125,118	93.2%	\$134,179
3351	Electric lighting equipment manufacturing	\$0	0.0%	\$132,416	100.0%	\$132,416
3141	Textile furnishings mills	\$0	0.0%	\$121,523	100.0%	\$121,523
8121	Personal care services	\$0	0.0%	\$119,194	100.0%	\$119,194
5269	Other funds and financial vehicles	\$0	0.0%	\$118,057	100.0%	\$118,057

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2372	Land subdivision	\$0	0.0%	\$117,251	100.0%	\$117,251
4421	Furniture stores	\$17,811	15.5%	\$97,211	84.5%	\$115,022
5323	General rental centres	\$0	0.0%	\$113,781	100.0%	\$113,781
6242	Community food and housing, and emergency and other relief services	\$19,083	16.9%	\$93,765	83.1%	\$112,847
5261	Pension funds	\$0	0.0%	\$111,683	100.0%	\$111,683
3274	Lime and gypsum product manufacturing	\$0	0.0%	\$108,152	100.0%	\$108,152
3122	Tobacco manufacturing	\$0	0.0%	\$105,160	100.0%	\$105,160
4142	Home entertainment equipment and household appliance merchant wholesalers	\$0	0.0%	\$103,952	100.0%	\$103,952
3321	Forging and stamping	\$0	0.0%	\$103,053	100.0%	\$103,053
4132	Beverage merchant wholesalers	\$0	0.0%	\$101,324	100.0%	\$101,324
3352	Household appliance manufacturing	\$0	0.0%	\$94,645	100.0%	\$94,645
8122	Funeral services	\$0	0.0%	\$93,067	100.0%	\$93,067
4412	Other motor vehicle dealers	\$33,742	37.0%	\$57,566	63.0%	\$91,308
7113	Promoters (presenters) of performing arts, sports and similar events	\$0	0.0%	\$87,782	100.0%	\$87,782
5122	Sound recording industries	\$0	0.0%	\$86,574	100.0%	\$86,574
7112	Spectator sports	\$48,739	56.4%	\$37,727	43.6%	\$86,466
4852	Interurban and rural bus transportation	\$0	0.0%	\$83,986	100.0%	\$83,986
4855	Charter bus industry	\$0	0.0%	\$82,129	100.0%	\$82,129
4453	Beer, wine and liquor stores	\$49,885	61.0%	\$31,919	39.0%	\$81,804
3271	Clay product and refractory manufacturing	\$0	0.0%	\$81,036	100.0%	\$81,036
5211	Monetary authorities - central bank	\$0	0.0%	\$79,540	100.0%	\$79,540
7132	Gambling industries	\$0	0.0%	\$78,137	100.0%	\$78,137
4422	Home furnishings stores	\$0	0.0%	\$76,360	100.0%	\$76,360
4859	Other transit and ground passenger transportation	\$0	0.0%	\$76,115	100.0%	\$76,115
4511	Sporting goods, hobby and musical instrument stores	\$3,519	4.6%	\$72,531	95.4%	\$76,051
7111	Performing arts companies	\$0	0.0%	\$75,261	100.0%	\$75,261
3133	Textile and fabric finishing and fabric coating	\$0	0.0%	\$72,373	100.0%	\$72,373
6116	Other schools and instruction	\$11,455	17.3%	\$54,784	82.7%	\$66,239
4452	Specialty food stores	\$38,310	58.0%	\$27,790	42.0%	\$66,100
3328	Coating, engraving, cold and heat treating and allied activities	\$0	0.0%	\$62,096	100.0%	\$62,096
7224	Drinking places (alcoholic beverages)	\$17,231	30.0%	\$40,145	70.0%	\$57,376
3159	Clothing accessories and other clothing manufacturing	\$0	0.0%	\$54,634	100.0%	\$54,634
4532	Office supplies, stationery and gift stores	\$0	0.0%	\$54,515	100.0%	\$54,515
4153	Used motor vehicle parts and accessories merchant wholesalers	\$0	0.0%	\$54,118	100.0%	\$54,118
8131	Religious organizations	\$35,598	66.8%	\$17,707	33.2%	\$53,305
3372	Office furniture (including fixtures) manufacturing	\$0	0.0%	\$52,932	100.0%	\$52,932
5232	Securities and commodity exchanges	\$0	0.0%	\$50,593	100.0%	\$50,593
4851	Urban transit systems	\$2,402	4.9%	\$46,836	95.1%	\$49,238
8129	Other personal services	\$0	0.0%	\$46,369	100.0%	\$46,369
4533	Used merchandise stores	\$16,622	36.2%	\$29,306	63.8%	\$45,927
3343	Audio and video equipment manufacturing	\$0	0.0%	\$45,238	100.0%	\$45,238
1141	Fishing	\$0	0.0%	\$41,554	100.0%	\$41,554
3162	Footwear manufacturing	\$0	0.0%	\$39,535	100.0%	\$39,535
3315	Foundries	\$0	0.0%	\$39,120	100.0%	\$39,120
3362	Motor vehicle body and trailer manufacturing	\$0	0.0%	\$36,803	100.0%	\$36,803
3131	Fibre, yarn and thread mills	\$0	0.0%	\$36,278	100.0%	\$36,278

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3361	Motor vehicle manufacturing	\$0	0.0%	\$35,277	100.0%	\$35,277
4133	Cigarette and tobacco product merchant wholesalers	\$0	0.0%	\$34,028	100.0%	\$34,028
5174	Satellite telecommunications	\$0	0.0%	\$33,657	100.0%	\$33,657
4871	Scenic and sightseeing transportation, land	\$0	0.0%	\$31,739	100.0%	\$31,739
3151	Clothing knitting mills	\$0	0.0%	\$27,445	100.0%	\$27,445
7212	Recreational vehicle (RV) parks and recreational camps	\$0	0.0%	\$26,214	100.0%	\$26,214
4482	Shoe stores	\$0	0.0%	\$26,011	100.0%	\$26,011
3346	Manufacturing and reproducing magnetic and optical media	\$0	0.0%	\$24,898	100.0%	\$24,898
4872	Scenic and sightseeing transportation, water	\$0	0.0%	\$23,916	100.0%	\$23,916
7213	Rooming and boarding houses	\$0	0.0%	\$22,637	100.0%	\$22,637
6115	Technical and trade schools	\$0	0.0%	\$22,513	100.0%	\$22,513
9111	Defence services	\$0	0.0%	\$21,811	100.0%	\$21,811
3379	Other furniture-related product manufacturing	\$0	0.0%	\$20,533	100.0%	\$20,533
3169	Other leather and allied product manufacturing	\$0	0.0%	\$18,618	100.0%	\$18,618
6117	Educational support services	\$0	0.0%	\$18,469	100.0%	\$18,469
4542	Vending machine operators	\$0	0.0%	\$17,557	100.0%	\$17,557
7115	Independent artists, writers and performers	\$0	0.0%	\$17,321	100.0%	\$17,321
7131	Amusement parks and arcades	\$0	0.0%	\$15,718	100.0%	\$15,718
4483	Jewellery, luggage and leather goods stores	\$0	0.0%	\$15,685	100.0%	\$15,685
4531	Florists	\$0	0.0%	\$12,379	100.0%	\$12,379
6114	Business schools and computer and management training	\$0	0.0%	\$12,218	100.0%	\$12,218
4513	Book stores and news dealers	\$0	0.0%	\$12,054	100.0%	\$12,054
7114	Agents and managers for artists, athletes, entertainers and other public figures	\$0	0.0%	\$8,736	100.0%	\$8,736
3161	Leather and hide tanning and finishing	\$5,341	96.6%	\$187	3.4%	\$5,528
3365	Railroad rolling stock manufacturing	\$0	0.0%	\$4,794	100.0%	\$4,794
4869	Other pipeline transportation	\$0	0.0%	\$3,590	100.0%	\$3,590
2121	Coal mining	\$0	0.0%	\$818	100.0%	\$818
1142	Hunting and trapping	\$0	0.0%	\$319	100.0%	\$319

Moose Jaw

NAICS	Purchases from	In-region Purchases	% In-region Purchases	Imported Purchases	% Imported Purchases	Total Purchases
3253	Pesticide, fertilizer and other agricultural chemical manufacturing	\$0	0.0%	\$15,584,866	100.0%	\$15,584,866
3116	Meat product manufacturing	\$15,103,899	98.9%	\$174,779	1.1%	\$15,278,678
3111	Animal food manufacturing	\$0	0.0%	\$12,209,579	100.0%	\$12,209,579
7225	Full-service restaurants and limited-service eating places	\$4,868,168	65.2%	\$2,603,365	34.8%	\$7,471,533
9120	Provincial and territorial public administration	\$6,744,859	91.1%	\$657,280	8.9%	\$7,402,139
3231	Printing and related support activities	\$0	0.0%	\$5,665,437	100.0%	\$5,665,437
3329	Other fabricated metal product manufacturing	\$0	0.0%	\$5,660,901	100.0%	\$5,660,901
5619	Other support services	\$0	0.0%	\$5,461,586	100.0%	\$5,461,586
4821	Rail transportation	\$4,586,893	84.0%	\$870,503	16.0%	\$5,457,396
5621	Waste collection	\$0	0.0%	\$4,166,652	100.0%	\$4,166,652

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5111	Newspaper, periodical, book and directory publishers	\$2,318,907	56.2%	\$1,808,071	43.8%	\$4,126,978
8139	Business, professional, labour and other membership organizations	\$629,350	15.4%	\$3,450,064	84.6%	\$4,079,414
3121	Beverage manufacturing	\$0	0.0%	\$3,971,273	100.0%	\$3,971,273
3311	Iron and steel mills and ferro-alloy manufacturing	\$0	0.0%	\$3,937,095	100.0%	\$3,937,095
3344	Semiconductor and other electronic component manufacturing	\$189,580	4.8%	\$3,739,457	95.2%	\$3,929,036
5223	Activities related to credit intermediation	\$708,857	18.3%	\$3,157,950	81.7%	\$3,866,807
8113	Commercial and industrial machinery and equipment (except automotive and electronic) repair and maintenance	\$351,245	9.2%	\$3,464,623	90.8%	\$3,815,868
6213	Offices of other health practitioners	\$2,881,459	75.7%	\$926,565	24.3%	\$3,808,024
3259	Other chemical product manufacturing	\$0	0.0%	\$3,789,747	100.0%	\$3,789,747
6111	Elementary and secondary schools	\$2,082,148	55.2%	\$1,687,472	44.8%	\$3,769,620
4172	Construction, forestry, mining, and industrial machinery, equipment and supplies merchant wholesalers	\$1,420,268	38.4%	\$2,279,125	61.6%	\$3,699,394
3273	Cement and concrete product manufacturing	\$2,085,088	56.5%	\$1,605,908	43.5%	\$3,690,996
3399	Other miscellaneous manufacturing	\$0	0.0%	\$3,682,244	100.0%	\$3,682,244
3331	Agricultural, construction and mining machinery manufacturing	\$1,530,562	42.1%	\$2,107,800	57.9%	\$3,638,362
4131	Food merchant wholesalers	\$182,888	5.0%	\$3,452,419	95.0%	\$3,635,308
3112	Grain and oilseed milling	\$225,503	6.5%	\$3,262,406	93.5%	\$3,487,909
2123	Non-metallic mineral mining and quarrying	\$59,433	1.7%	\$3,342,825	98.3%	\$3,402,258
2379	Other heavy and civil engineering construction	\$0	0.0%	\$1,873,832	100.0%	\$1,873,832
4854	School and employee bus transportation	\$414,720	22.2%	\$1,457,411	77.8%	\$1,872,131
4411	Automobile dealers	\$1,232,591	67.1%	\$605,223	32.9%	\$1,837,814
3256	Soap, cleaning compound and toilet preparation manufacturing	\$0	0.0%	\$1,763,697	100.0%	\$1,763,697
2122	Metal ore mining	\$0	0.0%	\$1,720,603	100.0%	\$1,720,603
5414	Specialized design services	\$0	0.0%	\$1,669,936	100.0%	\$1,669,936
8134	Civic and social organizations	\$129,487	7.8%	\$1,535,186	92.2%	\$1,664,673
3324	Boiler, tank and shipping container manufacturing	\$692,386	41.6%	\$970,219	58.4%	\$1,662,605
3219	Other wood product manufacturing	\$0	0.0%	\$1,646,952	100.0%	\$1,646,952
4152	New motor vehicle parts and accessories merchant wholesalers	\$484,811	29.9%	\$1,136,099	70.1%	\$1,620,909
4184	Chemical (except agricultural) and allied product merchant wholesalers	\$0	0.0%	\$1,557,283	100.0%	\$1,557,283
6243	Vocational rehabilitation services	\$937,559	61.0%	\$599,776	39.0%	\$1,537,335
6113	Universities	\$177,469	11.6%	\$1,358,185	88.4%	\$1,535,655
4141	Textile, clothing and footwear merchant wholesalers	\$101,666	6.8%	\$1,402,886	93.2%	\$1,504,552
6215	Medical and diagnostic laboratories	\$137,832	9.2%	\$1,365,913	90.8%	\$1,503,745
3255	Paint, coating and adhesive manufacturing	\$0	0.0%	\$1,500,908	100.0%	\$1,500,908
4183	Agricultural supplies merchant wholesalers	\$1,364,072	92.1%	\$116,969	7.9%	\$1,481,042
3279	Other non-metallic mineral product manufacturing	\$0	0.0%	\$1,475,959	100.0%	\$1,475,959
5312	Offices of real estate agents and brokers	\$941,530	65.3%	\$500,547	34.7%	\$1,442,077
3341	Computer and peripheral equipment manufacturing	\$326,187	22.9%	\$1,098,804	77.1%	\$1,424,991
5417	Scientific research and development services	\$0	0.0%	\$1,420,667	100.0%	\$1,420,667
6222	Psychiatric and substance abuse hospitals	\$0	0.0%	\$1,420,614	100.0%	\$1,420,614
4529	Other general merchandise stores	\$755,317	53.8%	\$648,519	46.2%	\$1,403,835
4111	Farm product merchant wholesalers	\$1,377,536	99.4%	\$8,924	0.6%	\$1,386,460
4182	Paper, paper product and disposable plastic product merchant wholesalers	\$74,755	5.4%	\$1,309,397	94.6%	\$1,384,153
4181	Recyclable material merchant wholesalers	\$945,911	70.7%	\$392,041	29.3%	\$1,337,952
3314	Non-ferrous metal (except aluminum) production and processing	\$0	0.0%	\$1,312,993	100.0%	\$1,312,993
3211	Sawmills and wood preservation	\$0	0.0%	\$1,307,072	100.0%	\$1,307,072
4151	Motor vehicle merchant wholesalers	\$867,549	67.6%	\$415,528	32.4%	\$1,283,077

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3114	Fruit and vegetable preserving and specialty food manufacturing	\$0	0.0%	\$1,264,698	100.0%	\$1,264,698
4862	Pipeline transportation of natural gas	\$0	0.0%	\$1,223,867	100.0%	\$1,223,867
5322	Consumer goods rental	\$0	0.0%	\$1,154,512	100.0%	\$1,154,512
4831	Deep sea, coastal and Great Lakes water transportation	\$0	0.0%	\$1,146,997	100.0%	\$1,146,997
3212	Veneer, plywood and engineered wood product manufacturing	\$797,714	69.8%	\$344,778	30.2%	\$1,142,492
3312	Steel product manufacturing from purchased steel	\$0	0.0%	\$1,100,266	100.0%	\$1,100,266
4521	Department stores	\$945,850	86.1%	\$153,116	13.9%	\$1,098,966
4144	Personal goods merchant wholesalers	\$0	0.0%	\$1,093,905	100.0%	\$1,093,905
3272	Glass and glass product manufacturing	\$1,051,878	96.4%	\$39,553	3.6%	\$1,091,431
3365	Railroad rolling stock manufacturing	\$0	0.0%	\$1,090,017	100.0%	\$1,090,017
4889	Other support activities for transportation	\$181,523	17.0%	\$884,388	83.0%	\$1,065,911
8132	Grant-making and giving services	\$212,295	20.4%	\$830,336	79.6%	\$1,042,630
4922	Local messengers and local delivery	\$0	0.0%	\$1,035,631	100.0%	\$1,035,631
3336	Engine, turbine and power transmission equipment manufacturing	\$0	0.0%	\$927,609	100.0%	\$927,609
3313	Alumina and aluminum production and processing	\$0	0.0%	\$922,097	100.0%	\$922,097
6112	Community colleges and C.E.G.E.P.s	\$535,417	93.1%	\$39,481	6.9%	\$574,898
8112	Electronic and precision equipment repair and maintenance	\$0	0.0%	\$565,306	100.0%	\$565,306
4812	Non-scheduled air transportation	\$0	0.0%	\$562,587	100.0%	\$562,587
3252	Resin, synthetic rubber, and artificial and synthetic fibres and filaments manufacturing	\$0	0.0%	\$552,430	100.0%	\$552,430
2213	Water, sewage and other systems	\$545,003	98.9%	\$6,099	1.1%	\$551,102
8121	Personal care services	\$284,378	52.9%	\$253,163	47.1%	\$537,541
7223	Special food services	\$194,722	36.3%	\$342,339	63.7%	\$537,061
5323	General rental centres	\$0	0.0%	\$533,361	100.0%	\$533,361
3362	Motor vehicle body and trailer manufacturing	\$457,329	88.3%	\$60,615	11.7%	\$517,945
4142	Home entertainment equipment and household appliance merchant wholesalers	\$0	0.0%	\$466,864	100.0%	\$466,864
3328	Coating, engraving, cold and heat treating and allied activities	\$0	0.0%	\$461,996	100.0%	\$461,996
7113	Promoters (presenters) of performing arts, sports and similar events	\$0	0.0%	\$438,596	100.0%	\$438,596
3321	Forging and stamping	\$0	0.0%	\$435,820	100.0%	\$435,820
7112	Spectator sports	\$0	0.0%	\$432,021	100.0%	\$432,021
3325	Hardware manufacturing	\$0	0.0%	\$424,759	100.0%	\$424,759
3141	Textile furnishings mills	\$0	0.0%	\$418,673	100.0%	\$418,673
3113	Sugar and confectionery product manufacturing	\$0	0.0%	\$418,139	100.0%	\$418,139
4453	Beer, wine and liquor stores	\$154,527	37.5%	\$257,568	62.5%	\$412,096
3315	Foundries	\$0	0.0%	\$395,700	100.0%	\$395,700
4539	Other miscellaneous store retailers	\$160,428	41.1%	\$229,907	58.9%	\$390,335
4413	Automotive parts, accessories and tire stores	\$150,054	38.8%	\$236,753	61.2%	\$386,807
2121	Coal mining	\$0	0.0%	\$377,329	100.0%	\$377,329
7111	Performing arts companies	\$0	0.0%	\$376,034	100.0%	\$376,034
4481	Clothing stores	\$153,327	41.6%	\$215,173	58.4%	\$368,500
7132	Gambling industries	\$295,404	80.4%	\$72,075	19.6%	\$367,479
3274	Lime and gypsum product manufacturing	\$0	0.0%	\$353,084	100.0%	\$353,084
3159	Clothing accessories and other clothing manufacturing	\$0	0.0%	\$348,119	100.0%	\$348,119
3343	Audio and video equipment manufacturing	\$0	0.0%	\$339,275	100.0%	\$339,275
4452	Specialty food stores	\$52,391	15.7%	\$280,592	84.3%	\$332,983
4132	Beverage merchant wholesalers	\$0	0.0%	\$324,312	100.0%	\$324,312
4852	Interurban and rural bus transportation	\$0	0.0%	\$322,080	100.0%	\$322,080

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4855	Charter bus industry	\$183,882	58.4%	\$131,076	41.6%	\$314,958
4421	Furniture stores	\$156,942	51.9%	\$145,447	48.1%	\$302,389
4859	Other transit and ground passenger transportation	\$0	0.0%	\$291,896	100.0%	\$291,896
3372	Office furniture (including fixtures) manufacturing	\$0	0.0%	\$271,788	100.0%	\$271,788
3271	Clay product and refractory manufacturing	\$0	0.0%	\$264,556	100.0%	\$264,556
5232	Securities and commodity exchanges	\$0	0.0%	\$263,091	100.0%	\$263,091
5122	Sound recording industries	\$0	0.0%	\$263,078	100.0%	\$263,078
4832	Inland water transportation	\$0	0.0%	\$257,206	100.0%	\$257,206
3162	Footwear manufacturing	\$0	0.0%	\$251,912	100.0%	\$251,912
3133	Textile and fabric finishing and fabric coating	\$0	0.0%	\$249,339	100.0%	\$249,339
4442	Lawn and garden equipment and supplies stores	\$90,802	36.7%	\$156,649	63.3%	\$247,451
4851	Urban transit systems	\$49,890	20.2%	\$197,499	79.8%	\$247,389
3352	Household appliance manufacturing	\$152,827	63.2%	\$88,874	36.8%	\$241,701
4412	Other motor vehicle dealers	\$86,380	37.2%	\$146,017	62.8%	\$232,397
8131	Religious organizations	\$138,008	61.7%	\$85,811	38.3%	\$223,819
3361	Motor vehicle manufacturing	\$0	0.0%	\$212,399	100.0%	\$212,399
7224	Drinking places (alcoholic beverages)	\$91,385	43.6%	\$118,339	56.4%	\$209,724
8129	Other personal services	\$60,575	29.0%	\$148,539	71.0%	\$209,114
3122	Tobacco manufacturing	\$0	0.0%	\$204,084	100.0%	\$204,084
4422	Home furnishings stores	\$139,227	69.4%	\$61,521	30.6%	\$200,748

Lloydminster – North Battleford Region

NAICS	Purchases from	In-region Purchases	% In-region Purchases	Imported Purchases	% Imported Purchases	Total Purchases
2111	Oil and gas extraction	\$181,230,705	80.1%	\$44,988,146	19.9%	\$226,218,850
1110	Farms	\$88,521,614	57.2%	\$66,282,654	42.8%	\$154,804,268
3241	Petroleum and coal product manufacturing	\$70,685,999	86.8%	\$10,784,626	13.2%	\$81,470,625
2131	Support activities for mining, and oil and gas extraction	\$61,584,988	100.0%	\$5,397	0.0%	\$61,590,385
5221	Depository credit intermediation	\$26,416,736	43.8%	\$33,930,206	56.2%	\$60,346,942
5413	Architectural, engineering and related services	\$17,320,095	32.3%	\$36,247,348	67.7%	\$53,567,443
2211	Electric power generation, transmission and distribution	\$5,488,141	11.8%	\$41,166,715	88.2%	\$46,654,856
4841	General freight trucking	\$17,911,004	39.5%	\$27,419,555	60.5%	\$45,330,560
5311	Lessors of real estate	\$36,006,670	86.6%	\$5,576,351	13.4%	\$41,583,020
5241	Insurance carriers	\$0	0.0%	\$37,815,172	100.0%	\$37,815,172
3331	Agricultural, construction and mining machinery manufacturing	\$25,890,521	74.0%	\$9,106,920	26.0%	\$34,997,441
4842	Specialized freight trucking	\$28,753,875	91.6%	\$2,634,646	8.4%	\$31,388,521
5617	Services to buildings and dwellings	\$9,830,675	33.2%	\$19,752,354	66.8%	\$29,583,030
3253	Pesticide, fertilizer and other agricultural chemical manufacturing	\$0	0.0%	\$28,519,142	100.0%	\$28,519,142
5415	Computer systems design and related services	\$225,095	0.8%	\$27,443,877	99.2%	\$27,668,972
5511	Management of companies and enterprises	\$0	0.0%	\$25,454,790	100.0%	\$25,454,790
5412	Accounting, tax preparation, bookkeeping and payroll services	\$6,031,520	25.7%	\$17,480,007	74.3%	\$23,511,528
3111	Animal food manufacturing	\$14,227,058	61.3%	\$8,970,837	38.7%	\$23,197,895
5611	Office administrative services	\$4,245,965	19.5%	\$17,478,338	80.5%	\$21,724,303
5416	Management, scientific and technical consulting services	\$5,495,734	26.1%	\$15,524,875	73.9%	\$21,020,609

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2382	Building equipment contractors	\$4,679,943	23.2%	\$15,522,902	76.8%	\$20,202,845
5613	Employment services	\$5,702,020	28.4%	\$14,391,827	71.6%	\$20,093,847
3112	Grain and oilseed milling	\$20,021,943	100.0%	\$2,489	0.0%	\$20,024,431
5411	Legal services	\$3,974,853	22.3%	\$13,848,707	77.7%	\$17,823,560
4861	Pipeline transportation of crude oil	\$0	0.0%	\$17,316,332	100.0%	\$17,316,332
3363	Motor vehicle parts manufacturing	\$0	0.0%	\$16,729,519	100.0%	\$16,729,519
3261	Plastic product manufacturing	\$1,500,097	9.0%	\$15,219,995	91.0%	\$16,720,092
3312	Steel product manufacturing from purchased steel	\$0	0.0%	\$16,536,212	100.0%	\$16,536,212
5173	Wired and wireless telecommunications carriers(except satellite)	\$2,257,494	13.7%	\$14,277,376	86.3%	\$16,534,870
3339	Other general-purpose machinery manufacturing	\$3,059,631	20.6%	\$11,792,615	79.4%	\$14,852,246
5239	Other financial investment activities	\$1,147,473	7.9%	\$13,426,011	92.1%	\$14,573,485
3251	Basic chemical manufacturing	\$8,764,915	61.2%	\$5,559,361	38.8%	\$14,324,276
5331	Lessors of non-financial intangible assets (except copyrighted works)	\$0	0.0%	\$14,125,550	100.0%	\$14,125,550
9130	Local, municipal and regional public administration	\$5,732,536	41.7%	\$8,005,035	58.3%	\$13,737,571
5619	Other support services	\$4,685,186	36.2%	\$8,272,654	63.8%	\$12,957,841
5419	Other professional, scientific and technical services	\$3,816,312	32.0%	\$8,113,829	68.0%	\$11,930,141
4885	Freight transportation arrangement	\$0	0.0%	\$11,873,044	100.0%	\$11,873,044
3323	Architectural and structural metals manufacturing	\$751,581	6.5%	\$10,759,222	93.5%	\$11,510,804
3345	Navigational, measuring, medical and control instruments manufacturing	\$0	0.0%	\$11,370,046	100.0%	\$11,370,046
5222	Non-depository credit intermediation	\$5,371,222	47.3%	\$5,986,276	52.7%	\$11,357,498
5324	Commercial and industrial machinery and equipment rental and leasing	\$6,022,743	55.4%	\$4,840,937	44.6%	\$10,863,680
7225	Full-service restaurants and limited-service eating places	\$5,052,305	48.4%	\$5,393,499	51.6%	\$10,445,804
4921	Couriers	\$3,758,584	36.7%	\$6,477,560	63.3%	\$10,236,144
4172	Construction, forestry, mining, and industrial machinery, equipment and supplies merchant wholesalers	\$3,147,959	31.9%	\$6,732,637	68.1%	\$9,880,596
3329	Other fabricated metal product manufacturing	\$6,234,969	64.1%	\$3,486,416	35.9%	\$9,721,384
4821	Rail transportation	\$3,959,597	40.9%	\$5,730,768	59.1%	\$9,690,365
5614	Business support services	\$85,121	0.9%	\$9,474,099	99.1%	\$9,559,221
4931	Warehousing and storage	\$1,113,046	11.7%	\$8,435,346	88.3%	\$9,548,392
3116	Meat product manufacturing	\$373,112	3.9%	\$9,110,878	96.1%	\$9,483,990
3311	Iron and steel mills and ferro-alloy manufacturing	\$0	0.0%	\$9,408,773	100.0%	\$9,408,773
5418	Advertising, public relations, and related services	\$681,905	7.3%	\$8,678,365	92.7%	\$9,360,270
4881	Support activities for air transportation	\$1,052,986	11.3%	\$8,236,201	88.7%	\$9,289,187
3259	Other chemical product manufacturing	\$0	0.0%	\$9,242,954	100.0%	\$9,242,954
6221	General medical and surgical hospitals	\$2,233,888	24.6%	\$6,836,358	75.4%	\$9,070,246
4884	Support activities for road transportation	\$100,397	1.2%	\$8,629,415	98.8%	\$8,729,812
5231	Securities and commodity contracts intermediation and brokerage	\$3,249,219	38.3%	\$5,224,610	61.7%	\$8,473,829
2381	Foundation, structure, and building exterior contractors	\$2,352,393	28.0%	\$6,054,459	72.0%	\$8,406,852
2389	Other specialty trade contractors	\$558,891	6.8%	\$7,615,322	93.2%	\$8,174,214
4173	Computer and communications equipment and supplies merchant wholesalers	\$0	0.0%	\$8,117,845	100.0%	\$8,117,845
4179	Other machinery, equipment and supplies merchant wholesalers	\$707,577	9.2%	\$6,948,969	90.8%	\$7,656,546
5616	Investigation and security services	\$1,795,332	24.0%	\$5,681,292	76.0%	\$7,476,624
5629	Remediation and other waste management services	\$0	0.0%	\$7,448,898	100.0%	\$7,448,898
3231	Printing and related support activities	\$0	0.0%	\$7,313,140	100.0%	\$7,313,140
2123	Non-metallic mineral mining and quarrying	\$2,413,442	33.3%	\$4,836,382	66.7%	\$7,249,823
3359	Other electrical equipment and component manufacturing	\$0	0.0%	\$7,237,743	100.0%	\$7,237,743
3254	Pharmaceutical and medicine manufacturing	\$0	0.0%	\$7,144,546	100.0%	\$7,144,546

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4121	Petroleum and petroleum products merchant wholesalers	\$3,333,829	47.0%	\$3,764,136	53.0%	\$7,097,965
5321	Automotive equipment rental and leasing	\$2,583,987	37.4%	\$4,328,719	62.6%	\$6,912,706
9120	Provincial and territorial public administration	\$932,032	13.5%	\$5,966,785	86.5%	\$6,898,816
8113	Commercial and industrial machinery and equipment (except automotive and electronic) repair and maintenance	\$4,992,245	72.9%	\$1,855,966	27.1%	\$6,848,211
5621	Waste collection	\$3,914,906	58.8%	\$2,741,011	41.2%	\$6,655,916
2371	Utility system construction	\$3,549,823	53.6%	\$3,076,416	46.4%	\$6,626,239
4131	Food merchant wholesalers	\$0	0.0%	\$6,568,699	100.0%	\$6,568,699
3262	Rubber product manufacturing	\$0	0.0%	\$6,487,315	100.0%	\$6,487,315
4111	Farm product merchant wholesalers	\$2,899,495	45.1%	\$3,529,446	54.9%	\$6,428,941
3222	Converted paper product manufacturing	\$0	0.0%	\$6,248,814	100.0%	\$6,248,814
6111	Elementary and secondary schools	\$2,772,864	46.8%	\$3,149,613	53.2%	\$5,922,477
2383	Building finishing contractors	\$1,605,563	27.1%	\$4,310,906	72.9%	\$5,916,469
5182	Data processing, hosting, and related services	\$0	0.0%	\$5,916,453	100.0%	\$5,916,453
2122	Metal ore mining	\$255,068	4.3%	\$5,644,494	95.7%	\$5,899,562
8111	Automotive repair and maintenance	\$3,835,564	65.2%	\$2,049,521	34.8%	\$5,885,085
3273	Cement and concrete product manufacturing	\$2,098,870	35.9%	\$3,741,116	64.1%	\$5,839,986
5111	Newspaper, periodical, book and directory publishers	\$425,721	7.4%	\$5,364,096	92.6%	\$5,789,817
5622	Waste treatment and disposal	\$3,572,410	63.3%	\$2,074,199	36.7%	\$5,646,610
4883	Support activities for water transportation	\$0	0.0%	\$5,595,064	100.0%	\$5,595,064
3121	Beverage manufacturing	\$1,045,568	18.7%	\$4,535,526	81.3%	\$5,581,094
4441	Building material and supplies dealers	\$3,594,847	64.8%	\$1,950,473	35.2%	\$5,545,320
3353	Electrical equipment manufacturing	\$0	0.0%	\$5,513,781	100.0%	\$5,513,781
3336	Engine, turbine and power transmission equipment manufacturing	\$0	0.0%	\$5,505,688	100.0%	\$5,505,688
4163	Lumber, millwork, hardware and other building supplies merchant wholesalers	\$2,386,430	45.8%	\$2,819,753	54.2%	\$5,206,182
2212	Natural gas distribution	\$1,992,097	38.3%	\$3,207,484	61.7%	\$5,199,580
4191	Business-to-business electronic markets, and agents and brokers	\$171,086	3.3%	\$4,950,966	96.7%	\$5,122,051
5313	Activities related to real estate	\$1,371,876	27.2%	\$3,679,202	72.8%	\$5,051,078
7211	Traveller accommodation	\$3,254,649	64.9%	\$1,760,109	35.1%	\$5,014,758
5191	Other information services	\$804,055	16.2%	\$4,162,688	83.8%	\$4,966,743
3327	Machine shops, turned product, and screw, nut and bolt manufacturing	\$2,095,099	42.4%	\$2,841,424	57.6%	\$4,936,523
3391	Medical equipment and supplies manufacturing	\$0	0.0%	\$4,839,159	100.0%	\$4,839,159
1150	Support activities for farms	\$2,939,601	60.8%	\$1,894,921	39.2%	\$4,834,522
3314	Non-ferrous metal (except aluminum) production and processing	\$0	0.0%	\$4,596,763	100.0%	\$4,596,763
4161	Electrical, plumbing, heating and air-conditioning equipment and supplies merchant wholesalers	\$1,648,306	36.4%	\$2,883,300	63.6%	\$4,531,606
5612	Facilities support services	\$0	0.0%	\$4,454,170	100.0%	\$4,454,170
2373	Highway, street and bridge construction	\$1,571,249	36.3%	\$2,758,477	63.7%	\$4,329,726
5223	Activities related to credit intermediation	\$344,429	8.0%	\$3,960,667	92.0%	\$4,305,095
3399	Other miscellaneous manufacturing	\$1,597,465	38.3%	\$2,569,014	61.7%	\$4,166,479
4189	Other miscellaneous merchant wholesalers	\$175,027	4.2%	\$3,983,859	95.8%	\$4,158,886
4911	Postal service	\$1,770,169	42.7%	\$2,375,681	57.3%	\$4,145,850
9112	Other federal services (9112-9119)	\$650,422	16.1%	\$3,401,318	83.9%	\$4,051,740
8139	Business, professional, labour and other membership organizations	\$891,985	23.6%	\$2,886,178	76.4%	\$3,778,163
3119	Other food manufacturing	\$183,174	4.9%	\$3,557,569	95.1%	\$3,740,744
3334	Ventilation, heating, air-conditioning and commercial refrigeration equipment manufacturing	\$0	0.0%	\$3,680,864	100.0%	\$3,680,864
5151	Radio and television broadcasting	\$1,043,285	28.7%	\$2,586,870	71.3%	\$3,630,155
3115	Dairy product manufacturing	\$0	0.0%	\$3,563,510	100.0%	\$3,563,510

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3324	Boiler, tank and shipping container manufacturing	\$1,979,081	57.6%	\$1,456,763	42.4%	\$3,435,844
3369	Other transportation equipment manufacturing	\$0	0.0%	\$3,299,768	100.0%	\$3,299,768
4152	New motor vehicle parts and accessories merchant wholesalers	\$897,793	27.2%	\$2,401,213	72.8%	\$3,299,006
4471	Gasoline stations	\$1,198,237	36.6%	\$2,074,819	63.4%	\$3,273,056
4862	Pipeline transportation of natural gas	\$0	0.0%	\$3,235,956	100.0%	\$3,235,956
5112	Software publishers	\$81,463	2.6%	\$3,052,462	97.4%	\$3,133,925
4811	Scheduled air transportation	\$0	0.0%	\$3,093,010	100.0%	\$3,093,010
4184	Chemical (except agricultural) and allied product merchant wholesalers	\$196,139	6.4%	\$2,848,815	93.6%	\$3,044,953
3219	Other wood product manufacturing	\$180,332	5.9%	\$2,850,633	94.1%	\$3,030,965
4145	Pharmaceuticals, toiletries, cosmetics and sundries merchant wholesalers	\$0	0.0%	\$3,027,668	100.0%	\$3,027,668
4411	Automobile dealers	\$1,722,020	58.1%	\$1,239,620	41.9%	\$2,961,640
3332	Industrial machinery manufacturing	\$1,011,342	34.6%	\$1,908,235	65.4%	\$2,919,577
4183	Agricultural supplies merchant wholesalers	\$2,442,946	84.4%	\$452,933	15.6%	\$2,895,878
3342	Communications equipment manufacturing	\$0	0.0%	\$2,801,442	100.0%	\$2,801,442
3255	Paint, coating and adhesive manufacturing	\$0	0.0%	\$2,800,924	100.0%	\$2,800,924
4182	Paper, paper product and disposable plastic product merchant wholesalers	\$0	0.0%	\$2,706,432	100.0%	\$2,706,432
5179	Other telecommunications	\$0	0.0%	\$2,658,506	100.0%	\$2,658,506
2379	Other heavy and civil engineering construction	\$0	0.0%	\$2,628,127	100.0%	\$2,628,127
4181	Recyclable material merchant wholesalers	\$1,117,857	42.7%	\$1,498,238	57.3%	\$2,616,095
4151	Motor vehicle merchant wholesalers	\$1,916,154	73.4%	\$695,267	26.6%	\$2,611,422
4461	Health and personal care stores	\$1,464,337	57.0%	\$1,105,290	43.0%	\$2,569,627
3256	Soap, cleaning compound and toilet preparation manufacturing	\$0	0.0%	\$2,564,089	100.0%	\$2,564,089
4451	Grocery stores	\$1,404,460	54.8%	\$1,156,293	45.2%	\$2,560,753
5312	Offices of real estate agents and brokers	\$504,160	19.7%	\$2,051,190	80.3%	\$2,555,350
3335	Metalworking machinery manufacturing	\$0	0.0%	\$2,489,373	100.0%	\$2,489,373
6231	Nursing care facilities	\$1,849,438	74.8%	\$623,905	25.2%	\$2,473,343
6113	Universities	\$75,506	3.1%	\$2,337,172	96.9%	\$2,412,678
3333	Commercial and service industry machinery manufacturing	\$0	0.0%	\$2,379,194	100.0%	\$2,379,194
5414	Specialized design services	\$545,233	23.3%	\$1,790,957	76.7%	\$2,336,190
3279	Other non-metallic mineral product manufacturing	\$0	0.0%	\$2,318,074	100.0%	\$2,318,074
5121	Motion picture and video industries	\$0	0.0%	\$2,270,108	100.0%	\$2,270,108
3211	Sawmills and wood preservation	\$0	0.0%	\$2,251,122	100.0%	\$2,251,122
5615	Travel arrangement and reservation services	\$437,187	19.7%	\$1,782,040	80.3%	\$2,219,227
4171	Farm, lawn and garden machinery and equipment merchant wholesalers	\$949,217	43.1%	\$1,250,860	56.9%	\$2,200,076
3313	Alumina and aluminum production and processing	\$0	0.0%	\$2,171,748	100.0%	\$2,171,748
7139	Other amusement and recreation industries	\$585,679	27.2%	\$1,568,503	72.8%	\$2,154,182
5417	Scientific research and development services	\$272,868	13.0%	\$1,827,400	87.0%	\$2,100,268
3252	Resin, synthetic rubber, and artificial and synthetic fibres and filaments manufacturing	\$0	0.0%	\$2,036,655	100.0%	\$2,036,655
6211	Offices of physicians	\$1,054,429	51.8%	\$981,433	48.2%	\$2,035,862
4854	School and employee bus transportation	\$308,964	15.5%	\$1,680,571	84.5%	\$1,989,536
5152	Pay and specialty television	\$0	0.0%	\$1,954,126	100.0%	\$1,954,126
3118	Bakeries and tortilla manufacturing	\$0	0.0%	\$1,931,672	100.0%	\$1,931,672
4889	Other support activities for transportation	\$0	0.0%	\$1,916,715	100.0%	\$1,916,715
6241	Individual and family services	\$1,023,291	55.2%	\$828,868	44.8%	\$1,852,159
4529	Other general merchandise stores	\$786,170	42.7%	\$1,055,069	57.3%	\$1,841,239
3212	Veneer, plywood and engineered wood product manufacturing	\$689,410	38.7%	\$1,089,915	61.3%	\$1,779,324

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3272	Glass and glass product manufacturing	\$0	0.0%	\$1,714,152	100.0%	\$1,714,152
4162	Metal service centres	\$0	0.0%	\$1,711,511	100.0%	\$1,711,511
6214	Out-patient care centres	\$397,769	23.3%	\$1,310,176	76.7%	\$1,707,946
5322	Consumer goods rental	\$928,350	56.1%	\$725,421	43.9%	\$1,653,771
3117	Seafood product preparation and packaging	\$0	0.0%	\$1,645,342	100.0%	\$1,645,342
3344	Semiconductor and other electronic component manufacturing	\$0	0.0%	\$1,616,407	100.0%	\$1,616,407
4831	Deep sea, coastal and Great Lakes water transportation	\$0	0.0%	\$1,590,330	100.0%	\$1,590,330
3152	Cut and sew clothing manufacturing	\$0	0.0%	\$1,547,873	100.0%	\$1,547,873
8134	Civic and social organizations	\$0	0.0%	\$1,541,742	100.0%	\$1,541,742
3321	Forging and stamping	\$0	0.0%	\$1,540,468	100.0%	\$1,540,468
4922	Local messengers and local delivery	\$0	0.0%	\$1,522,502	100.0%	\$1,522,502
4882	Support activities for rail transportation	\$278,068	18.5%	\$1,227,048	81.5%	\$1,505,116
3114	Fruit and vegetable preserving and specialty food manufacturing	\$0	0.0%	\$1,455,206	100.0%	\$1,455,206
4521	Department stores	\$774,838	53.8%	\$666,542	46.2%	\$1,441,380
3371	Household and institutional furniture and kitchen cabinet manufacturing	\$700,339	50.7%	\$680,040	49.3%	\$1,380,380
6233	Community care facilities for the elderly	\$1,092,146	80.9%	\$258,683	19.1%	\$1,350,829
3315	Foundries	\$0	0.0%	\$1,276,863	100.0%	\$1,276,863
6244	Child day-care services	\$655,189	54.0%	\$558,109	46.0%	\$1,213,298
3322	Cutlery and hand tool manufacturing	\$0	0.0%	\$1,172,426	100.0%	\$1,172,426
6212	Offices of dentists	\$684,615	58.4%	\$487,444	41.6%	\$1,172,059
8114	Personal and household goods repair and maintenance	\$140,258	12.4%	\$989,348	87.6%	\$1,129,606
2372	Land subdivision	\$0	0.0%	\$1,119,352	100.0%	\$1,119,352
4141	Textile, clothing and footwear merchant wholesalers	\$59,498	5.6%	\$1,010,770	94.4%	\$1,070,268
3364	Aerospace product and parts manufacturing	\$0	0.0%	\$1,065,360	100.0%	\$1,065,360
3326	Spring and wire product manufacturing	\$0	0.0%	\$1,043,824	100.0%	\$1,043,824
8112	Electronic and precision equipment repair and maintenance	\$502,418	49.5%	\$512,118	50.5%	\$1,014,536
2213	Water, sewage and other systems	\$188,707	18.7%	\$822,677	81.3%	\$1,011,384
4543	Direct selling establishments	\$635,378	63.8%	\$361,164	36.2%	\$996,542
4853	Taxi and limousine service	\$162,567	16.5%	\$822,366	83.5%	\$984,933
6213	Offices of other health practitioners	\$619,026	63.5%	\$355,387	36.5%	\$974,412
3328	Coating, engraving, cold and heat treating and allied activities	\$773,773	79.8%	\$196,157	20.2%	\$969,930
8132	Grant-making and giving services	\$142,503	14.8%	\$823,132	85.2%	\$965,635
3149	Other textile product mills	\$0	0.0%	\$933,487	100.0%	\$933,487
6112	Community colleges and C.E.G.E.P.s	\$247,130	27.4%	\$656,097	72.6%	\$903,227
3351	Electric lighting equipment manufacturing	\$0	0.0%	\$900,152	100.0%	\$900,152
4481	Clothing stores	\$354,680	39.8%	\$536,825	60.2%	\$891,505
5269	Other funds and financial vehicles	\$0	0.0%	\$856,999	100.0%	\$856,999
4541	Electronic shopping and mail-order houses	\$0	0.0%	\$853,450	100.0%	\$853,450
3221	Pulp, paper and paperboard mills	\$0	0.0%	\$836,141	100.0%	\$836,141
8123	Dry cleaning and laundry services	\$0	0.0%	\$824,918	100.0%	\$824,918
6223	Specialty (except psychiatric and substance abuse) hospitals	\$329,751	40.0%	\$493,626	60.0%	\$823,376
5261	Pension funds	\$0	0.0%	\$810,729	100.0%	\$810,729
3132	Fabric mills	\$0	0.0%	\$806,994	100.0%	\$806,994
6216	Home health care services	\$468,216	59.8%	\$314,979	40.2%	\$783,195
4144	Personal goods merchant wholesalers	\$104,762	13.5%	\$673,391	86.5%	\$778,153
7121	Heritage institutions	\$173,157	22.4%	\$599,559	77.6%	\$772,716

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3341	Computer and peripheral equipment manufacturing	\$0	0.0%	\$767,777	100.0%	\$767,777
8133	Social advocacy organizations	\$237,030	30.9%	\$529,361	69.1%	\$766,392
5323	General rental centres	\$0	0.0%	\$764,009	100.0%	\$764,009
7223	Special food services	\$207,502	27.6%	\$543,353	72.4%	\$750,855
6232	Residential developmental handicap, mental health and substance abuse facilities	\$586,930	81.5%	\$133,117	18.5%	\$720,048
3325	Hardware manufacturing	\$0	0.0%	\$695,361	100.0%	\$695,361
4431	Electronics and appliance stores	\$456,377	66.5%	\$230,322	33.5%	\$686,699
4812	Non-scheduled air transportation	\$0	0.0%	\$664,441	100.0%	\$664,441
6219	Other ambulatory health care services	\$127,988	19.6%	\$524,243	80.4%	\$652,231
4143	Home furnishings merchant wholesalers	\$108,819	16.7%	\$541,946	83.3%	\$650,766
8121	Personal care services	\$439,730	69.9%	\$189,029	30.1%	\$628,760
4413	Automotive parts, accessories and tire stores	\$461,762	74.1%	\$161,578	25.9%	\$623,340
6239	Other residential care facilities	\$316,891	51.3%	\$300,557	48.7%	\$617,448
3343	Audio and video equipment manufacturing	\$0	0.0%	\$611,913	100.0%	\$611,913
4132	Beverage merchant wholesalers	\$0	0.0%	\$586,004	100.0%	\$586,004
3122	Tobacco manufacturing	\$0	0.0%	\$580,807	100.0%	\$580,807
3113	Sugar and confectionery product manufacturing	\$0	0.0%	\$562,865	100.0%	\$562,865
3274	Lime and gypsum product manufacturing	\$0	0.0%	\$554,538	100.0%	\$554,538
4539	Other miscellaneous store retailers	\$321,504	58.4%	\$228,942	41.6%	\$550,446
7113	Promoters (presenters) of performing arts, sports and similar events	\$164,368	32.5%	\$341,155	67.5%	\$505,523
4421	Furniture stores	\$301,049	59.9%	\$201,440	40.1%	\$502,489
7112	Spectator sports	\$234,721	47.1%	\$263,225	52.9%	\$497,946
7132	Gambling industries	\$15,381	3.2%	\$463,482	96.8%	\$478,862
4442	Lawn and garden equipment and supplies stores	\$161,135	34.8%	\$301,520	65.2%	\$462,655
3141	Textile furnishings mills	\$0	0.0%	\$449,744	100.0%	\$449,744
7111	Performing arts companies	\$62,922	14.5%	\$370,493	85.5%	\$433,415
3365	Railroad rolling stock manufacturing	\$0	0.0%	\$429,824	100.0%	\$429,824
1133	Logging	\$166,632	39.8%	\$252,261	60.2%	\$418,893
3271	Clay product and refractory manufacturing	\$0	0.0%	\$415,500	100.0%	\$415,500
3362	Motor vehicle body and trailer manufacturing	\$49,073	12.0%	\$359,868	88.0%	\$408,940
4453	Beer, wine and liquor stores	\$318,298	79.1%	\$84,324	20.9%	\$402,622
5122	Sound recording industries	\$0	0.0%	\$399,235	100.0%	\$399,235
6243	Vocational rehabilitation services	\$16,700	4.2%	\$376,680	95.8%	\$393,379
2121	Coal mining	\$328,218	84.2%	\$61,469	15.8%	\$389,687
6215	Medical and diagnostic laboratories	\$0	0.0%	\$384,784	100.0%	\$384,784
4511	Sporting goods, hobby and musical instrument stores	\$202,711	53.2%	\$178,541	46.8%	\$381,253
4412	Other motor vehicle dealers	\$98,958	26.4%	\$275,551	73.6%	\$374,509
3352	Household appliance manufacturing	\$0	0.0%	\$370,026	100.0%	\$370,026
5232	Securities and commodity exchanges	\$0	0.0%	\$367,262	100.0%	\$367,262
6222	Psychiatric and substance abuse hospitals	\$0	0.0%	\$363,512	100.0%	\$363,512
4832	Inland water transportation	\$0	0.0%	\$356,620	100.0%	\$356,620
1141	Fishing	\$0	0.0%	\$350,231	100.0%	\$350,231
1153	Support activities for forestry	\$0	0.0%	\$347,956	100.0%	\$347,956
4852	Interurban and rural bus transportation	\$0	0.0%	\$342,278	100.0%	\$342,278
3346	Manufacturing and reproducing magnetic and optical media	\$0	0.0%	\$336,779	100.0%	\$336,779
4855	Charter bus industry	\$0	0.0%	\$334,710	100.0%	\$334,710

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4422	Home furnishings stores	\$190,199	57.0%	\$143,389	43.0%	\$333,588
4142	Home entertainment equipment and household appliance merchant wholesalers	\$0	0.0%	\$332,105	100.0%	\$332,105
4452	Specialty food stores	\$188,641	58.0%	\$136,687	42.0%	\$325,328
8122	Funeral services	\$96,270	30.7%	\$217,744	69.3%	\$314,014
4859	Other transit and ground passenger transportation	\$0	0.0%	\$310,201	100.0%	\$310,201
7224	Drinking places (alcoholic beverages)	\$101,439	34.6%	\$191,771	65.4%	\$293,211
8131	Religious organizations	\$71,174	25.3%	\$209,662	74.7%	\$280,836
3133	Textile and fabric finishing and fabric coating	\$0	0.0%	\$267,843	100.0%	\$267,843
3361	Motor vehicle manufacturing	\$4,078	1.6%	\$256,093	98.4%	\$260,171
4869	Other pipeline transportation	\$0	0.0%	\$252,466	100.0%	\$252,466
6116	Other schools and instruction	\$75,056	30.7%	\$169,654	69.3%	\$244,711
8129	Other personal services	\$0	0.0%	\$244,600	100.0%	\$244,600
3372	Office furniture (including fixtures) manufacturing	\$0	0.0%	\$239,887	100.0%	\$239,887
3159	Clothing accessories and other clothing manufacturing	\$0	0.0%	\$233,956	100.0%	\$233,956
5242	Agencies, brokerages and other insurance related activities	\$158,076	68.8%	\$71,526	31.2%	\$229,603
4153	Used motor vehicle parts and accessories merchant wholesalers	\$103,224	46.3%	\$119,768	53.7%	\$222,992
5174	Satellite telecommunications	\$0	0.0%	\$213,571	100.0%	\$213,571
4851	Urban transit systems	\$0	0.0%	\$213,148	100.0%	\$213,148
4133	Cigarette and tobacco product merchant wholesalers	\$0	0.0%	\$196,802	100.0%	\$196,802
4532	Office supplies, stationery and gift stores	\$130,682	67.6%	\$62,565	32.4%	\$193,247
6242	Community food and housing, and emergency and other relief services	\$98,656	54.0%	\$84,060	46.0%	\$182,715
3162	Footwear manufacturing	\$0	0.0%	\$169,299	100.0%	\$169,299
4533	Used merchandise stores	\$0	0.0%	\$162,804	100.0%	\$162,804
5211	Monetary authorities - central bank	\$0	0.0%	\$146,953	100.0%	\$146,953
4482	Shoe stores	\$69,934	49.3%	\$71,931	50.7%	\$141,865
3131	Fibre, yarn and thread mills	\$0	0.0%	\$134,259	100.0%	\$134,259
3366	Ship and boat building	\$0	0.0%	\$133,638	100.0%	\$133,638
4871	Scenic and sightseeing transportation, land	\$0	0.0%	\$129,348	100.0%	\$129,348
9111	Defence services	\$0	0.0%	\$123,375	100.0%	\$123,375
7212	Recreational vehicle (RV) parks and recreational camps	\$58,012	48.3%	\$62,215	51.7%	\$120,227
3151	Clothing knitting mills	\$0	0.0%	\$117,527	100.0%	\$117,527
7131	Amusement parks and arcades	\$0	0.0%	\$109,078	100.0%	\$109,078
7213	Rooming and boarding houses	\$0	0.0%	\$103,823	100.0%	\$103,823
7115	Independent artists, writers and performers	\$0	0.0%	\$99,750	100.0%	\$99,750
4872	Scenic and sightseeing transportation, water	\$0	0.0%	\$97,469	100.0%	\$97,469
3379	Other furniture-related product manufacturing	\$0	0.0%	\$89,953	100.0%	\$89,953
4483	Jewellery, luggage and leather goods stores	\$21,709	25.4%	\$63,837	74.6%	\$85,546
6115	Technical and trade schools	\$0	0.0%	\$83,170	100.0%	\$83,170
3169	Other leather and allied product manufacturing	\$0	0.0%	\$79,726	100.0%	\$79,726
4542	Vending machine operators	\$0	0.0%	\$75,950	100.0%	\$75,950
6117	Educational support services	\$0	0.0%	\$68,231	100.0%	\$68,231
4513	Book stores and news dealers	\$0	0.0%	\$60,430	100.0%	\$60,430
7114	Agents and managers for artists, athletes, entertainers and other public figures	\$0	0.0%	\$50,309	100.0%	\$50,309
6114	Business schools and computer and management training	\$0	0.0%	\$45,136	100.0%	\$45,136
4531	Florists	\$16,900	38.5%	\$26,983	61.5%	\$43,882
3161	Leather and hide tanning and finishing	\$0	0.0%	\$23,674	100.0%	\$23,674

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1132	Forest nurseries and gathering of forest products	\$0	0.0%	\$15,842	100.0%	\$15,842
1131	Timber tract operations	\$0	0.0%	\$9,417	100.0%	\$9,417
1142	Hunting and trapping	\$0	0.0%	\$2,692	100.0%	\$2,692

Prince Albert

NAICS	Purchases from	In-region Purchases	% In-region Purchases	Imported Purchases	% Imported Purchases	Total Purchases
6221	General medical and surgical hospitals	\$19,897,420	17.1%	\$96,382,720	82.9%	\$116,280,141
3254	Pharmaceutical and medicine manufacturing	\$0	0.0%	\$85,442,878	100.0%	\$85,442,878
5311	Lessors of real estate	\$16,402,241	31.3%	\$35,935,685	68.7%	\$52,337,926
5221	Depository credit intermediation	\$17,821,811	46.4%	\$20,620,540	53.6%	\$38,442,351
5415	Computer systems design and related services	\$1,884,881	5.6%	\$31,673,227	94.4%	\$33,558,108
6231	Nursing care facilities	\$8,074,534	25.5%	\$23,633,606	74.5%	\$31,708,140
6211	Offices of physicians	\$4,483,611	17.2%	\$21,616,046	82.8%	\$26,099,657
5413	Architectural, engineering and related services	\$7,137,245	28.5%	\$17,942,150	71.5%	\$25,079,395
2211	Electric power generation, transmission and distribution	\$7,409,040	29.6%	\$17,611,187	70.4%	\$25,020,227
6241	Individual and family services	\$4,257,941	17.9%	\$19,486,654	82.1%	\$23,744,594
3391	Medical equipment and supplies manufacturing	\$2,840,442	12.1%	\$20,642,715	87.9%	\$23,483,156
5611	Office administrative services	\$10,103,384	44.6%	\$12,562,430	55.4%	\$22,665,815
5412	Accounting, tax preparation, bookkeeping and payroll services	\$6,253,603	28.0%	\$16,063,045	72.0%	\$22,316,648
5419	Other professional, scientific and technical services	\$1,716,670	7.8%	\$20,240,032	92.2%	\$21,956,702
6214	Out-patient care centres	\$8,020,812	36.6%	\$13,874,971	63.4%	\$21,895,783
5241	Insurance carriers	\$2,758,082	12.6%	\$19,106,979	87.4%	\$21,865,061
3241	Petroleum and coal product manufacturing	\$0	0.0%	\$21,657,660	100.0%	\$21,657,660
1110	Farms	\$19,119,785	92.5%	\$1,553,842	7.5%	\$20,673,627
5416	Management, scientific and technical consulting services	\$2,166,673	10.6%	\$18,360,476	89.4%	\$20,527,148
5617	Services to buildings and dwellings	\$3,187,052	16.1%	\$16,632,304	83.9%	\$19,819,357
5173	Wired and wireless telecommunications carriers(except satellite)	\$8,990,719	46.4%	\$10,376,985	53.6%	\$19,367,703
5411	Legal services	\$4,518,600	23.7%	\$14,512,345	76.3%	\$19,030,945
6233	Community care facilities for the elderly	\$331,057	1.9%	\$16,986,506	98.1%	\$17,317,564
2382	Building equipment contractors	\$3,405,270	19.7%	\$13,884,251	80.3%	\$17,289,521
6244	Child day-care services	\$4,252,336	27.3%	\$11,302,091	72.7%	\$15,554,427
9120	Provincial and territorial public administration	\$15,076,328	100.0%	\$0	0.0%	\$15,076,328
6212	Offices of dentists	\$2,094,942	13.9%	\$12,930,795	86.1%	\$15,025,737
9130	Local, municipal and regional public administration	\$10,001,117	67.2%	\$4,889,584	32.8%	\$14,890,701
4841	General freight trucking	\$4,837,153	37.6%	\$8,037,236	62.4%	\$12,874,389
5239	Other financial investment activities	\$3,402,136	26.9%	\$9,223,160	73.1%	\$12,625,297
6213	Offices of other health practitioners	\$4,508,098	36.1%	\$7,983,825	63.9%	\$12,491,923
5616	Investigation and security services	\$4,763,887	39.4%	\$7,339,212	60.6%	\$12,103,099
4145	Pharmaceuticals, toiletries, cosmetics and sundries merchant wholesalers	\$118,052	1.1%	\$10,954,245	98.9%	\$11,072,297
5614	Business support services	\$1,773,246	16.2%	\$9,170,486	83.8%	\$10,943,732
7225	Full-service restaurants and limited-service eating places	\$6,314,658	58.6%	\$4,460,421	41.4%	\$10,775,079

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6223	Specialty (except psychiatric and substance abuse) hospitals	\$0	0.0%	\$10,555,644	100.0%	\$10,555,644
6111	Elementary and secondary schools	\$3,957,975	37.9%	\$6,492,788	62.1%	\$10,450,763
5613	Employment services	\$718,161	7.0%	\$9,478,938	93.0%	\$10,197,099
3261	Plastic product manufacturing	\$0	0.0%	\$10,168,698	100.0%	\$10,168,698
8139	Business, professional, labour and other membership organizations	\$457,337	4.5%	\$9,621,901	95.5%	\$10,079,238
6216	Home health care services	\$3,406,955	33.9%	\$6,633,566	66.1%	\$10,040,522
9112	Other federal services (9112-9119)	\$6,465,034	66.9%	\$3,193,767	33.1%	\$9,658,802
6232	Residential developmental handicap, mental health and substance abuse facilities	\$678,527	7.4%	\$8,552,451	92.6%	\$9,230,978
4842	Specialized freight trucking	\$1,795,168	20.1%	\$7,119,526	79.9%	\$8,914,693
3363	Motor vehicle parts manufacturing	\$0	0.0%	\$8,861,094	100.0%	\$8,861,094
4461	Health and personal care stores	\$2,937,080	34.2%	\$5,648,449	65.8%	\$8,585,529
3116	Meat product manufacturing	\$512,446	6.0%	\$8,026,811	94.0%	\$8,539,257
6219	Other ambulatory health care services	\$2,791,176	33.4%	\$5,570,399	66.6%	\$8,361,575
4921	Couriers	\$672,587	8.2%	\$7,492,215	91.8%	\$8,164,802
5418	Advertising, public relations, and related services	\$1,246,718	15.4%	\$6,871,211	84.6%	\$8,117,929
3231	Printing and related support activities	\$319,345	4.0%	\$7,672,684	96.0%	\$7,992,029
5324	Commercial and industrial machinery and equipment rental and leasing	\$0	0.0%	\$7,961,763	100.0%	\$7,961,763
6239	Other residential care facilities	\$3,463,921	43.8%	\$4,451,739	56.2%	\$7,915,660
5222	Non-depository credit intermediation	\$4,004,775	50.9%	\$3,860,981	49.1%	\$7,865,756
3253	Pesticide, fertilizer and other agricultural chemical manufacturing	\$0	0.0%	\$7,712,986	100.0%	\$7,712,986
5182	Data processing, hosting, and related services	\$0	0.0%	\$7,552,112	100.0%	\$7,552,112
3323	Architectural and structural metals manufacturing	\$0	0.0%	\$7,540,522	100.0%	\$7,540,522
3345	Navigational, measuring, medical and control instruments manufacturing	\$0	0.0%	\$7,410,852	100.0%	\$7,410,852
5231	Securities and commodity contracts intermediation and brokerage	\$886,196	12.1%	\$6,454,849	87.9%	\$7,341,045
2381	Foundation, structure, and building exterior contractors	\$940,300	13.1%	\$6,254,254	86.9%	\$7,194,553
5331	Lessors of non-financial intangible assets (except copyrighted works)	\$0	0.0%	\$7,107,271	100.0%	\$7,107,271
2389	Other specialty trade contractors	\$1,421,470	20.3%	\$5,573,992	79.7%	\$6,995,462
5511	Management of companies and enterprises	\$178,963	2.6%	\$6,681,004	97.4%	\$6,859,967
1153	Support activities for forestry	\$631,193	9.4%	\$6,050,700	90.6%	\$6,681,893
5619	Other support services	\$2,147,417	33.4%	\$4,285,769	66.6%	\$6,433,186
5629	Remediation and other waste management services	\$3,465,208	54.1%	\$2,936,852	45.9%	\$6,402,060
1133	Logging	\$5,922,002	97.0%	\$181,751	3.0%	\$6,103,753
3111	Animal food manufacturing	\$0	0.0%	\$5,956,667	100.0%	\$5,956,667
3329	Other fabricated metal product manufacturing	\$0	0.0%	\$5,721,559	100.0%	\$5,721,559
5621	Waste collection	\$1,155,899	20.2%	\$4,564,621	79.8%	\$5,720,521
3342	Communications equipment manufacturing	\$0	0.0%	\$5,710,578	100.0%	\$5,710,578
2371	Utility system construction	\$2,806,470	49.5%	\$2,864,241	50.5%	\$5,670,711
8113	Commercial and industrial machinery and equipment (except automotive and electronic) repair and maintenance	\$457,150	8.3%	\$5,041,848	91.7%	\$5,498,998
5111	Newspaper, periodical, book and directory publishers	\$1,625,268	29.7%	\$3,841,257	70.3%	\$5,466,525
3359	Other electrical equipment and component manufacturing	\$0	0.0%	\$5,380,188	100.0%	\$5,380,188
2131	Support activities for mining, and oil and gas extraction	\$1,959,338	36.4%	\$3,419,616	63.6%	\$5,378,953
2111	Oil and gas extraction	\$59,069	1.1%	\$5,254,841	98.9%	\$5,313,910
3399	Other miscellaneous manufacturing	\$0	0.0%	\$5,246,804	100.0%	\$5,246,804
7211	Traveller accommodation	\$2,972,059	56.8%	\$2,261,447	43.2%	\$5,233,507
4911	Postal service	\$1,294,987	24.8%	\$3,925,464	75.2%	\$5,220,451
4172	Construction, forestry, mining, and industrial machinery, equipment and supplies merchant wholesalers	\$1,658,581	32.4%	\$3,459,626	67.6%	\$5,118,207

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5112	Software publishers	\$252,434	5.0%	\$4,840,643	95.0%	\$5,093,077
2383	Building finishing contractors	\$150,745	3.0%	\$4,912,548	97.0%	\$5,063,292
6243	Vocational rehabilitation services	\$1,174,273	23.3%	\$3,868,834	76.7%	\$5,043,106
6215	Medical and diagnostic laboratories	\$130,904	2.7%	\$4,802,014	97.3%	\$4,932,919
5622	Waste treatment and disposal	\$0	0.0%	\$4,853,058	100.0%	\$4,853,058
6222	Psychiatric and substance abuse hospitals	\$1,282,410	27.5%	\$3,377,803	72.5%	\$4,660,213
3121	Beverage manufacturing	\$418,759	9.0%	\$4,237,707	91.0%	\$4,656,467
5313	Activities related to real estate	\$1,331,009	29.4%	\$3,188,776	70.6%	\$4,519,785
8111	Automotive repair and maintenance	\$2,444,791	55.6%	\$1,952,718	44.4%	\$4,397,509
5191	Other information services	\$1,568,053	35.8%	\$2,812,585	64.2%	\$4,380,638
4885	Freight transportation arrangement	\$746,931	17.1%	\$3,617,708	82.9%	\$4,364,639
6113	Universities	\$311,649	7.3%	\$3,945,746	92.7%	\$4,257,396
3273	Cement and concrete product manufacturing	\$0	0.0%	\$4,237,935	100.0%	\$4,237,935
5321	Automotive equipment rental and leasing	\$2,089,653	49.3%	\$2,145,277	50.7%	\$4,234,930
4173	Computer and communications equipment and supplies merchant wholesalers	\$0	0.0%	\$4,205,092	100.0%	\$4,205,092
3369	Other transportation equipment manufacturing	\$0	0.0%	\$4,153,680	100.0%	\$4,153,680
3222	Converted paper product manufacturing	\$0	0.0%	\$4,151,567	100.0%	\$4,151,567
4131	Food merchant wholesalers	\$2,684,490	65.2%	\$1,430,836	34.8%	\$4,115,326
8134	Civic and social organizations	\$1,031,940	25.1%	\$3,081,061	74.9%	\$4,113,001
4811	Scheduled air transportation	\$1,728,310	43.2%	\$2,271,182	56.8%	\$3,999,492
4179	Other machinery, equipment and supplies merchant wholesalers	\$415,634	10.5%	\$3,550,502	89.5%	\$3,966,136
4141	Textile, clothing and footwear merchant wholesalers	\$51,196	1.3%	\$3,862,814	98.7%	\$3,914,010
3115	Dairy product manufacturing	\$0	0.0%	\$3,881,722	100.0%	\$3,881,722
2373	Highway, street and bridge construction	\$2,254,912	60.9%	\$1,450,451	39.1%	\$3,705,363
5121	Motion picture and video industries	\$165,938	4.5%	\$3,537,092	95.5%	\$3,703,030
4163	Lumber, millwork, hardware and other building supplies merchant wholesalers	\$1,577,586	42.6%	\$2,124,202	57.4%	\$3,701,787
4451	Grocery stores	\$1,179,336	32.9%	\$2,401,638	67.1%	\$3,580,974
5152	Pay and specialty television	\$0	0.0%	\$3,467,638	100.0%	\$3,467,638
4881	Support activities for air transportation	\$2,491,629	73.0%	\$923,160	27.0%	\$3,414,789
3339	Other general-purpose machinery manufacturing	\$0	0.0%	\$3,411,914	100.0%	\$3,411,914
4821	Rail transportation	\$105,448	3.1%	\$3,246,723	96.9%	\$3,352,172
3331	Agricultural, construction and mining machinery manufacturing	\$0	0.0%	\$3,337,656	100.0%	\$3,337,656
5223	Activities related to credit intermediation	\$0	0.0%	\$3,248,804	100.0%	\$3,248,804
3353	Electrical equipment manufacturing	\$0	0.0%	\$3,232,704	100.0%	\$3,232,704
5151	Radio and television broadcasting	\$2,078,844	64.3%	\$1,151,712	35.7%	\$3,230,556
4161	Electrical, plumbing, heating and air-conditioning equipment and supplies merchant wholesalers	\$777,083	24.1%	\$2,445,056	75.9%	\$3,222,139
5242	Agencies, brokerages and other insurance related activities	\$3,062,756	95.1%	\$156,504	4.9%	\$3,219,260
4884	Support activities for road transportation	\$2,388,203	74.4%	\$820,955	25.6%	\$3,209,158
4441	Building material and supplies dealers	\$2,474,369	77.6%	\$716,216	22.4%	\$3,190,585
5179	Other telecommunications	\$0	0.0%	\$3,113,974	100.0%	\$3,113,974
3119	Other food manufacturing	\$0	0.0%	\$3,067,107	100.0%	\$3,067,107
3259	Other chemical product manufacturing	\$0	0.0%	\$3,051,647	100.0%	\$3,051,647
3262	Rubber product manufacturing	\$0	0.0%	\$3,000,676	100.0%	\$3,000,676
3152	Cut and sew clothing manufacturing	\$0	0.0%	\$2,926,781	100.0%	\$2,926,781
2123	Non-metallic mineral mining and quarrying	\$39,029	1.3%	\$2,881,423	98.7%	\$2,920,452
4144	Personal goods merchant wholesalers	\$0	0.0%	\$2,845,735	100.0%	\$2,845,735

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4854	School and employee bus transportation	\$517,844	18.2%	\$2,319,890	81.8%	\$2,837,734
3251	Basic chemical manufacturing	\$0	0.0%	\$2,791,178	100.0%	\$2,791,178
3327	Machine shops, turned product, and screw, nut and bolt manufacturing	\$482,675	17.3%	\$2,302,363	82.7%	\$2,785,039
3334	Ventilation, heating, air-conditioning and commercial refrigeration equipment manufacturing	\$0	0.0%	\$2,708,018	100.0%	\$2,708,018
3333	Commercial and service industry machinery manufacturing	\$0	0.0%	\$2,705,761	100.0%	\$2,705,761
4931	Warehousing and storage	\$0	0.0%	\$2,705,186	100.0%	\$2,705,186
3211	Sawmills and wood preservation	\$1,774,381	67.3%	\$860,910	32.7%	\$2,635,290
4411	Automobile dealers	\$1,279,504	48.6%	\$1,355,072	51.4%	\$2,634,576
4191	Business-to-business electronic markets, and agents and brokers	\$0	0.0%	\$2,631,764	100.0%	\$2,631,764
3112	Grain and oilseed milling	\$0	0.0%	\$2,602,108	100.0%	\$2,602,108
8132	Grant-making and giving services	\$0	0.0%	\$2,576,085	100.0%	\$2,576,085
5615	Travel arrangement and reservation services	\$66,572	2.6%	\$2,463,968	97.4%	\$2,530,540
4471	Gasoline stations	\$1,655,587	65.8%	\$860,943	34.2%	\$2,516,529
4143	Home furnishings merchant wholesalers	\$474,802	20.0%	\$1,905,072	80.0%	\$2,379,874
7139	Other amusement and recreation industries	\$542,325	22.9%	\$1,822,718	77.1%	\$2,365,043
5211	Monetary authorities - central bank	\$0	0.0%	\$2,348,049	100.0%	\$2,348,049
6242	Community food and housing, and emergency and other relief services	\$263,491	11.2%	\$2,078,911	88.8%	\$2,342,402
4121	Petroleum and petroleum products merchant wholesalers	\$157,139	6.8%	\$2,169,191	93.2%	\$2,326,330
5312	Offices of real estate agents and brokers	\$410,103	17.9%	\$1,876,465	82.1%	\$2,286,568
2379	Other heavy and civil engineering construction	\$981,264	43.6%	\$1,267,877	56.4%	\$2,249,141
3256	Soap, cleaning compound and toilet preparation manufacturing	\$0	0.0%	\$2,238,725	100.0%	\$2,238,725
3219	Other wood product manufacturing	\$208,227	9.4%	\$2,014,087	90.6%	\$2,222,314
5612	Facilities support services	\$0	0.0%	\$2,211,364	100.0%	\$2,211,364
4189	Other miscellaneous merchant wholesalers	\$390,216	17.9%	\$1,789,643	82.1%	\$2,179,859
3118	Bakeries and tortilla manufacturing	\$0	0.0%	\$2,126,393	100.0%	\$2,126,393
2212	Natural gas distribution	\$1,472,711	69.6%	\$644,228	30.4%	\$2,116,938
4883	Support activities for water transportation	\$631,561	30.7%	\$1,425,235	69.3%	\$2,056,796
8133	Social advocacy organizations	\$1,090,863	53.4%	\$953,687	46.6%	\$2,044,550
5417	Scientific research and development services	\$0	0.0%	\$1,989,751	100.0%	\$1,989,751
4529	Other general merchandise stores	\$1,183,936	59.6%	\$801,885	40.4%	\$1,985,821
3344	Semiconductor and other electronic component manufacturing	\$0	0.0%	\$1,963,472	100.0%	\$1,963,472
3255	Paint, coating and adhesive manufacturing	\$0	0.0%	\$1,948,511	100.0%	\$1,948,511
3117	Seafood product preparation and packaging	\$0	0.0%	\$1,947,454	100.0%	\$1,947,454
3212	Veneer, plywood and engineered wood product manufacturing	\$1,701,212	87.9%	\$234,950	12.1%	\$1,936,163
4152	New motor vehicle parts and accessories merchant wholesalers	\$89,948	5.0%	\$1,723,563	95.0%	\$1,813,511
5414	Specialized design services	\$0	0.0%	\$1,722,140	100.0%	\$1,722,140
3332	Industrial machinery manufacturing	\$0	0.0%	\$1,628,771	100.0%	\$1,628,771
4184	Chemical (except agricultural) and allied product merchant wholesalers	\$437,332	27.4%	\$1,158,665	72.6%	\$1,595,997
6112	Community colleges and C.E.G.E.P.s	\$600,930	37.7%	\$992,898	62.3%	\$1,593,828
4521	Department stores	\$1,050,214	67.6%	\$504,350	32.4%	\$1,554,563
4183	Agricultural supplies merchant wholesalers	\$88,265	5.8%	\$1,429,595	94.2%	\$1,517,860
3324	Boiler, tank and shipping container manufacturing	\$0	0.0%	\$1,441,960	100.0%	\$1,441,960
4151	Motor vehicle merchant wholesalers	\$479,907	33.4%	\$955,629	66.6%	\$1,435,536
4831	Deep sea, coastal and Great Lakes water transportation	\$0	0.0%	\$1,432,274	100.0%	\$1,432,274
4182	Paper, paper product and disposable plastic product merchant wholesalers	\$0	0.0%	\$1,418,562	100.0%	\$1,418,562
3364	Aerospace product and parts manufacturing	\$0	0.0%	\$1,417,899	100.0%	\$1,417,899

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2122	Metal ore mining	\$0	0.0%	\$1,404,676	100.0%	\$1,404,676
4181	Recyclable material merchant wholesalers	\$909,174	66.3%	\$462,039	33.7%	\$1,371,213
8123	Dry cleaning and laundry services	\$109,012	8.1%	\$1,242,028	91.9%	\$1,351,040
1150	Support activities for farms	\$0	0.0%	\$1,350,645	100.0%	\$1,350,645
3114	Fruit and vegetable preserving and specialty food manufacturing	\$0	0.0%	\$1,341,535	100.0%	\$1,341,535
4862	Pipeline transportation of natural gas	\$0	0.0%	\$1,236,284	100.0%	\$1,236,284
3371	Household and institutional furniture and kitchen cabinet manufacturing	\$261,785	21.3%	\$969,466	78.7%	\$1,231,250
3279	Other non-metallic mineral product manufacturing	\$0	0.0%	\$1,219,895	100.0%	\$1,219,895
4162	Metal service centres	\$0	0.0%	\$1,216,947	100.0%	\$1,216,947
4142	Home entertainment equipment and household appliance merchant wholesalers	\$0	0.0%	\$1,214,522	100.0%	\$1,214,522
4922	Local messengers and local delivery	\$822,535	67.7%	\$391,880	32.3%	\$1,214,415
5322	Consumer goods rental	\$182,253	15.0%	\$1,029,761	85.0%	\$1,212,014
4171	Farm, lawn and garden machinery and equipment merchant wholesalers	\$952,992	83.6%	\$186,661	16.4%	\$1,139,653
3314	Non-ferrous metal (except aluminum) production and processing	\$0	0.0%	\$1,122,743	100.0%	\$1,122,743
3341	Computer and peripheral equipment manufacturing	\$0	0.0%	\$1,114,367	100.0%	\$1,114,367
4431	Electronics and appliance stores	\$387,979	35.1%	\$718,144	64.9%	\$1,106,122
3336	Engine, turbine and power transmission equipment manufacturing	\$0	0.0%	\$1,102,564	100.0%	\$1,102,564
3335	Metalworking machinery manufacturing	\$0	0.0%	\$1,090,453	100.0%	\$1,090,453
4853	Taxi and limousine service	\$738,901	68.8%	\$335,223	31.2%	\$1,074,124
4861	Pipeline transportation of crude oil	\$0	0.0%	\$1,039,790	100.0%	\$1,039,790
7121	Heritage institutions	\$112,805	10.9%	\$924,750	89.1%	\$1,037,555
5122	Sound recording industries	\$0	0.0%	\$987,524	100.0%	\$987,524
3312	Steel product manufacturing from purchased steel	\$0	0.0%	\$977,719	100.0%	\$977,719
2372	Land subdivision	\$705,889	73.7%	\$252,049	26.3%	\$957,938
4543	Direct selling establishments	\$435,488	46.1%	\$509,710	53.9%	\$945,198
8114	Personal and household goods repair and maintenance	\$540,882	59.6%	\$366,173	40.4%	\$907,055
3272	Glass and glass product manufacturing	\$0	0.0%	\$902,079	100.0%	\$902,079
4812	Non-scheduled air transportation	\$0	0.0%	\$859,172	100.0%	\$859,172
3351	Electric lighting equipment manufacturing	\$0	0.0%	\$858,190	100.0%	\$858,190
8112	Electronic and precision equipment repair and maintenance	\$0	0.0%	\$814,655	100.0%	\$814,655
3149	Other textile product mills	\$0	0.0%	\$810,369	100.0%	\$810,369
4541	Electronic shopping and mail-order houses	\$0	0.0%	\$809,479	100.0%	\$809,479
4111	Farm product merchant wholesalers	\$316,293	40.7%	\$460,918	59.3%	\$777,211
7223	Special food services	\$98,607	12.7%	\$675,916	87.3%	\$774,523
8121	Personal care services	\$287,868	37.3%	\$483,676	62.7%	\$771,544
5269	Other funds and financial vehicles	\$0	0.0%	\$742,435	100.0%	\$742,435
3326	Spring and wire product manufacturing	\$0	0.0%	\$721,327	100.0%	\$721,327
4889	Other support activities for transportation	\$177,564	25.2%	\$527,038	74.8%	\$704,602
5261	Pension funds	\$0	0.0%	\$702,351	100.0%	\$702,351
3132	Fabric mills	\$0	0.0%	\$700,560	100.0%	\$700,560
3221	Pulp, paper and paperboard mills	\$0	0.0%	\$697,279	100.0%	\$697,279
3322	Cutlery and hand tool manufacturing	\$0	0.0%	\$690,036	100.0%	\$690,036
2213	Water, sewage and other systems	\$586,205	85.9%	\$96,345	14.1%	\$682,549
7113	Promoters (presenters) of performing arts, sports and similar events	\$31,892	4.7%	\$646,894	95.3%	\$678,785
7112	Spectator sports	\$233,892	35.0%	\$434,719	65.0%	\$668,610
3311	Iron and steel mills and ferro-alloy manufacturing	\$0	0.0%	\$633,958	100.0%	\$633,958

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3252	Resin, synthetic rubber, and artificial and synthetic fibres and filaments manufacturing	\$0	0.0%	\$615,023	100.0%	\$615,023
7111	Performing arts companies	\$24,815	4.3%	\$557,148	95.7%	\$581,963
4453	Beer, wine and liquor stores	\$83,020	14.7%	\$480,010	85.3%	\$563,029
2121	Coal mining	\$0	0.0%	\$562,616	100.0%	\$562,616
5323	General rental centres	\$0	0.0%	\$559,926	100.0%	\$559,926
4413	Automotive parts, accessories and tire stores	\$368,097	66.4%	\$186,406	33.6%	\$554,502
4882	Support activities for rail transportation	\$169,403	30.6%	\$383,891	69.4%	\$553,294
7132	Gambling industries	\$483,593	87.6%	\$68,199	12.4%	\$551,792
3372	Office furniture (including fixtures) manufacturing	\$0	0.0%	\$520,937	100.0%	\$520,937
4851	Urban transit systems	\$0	0.0%	\$520,557	100.0%	\$520,557
4852	Interurban and rural bus transportation	\$269,030	55.1%	\$219,172	44.9%	\$488,202
4855	Charter bus industry	\$0	0.0%	\$477,407	100.0%	\$477,407
4452	Specialty food stores	\$146,358	32.2%	\$308,583	67.8%	\$454,941
4539	Other miscellaneous store retailers	\$373,145	83.2%	\$75,599	16.8%	\$448,744
4859	Other transit and ground passenger transportation	\$294,412	66.5%	\$148,037	33.5%	\$442,449
3159	Clothing accessories and other clothing manufacturing	\$0	0.0%	\$442,374	100.0%	\$442,374
6116	Other schools and instruction	\$145,039	33.6%	\$286,776	66.4%	\$431,815
4481	Clothing stores	\$209,991	49.7%	\$212,703	50.3%	\$422,694
3321	Forging and stamping	\$0	0.0%	\$415,877	100.0%	\$415,877
3113	Sugar and confectionery product manufacturing	\$0	0.0%	\$415,620	100.0%	\$415,620
3343	Audio and video equipment manufacturing	\$0	0.0%	\$398,837	100.0%	\$398,837
8131	Religious organizations	\$270,756	68.3%	\$125,795	31.7%	\$396,551
3141	Textile furnishings mills	\$0	0.0%	\$390,427	100.0%	\$390,427
4421	Furniture stores	\$194,503	50.4%	\$191,149	49.6%	\$385,652
4132	Beverage merchant wholesalers	\$284,567	77.5%	\$82,568	22.5%	\$367,135
3313	Alumina and aluminum production and processing	\$0	0.0%	\$348,287	100.0%	\$348,287
4412	Other motor vehicle dealers	\$233,520	70.1%	\$99,630	29.9%	\$333,150
3325	Hardware manufacturing	\$0	0.0%	\$328,718	100.0%	\$328,718
4832	Inland water transportation	\$0	0.0%	\$321,177	100.0%	\$321,177
3366	Ship and boat building	\$0	0.0%	\$320,517	100.0%	\$320,517
3162	Footwear manufacturing	\$0	0.0%	\$320,118	100.0%	\$320,118
5232	Securities and commodity exchanges	\$0	0.0%	\$318,166	100.0%	\$318,166
3352	Household appliance manufacturing	\$0	0.0%	\$313,631	100.0%	\$313,631
7224	Drinking places (alcoholic beverages)	\$161,760	53.5%	\$140,694	46.5%	\$302,453
8129	Other personal services	\$126,498	42.1%	\$173,648	57.9%	\$300,146
3274	Lime and gypsum product manufacturing	\$0	0.0%	\$291,828	100.0%	\$291,828
9111	Defence services	\$19,406	6.9%	\$262,557	93.1%	\$281,963
4442	Lawn and garden equipment and supplies stores	\$167,264	62.8%	\$98,932	37.2%	\$266,195
3315	Foundries	\$0	0.0%	\$262,688	100.0%	\$262,688
4422	Home furnishings stores	\$143,317	56.0%	\$112,707	44.0%	\$256,024
8122	Funeral services	\$131,957	51.7%	\$123,518	48.3%	\$255,476
5174	Satellite telecommunications	\$0	0.0%	\$250,161	100.0%	\$250,161
4511	Sporting goods, hobby and musical instrument stores	\$156,926	64.5%	\$86,497	35.5%	\$243,423
3362	Motor vehicle body and trailer manufacturing	\$0	0.0%	\$238,603	100.0%	\$238,603
1141	Fishing	\$0	0.0%	\$233,976	100.0%	\$233,976
3133	Textile and fabric finishing and fabric coating	\$0	0.0%	\$232,517	100.0%	\$232,517

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1132	Forest nurseries and gathering of forest products	\$227,026	98.3%	\$3,812	1.7%	\$230,839
3151	Clothing knitting mills	\$0	0.0%	\$222,225	100.0%	\$222,225
3346	Manufacturing and reproducing magnetic and optical media	\$0	0.0%	\$219,508	100.0%	\$219,508
3271	Clay product and refractory manufacturing	\$0	0.0%	\$218,659	100.0%	\$218,659
3328	Coating, engraving, cold and heat treating and allied activities	\$0	0.0%	\$199,250	100.0%	\$199,250
3122	Tobacco manufacturing	\$0	0.0%	\$187,565	100.0%	\$187,565
4871	Scenic and sightseeing transportation, land	\$0	0.0%	\$184,494	100.0%	\$184,494
7212	Recreational vehicle (RV) parks and recreational camps	\$7,179	4.4%	\$156,586	95.6%	\$163,766
4532	Office supplies, stationery and gift stores	\$97,565	61.9%	\$59,977	38.1%	\$157,542
3169	Other leather and allied product manufacturing	\$0	0.0%	\$150,748	100.0%	\$150,748
3379	Other furniture-related product manufacturing	\$0	0.0%	\$150,326	100.0%	\$150,326
6115	Technical and trade schools	\$99,387	67.7%	\$47,374	32.3%	\$146,761
7213	Rooming and boarding houses	\$0	0.0%	\$141,421	100.0%	\$141,421
4872	Scenic and sightseeing transportation, water	\$0	0.0%	\$139,023	100.0%	\$139,023
1131	Timber tract operations	\$0	0.0%	\$137,220	100.0%	\$137,220
7115	Independent artists, writers and performers	\$0	0.0%	\$133,938	100.0%	\$133,938
4533	Used merchandise stores	\$100,627	75.8%	\$32,096	24.2%	\$132,723
4133	Cigarette and tobacco product merchant wholesalers	\$0	0.0%	\$123,298	100.0%	\$123,298
4153	Used motor vehicle parts and accessories merchant wholesalers	\$0	0.0%	\$122,582	100.0%	\$122,582
6117	Educational support services	\$58,334	48.5%	\$62,066	51.5%	\$120,399
7131	Amusement parks and arcades	\$0	0.0%	\$119,755	100.0%	\$119,755
3361	Motor vehicle manufacturing	\$0	0.0%	\$119,183	100.0%	\$119,183
3131	Fibre, yarn and thread mills	\$0	0.0%	\$116,551	100.0%	\$116,551
6114	Business schools and computer and management training	\$0	0.0%	\$79,647	100.0%	\$79,647
3365	Railroad rolling stock manufacturing	\$0	0.0%	\$76,555	100.0%	\$76,555
4542	Vending machine operators	\$0	0.0%	\$72,037	100.0%	\$72,037
7114	Agents and managers for artists, athletes, entertainers and other public figures	\$0	0.0%	\$67,551	100.0%	\$67,551
4482	Shoe stores	\$12,184	18.1%	\$55,079	81.9%	\$67,263
3161	Leather and hide tanning and finishing	\$0	0.0%	\$44,763	100.0%	\$44,763
4483	Jewellery, luggage and leather goods stores	\$19,208	47.4%	\$21,352	52.6%	\$40,561
4513	Book stores and news dealers	\$0	0.0%	\$38,583	100.0%	\$38,583
4531	Florists	\$21,326	59.6%	\$14,449	40.4%	\$35,774
4869	Other pipeline transportation	\$0	0.0%	\$15,160	100.0%	\$15,160
1142	Hunting and trapping	\$0	0.0%	\$1,798	100.0%	\$1,798

Yorkton Region

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NAICS	Purchases from	In-region Purchases	% In-region Purchases	Imported Purchases	% Imported Purchases	Total Purchases
1110	Farms	\$111,120,411	61.2%	\$70,313,316	38.8%	\$181,433,727
3241	Petroleum and coal product manufacturing	\$5,740,415	11.8%	\$42,801,337	88.2%	\$48,541,752
2211	Electric power generation, transmission and distribution	\$1,714,615	4.0%	\$41,146,960	96.0%	\$42,861,575
5221	Depository credit intermediation	\$18,666,522	44.2%	\$23,560,355	55.8%	\$42,226,877
5311	Lessors of real estate	\$6,507,413	18.4%	\$28,874,364	81.6%	\$35,381,777
6221	General medical and surgical hospitals	\$25,168,529	79.6%	\$6,446,111	20.4%	\$31,614,641
5413	Architectural, engineering and related services	\$6,826,244	24.0%	\$21,643,115	76.0%	\$28,469,359
3331	Agricultural, construction and mining machinery manufacturing	\$17,457,824	64.4%	\$9,643,479	35.6%	\$27,101,303
3253	Pesticide, fertilizer and other agricultural chemical manufacturing	\$6,934,760	25.9%	\$19,888,834	74.1%	\$26,823,594
5241	Insurance carriers	\$8,604,609	33.0%	\$17,455,616	67.0%	\$26,060,225
3116	Meat product manufacturing	\$25,003,613	99.4%	\$163,110	0.6%	\$25,166,724
3254	Pharmaceutical and medicine manufacturing	\$0	0.0%	\$24,244,984	100.0%	\$24,244,984
4841	General freight trucking	\$4,806,484	21.7%	\$17,358,584	78.3%	\$22,165,068
2111	Oil and gas extraction	\$2,048,593	9.3%	\$19,955,620	90.7%	\$22,004,213
5415	Computer systems design and related services	\$673,750	3.1%	\$21,231,025	96.9%	\$21,904,775
2131	Support activities for mining, and oil and gas extraction	\$6,384,207	29.6%	\$15,219,248	70.4%	\$21,603,455
5412	Accounting, tax preparation, bookkeeping and payroll services	\$7,399,861	35.7%	\$13,357,111	64.3%	\$20,756,972
3111	Animal food manufacturing	\$0	0.0%	\$19,885,934	100.0%	\$19,885,934
5411	Legal services	\$3,414,880	19.0%	\$14,511,185	81.0%	\$17,926,066
5173	Wired and wireless telecommunications carriers(except satellite)	\$6,680,355	38.9%	\$10,484,324	61.1%	\$17,164,679
3261	Plastic product manufacturing	\$110,707	0.7%	\$16,499,164	99.3%	\$16,609,871
5617	Services to buildings and dwellings	\$5,001,815	32.2%	\$10,546,861	67.8%	\$15,548,676
4842	Specialized freight trucking	\$9,833,574	64.1%	\$5,514,322	35.9%	\$15,347,896
5416	Management, scientific and technical consulting services	\$2,560,182	17.1%	\$12,443,345	82.9%	\$15,003,527
2382	Building equipment contractors	\$3,828,974	25.6%	\$11,128,517	74.4%	\$14,957,491
5611	Office administrative services	\$3,131,901	22.1%	\$11,016,847	77.9%	\$14,148,747
3112	Grain and oilseed milling	\$12,717,506	99.0%	\$122,034	1.0%	\$12,839,539
5242	Agencies, brokerages and other insurance related activities	\$11,774,719	95.3%	\$586,997	4.7%	\$12,361,716
3391	Medical equipment and supplies manufacturing	\$735,316	6.0%	\$11,594,250	94.0%	\$12,329,565
3323	Architectural and structural metals manufacturing	\$3,590,806	30.9%	\$8,021,284	69.1%	\$11,612,090
3251	Basic chemical manufacturing	\$0	0.0%	\$11,451,175	100.0%	\$11,451,175
9130	Local, municipal and regional public administration	\$4,146,233	38.0%	\$6,778,845	62.0%	\$10,925,079
5511	Management of companies and enterprises	\$0	0.0%	\$10,791,015	100.0%	\$10,791,015
5613	Employment services	\$1,165,497	11.1%	\$9,322,622	88.9%	\$10,488,119
5419	Other professional, scientific and technical services	\$1,913,525	19.0%	\$8,156,104	81.0%	\$10,069,629
5324	Commercial and industrial machinery and equipment rental and leasing	\$1,119,623	11.1%	\$8,924,165	88.9%	\$10,043,788
5239	Other financial investment activities	\$380,139	3.9%	\$9,336,011	96.1%	\$9,716,151
3363	Motor vehicle parts manufacturing	\$0	0.0%	\$9,634,332	100.0%	\$9,634,332
5222	Non-depository credit intermediation	\$5,322,107	58.1%	\$3,843,823	41.9%	\$9,165,930
3339	Other general-purpose machinery manufacturing	\$1,088,920	11.9%	\$8,051,641	88.1%	\$9,140,561
3311	Iron and steel mills and ferro-alloy manufacturing	\$0	0.0%	\$8,960,603	100.0%	\$8,960,603
3273	Cement and concrete product manufacturing	\$7,626,433	85.2%	\$1,323,897	14.8%	\$8,950,329
5614	Business support services	\$1,864,150	20.8%	\$7,079,756	79.2%	\$8,943,906
7225	Full-service restaurants and limited-service eating places	\$4,080,653	46.0%	\$4,795,754	54.0%	\$8,876,407

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6231	Nursing care facilities	\$8,202,418	95.1%	\$418,500	4.9%	\$8,620,917
4885	Freight transportation arrangement	\$458,156	5.3%	\$8,117,039	94.7%	\$8,575,196
3329	Other fabricated metal product manufacturing	\$0	0.0%	\$8,544,923	100.0%	\$8,544,923
4172	Construction, forestry, mining, and industrial machinery, equipment and supplies merchant wholesalers	\$2,173,111	26.4%	\$6,055,460	73.6%	\$8,228,570
3345	Navigational, measuring, medical and control instruments manufacturing	\$0	0.0%	\$8,155,095	100.0%	\$8,155,095
2123	Non-metallic mineral mining and quarrying	\$8,074,015	100.0%	\$0	0.0%	\$8,074,015
4821	Rail transportation	\$6,982,475	89.0%	\$864,141	11.0%	\$7,846,616
4921	Couriers	\$1,226,865	15.8%	\$6,537,959	84.2%	\$7,764,824
5616	Investigation and security services	\$5,087,061	67.3%	\$2,470,228	32.7%	\$7,557,289
5331	Lessors of non-financial intangible assets (except copyrighted works)	\$0	0.0%	\$7,351,635	100.0%	\$7,351,635
5619	Other support services	\$0	0.0%	\$7,170,871	100.0%	\$7,170,871
6211	Offices of physicians	\$2,526,896	35.6%	\$4,569,167	64.4%	\$7,096,064
3222	Converted paper product manufacturing	\$0	0.0%	\$6,809,637	100.0%	\$6,809,637
4173	Computer and communications equipment and supplies merchant wholesalers	\$0	0.0%	\$6,760,550	100.0%	\$6,760,550
5418	Advertising, public relations, and related services	\$122,290	1.8%	\$6,635,197	98.2%	\$6,757,487
9120	Provincial and territorial public administration	\$5,210,429	77.3%	\$1,531,302	22.7%	\$6,741,731
4881	Support activities for air transportation	\$0	0.0%	\$6,709,029	100.0%	\$6,709,029
3231	Printing and related support activities	\$830,101	12.5%	\$5,817,036	87.5%	\$6,647,137
8113	Commercial and industrial machinery and equipment (except automotive and electronic) repair and maintenance	\$3,247,283	48.9%	\$3,390,360	51.1%	\$6,637,642
4931	Warehousing and storage	\$62,172	0.9%	\$6,483,109	99.1%	\$6,545,281
6241	Individual and family services	\$3,143,534	48.7%	\$3,312,227	51.3%	\$6,455,761
4179	Other machinery, equipment and supplies merchant wholesalers	\$91,160	1.4%	\$6,285,220	98.6%	\$6,376,379
4884	Support activities for road transportation	\$0	0.0%	\$6,305,025	100.0%	\$6,305,025
3359	Other electrical equipment and component manufacturing	\$0	0.0%	\$6,258,887	100.0%	\$6,258,887
2381	Foundation, structure, and building exterior contractors	\$1,682,031	27.0%	\$4,542,113	73.0%	\$6,224,144
6111	Elementary and secondary schools	\$2,688,712	44.1%	\$3,407,164	55.9%	\$6,095,876
2389	Other specialty trade contractors	\$1,481,185	24.5%	\$4,570,721	75.5%	\$6,051,906
3259	Other chemical product manufacturing	\$3,529,065	58.8%	\$2,469,713	41.2%	\$5,998,778
6214	Out-patient care centres	\$5,484,637	92.1%	\$468,463	7.9%	\$5,953,100
3324	Boiler, tank and shipping container manufacturing	\$242,514	4.1%	\$5,673,503	95.9%	\$5,916,017
5231	Securities and commodity contracts intermediation and brokerage	\$842,448	14.9%	\$4,807,059	85.1%	\$5,649,507
3353	Electrical equipment manufacturing	\$0	0.0%	\$5,450,918	100.0%	\$5,450,918
4441	Building material and supplies dealers	\$2,984,057	54.8%	\$2,465,289	45.2%	\$5,449,346
5321	Automotive equipment rental and leasing	\$0	0.0%	\$5,432,360	100.0%	\$5,432,360
4163	Lumber, millwork, hardware and other building supplies merchant wholesalers	\$1,596,648	30.4%	\$3,650,918	69.6%	\$5,247,566
4111	Farm product merchant wholesalers	\$2,513,591	47.9%	\$2,730,813	52.1%	\$5,244,404
4131	Food merchant wholesalers	\$102,732	2.0%	\$5,053,512	98.0%	\$5,156,244
3342	Communications equipment manufacturing	\$900,637	17.5%	\$4,233,281	82.5%	\$5,133,919
2371	Utility system construction	\$971,442	19.8%	\$3,934,397	80.2%	\$4,905,839
8139	Business, professional, labour and other membership organizations	\$0	0.0%	\$4,883,020	100.0%	\$4,883,020
3262	Rubber product manufacturing	\$0	0.0%	\$4,857,333	100.0%	\$4,857,333
5182	Data processing, hosting, and related services	\$0	0.0%	\$4,836,953	100.0%	\$4,836,953
5629	Remediation and other waste management services	\$0	0.0%	\$4,765,660	100.0%	\$4,765,660
3312	Steel product manufacturing from purchased steel	\$0	0.0%	\$4,763,660	100.0%	\$4,763,660
6233	Community care facilities for the elderly	\$748,713	15.9%	\$3,959,645	84.1%	\$4,708,358

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3334	Ventilation, heating, air-conditioning and commercial refrigeration equipment manufacturing	\$0	0.0%	\$4,592,103	100.0%	\$4,592,103
4161	Electrical, plumbing, heating and air-conditioning equipment and supplies merchant wholesalers	\$795,533	17.4%	\$3,772,095	82.6%	\$4,567,628
5111	Newspaper, periodical, book and directory publishers	\$1,676,466	37.6%	\$2,783,567	62.4%	\$4,460,034
4145	Pharmaceuticals, toiletries, cosmetics and sundries merchant wholesalers	\$0	0.0%	\$4,458,447	100.0%	\$4,458,447
1150	Support activities for farms	\$3,523,842	79.2%	\$927,795	20.8%	\$4,451,636
4121	Petroleum and petroleum products merchant wholesalers	\$1,435,961	32.6%	\$2,973,128	67.4%	\$4,409,090
2383	Building finishing contractors	\$640,034	14.6%	\$3,740,316	85.4%	\$4,380,350
4461	Health and personal care stores	\$1,986,362	46.0%	\$2,327,407	54.0%	\$4,313,770
5621	Waste collection	\$914,125	21.5%	\$3,344,200	78.5%	\$4,258,325
3327	Machine shops, turned product, and screw, nut and bolt manufacturing	\$2,013,294	47.4%	\$2,235,797	52.6%	\$4,249,091
6244	Child day-care services	\$1,241,186	29.3%	\$2,987,805	70.7%	\$4,228,991
7211	Traveller accommodation	\$2,021,054	48.0%	\$2,188,020	52.0%	\$4,209,074
3219	Other wood product manufacturing	\$1,471,616	35.7%	\$2,655,077	64.3%	\$4,126,693
3399	Other miscellaneous manufacturing	\$564,590	13.8%	\$3,531,331	86.2%	\$4,095,922
6212	Offices of dentists	\$1,590,011	38.9%	\$2,495,237	61.1%	\$4,085,249
9112	Other federal services (9112-9119)	\$1,446,116	35.4%	\$2,638,315	64.6%	\$4,084,431
3121	Beverage manufacturing	\$0	0.0%	\$4,071,586	100.0%	\$4,071,586
4883	Support activities for water transportation	\$0	0.0%	\$4,040,983	100.0%	\$4,040,983
2122	Metal ore mining	\$0	0.0%	\$3,976,978	100.0%	\$3,976,978
8111	Automotive repair and maintenance	\$1,841,146	46.4%	\$2,126,782	53.6%	\$3,967,928
4911	Postal service	\$2,630,069	69.9%	\$1,133,390	30.1%	\$3,763,458
3119	Other food manufacturing	\$779,667	20.9%	\$2,955,994	79.1%	\$3,735,661
3314	Non-ferrous metal (except aluminum) production and processing	\$0	0.0%	\$3,659,416	100.0%	\$3,659,416
5191	Other information services	\$1,175,872	32.4%	\$2,450,319	67.6%	\$3,626,191
5622	Waste treatment and disposal	\$2,645,551	73.2%	\$967,039	26.8%	\$3,612,591
5223	Activities related to credit intermediation	\$911,404	25.5%	\$2,658,289	74.5%	\$3,569,693
4471	Gasoline stations	\$1,969,026	55.5%	\$1,579,598	44.5%	\$3,548,624
3211	Sawmills and wood preservation	\$193,722	5.5%	\$3,352,200	94.5%	\$3,545,922
3369	Other transportation equipment manufacturing	\$0	0.0%	\$3,485,272	100.0%	\$3,485,272
4451	Grocery stores	\$1,749,390	51.2%	\$1,666,067	48.8%	\$3,415,458
4189	Other miscellaneous merchant wholesalers	\$0	0.0%	\$3,413,333	100.0%	\$3,413,333
6213	Offices of other health practitioners	\$2,929,147	86.2%	\$467,200	13.8%	\$3,396,347
4191	Business-to-business electronic markets, and agents and brokers	\$0	0.0%	\$3,243,361	100.0%	\$3,243,361
2373	Highway, street and bridge construction	\$1,265,128	39.5%	\$1,940,452	60.5%	\$3,205,580
4811	Scheduled air transportation	\$0	0.0%	\$3,004,140	100.0%	\$3,004,140
3279	Other non-metallic mineral product manufacturing	\$0	0.0%	\$2,985,130	100.0%	\$2,985,130
3115	Dairy product manufacturing	\$0	0.0%	\$2,919,703	100.0%	\$2,919,703
6223	Specialty (except psychiatric and substance abuse) hospitals	\$0	0.0%	\$2,869,905	100.0%	\$2,869,905
3332	Industrial machinery manufacturing	\$0	0.0%	\$2,833,630	100.0%	\$2,833,630
5152	Pay and specialty television	\$0	0.0%	\$2,832,053	100.0%	\$2,832,053
5112	Software publishers	\$207,272	7.4%	\$2,585,612	92.6%	\$2,792,884
5179	Other telecommunications	\$618,470	22.4%	\$2,141,297	77.6%	\$2,759,767
6216	Home health care services	\$1,565,634	57.4%	\$1,164,217	42.6%	\$2,729,851
4411	Automobile dealers	\$1,074,388	40.2%	\$1,597,004	59.8%	\$2,671,393
3336	Engine, turbine and power transmission equipment manufacturing	\$0	0.0%	\$2,651,422	100.0%	\$2,651,422
5313	Activities related to real estate	\$756,972	28.7%	\$1,876,845	71.3%	\$2,633,817

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3212	Veneer, plywood and engineered wood product manufacturing	\$1,700,274	65.8%	\$882,453	34.2%	\$2,582,728
6232	Residential developmental handicap, mental health and substance abuse facilities	\$180,839	7.2%	\$2,328,911	92.8%	\$2,509,750
4184	Chemical (except agricultural) and allied product merchant wholesalers	\$123,780	5.0%	\$2,375,312	95.0%	\$2,499,092
2212	Natural gas distribution	\$597,618	24.0%	\$1,895,617	76.0%	\$2,493,235
6113	Universities	\$29,695	1.2%	\$2,453,622	98.8%	\$2,483,317
5612	Facilities support services	\$0	0.0%	\$2,464,938	100.0%	\$2,464,938
3333	Commercial and service industry machinery manufacturing	\$0	0.0%	\$2,457,187	100.0%	\$2,457,187
5151	Radio and television broadcasting	\$1,330,218	54.2%	\$1,122,381	45.8%	\$2,452,599
5121	Motion picture and video industries	\$271,824	11.3%	\$2,127,624	88.7%	\$2,399,448
4183	Agricultural supplies merchant wholesalers	\$1,514,749	63.7%	\$861,993	36.3%	\$2,376,741
4152	New motor vehicle parts and accessories merchant wholesalers	\$671,302	28.5%	\$1,680,637	71.5%	\$2,351,939
3255	Paint, coating and adhesive manufacturing	\$0	0.0%	\$2,337,370	100.0%	\$2,337,370
6219	Other ambulatory health care services	\$2,166,209	95.3%	\$107,165	4.7%	\$2,273,373
3256	Soap, cleaning compound and toilet preparation manufacturing	\$0	0.0%	\$2,228,497	100.0%	\$2,228,497
4529	Other general merchandise stores	\$1,277,155	57.4%	\$947,061	42.6%	\$2,224,216
4182	Paper, paper product and disposable plastic product merchant wholesalers	\$0	0.0%	\$2,221,256	100.0%	\$2,221,256
3272	Glass and glass product manufacturing	\$0	0.0%	\$2,207,422	100.0%	\$2,207,422
6239	Other residential care facilities	\$294,471	13.7%	\$1,857,666	86.3%	\$2,152,136
4181	Recyclable material merchant wholesalers	\$463,491	21.6%	\$1,683,623	78.4%	\$2,147,114
3371	Household and institutional furniture and kitchen cabinet manufacturing	\$301,967	14.5%	\$1,780,060	85.5%	\$2,082,027
4861	Pipeline transportation of crude oil	\$0	0.0%	\$2,058,461	100.0%	\$2,058,461
8134	Civic and social organizations	\$634,692	31.9%	\$1,357,905	68.1%	\$1,992,598
2379	Other heavy and civil engineering construction	\$0	0.0%	\$1,945,774	100.0%	\$1,945,774
7139	Other amusement and recreation industries	\$336,797	17.9%	\$1,543,396	82.1%	\$1,880,192
4862	Pipeline transportation of natural gas	\$0	0.0%	\$1,876,864	100.0%	\$1,876,864
3152	Cut and sew clothing manufacturing	\$0	0.0%	\$1,862,304	100.0%	\$1,862,304
4151	Motor vehicle merchant wholesalers	\$39,622	2.1%	\$1,822,122	97.9%	\$1,861,744
4831	Deep sea, coastal and Great Lakes water transportation	\$0	0.0%	\$1,840,561	100.0%	\$1,840,561
4171	Farm, lawn and garden machinery and equipment merchant wholesalers	\$1,150,303	62.8%	\$681,923	37.2%	\$1,832,226
5615	Travel arrangement and reservation services	\$158,155	8.7%	\$1,668,220	91.3%	\$1,826,375
4521	Department stores	\$1,121,062	64.4%	\$620,125	35.6%	\$1,741,186
5414	Specialized design services	\$0	0.0%	\$1,727,769	100.0%	\$1,727,769
4162	Metal service centres	\$104,536	6.1%	\$1,620,579	93.9%	\$1,725,116
4854	School and employee bus transportation	\$393,022	24.0%	\$1,246,657	76.0%	\$1,639,679
3118	Bakeries and tortilla manufacturing	\$0	0.0%	\$1,611,030	100.0%	\$1,611,030
3365	Railroad rolling stock manufacturing	\$0	0.0%	\$1,601,568	100.0%	\$1,601,568
3344	Semiconductor and other electronic component manufacturing	\$0	0.0%	\$1,592,778	100.0%	\$1,592,778
3335	Metalworking machinery manufacturing	\$0	0.0%	\$1,581,912	100.0%	\$1,581,912
4141	Textile, clothing and footwear merchant wholesalers	\$0	0.0%	\$1,576,042	100.0%	\$1,576,042
5322	Consumer goods rental	\$0	0.0%	\$1,528,960	100.0%	\$1,528,960
3117	Seafood product preparation and packaging	\$0	0.0%	\$1,517,621	100.0%	\$1,517,621
5417	Scientific research and development services	\$105,021	7.2%	\$1,351,512	92.8%	\$1,456,533
4889	Other support activities for transportation	\$0	0.0%	\$1,384,330	100.0%	\$1,384,330
6243	Vocational rehabilitation services	\$1,305,893	95.2%	\$65,244	4.8%	\$1,371,137
6215	Medical and diagnostic laboratories	\$163,066	12.2%	\$1,178,112	87.8%	\$1,341,179
5312	Offices of real estate agents and brokers	\$1,086,108	81.5%	\$246,345	18.5%	\$1,332,453

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3313	Alumina and aluminum production and processing	\$0	0.0%	\$1,308,167	100.0%	\$1,308,167
6222	Psychiatric and substance abuse hospitals	\$0	0.0%	\$1,267,035	100.0%	\$1,267,035
4431	Electronics and appliance stores	\$532,551	42.2%	\$729,693	57.8%	\$1,262,244
3252	Resin, synthetic rubber, and artificial and synthetic fibres and filaments manufacturing	\$0	0.0%	\$1,251,245	100.0%	\$1,251,245
8132	Grant-making and giving services	\$13,661	1.1%	\$1,234,357	98.9%	\$1,248,018
3114	Fruit and vegetable preserving and specialty food manufacturing	\$0	0.0%	\$1,224,532	100.0%	\$1,224,532
3351	Electric lighting equipment manufacturing	\$0	0.0%	\$1,198,347	100.0%	\$1,198,347
4922	Local messengers and local delivery	\$0	0.0%	\$1,154,923	100.0%	\$1,154,923
4144	Personal goods merchant wholesalers	\$289,159	25.2%	\$856,725	74.8%	\$1,145,883
8114	Personal and household goods repair and maintenance	\$526,446	48.1%	\$568,427	51.9%	\$1,094,873
4882	Support activities for rail transportation	\$584,405	53.8%	\$502,651	46.2%	\$1,087,056
8123	Dry cleaning and laundry services	\$356,905	33.1%	\$720,513	66.9%	\$1,077,418
3149	Other textile product mills	\$161,272	15.3%	\$891,701	84.7%	\$1,052,973
1133	Logging	\$0	0.0%	\$1,048,978	100.0%	\$1,048,978
3326	Spring and wire product manufacturing	\$0	0.0%	\$1,033,295	100.0%	\$1,033,295
3322	Cutlery and hand tool manufacturing	\$0	0.0%	\$1,030,542	100.0%	\$1,030,542
3221	Pulp, paper and paperboard mills	\$0	0.0%	\$1,017,642	100.0%	\$1,017,642
8133	Social advocacy organizations	\$762,981	77.0%	\$227,529	23.0%	\$990,509
8112	Electronic and precision equipment repair and maintenance	\$0	0.0%	\$983,341	100.0%	\$983,341
3364	Aerospace product and parts manufacturing	\$0	0.0%	\$961,722	100.0%	\$961,722
4143	Home furnishings merchant wholesalers	\$0	0.0%	\$958,296	100.0%	\$958,296
3315	Foundries	\$0	0.0%	\$934,161	100.0%	\$934,161
6112	Community colleges and C.E.G.E.P.s	\$314,930	33.9%	\$614,742	66.1%	\$929,671
3132	Fabric mills	\$0	0.0%	\$910,290	100.0%	\$910,290
4543	Direct selling establishments	\$170,807	19.2%	\$720,212	80.8%	\$891,018
2372	Land subdivision	\$0	0.0%	\$828,730	100.0%	\$828,730
3341	Computer and peripheral equipment manufacturing	\$0	0.0%	\$770,752	100.0%	\$770,752
4853	Taxi and limousine service	\$217,784	28.4%	\$548,295	71.6%	\$766,078
4541	Electronic shopping and mail-order houses	\$95,996	12.6%	\$667,083	87.4%	\$763,078
4481	Clothing stores	\$131,110	17.4%	\$624,163	82.6%	\$755,273
3274	Lime and gypsum product manufacturing	\$0	0.0%	\$714,113	100.0%	\$714,113
5323	General rental centres	\$0	0.0%	\$706,348	100.0%	\$706,348
2213	Water, sewage and other systems	\$115,603	17.0%	\$566,233	83.0%	\$681,836
3321	Forging and stamping	\$0	0.0%	\$664,275	100.0%	\$664,275
4812	Non-scheduled air transportation	\$0	0.0%	\$645,350	100.0%	\$645,350
7223	Special food services	\$90,415	14.2%	\$547,629	85.8%	\$638,045
6242	Community food and housing, and emergency and other relief services	\$146,504	23.0%	\$490,356	77.0%	\$636,860
3328	Coating, engraving, cold and heat treating and allied activities	\$0	0.0%	\$626,583	100.0%	\$626,583
7121	Heritage institutions	\$51,918	8.3%	\$572,143	91.7%	\$624,062
5122	Sound recording industries	\$338,131	55.9%	\$267,006	44.1%	\$605,137
8121	Personal care services	\$181,762	30.1%	\$421,709	69.9%	\$603,471
5269	Other funds and financial vehicles	\$0	0.0%	\$571,362	100.0%	\$571,362
4539	Other miscellaneous store retailers	\$111,651	19.8%	\$453,028	80.2%	\$564,679
4413	Automotive parts, accessories and tire stores	\$302,509	53.8%	\$259,742	46.2%	\$562,251
4421	Furniture stores	\$371,722	67.2%	\$181,523	32.8%	\$553,245
3325	Hardware manufacturing	\$0	0.0%	\$545,609	100.0%	\$545,609

Saskatchewan Economic Development Alliance

5261	Pension funds	\$0	0.0%	\$540,514	100.0%	\$540,514
4453	Beer, wine and liquor stores	\$199,965	37.2%	\$337,041	62.8%	\$537,005
3271	Clay product and refractory manufacturing	\$0	0.0%	\$535,066	100.0%	\$535,066
3141	Textile furnishings mills	\$0	0.0%	\$507,311	100.0%	\$507,311
1153	Support activities for forestry	\$0	0.0%	\$494,911	100.0%	\$494,911
4142	Home entertainment equipment and household appliance merchant wholesalers	\$0	0.0%	\$489,048	100.0%	\$489,048
3113	Sugar and confectionery product manufacturing	\$0	0.0%	\$477,261	100.0%	\$477,261
3122	Tobacco manufacturing	\$0	0.0%	\$468,238	100.0%	\$468,238
4132	Beverage merchant wholesalers	\$0	0.0%	\$459,997	100.0%	\$459,997
3352	Household appliance manufacturing	\$0	0.0%	\$459,578	100.0%	\$459,578
4442	Lawn and garden equipment and supplies stores	\$235,985	51.9%	\$218,662	48.1%	\$454,647
7132	Gambling industries	\$406,535	92.5%	\$32,922	7.5%	\$439,457
3343	Audio and video equipment manufacturing	\$0	0.0%	\$438,891	100.0%	\$438,891
4452	Specialty food stores	\$55,025	12.7%	\$378,889	87.3%	\$433,913
3372	Office furniture (including fixtures) manufacturing	\$0	0.0%	\$414,430	100.0%	\$414,430
4832	Inland water transportation	\$0	0.0%	\$412,732	100.0%	\$412,732
7113	Promoters (presenters) of performing arts, sports and similar events	\$0	0.0%	\$408,271	100.0%	\$408,271
7112	Spectator sports	\$46,163	11.5%	\$355,988	88.5%	\$402,151
4422	Home furnishings stores	\$169,748	46.2%	\$197,535	53.8%	\$367,284
3362	Motor vehicle body and trailer manufacturing	\$0	0.0%	\$354,167	100.0%	\$354,167
5211	Monetary authorities - central bank	\$0	0.0%	\$352,067	100.0%	\$352,067
7111	Performing arts companies	\$0	0.0%	\$350,035	100.0%	\$350,035
1141	Fishing	\$0	0.0%	\$346,652	100.0%	\$346,652
4511	Sporting goods, hobby and musical instrument stores	\$126,997	36.8%	\$218,006	63.2%	\$345,002
4412	Other motor vehicle dealers	\$190,002	56.2%	\$147,804	43.8%	\$337,806
3133	Textile and fabric finishing and fabric coating	\$0	0.0%	\$302,127	100.0%	\$302,127
8122	Funeral services	\$166,759	57.2%	\$124,561	42.8%	\$291,320
4852	Interurban and rural bus transportation	\$0	0.0%	\$282,089	100.0%	\$282,089
3159	Clothing accessories and other clothing manufacturing	\$0	0.0%	\$281,482	100.0%	\$281,482
4855	Charter bus industry	\$89,885	32.6%	\$185,967	67.4%	\$275,852
4859	Other transit and ground passenger transportation	\$0	0.0%	\$255,653	100.0%	\$255,653
6116	Other schools and instruction	\$59,560	23.6%	\$192,315	76.4%	\$251,875
7224	Drinking places (alcoholic beverages)	\$81,614	32.8%	\$167,544	67.2%	\$249,158
5232	Securities and commodity exchanges	\$0	0.0%	\$244,854	100.0%	\$244,854
2121	Coal mining	\$0	0.0%	\$243,516	100.0%	\$243,516
8131	Religious organizations	\$96,194	39.8%	\$145,585	60.2%	\$241,779
3346	Manufacturing and reproducing magnetic and optical media	\$0	0.0%	\$241,552	100.0%	\$241,552
8129	Other personal services	\$64,914	27.7%	\$169,849	72.3%	\$234,762
4851	Urban transit systems	\$1,940	0.9%	\$222,438	99.1%	\$224,379
5174	Satellite telecommunications	\$0	0.0%	\$221,706	100.0%	\$221,706
3162	Footwear manufacturing	\$0	0.0%	\$203,690	100.0%	\$203,690
4532	Office supplies, stationery and gift stores	\$27,077	13.7%	\$171,166	86.3%	\$198,244
3361	Motor vehicle manufacturing	\$0	0.0%	\$173,609	100.0%	\$173,609
4533	Used merchandise stores	\$107,262	64.2%	\$59,752	35.8%	\$167,013
4153	Used motor vehicle parts and accessories merchant wholesalers	\$37,690	23.7%	\$121,286	76.3%	\$158,976
4133	Cigarette and tobacco product merchant wholesalers	\$0	0.0%	\$154,484	100.0%	\$154,484

Saskatchewan Economic Development Alliance

3131	Fibre, yarn and thread mills	\$0	0.0%	\$151,444	100.0%	\$151,444
3379	Other furniture-related product manufacturing	\$0	0.0%	\$148,947	100.0%	\$148,947
3151	Clothing knitting mills	\$0	0.0%	\$141,401	100.0%	\$141,401
3366	Ship and boat building	\$0	0.0%	\$139,849	100.0%	\$139,849
9111	Defence services	\$21,673	17.5%	\$102,001	82.5%	\$123,674
7212	Recreational vehicle (RV) parks and recreational camps	\$0	0.0%	\$122,589	100.0%	\$122,589
4482	Shoe stores	\$7,305	6.1%	\$112,882	93.9%	\$120,186
4871	Scenic and sightseeing transportation, land	\$0	0.0%	\$106,603	100.0%	\$106,603
7213	Rooming and boarding houses	\$0	0.0%	\$105,863	100.0%	\$105,863
3169	Other leather and allied product manufacturing	\$0	0.0%	\$95,921	100.0%	\$95,921
7131	Amusement parks and arcades	\$0	0.0%	\$95,205	100.0%	\$95,205
6115	Technical and trade schools	\$7,905	9.2%	\$77,700	90.8%	\$85,605
7115	Independent artists, writers and performers	\$0	0.0%	\$80,560	100.0%	\$80,560
4872	Scenic and sightseeing transportation, water	\$0	0.0%	\$80,329	100.0%	\$80,329
4483	Jewellery, luggage and leather goods stores	\$13,740	19.0%	\$58,734	81.0%	\$72,474
6117	Educational support services	\$0	0.0%	\$70,228	100.0%	\$70,228
4542	Vending machine operators	\$52,831	77.8%	\$15,077	22.2%	\$67,908
4513	Book stores and news dealers	\$20,494	37.5%	\$34,190	62.5%	\$54,684
6114	Business schools and computer and management training	\$0	0.0%	\$46,458	100.0%	\$46,458
4531	Florists	\$28,072	62.4%	\$16,945	37.6%	\$45,017
7114	Agents and managers for artists, athletes, entertainers and other public figures	\$0	0.0%	\$40,630	100.0%	\$40,630
1132	Forest nurseries and gathering of forest products	\$0	0.0%	\$39,671	100.0%	\$39,671
4869	Other pipeline transportation	\$0	0.0%	\$30,012	100.0%	\$30,012
3161	Leather and hide tanning and finishing	\$27,699	97.2%	\$783	2.8%	\$28,483
1131	Timber tract operations	\$0	0.0%	\$23,582	100.0%	\$23,582
1142	Hunting and trapping	\$0	0.0%	\$2,665	100.0%	\$2,665

Appendix F

Industry Interview Findings

BUSINESS INFORMATION

1. Description of your business.

- Manufacturing
- Agri-Value
- Forestry
- Technology
- Minerals
- Oil and Gas
- Logistics
- Other. Specify.

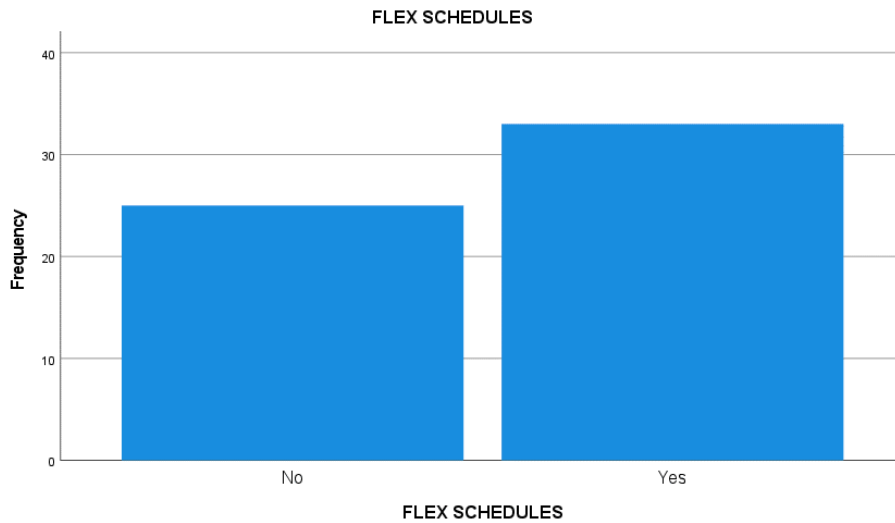


2. Number of staff? Total of firms interviewed = 8046

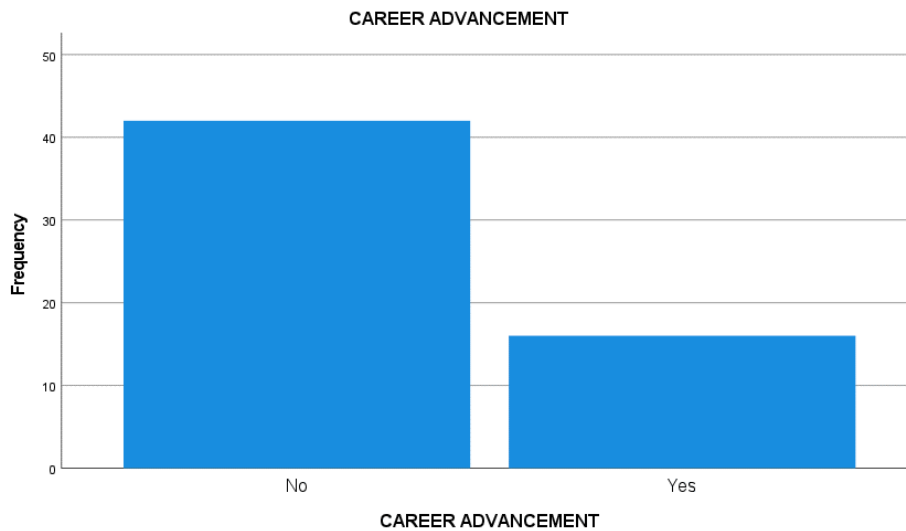
WORKFORCE

1. What are current employment trends and challenges you are seeing in your company? Select all that apply.

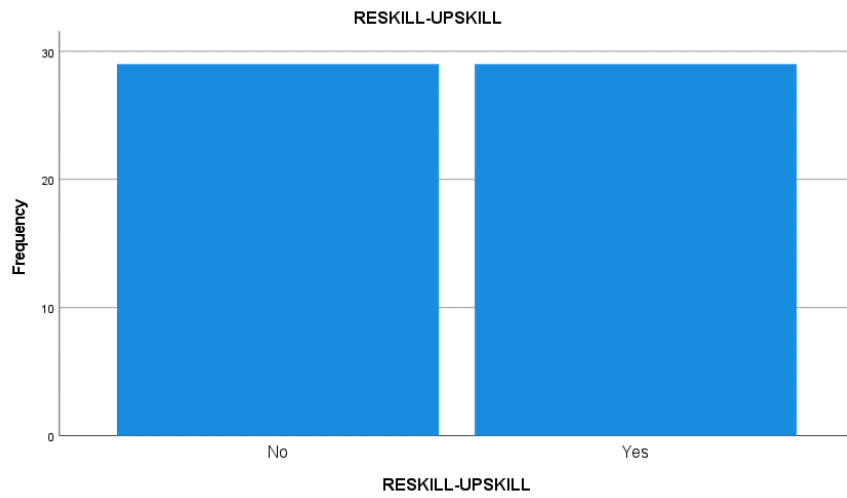
- Request for flexible schedules



- Demands for career advancement

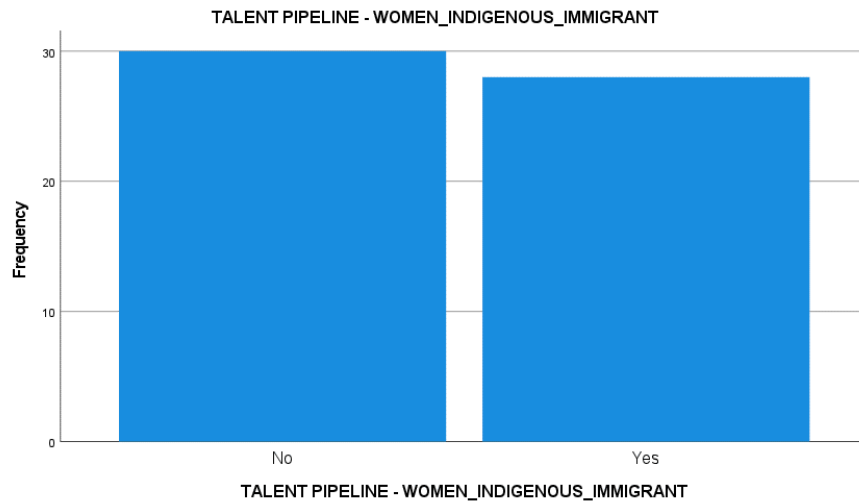


- Need to reskill (Skills shift.) and upskill (Skills gap)

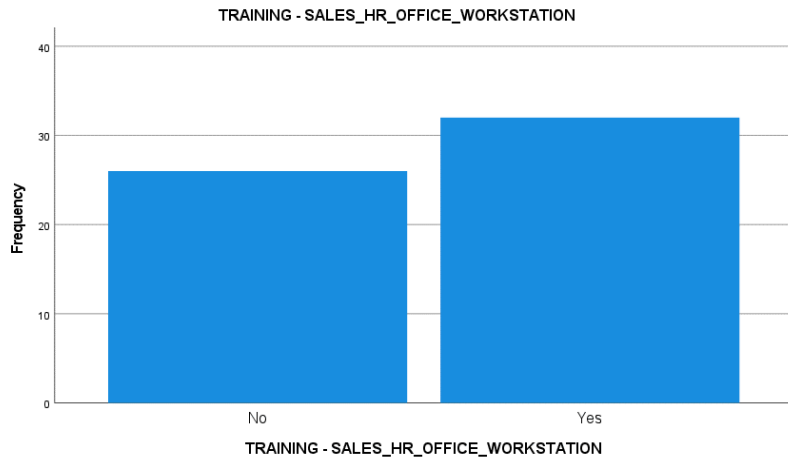


- Need to create a broader talent pipeline.

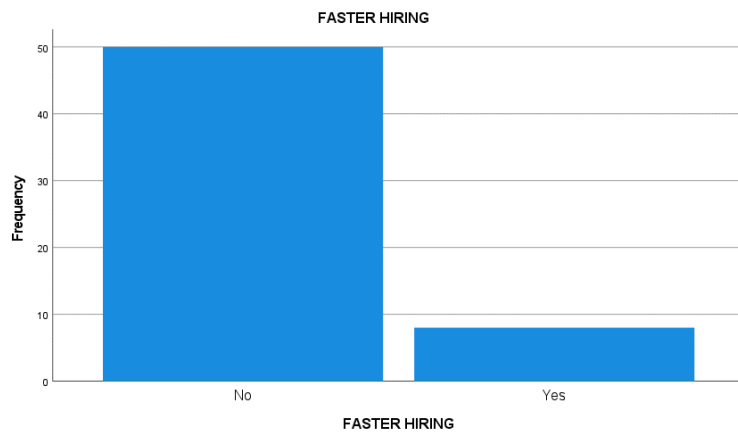
- Women.
- Immigrants.
- Indigenous people.



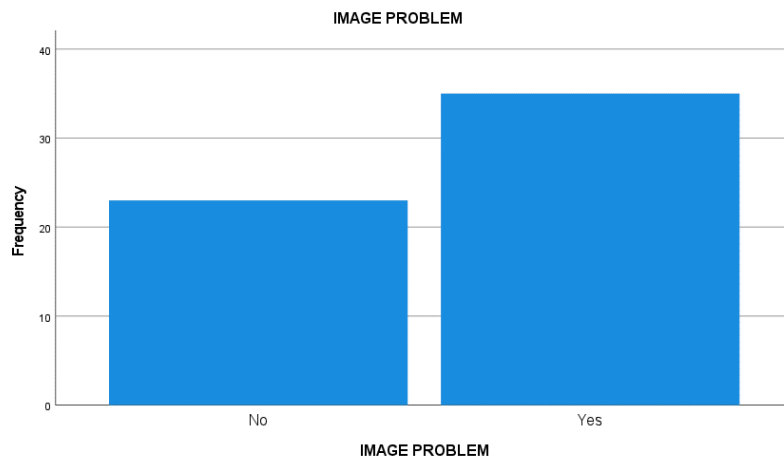
○ Training in digital tools and automation.



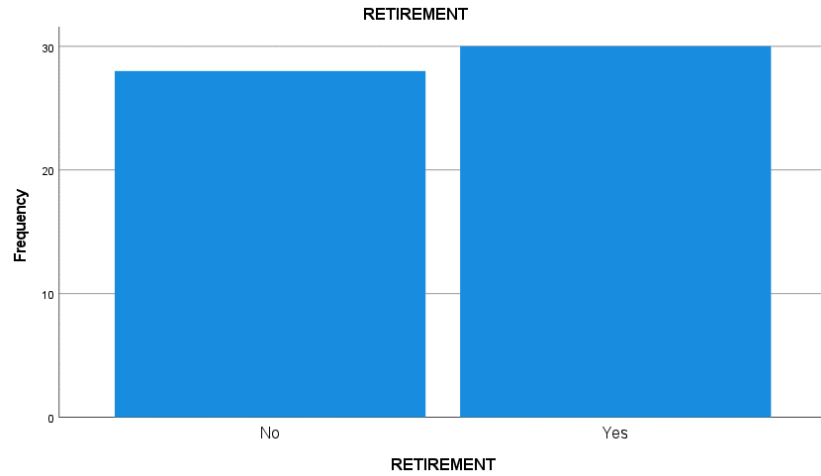
○ Faster hiring process.



○ Image problem among young people.

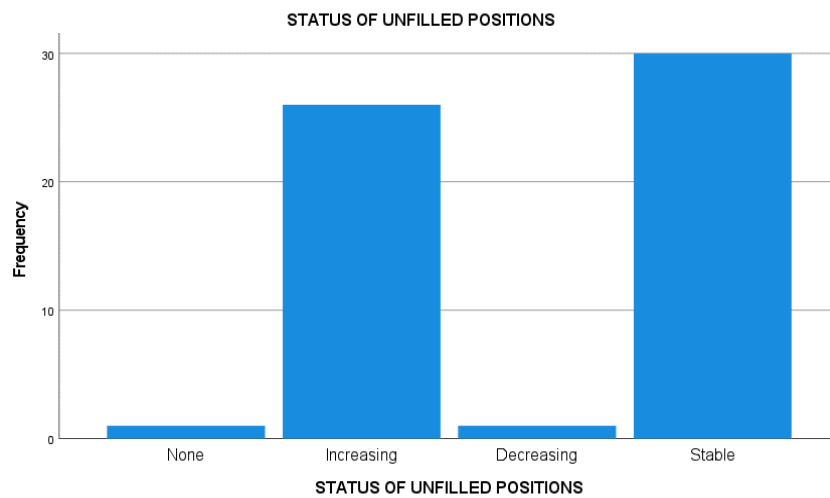


- Current work force aging out.



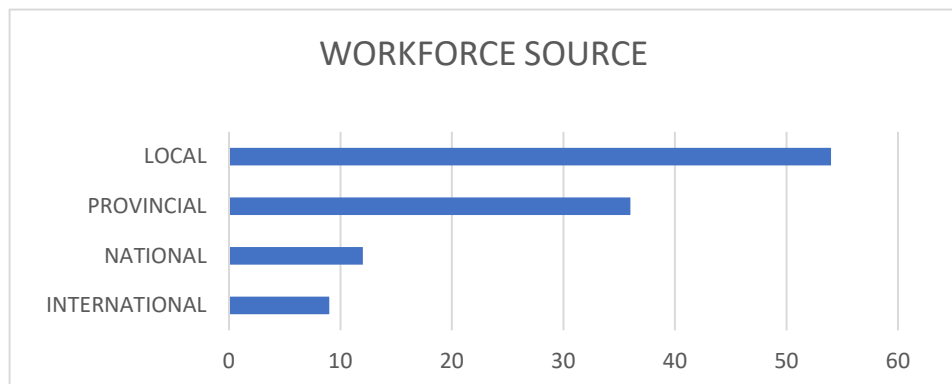
2. Is the number of unfilled positions?

- Increasing
- Decreasing
- Stabilizing



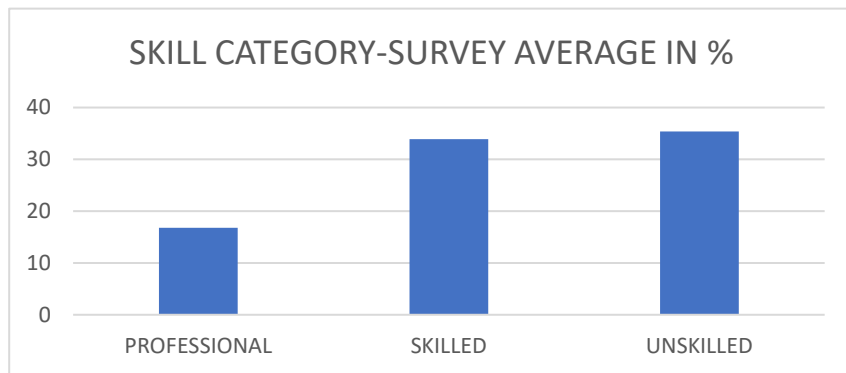
3. Where does the company attract most of its workers from? Select all that apply.

- Locally
- Provincially
- Nationally
- Internationally



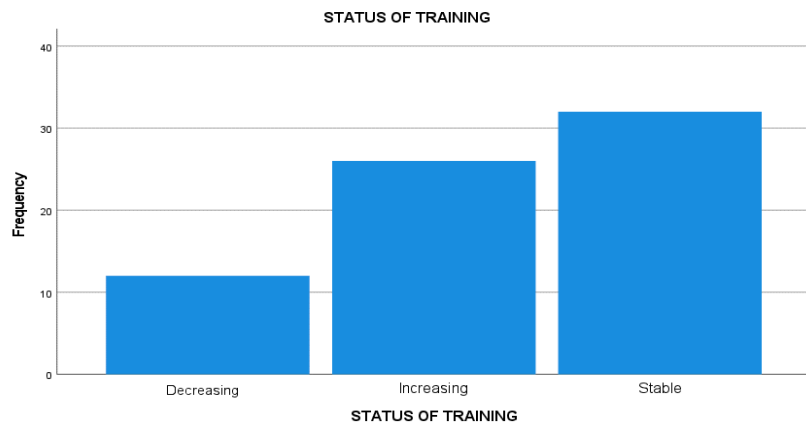
4. Percent of workforce is:

- Professional % Skilled % Unskilled %



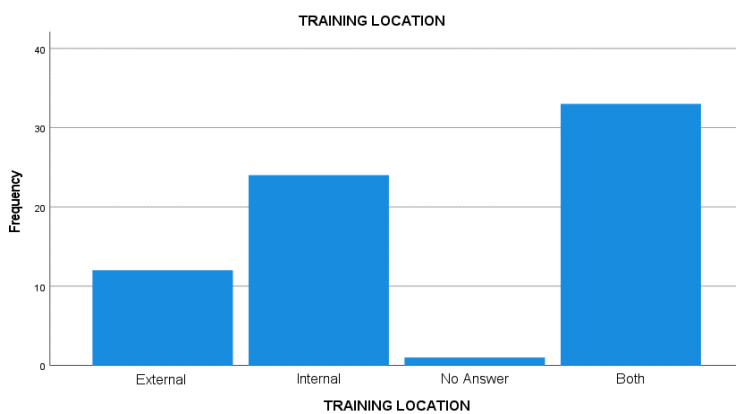
5. Is company investment in employee training?

- Increasing Decreasing Stabilizing None provided.

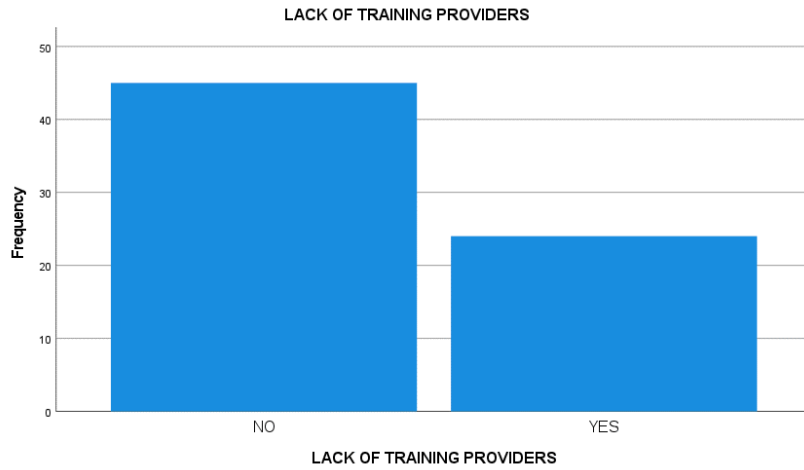


6. If there is training where is it being done?

- Internal External Both

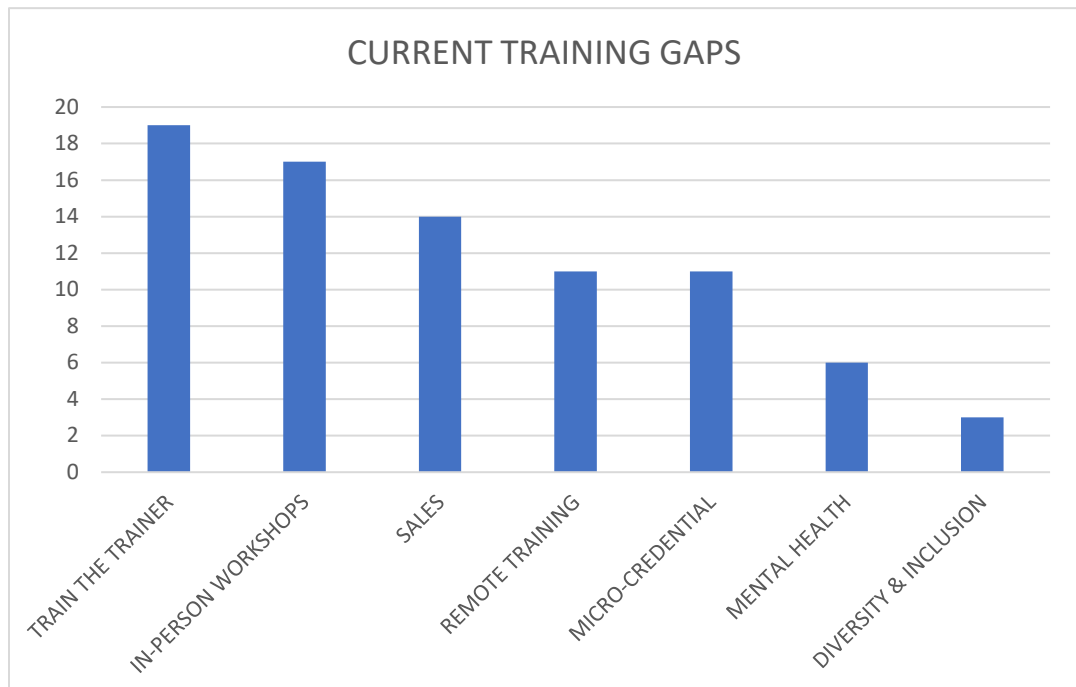


7. Is there a lack of external training providers? Yes/No?



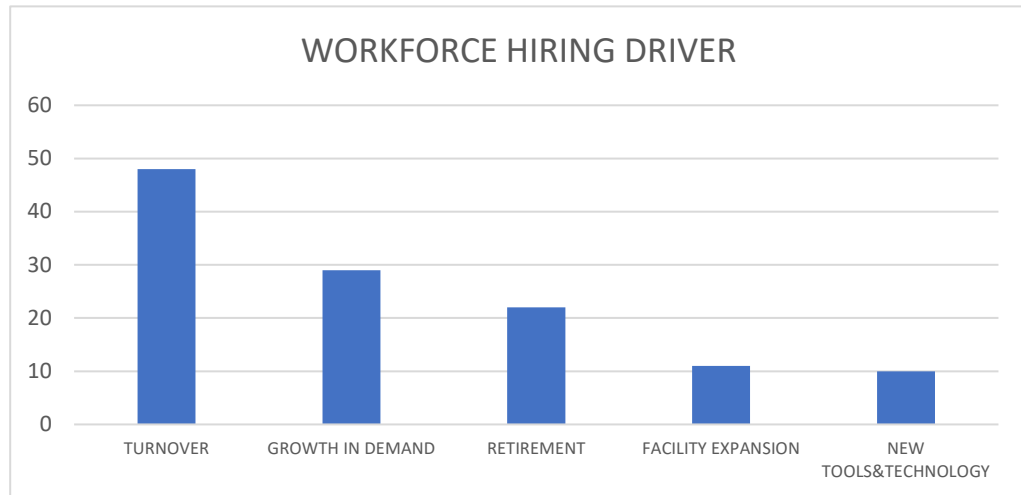
8. Is there a gap in your current training needs? Select all that apply.

- In-person workshops
- Train the Trainer
- Remote training
- Micro-credentials
- Mental Health
- Sales
- Diversity and Inclusion



9. What is driving your work force needs? Select all that apply.

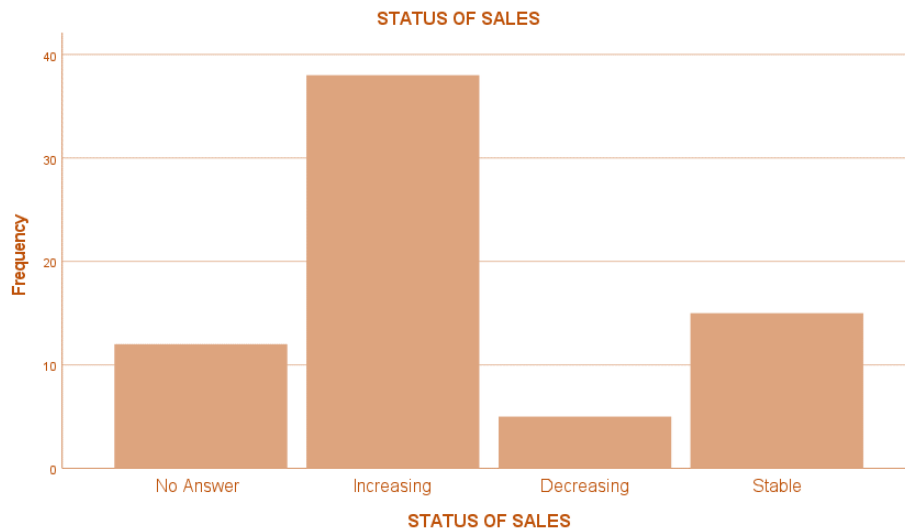
- Constant turnover.
- Retirements
- New technology, new tools and workstations.
- Growth in demand
- Expansion in facilities



SALES

1. State of sales?

- Increasing
- Decreasing
- Stabilizing



2. Is the market share of the company's key products:

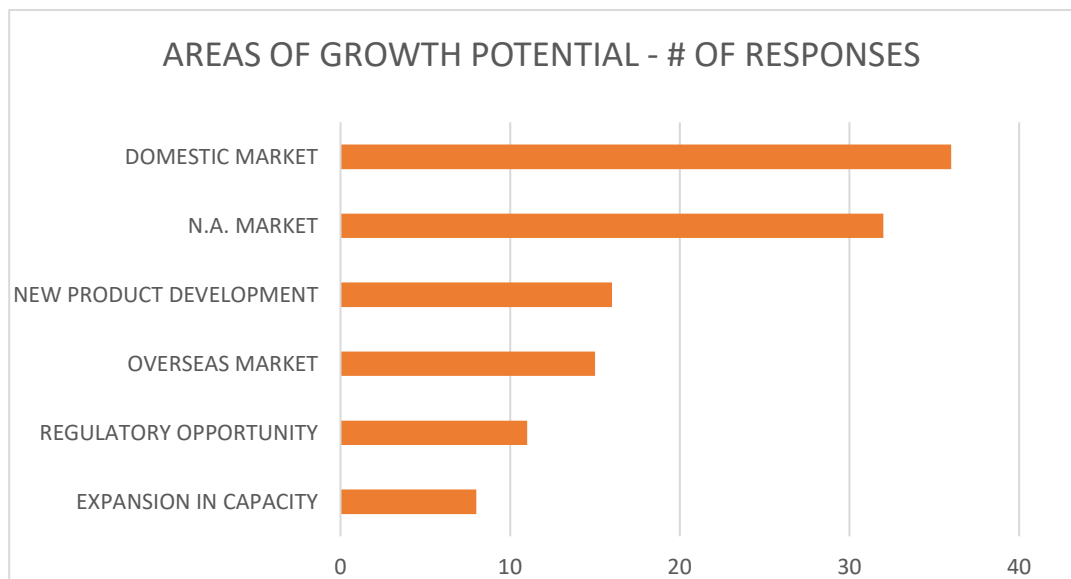
- Increasing Decreasing Stabilizing

STATE OF MARKET SHARE IN KEY PRODUCTS

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid Increasing	14	24.1	24.1	24.1
Decreasing	3	5.2	5.2	29.3
Stable	41	70.7	70.7	100.0
Total	58	100.0	100.0	

3. Do you have areas of growth potential you are eyeing? Please list up to three in general terms only please.

- a. First:
- b. Second
- c. Third

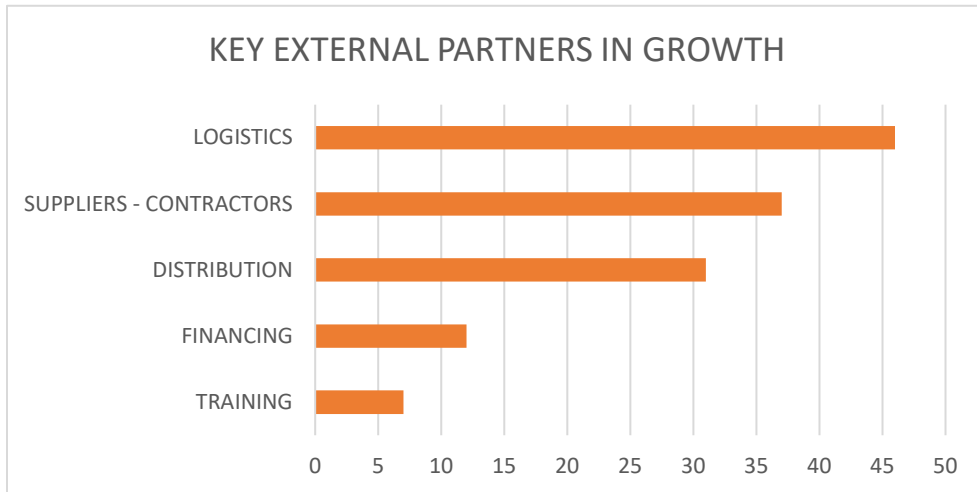


4. Besides internal operations, do you see key outside partners who can help you drive sales growth? Select all that apply.

- Financing
- Training

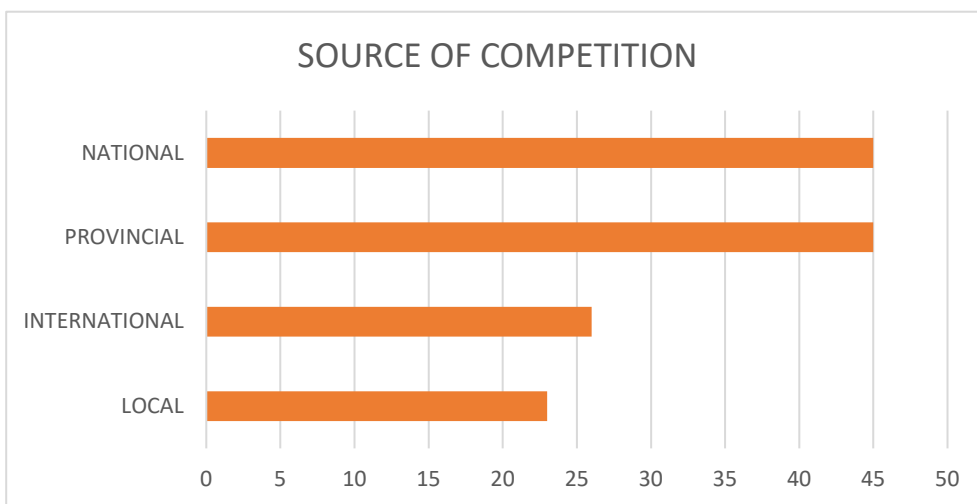
4. Besides internal operations, do you see key outside partners who can help you drive sales growth? Select all that apply.

- Financing
- Training
- Material suppliers
- Logistics
- Distribution



5. Where is your main competition coming from? Select all that apply.

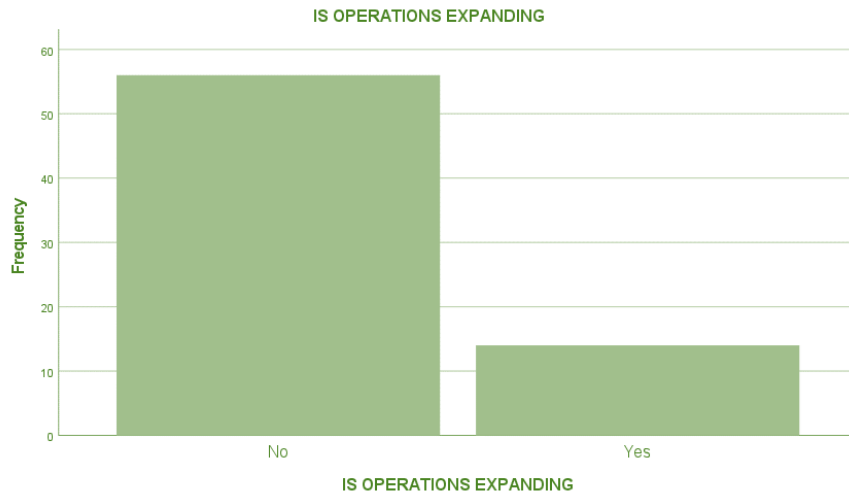
- Locally
- Regionally
- Nationally
- Internationally



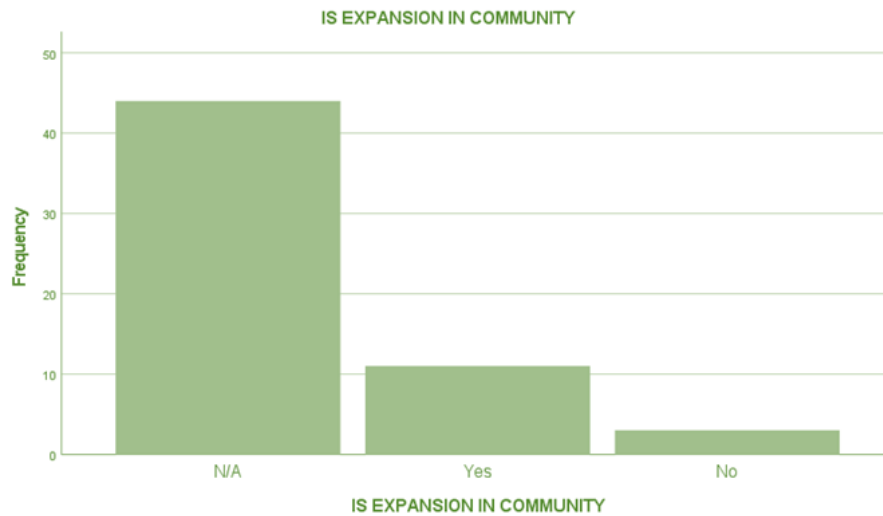
FACILITY/OPERATIONS/EQUIPMENT

Future:

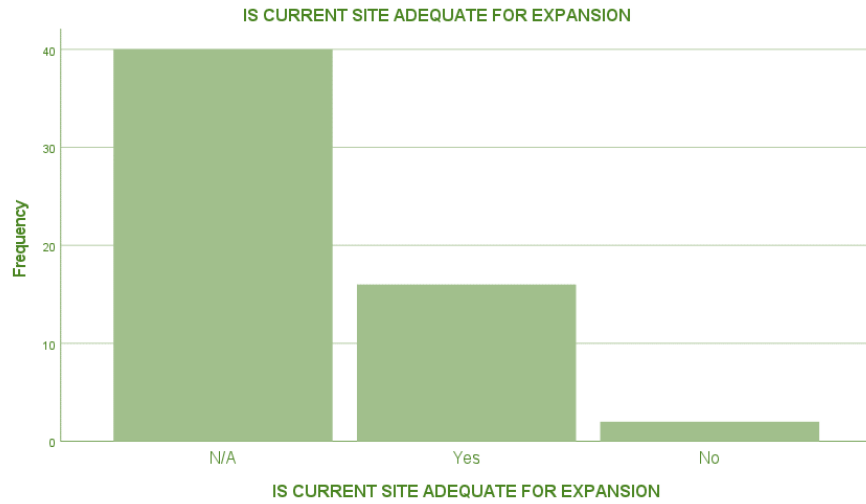
1. Are there any thoughts to expanding in the next three to five years? Yes/No



2. If yes, will it be in this community? Yes/No

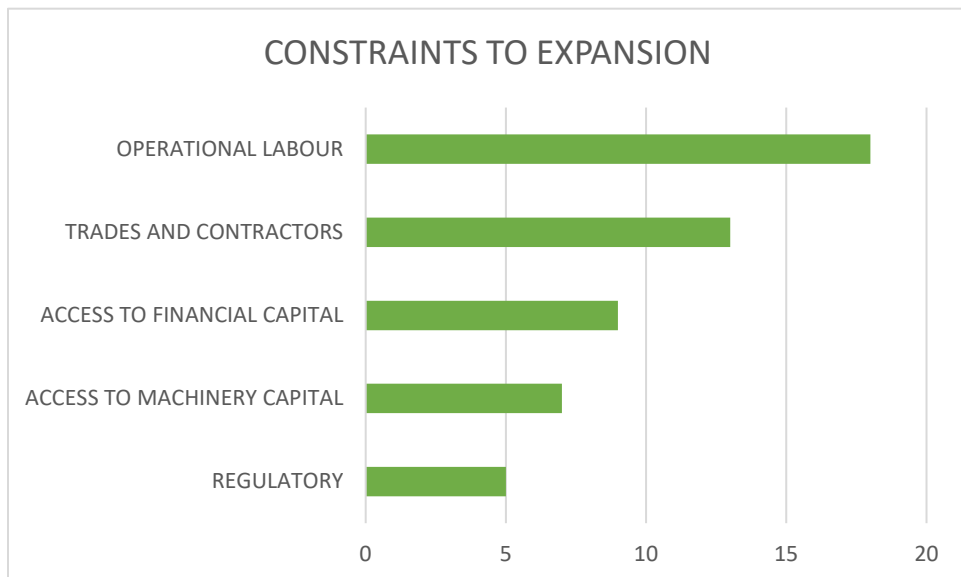


3. Is your current site adequate for the proposed expansion? Yes/No



4. What, if any, are the major constraints to your expansion?

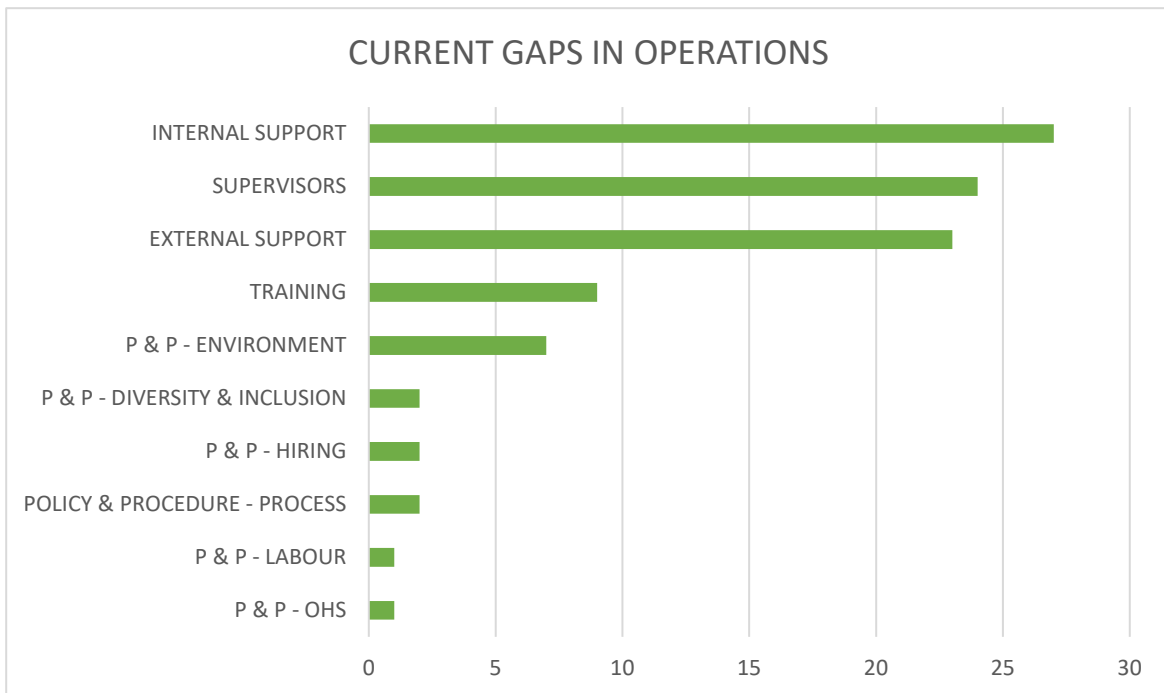
- Regulatory
- Access to capital
- Access to trades/contractors
- Access to machinery capital



Current:

1. What do you feel is missing in the support for your current operational needs in facilities and equipment? Select all that apply.

- Access to support/maintenance staff.
 - Internal
 - External
- Training resources
- Supervisors.
- Development of Policy and Procedures
 - Hiring
 - OHS
 - Workplace Behaviour (Harassment, etc.)
 - Labour law
 - Inclusion and diversity
 - Environmental: Disposition and management.
 - Reporting

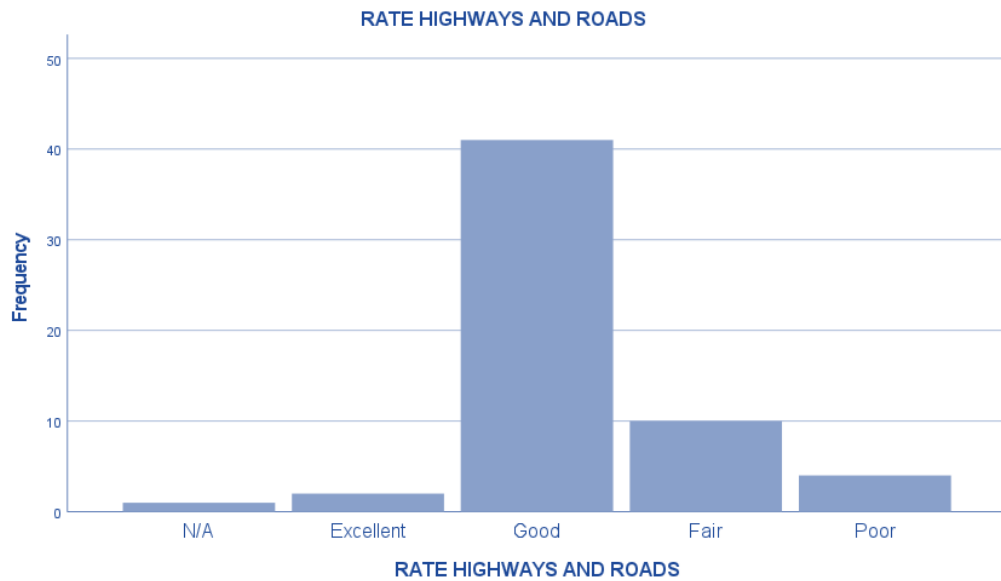


Note. Bar chart only displays those categories with an actual selection. There were no entries for the category of reporting.

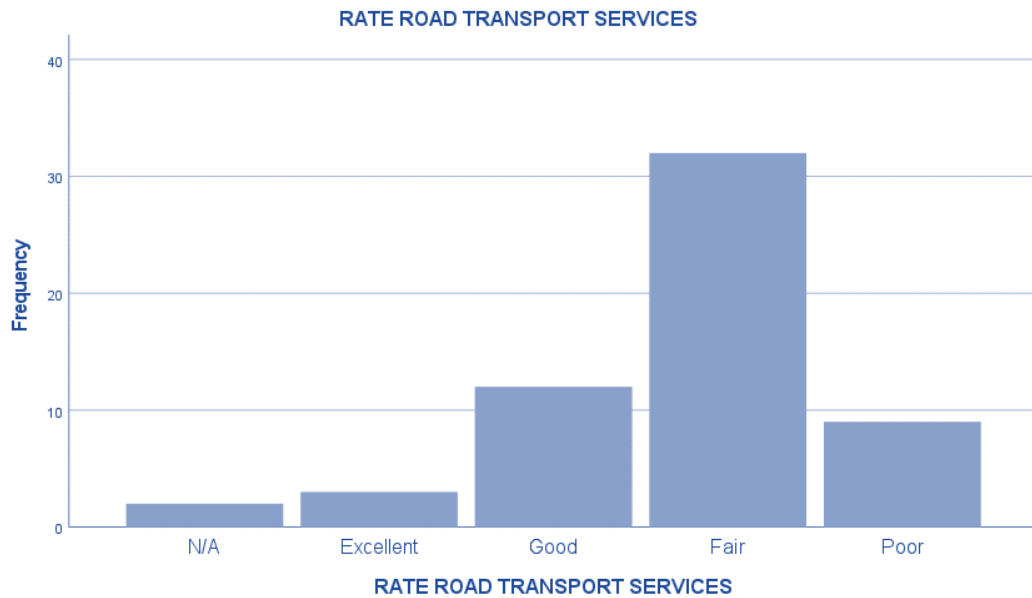
BUSINESS SUPPORT, INFRASTRUCTURE and BUSINESS CLIMATE

1. Please rate the following: N/A Poor Fair Good Excellent

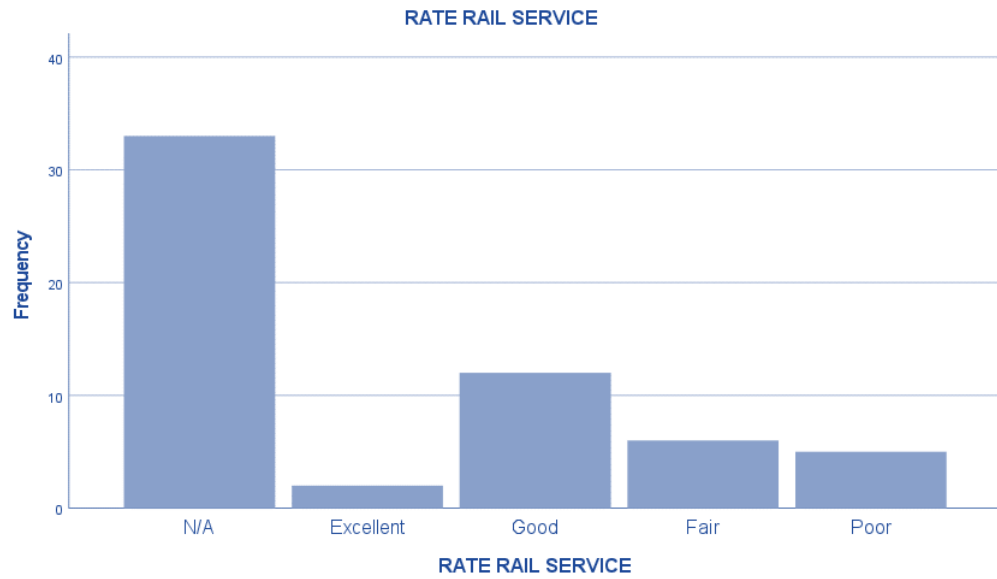
Access to highway/roadway N/A Poor Fair Good Excellent



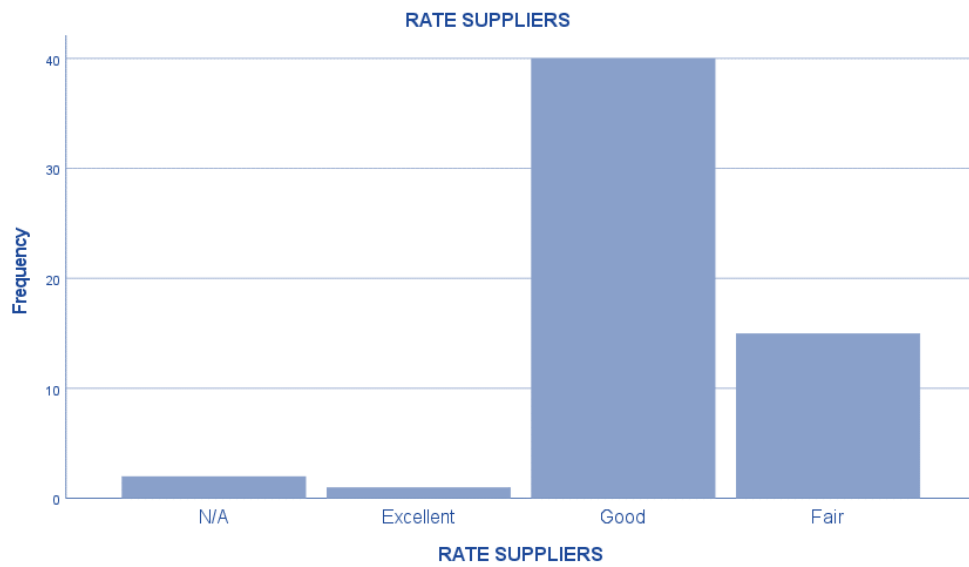
Availability of road transport services N/A Poor Fair Good Excellent



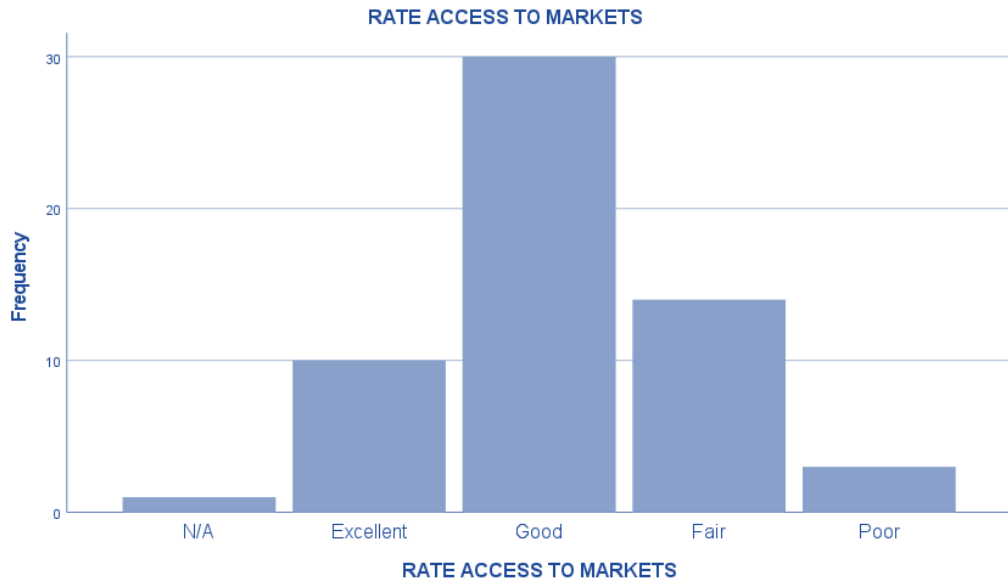
- Availability of rail transport ○ N/A ○ Poor ○ Fair ○ Good ○ Excellent



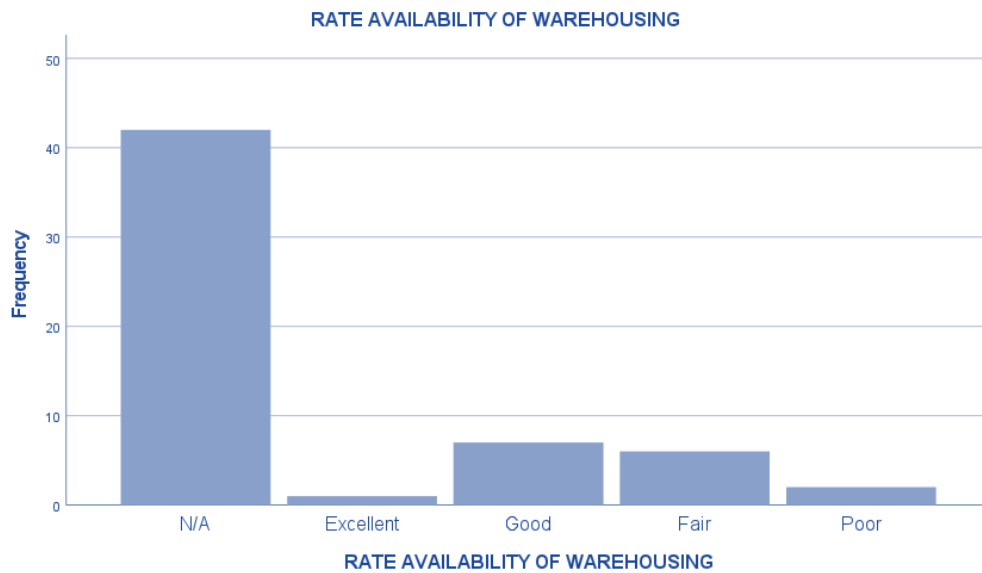
- Access to suppliers/vendors ○ N/A ○ Poor ○ Fair ○ Good ○ Excellent



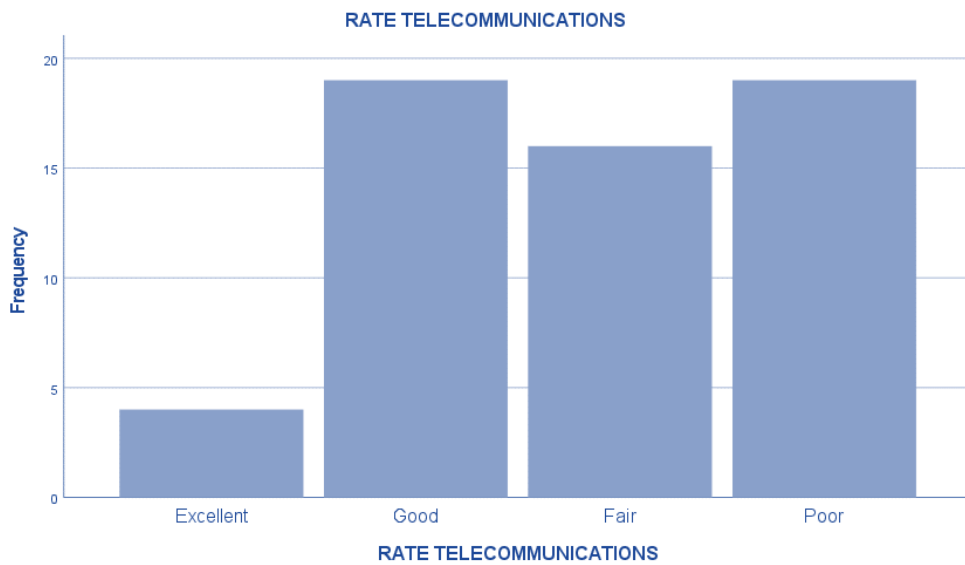
- Access to markets ○ N/A ○ Poor ○ Fair ○ Good ○ Excellent



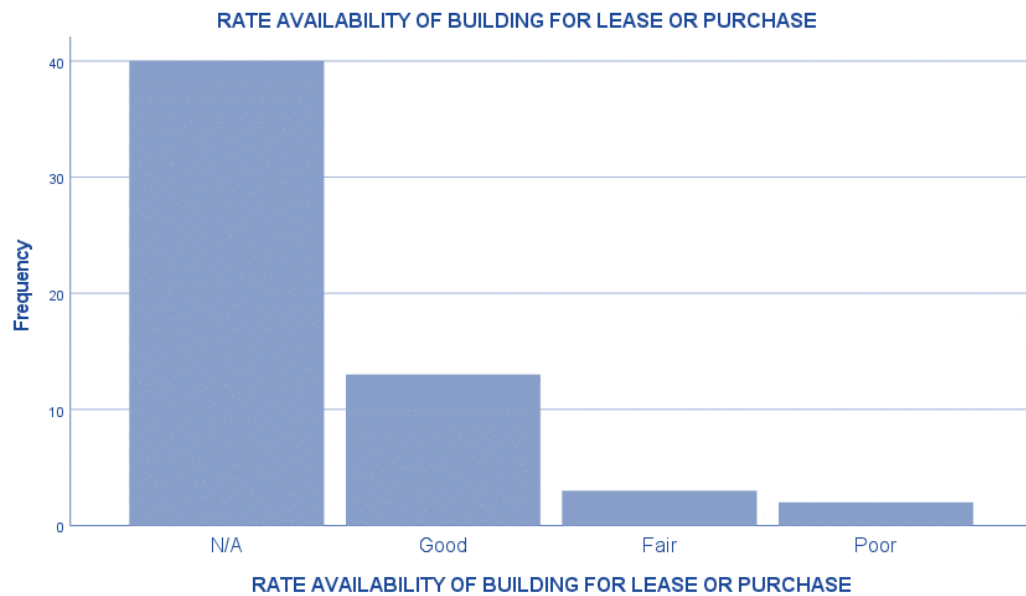
- Availability of warehousing ○ N/A ○ Poor ○ Fair ○ Good ○ Excellent



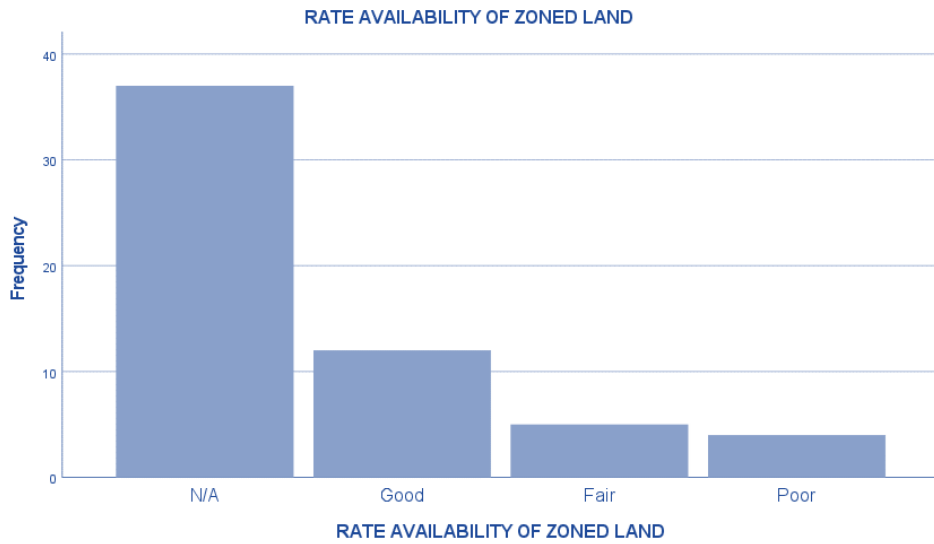
- Telecommunications (tel, Internet, Cell) ○ N/A ○ Poor ○ Fair ○ Good ○ Excellent



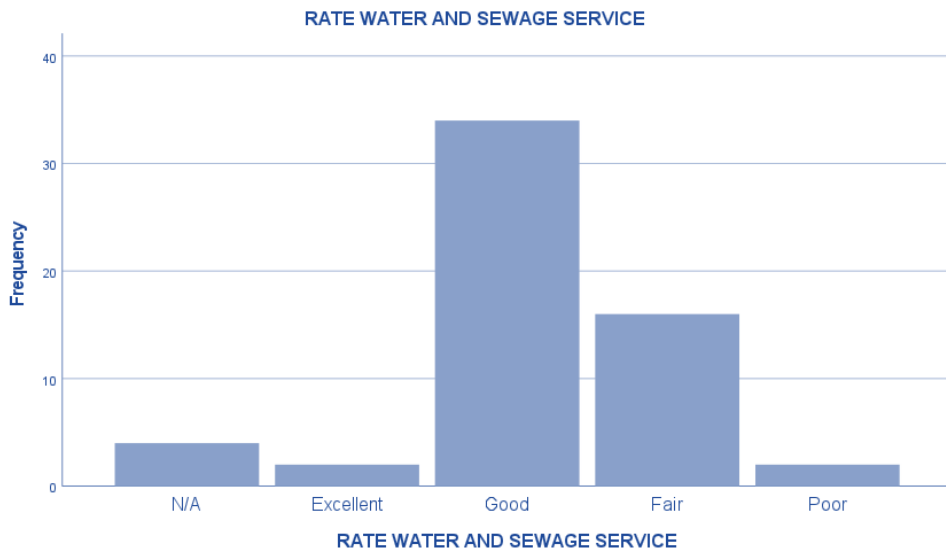
- Availability of buildings for lease/purchase ○ N/A ○ Poor ○ Fair ○ Good ○ Excellent



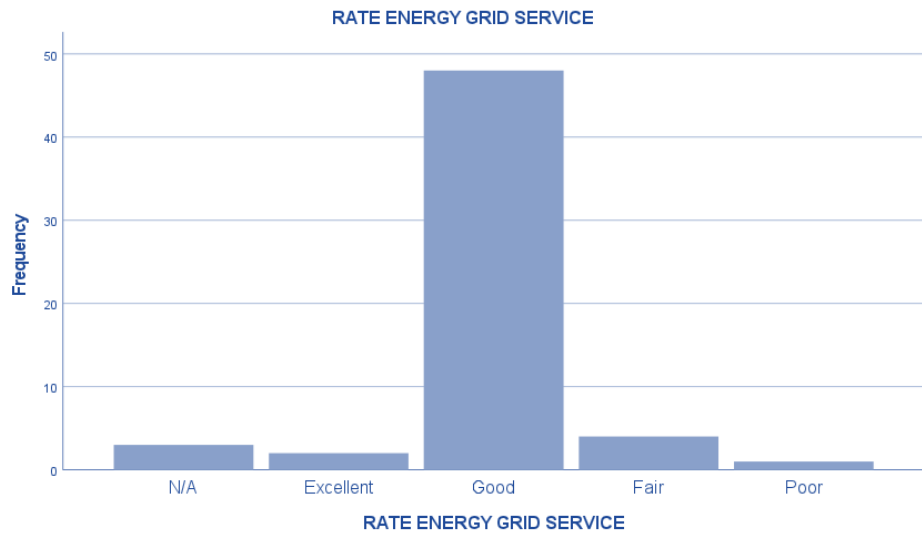
- Availability of appropriately zoned land ○ N/A ○ Poor ○ Fair ○ Good ○ Excellent



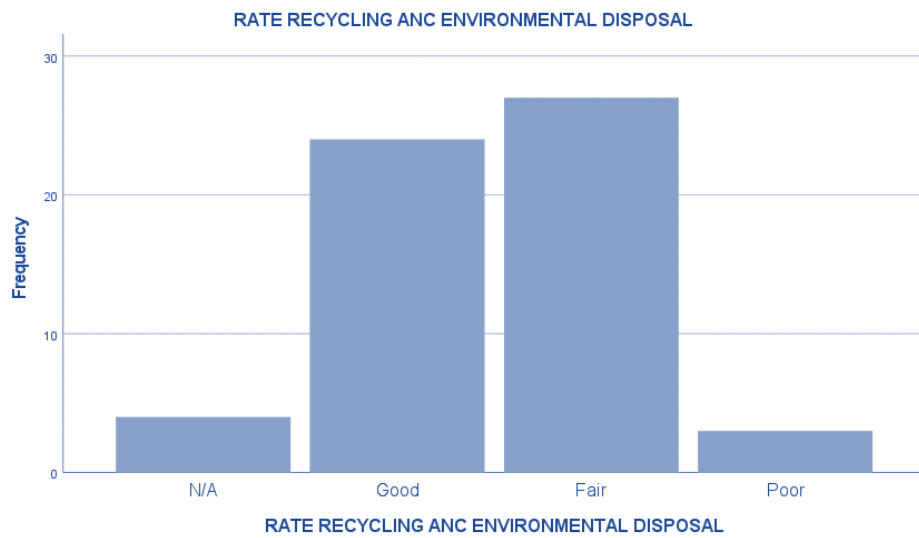
- Water and sewage supply ○ N/A ○ Poor ○ Fair ○ Good ○ Excellent



- Energy Grid ○ N/A ○ Poor ○ Fair ○ Good ○ Excellent



- Recycling and environmental disposal ○ N/A ○ Poor ○ Fair ○ Good ○ Excellent



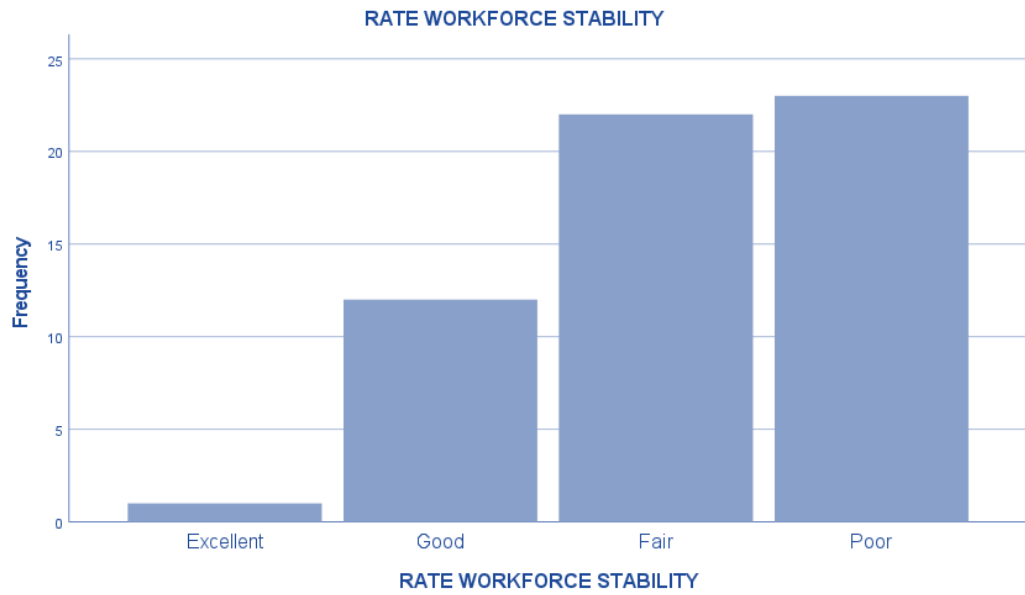
- Workforce quality ○ N/A ○ Poor ○ Fair ○ Good ○ Excellent



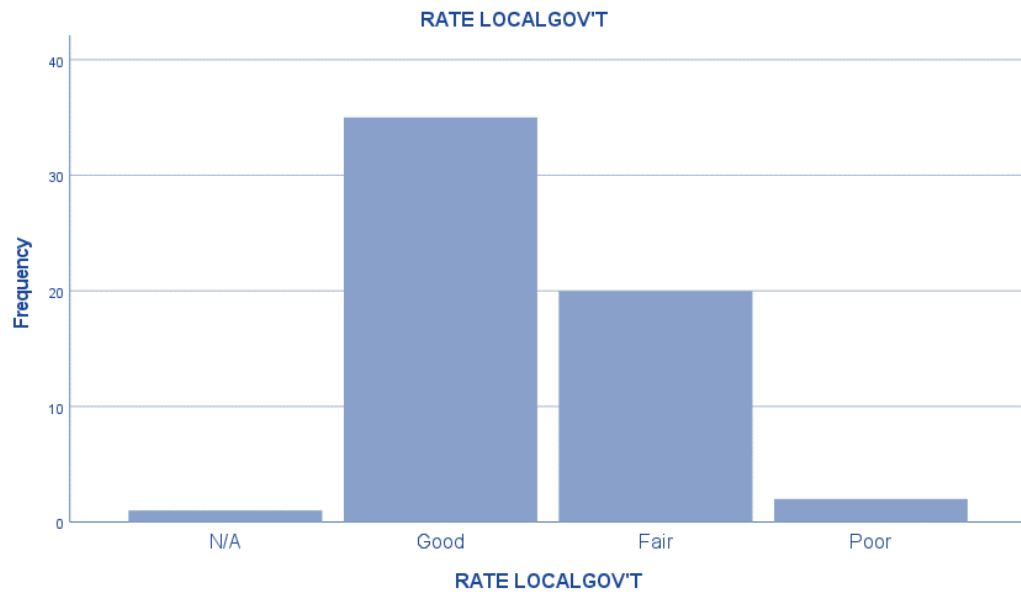
- Workforce availability ○ N/A ○ Poor ○ Fair ○ Good ○ Excellent



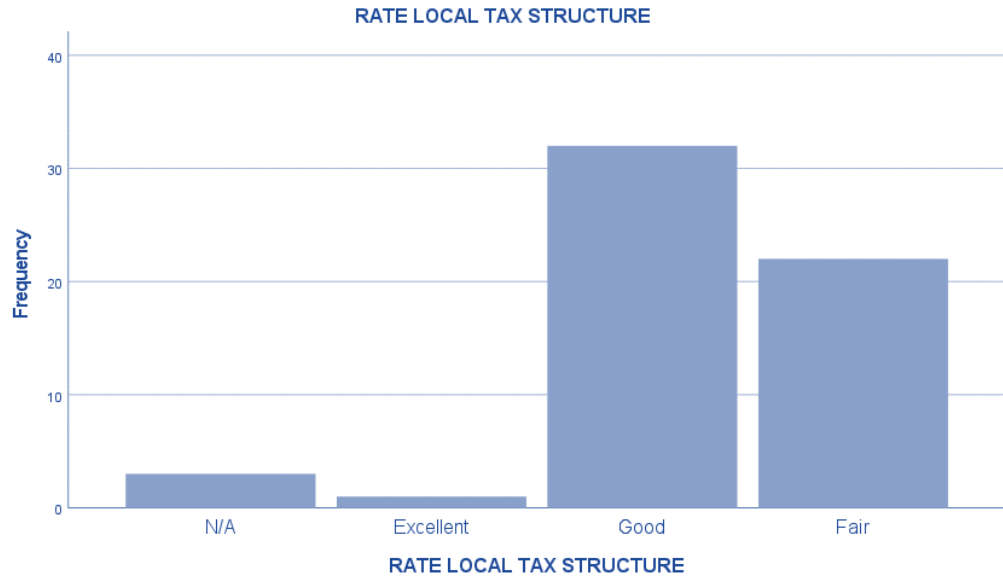
- Workforce stability ○ N/A ○ Poor ○ Fair ○ Good ○ Excellent



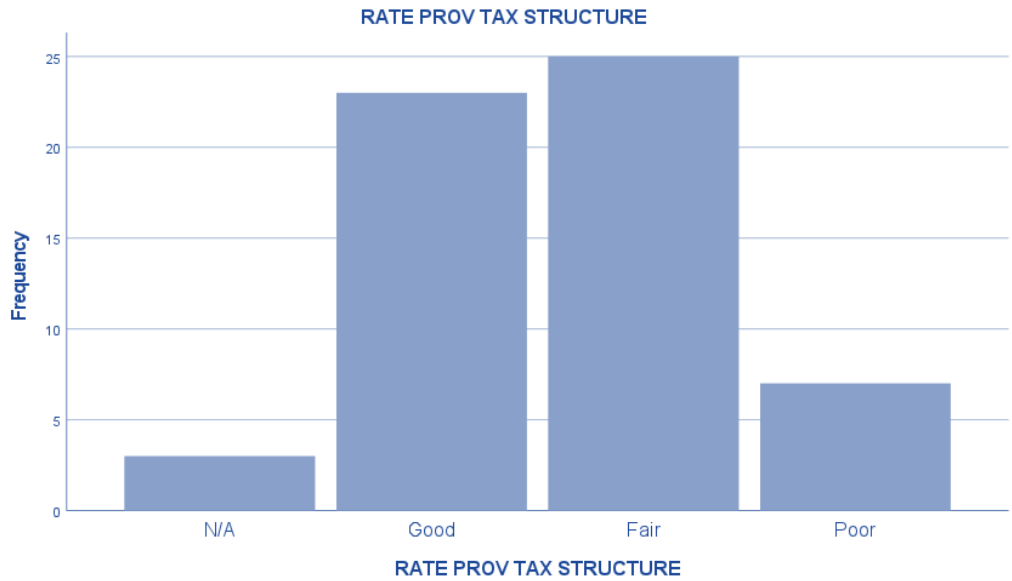
- Local government ○ N/A ○ Poor ○ Fair ○ Good ○ Excellent



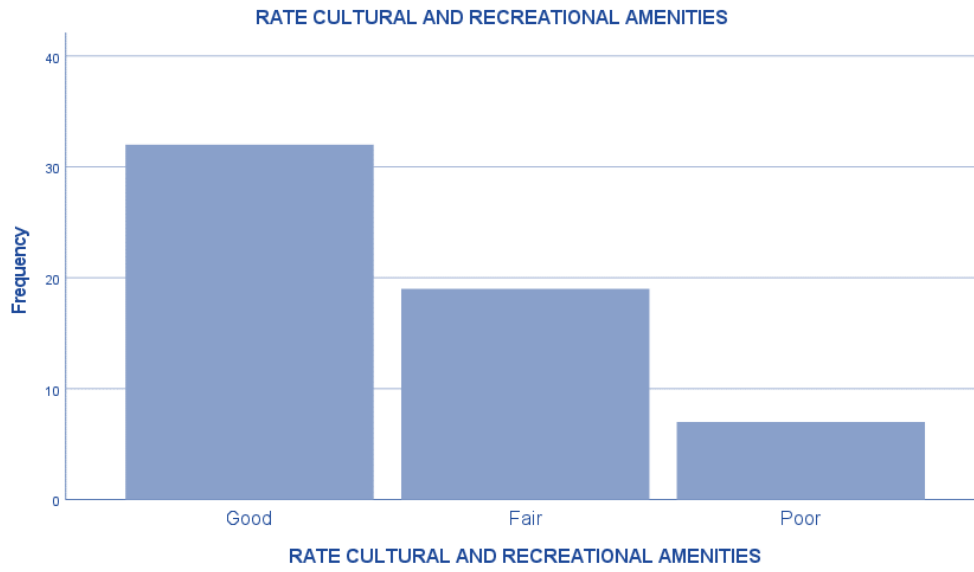
- Local tax structure ○ N/A ○ Poor ○ Fair ○ Good ○ Excellent



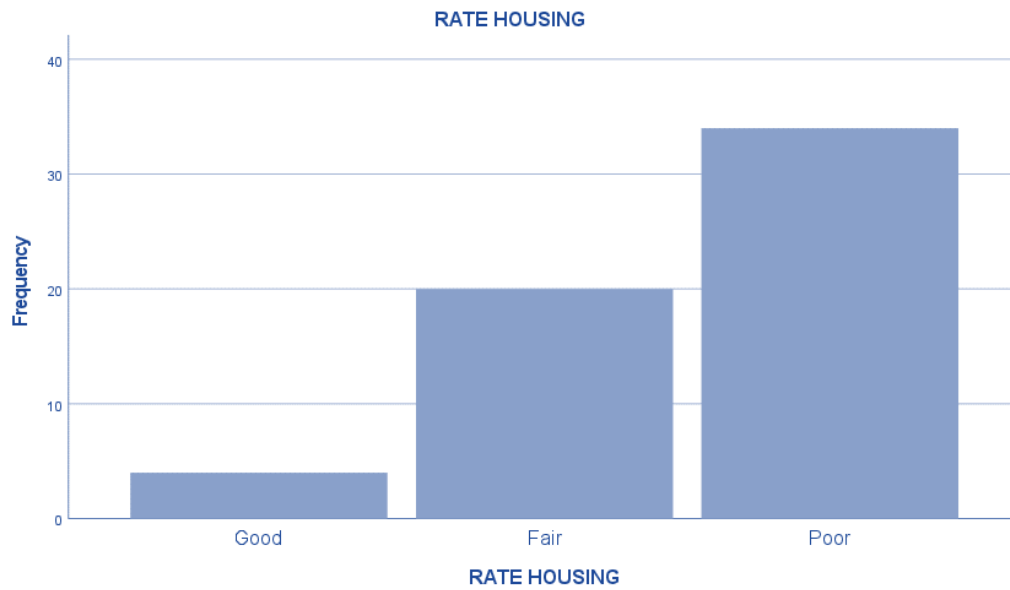
- Province tax structure ○ N/A ○ Poor ○ Fair ○ Good ○ Excellent



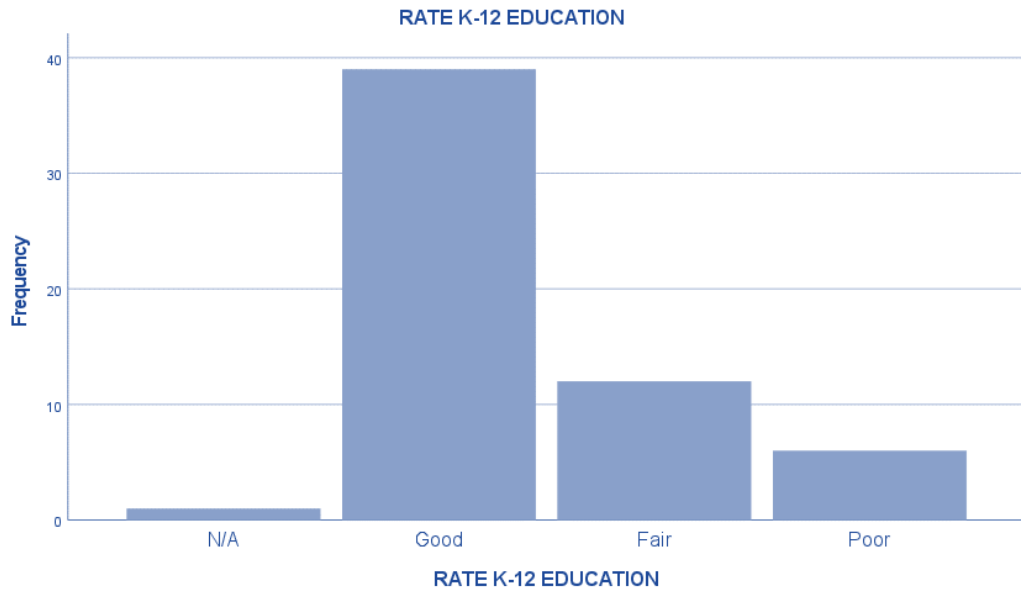
- Cultural/Recreational amenities N/A Poor Fair Good Excellent



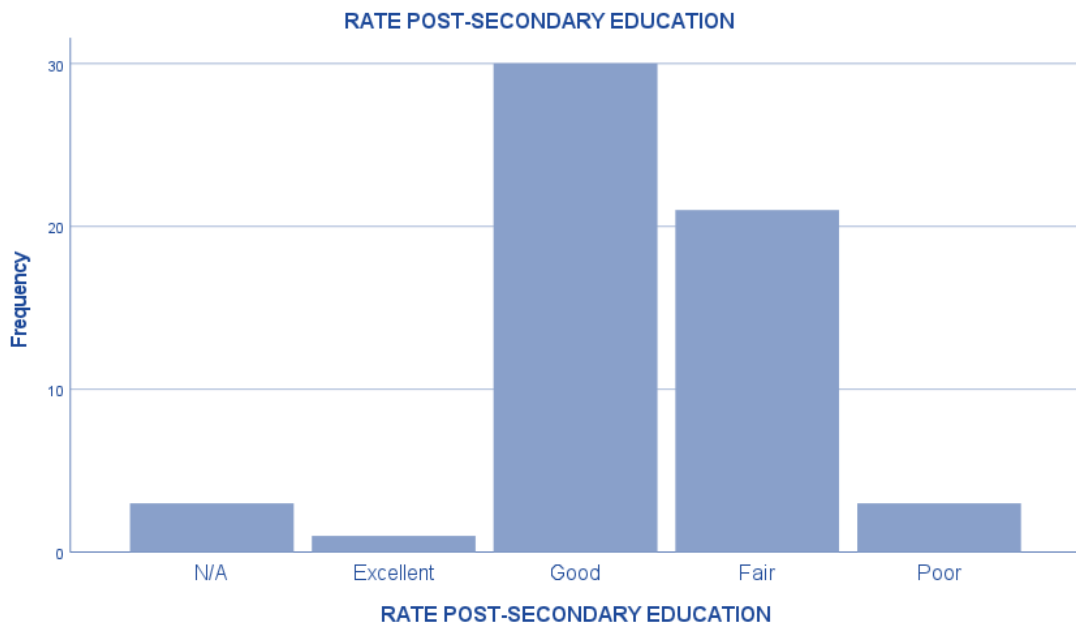
- Housing N/A Poor Fair Good Excellent



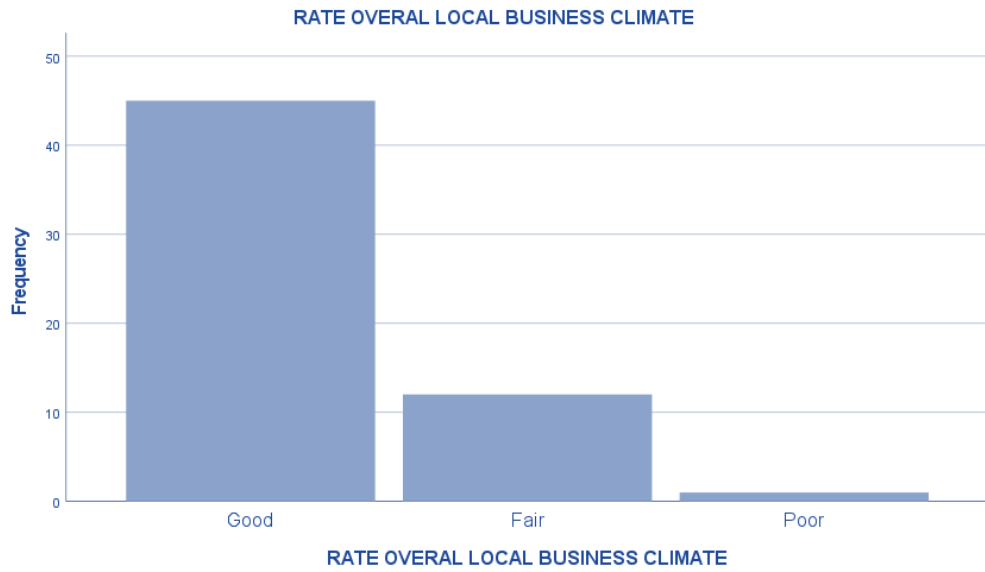
- K - 12 education ○ N/A ○ Poor ○ Fair ○ Good ○ Excellent



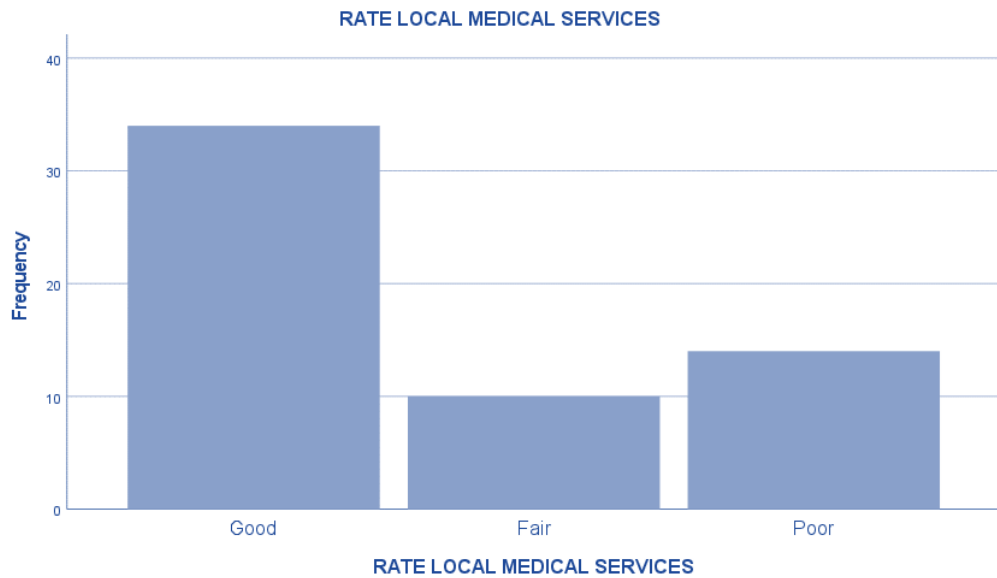
- Post Secondary Education ○ N/A ○ Poor ○ Fair ○ Good ○ Excellent



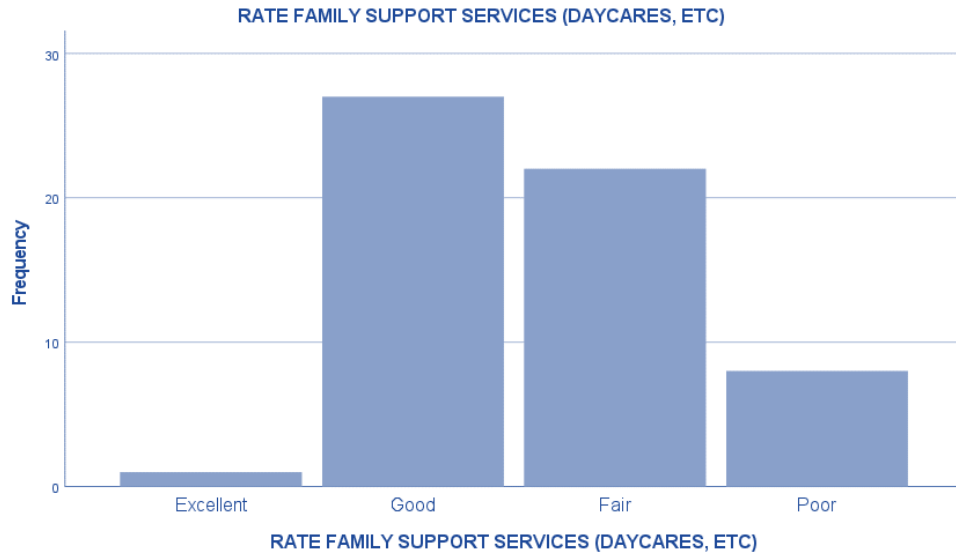
- Rate the local business climate ○ N/A ○ Poor ○ Fair ○ Good ○ Excellent



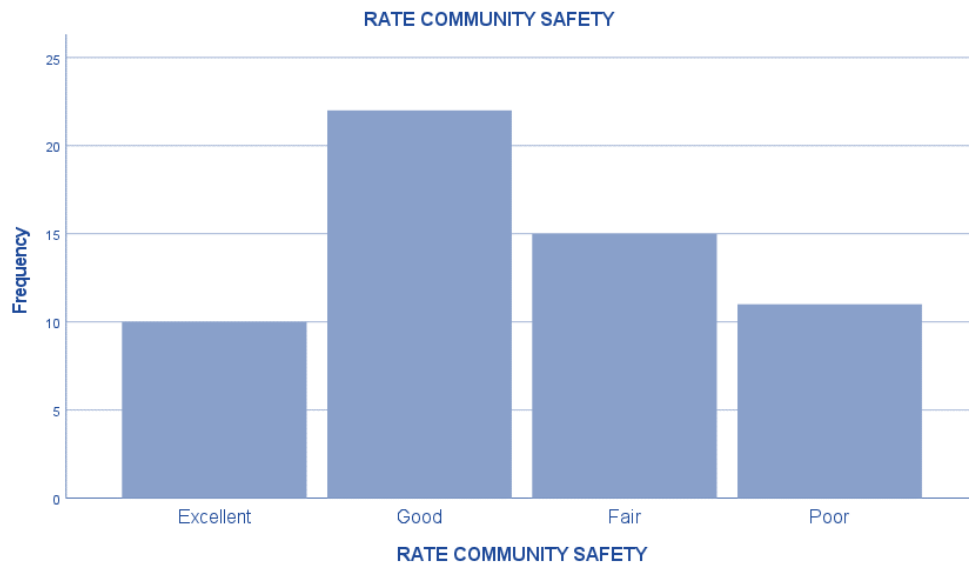
- Rate Medical facilities ○ N/A ○ Poor ○ Fair ○ Good ○ Excellent



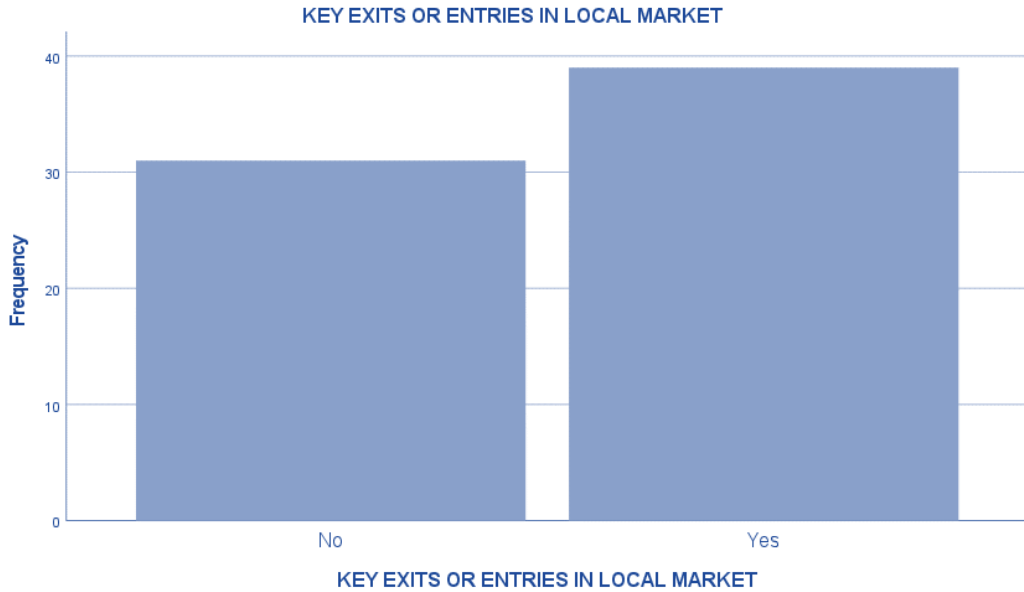
- Rate Family Support ○ N/A ○ Poor ○ Fair ○ Good ○ Excellent



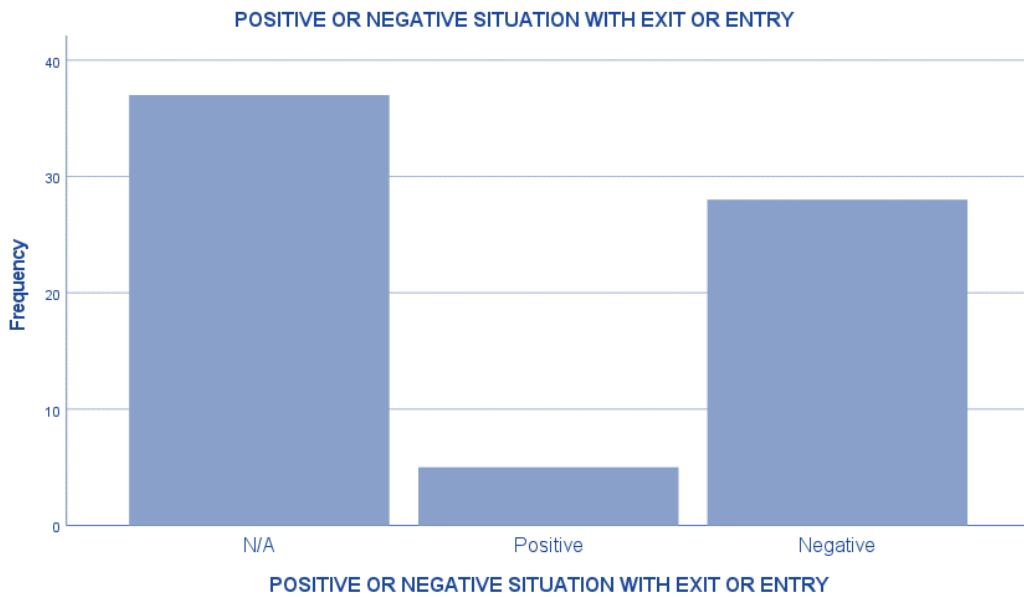
- Rate Community Safety ○ N/A ○ Poor ○ Fair ○ Good ○ Excellent



2. **Have there been key exits or entries into your industry and region?** (Refers to any companies that are entering into the marketplace or exiting the marketplace. They may be competitors within the respondent's industry or in many cases are competitors for the local/regional labour force)

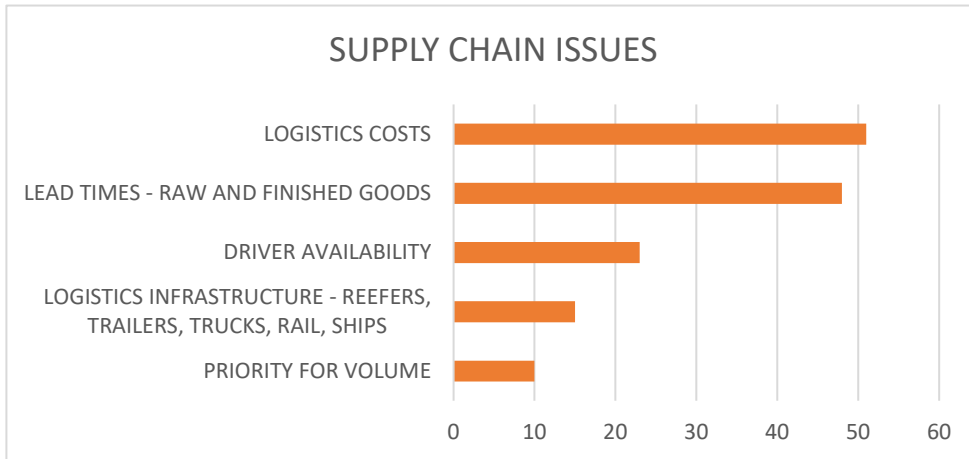


3. **How will you be affected by these exits or entries?**

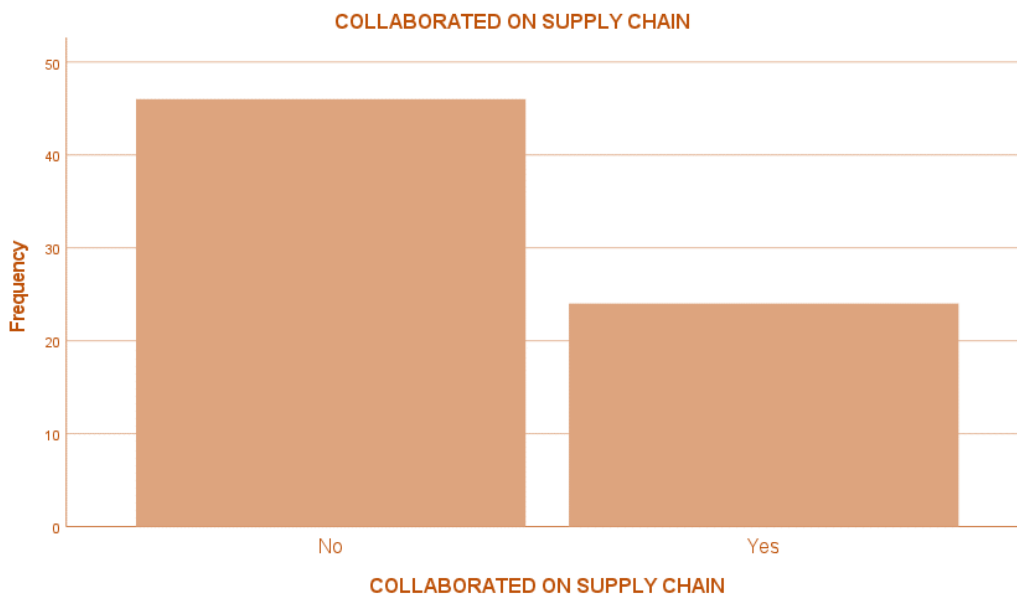


SUPPLY CHAIN/VENDOR DEVELOPMENT

1. What are your biggest supply chain/supplier headaches?



2. Have you ever purchased inputs jointly with other businesses?

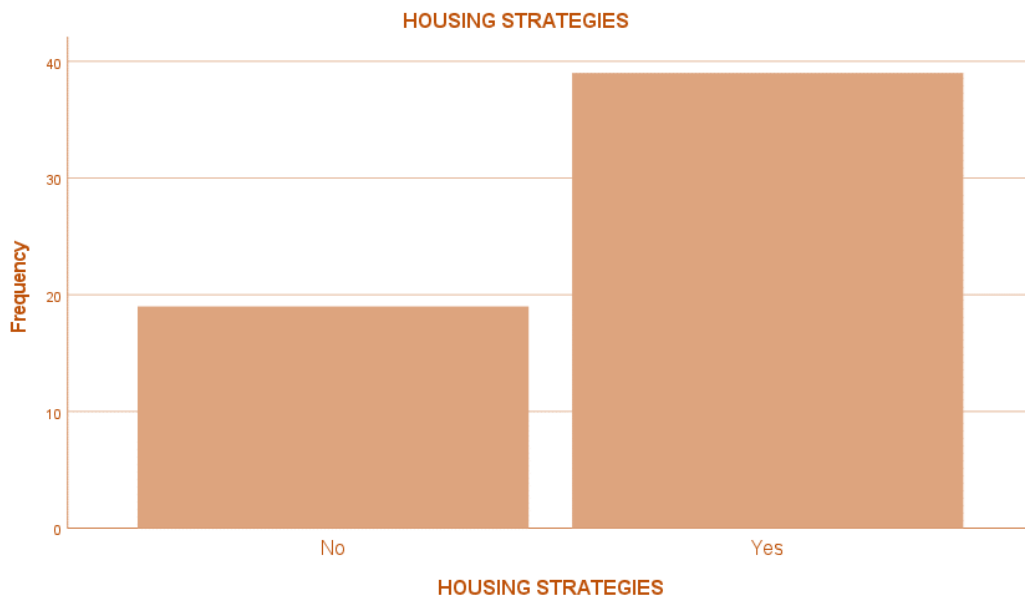
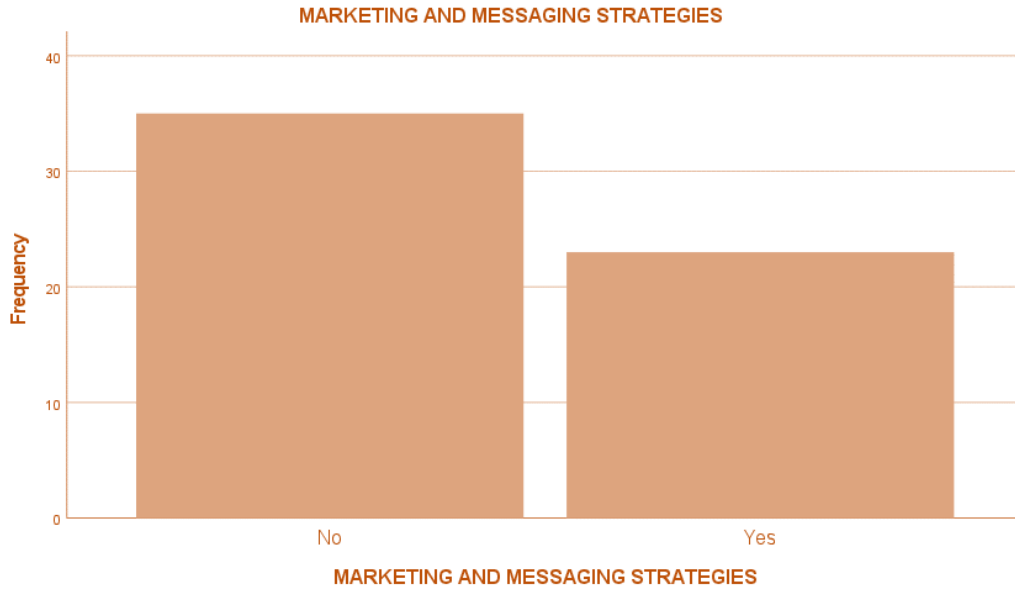


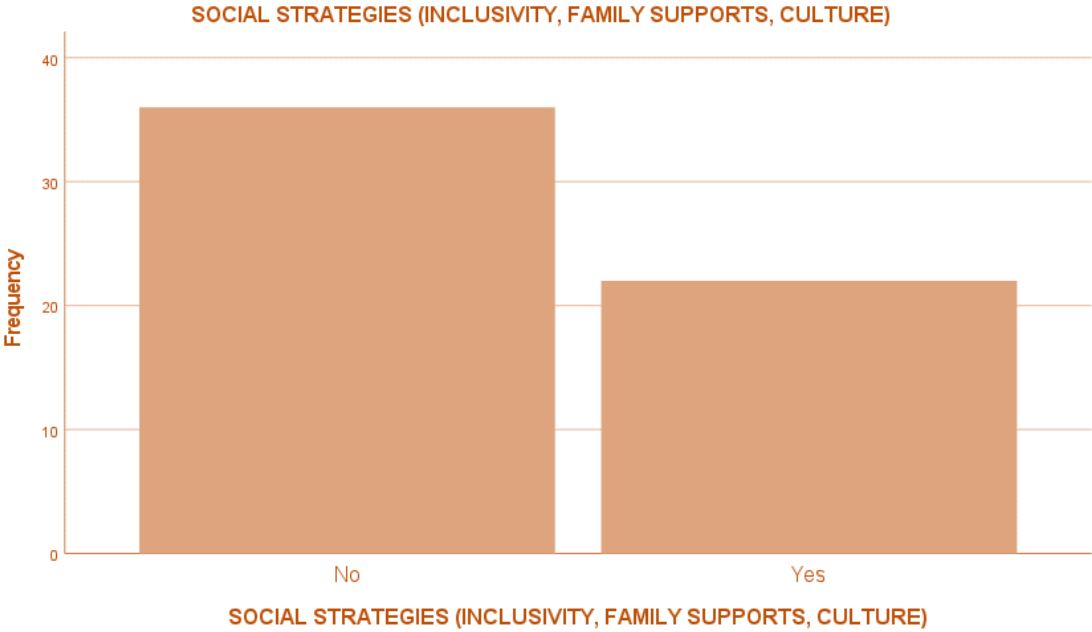
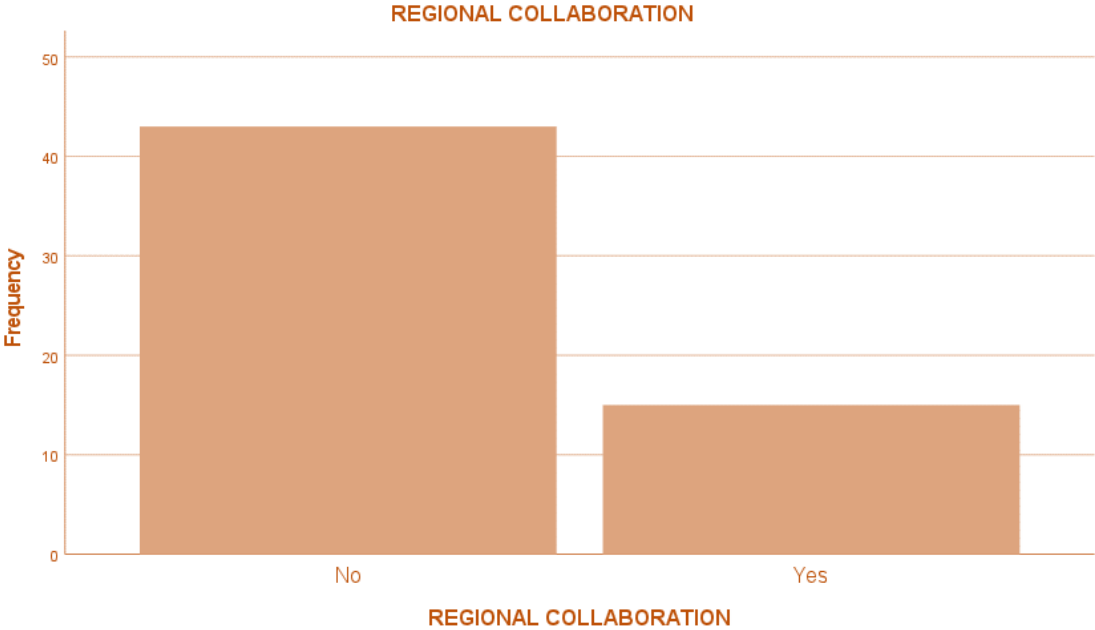
3. Are there opportunities you can identify within the purchasing/supply chain relationship that would improve your business operations?

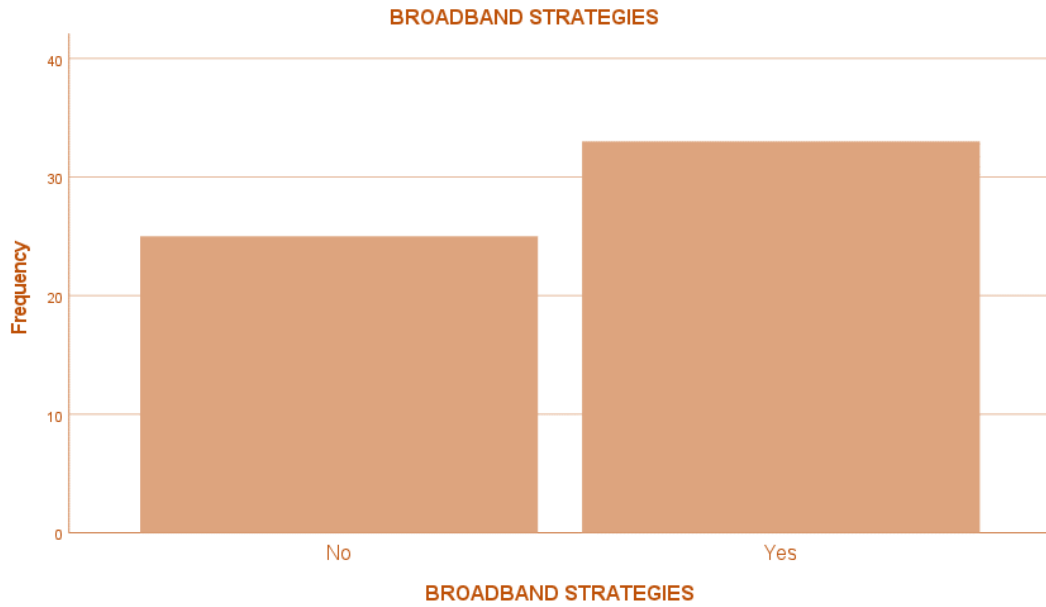
No responses were given by respondents on this question.

FINAL OPEN-ENDED QUESTIONS

1. What could be done within the community to help your business?







2. What is preventing your organization from doubling in growth?

