

Overview of the Manufacturing Sector in Saskatchewan 2006-2016

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of
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Executive Summary

This report provides updated statistical research on Saskatchewan's manufacturing sector, and is meant to be a reference tool for those interested in the performance of this sector. The paper looks at the size of Saskatchewan's manufacturing sector, examines growth trends in a number of indicators for the sector and its main subsectors, and compares the size and performance of Saskatchewan's manufacturing sector with that of other provinces and the national average.

Data used in the report were obtained from Statistics Canada. With the exception of Gross Domestic Product (GDP) numbers, the data are in current dollars and have not been adjusted to remove the effects of inflation.

The following are the key findings:

- Manufacturing continues to be an important industrial sector for purposes of economic growth and diversification in Saskatchewan. In 2016, Saskatchewan's manufacturing sector contributed \$3.9 billion (B) or 6.6% to the province's real GDP (\$58.9B at basic prices in chained 2007 dollars). Manufacturing's share of provincial GDP was 6.2% in 2006.
- In real dollar terms, Saskatchewan's manufacturing GDP increased at an average growth rate of 2.8% per year, from \$3.0B in 2006 to \$3.9B in 2016. For the 2006 to 2016 period, Saskatchewan's percentage changed ranked first among the provinces.
- Saskatchewan's productivity (real GDP per worked hour) in the manufacturing sector stood at \$73.90 in 2016, the highest level in Canada. Between 2011 and 2016, productivity in Saskatchewan's manufacturing sector productivity grew, on average, by 4.3% per year, the second-highest rate among the provinces.
- In 2016, Saskatchewan's manufacturing shipments amounted to \$14.1B, up by 0.8% from 2015. Between 2006 and 2016, Saskatchewan's manufacturing shipments grew at an average rate of 3.7% a year (highest among the provinces). This was above the national average of 0.1%, and ahead of Manitoba (+1.6%), Alberta (-0.4%), and British Columbia (+0.5%).
- In 2016, Saskatchewan's manufacturing sector employed 25,700 people, a decrease of 500 (-0.5%) from 2015, with the percentage change ranking third among the provinces. The number of people employed in Saskatchewan's manufacturing sector decreased from 29,600 in 2006, for an average annual growth rate of -1.4%. This percentage change was better than the national rate of -2.1%.
- Manufacturing is a significant contributor to Saskatchewan's research and development (R&D) activities. From 2004 to 2014, manufacturing contributed 39.2% of Saskatchewan's total in-house business R&D expenditures, on average.
- As of December 31, 2016, Saskatchewan had 1,081 manufacturing establishments (with at least one paid employee). Nearly 89% of these establishments were classified as small businesses (1-49 employees). Among the 1,081 manufacturing establishments, 961 manufacturers had between one and 49 employees, 117 establishments had 50 to 499 employees, and three manufacturers had more than 500 employees.
- Saskatchewan's international exports of manufactured goods amounted to \$6.0B in 2016, an increase of 3.4% from 2015, with the percentage change ranking third among the provinces. In 2016, manufacturing exports made up 22.5% of Saskatchewan's exports abroad, up from 20.5% in 2006. The sector's share was behind the agriculture sector (40.8%), but ahead of the oil and gas extraction sector (17.5%) and mining (except oil and gas) (17.6%).
- Saskatchewan's average weekly earnings in the manufacturing sector in 2016 grew by 1.4% to \$1,134.98, from \$1,119.51 in 2015, the sixth-highest growth rate among the provinces. Saskatchewan's weekly earnings were 104.2% of the national average in 2016, and compared with Manitoba at 93.6% of the national average, British Columbia at 97.5% and Alberta at 118.5%.
- New capital investment in Saskatchewan's manufacturing sector was \$557.7M in 2016, which represented a decrease of 29.5% from 2015, following a 45.8% increase from 2014.

Introduction

Manufacturing is one of the key goods-producing sectors in Saskatchewan's economy. An expanding manufacturing sector is one indication that economic diversification is occurring within Saskatchewan.

This report is an update of a previous overview, prepared using the most current available data – 2016 in most cases. The report looks at changes in manufacturing indicators over time, and also compares these indicators with those for the other provinces, and for Canada as a whole.

The major indicators for Saskatchewan's manufacturing sector covered in this report are manufacturing GDP, establishments, employment, shipments, earnings, exports, and capital investment.

1. Real GDP

- Manufacturing GDP (also known as manufacturing value-added) measures net output, that is, gross output less purchased inputs that have been embodied in the value of the manufactured products. Manufacturing GDP provides a fair idea of the degree of transformation which occurs within the manufacturing industries.
- Between 2006 and 2016, Saskatchewan's manufacturing sector had an average annual growth rate (AAGR) of 2.8%, with real GDP rising from \$3.0B in 2006 to \$3.9B in 2016. In comparison, Saskatchewan's total real GDP grew, on average, by 2.1% per year in the same period.
- In 2016, real GDP for Saskatchewan's manufacturing sector was up by 2.9% from \$3.8B in 2015. According to Statistics Canada, the net gain of \$108.4M was primarily a result of a \$209.4M increase in food manufacturing, offset by declines in primary metal manufacturing (-\$62.0M), petroleum products (-\$36.1M), and fabricated metal product manufacturing (-\$19.3M).
- In real dollar terms, manufacturing's contribution to total provincial GDP was 6.6% in 2016, up slightly from 6.2% in 2006.
- Compared to Saskatchewan's other goods-producing sectors, manufacturing's share of total GDP ranked fourth-largest in 2016, behind mining, oil and gas (20.5% of real GDP), construction (6.9% of real GDP) and agriculture (6.8% of real GDP)..

Saskatchewan Real GDP by Sector, 2016 (% of Total)

Source: Statistics Canada, CANSIM Table 379-0030

Oil and gas extraction	14.5%
Construction	6.9%
Crop and animal production	6.8%
Manufacturing	6.6%
Mining and quarrying	4.8%
Utilities	2.2%

2. Real GDP by Province

- Manufacturing's contribution to Saskatchewan's total real GDP in 2016 was, at 6.6%, well below the national average. For Canada as a whole, manufacturing GDP represented 10.4% of the country's total GDP in 2016, down from 13.5% in 2006. Among the 10 provinces, Québec had the highest share at 14.0% in 2016.
- Over the period 2006 to 2016, the Saskatchewan manufacturing sector's contribution to provincial GDP averaged 6.5%, the ninth-highest among the provinces. Québec had the highest share at 15.2%, followed by Ontario at 13.8%. In the west, Manitoba's manufacturing sector had the highest share at 10.4%, followed by British Columbia (B.C.) at 7.5%. The national average over this period was 11.2%.
- Manufacturing GDP in Saskatchewan (in real dollars) grew at an average rate of 2.79% per year between 2006 and 2016, compared to a national decline at -1.0%. Saskatchewan's growth rate ranked best in Canada, followed by Prince Edward Island at 2.77%.
- In 2016, Saskatchewan's manufacturing GDP increased by 2.9%, the third-highest growth rate among the provinces. Saskatchewan was among the top performing provinces for growth of manufacturing GDP in seven of the past ten years.

GDP

*Provincial Share of National
Manufacturing Real GDP, 2016*

Source: Statistics Canada, CANSIM Table 379-0030.

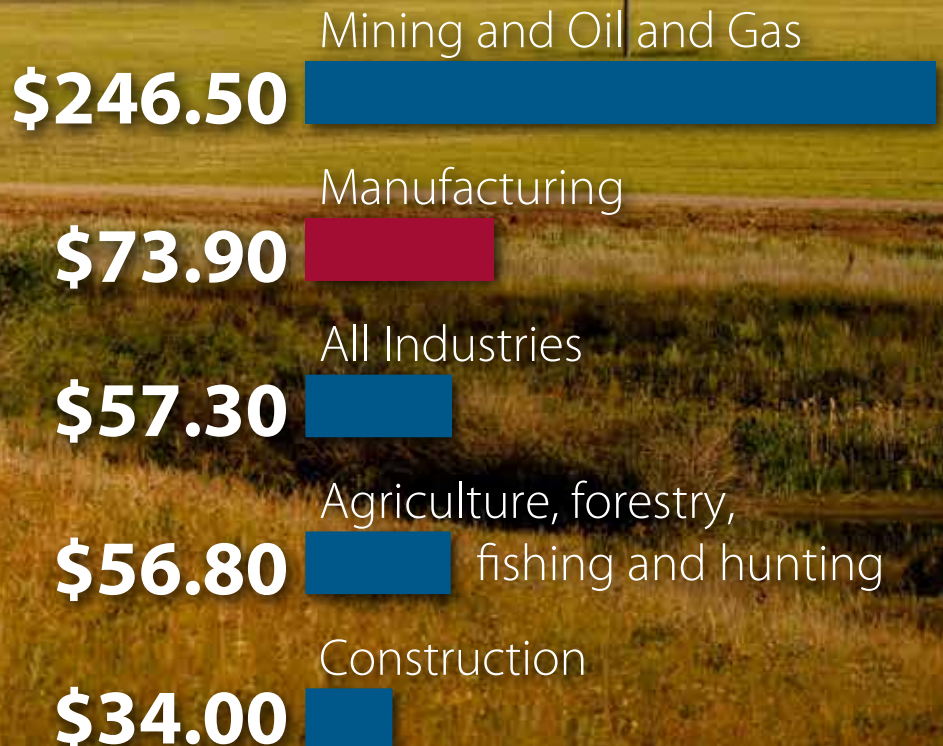
Ontario	46.3%
Québec	25.6%
Alberta	9.5%
British Columbia	9.2%
Manitoba	3.1%
Saskatchewan	2.2%
New Brunswick	1.7%
Nova Scotia	1.5%
Newfoundland and Labrador	0.6%
Prince Edward Island	0.3%

3. Manufacturing Productivity Summary

- Manufacturing GDP per worked hour is one measure of labour productivity in the manufacturing sector. It is a net output per worked hour, as the cost of materials and supplies, energy, water utilities, and vehicle fuel used are excluded. Manufacturing GDP per worked hour measures the extent to which labour is efficiently used in the manufacturing sector.
- Manufacturing productivity may fall if the sector does not adequately invest in its labour force, or does not improve the efficiency of its operations. On the other hand, increases in the use of technology and capital inputs may allow labour to be more productive.
- Between 2011 and 2016, manufacturing productivity increased at a rate of 4.3% per year, on average. During this period, productivity in the agriculture sector grew by 6.2% per year. Productivity in the construction sector decreased at an annual average rate of 4.7%. The provincial aggregate increased 0.7% per year during the 2011 to 2016 period.
- In 2016, manufacturing productivity stood at \$73.90 per worked hour, ahead of agriculture (\$56.80 per worked hour) and construction (\$34.00 per worked hour), but behind mining and oil and gas (\$246.50 per worked hour). The provincial aggregate (for all industries) was \$57.30 per worked hour in 2016. Between 2015 and 2016, manufacturing productivity increased by 6.8%, compared with an increase of 0.5% for all industries.

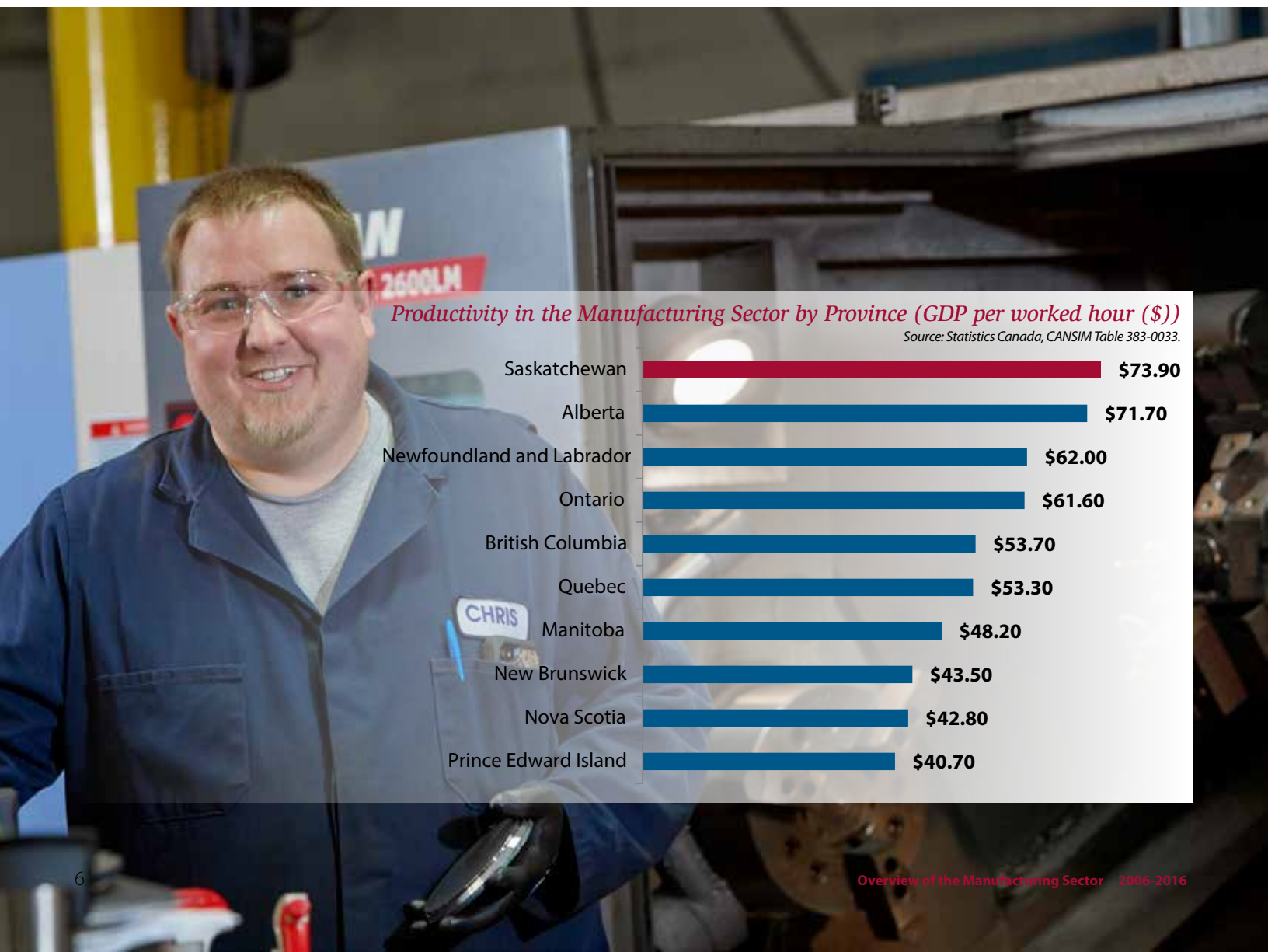
*Saskatchewan Productivity by Sector,
2016 (GDP per worked hour)*

Source: Statistics Canada, CANSIM Table 383-0033.



4. Manufacturing Productivity by Province

- In 2016, Saskatchewan's manufacturing productivity, which stood at \$73.90 per worked hour, was the highest level in Canada, ahead of Alberta (\$71.70).
- Manufacturing productivity in Saskatchewan was above the Canadian average of \$58.20 in 2016. Newfoundland and Labrador (\$62.00) and Ontario (\$61.60) were the third- and fourth-highest ranked provinces, respectively, for manufacturing productivity in 2016.
- During the 2011 to 2016 period, Saskatchewan's manufacturing sector posted a productivity growth rate of 4.3% per year on average. Manufacturing productivity increased on an annual average basis in Alberta by 2.6%, by 2.3% in Manitoba, and by 1.8% in B.C. over the same period. The average for Canada was 1.7% annually.
- In 2016, manufacturing productivity in Saskatchewan was up by 6.8% over the previous year, the second-highest growth rate among the provinces. Nationally, this measure increased by 1.9% in 2016.



Productivity in the Manufacturing Sector by Province (GDP per worked hour (\$))

Source: Statistics Canada, CANSIM Table 383-0033.



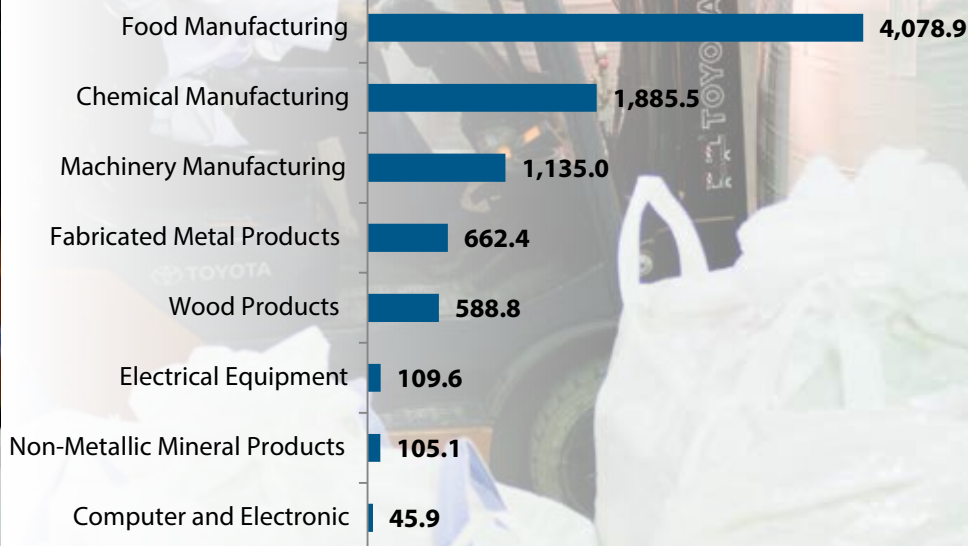
5. Shipments

- Manufacturing shipments refer to the value of manufactured goods produced and destined for retail and wholesale markets in Saskatchewan and other parts of Canada, exports to international markets, or use as inputs by other industries.
- In 2016, Saskatchewan's manufacturing shipments amounted to \$14.1B, according to Statistics Canada's Monthly Survey of Manufacturing, up by 0.8% from 2015 (\$14.0B).
- Food manufacturing is the largest of the reported manufacturing subsectors in Saskatchewan, with shipments of \$4.1B (28.8% of the total). The second-largest subsector in 2016 was chemical manufacturing, with shipments of \$1.9B (13.3% of the total), while machinery manufacturing was the third-largest subsector, totaling \$1.1B. Shipments in petroleum and coal products were not reported.
- The value of manufacturing shipments increased from \$9.9B in 2006 to \$14.1B in 2016, with an average growth rate of 3.7% per year. Four major manufacturing subsectors grew during this period, with average annual increases of 7.1% in chemical manufacturing, 5.9% in food manufacturing, 3.8% in machinery manufacturing, and 1.9% in wood products.



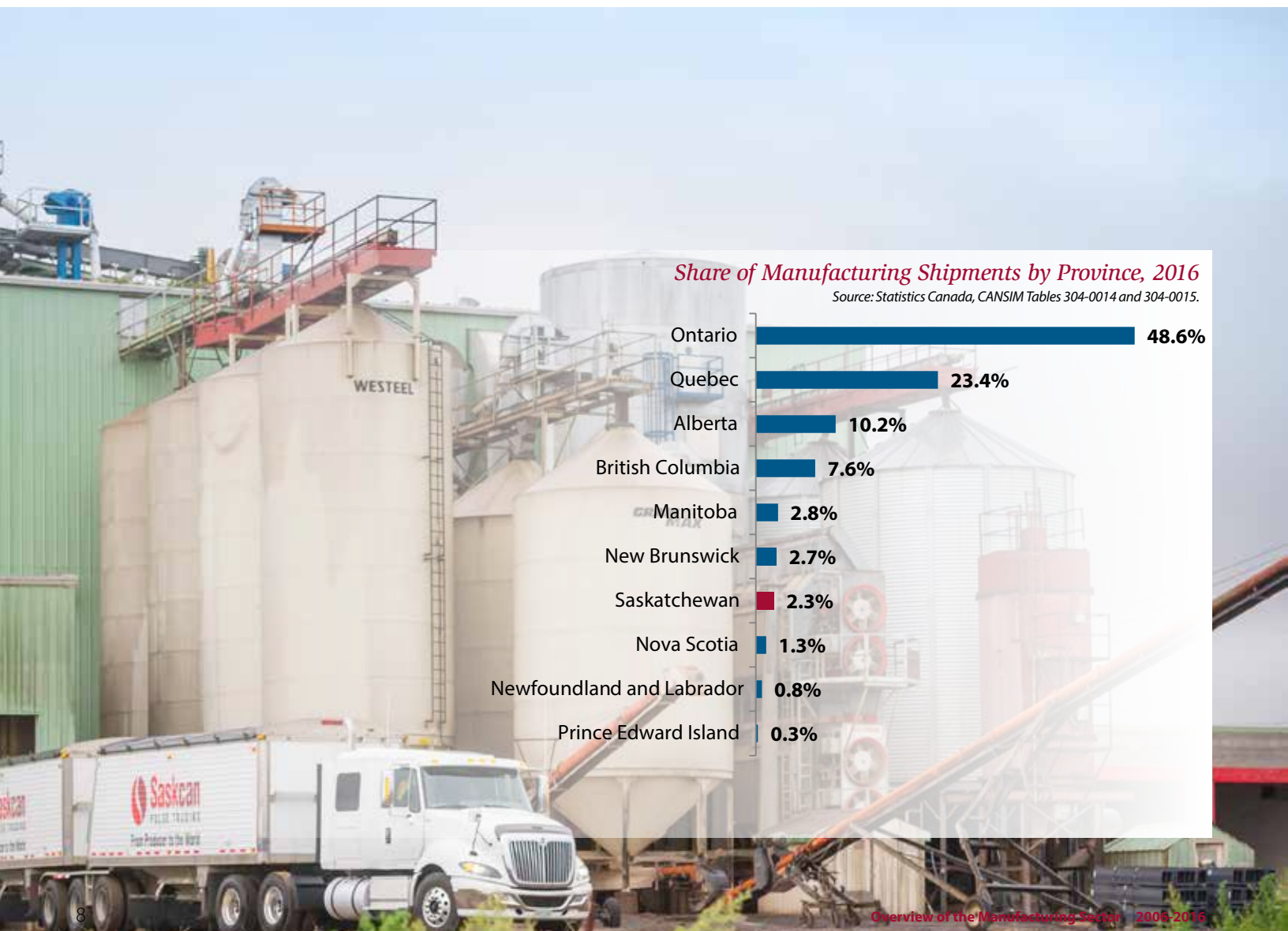
Manufacturing Shipments by Subsector, Saskatchewan (\$M)

Source: Statistics Canada, CANSIM Table 304-0015



6. Shipments by Province

- Saskatchewan accounted for 2.3% (or \$14.1B) of Canada's manufacturing shipments in 2016, increasing from 1.6% in 2006. Saskatchewan's share in 2016 was the seventh-highest in Canada.
- Alberta had the third-largest share of Canada's manufacturing shipments at 10.2% (\$62.7B), down from 10.8% in 2006. B.C.'s share was 7.6% in 2016 (\$46.6B), slightly up from 7.3% in 2006. Manitoba's contribution increased from 2.5% in 2006 to 2.8% (\$17.4B) in 2016. The national manufacturing shipment total was up 1.2% from 2006 to 2016.
- Ontario had the largest share of manufacturing shipments in Canada (\$297.6B), accounting for 48.6% of the Canadian total in 2016. Ontario's total shipments were up 0.7% from 2006.
- Between 2006 and 2016, Saskatchewan's manufacturing shipments grew at an average rate of 3.7% a year (highest among the provinces). This was above the national average of 0.1%, and ahead of Manitoba (+1.6%), B.C. (+0.5%), and Alberta (-0.4%).
- Manufacturing shipments in Saskatchewan rebounded strongly from the recession in 2009 (-15.0%) and 2010 (-2.9%), and grew at an annual average of 9.9% for the next four years. Shipments in Saskatchewan fell by 11.7% in 2015, but grew by 0.8% in 2016.

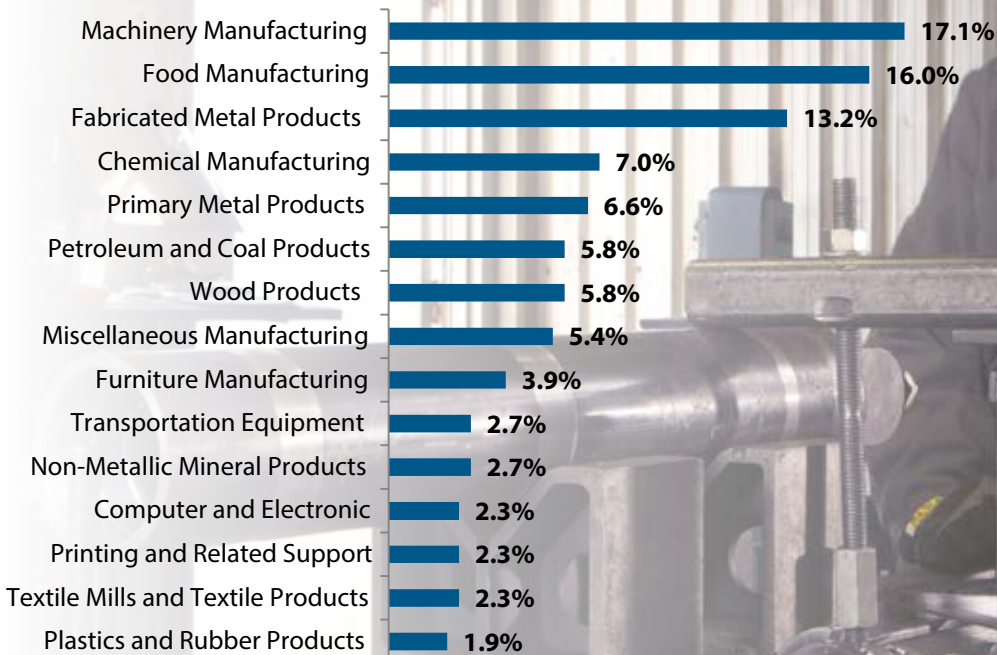


7. Employment

- According to Statistics Canada's Labour Force Survey (LFS), the number of employees in Saskatchewan's manufacturing sector totaled 25,700 in 2016, down by 1.9% from 2015 (26,200).
- Among subsectors, machinery manufacturing is the largest employer, with 4,400 employees in 2016. This was a decrease of 300 or 6.4% from 2015. The machinery manufacturing sector accounted for 17.1% of manufacturing employment in 2016.
- Other subsectors with 1,000 or more employees in 2015 were food manufacturing (4,100), fabricated metal products (3,400), chemical manufacturing (1,800), primary metal products (1,700), wood products (1,500), petroleum and coal products (1,500), miscellaneous manufacturing (1,400), transportation equipment (700), and non-metallic mineral products (700).
- Between 2006 and 2016, manufacturing employment decreased by 13.2% from 29,600 in 2006, or at a negative average growth rate of 1.4% per year.

Share of Saskatchewan Manufacturing Employment by Subsector, 2016

Source: Statistics Canada, Labour Force Survey.

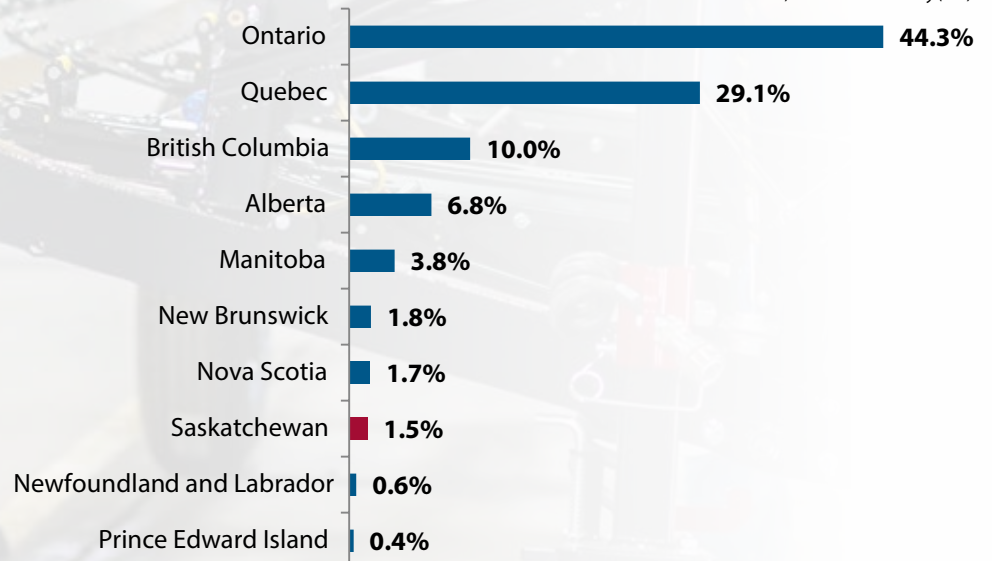


8. Employment by Province

- According to LFS data, employment in Canada's manufacturing sector gradually dropped to 1.7M in 2016, from 2.1M in 2006. Ontario had 751,400 manufacturing workers in 2016, or 44.3% of the Canadian total.
- In western Canada, B.C. had 170,100 people employed in manufacturing in 2016 (10.0% of total Canadian manufacturing employment), Alberta had 115,500 (6.8% of the total), Manitoba employed 63,600 (3.8% of the total), and there were 25,700 employed in Saskatchewan (1.5% of the total). Together, the four western provinces had 374,900 manufacturing employees in 2016 or 22.1% of the total for Canada.
- Saskatchewan had 1.5% of national manufacturing employment in 2016, up from 1.4% in 2006, and was eighth-highest in Canada.
- The Saskatchewan manufacturing sector's share of the provincial workforce averaged 5.4% in the 2006 to 2016 period, the lowest share in Canada. Québec, at 12.9%, had the highest share, followed by Ontario, at 12.2%. In the west, Manitoba had the highest share (10.4%), followed by B.C. (7.5%), and Alberta (6.4%). The national average stood at 10.5%.
- Saskatchewan's manufacturing employment declined at an average annual rate of 1.4% between 2006 and 2016 and ranked fourth-highest among the provinces. The national average was -2.1%, with every province registering a decrease from 2006 to 2016.

Provincial Share of National Manufacturing Employment, 2016

Source: Statistics Canada, Labour Force Survey (LFS)



9. Research and Development

- Manufacturing is a significant contributor to Saskatchewan's research and development (R&D) activities.¹ The most complete recent data are from 2013, when manufacturing represented 22.0% of total in-house provincial business R&D expenditures. From 2004 to 2014, manufacturing averaged \$73M or 39.2% of Saskatchewan's total in-house business R&D expenditures.
- Manufacturing R&D personnel represented an average of 43.1% of total business R&D employment between 2004 and 2014. On average, there were 637 dedicated R&D personnel in Saskatchewan's manufacturing sector from 2004 to 2014.
- Machinery manufacturing was the largest contributor to business R&D in the manufacturing sector, in terms of both expenditure and employment. From 2004 to 2014, R&D expenditures averaged \$17M each year and R&D employment averaged 238.

¹ Statistics Canada's primary means of collecting R&D statistics is through tax credits claimed at the time of tax filing. Since companies do not always claim their tax credits in the year earned, it is difficult to have accurate current year estimates at the provincial level. R&D data are therefore lagging by two years. There are also frequent gaps in the data as a result of confidentiality requirements that prohibit publication.

Saskatchewan Manufacturing R&D Expenditure (\$M)

	Share			
	2004	2013	2014	2013
Manufacturing	x	62	x	22.0%
Food manufacturing	3	3	x	1.1%
Chemical manufacturing	x	18	x	6.4%
Fabricated metal product manufacturing	1	3	3	1.1%
Machinery manufacturing	11	20	x	7.1%
Electrical equipment, appliance and component manufacturing	x	1	x	0.4%
Motor vehicle and parts manufacturing	2	2	x	0.7%
All other manufacturing industries	1	1	1	0.4%

Source: Statistics Canada, CANSIM Tables 358-0161 and 358-0518

Saskatchewan Manufacturing R&D Employment

	Share			
	2004	2013	2014	2013
Manufacturing	533	674	584	43.9%
Food manufacturing	63	53	39	3.4%
Textile mills and textile product mills	x	12	11	0.8%
Chemical manufacturing	47	128	87	8.3%
Fabricated metal product manufacturing	28	47	31	3.1%
Machinery manufacturing	223	222	173	14.4%
Control instrument manufacturing	32	x	x	--
Motor vehicle and parts manufacturing	x	30	22	2.0%
Other manufacturing industries	11	10	19	0.7%

Source: Statistics Canada, CANSIM Tables 358-0161 and 358-0518

10. Research and Development by Province

- In 2013, in-house manufacturing R&D expenditures by Saskatchewan businesses represented 0.9% of the national total, which was consistent with the average for the 2004 to 2014 period. Ontario and Québec combined for 87.3% of the national total in 2013.
- In 2013, Saskatchewan manufacturers employed 1.2% of the national total manufacturing R&D personnel, slightly above the 1.0% average for the 2004 to 2014 period. Ontario and Québec combined for 86.1% of manufacturing R&D employees in 2013.

Manufacturing R&D Expenditure (\$M)

	Share			
	2004	2013	2014	2013
Canada	8,281	6,968	6,150	100.0%
Newfoundland and Labrador	x	22	28	0.3%
Prince Edward Island	x	4	8	0.1%
Nova Scotia	x	26	x	0.4%
New Brunswick	63	18	34	0.3%
Quebec	2,351	2,671	2,851	38.3%
Ontario	4,865	3,415	2,424	49.0%
Manitoba	x	75	x	1.1%
Saskatchewan	x	62	x	0.9%
Alberta	x	287	x	4.1%
British Columbia	473	388	353	5.6%

Source: Statistics Canada, CANSIM Tables 358-0161, 358-0024, 358-0510 and 358-0518

Manufacturing R&D Employment

	Share			
	2004	2013	2014	2013
Canada	69,359	55,678	0	100.0%
Newfoundland and Labrador	145	72	x	0.1%
Prince Edward Island	95	58	131	0.1%
Nova Scotia	544	281	x	0.5%
New Brunswick	460	204	390	0.4%
Quebec	21,877	19,957	21,611	35.8%
Ontario	38,825	28,007	21,311	50.3%
Manitoba	920	645	982	1.2%
Saskatchewan	533	674	584	1.2%
Alberta	2,002	2,008	1,965	3.6%
British Columbia	3,958	3,771	3,873	6.8%

Source: Statistics Canada, CANSIM Tables 358-0161, 358-0024, 358-0510 and 358-0518



What is the key to your success?

The initial key to Honey Bee's success is the influence of the company's founders, Greg and Glenn Honey, as well as a great General Manager for many years, Brad Nelson. The perseverance of those gentlemen, and a lot of people that have worked in our company, through really good times and some pretty difficult times, has been critical. Through thick and thin we have never compromised the goal of always pleasing the farmer.

One of the keys to their leadership is innovation. Greg and Glenn were able to look at various products on their farm and other people's farms and see ways to improve upon them. They didn't do that to create a large business: they did that for themselves and their farm, and they did that for their neighbours who were experiencing similar issues. And then it grew from neighbours to neighbours' friends, and then it was part of Saskatchewan, and eventually it ended up being a worldwide company.

What are the major benefits of manufacturing in Saskatchewan?

Saskatchewan – especially in agriculture – opens the door to innovation because there is great opportunity, but also many challenges. People are forced to be innovative because they have to create

products that will work in all kinds of conditions, which helps to build a company. Another great benefit in Saskatchewan is STEP (Saskatchewan Trade and Export Partnership), a program that outdistances what the other provinces are offering today. STEP does a fantastic job of opening doors in other provinces and other countries and around the world, and that is a big benefit of doing business in Saskatchewan.

The most important benefit of manufacturing in Saskatchewan is the people. They're humble people with a very strong work ethic and a very good vision for the future. If you can set a goal or target in front of those people, they will do just about anything to get there. At Honey Bee we're really blessed to have a group of people that has been like that for 30-plus years.

How do you see the future for Saskatchewan's manufacturing sector?

There are no shortages of ideas or innovators in Saskatchewan, and actually in the last few years it has been really exciting, because people that have left are now coming back to the province and are growing that innovative base even more.

In agricultural manufacturing there are great opportunities out there, especially in the way the world is changing because of driverless vehicles. There's a great opportunity in the manufacturing community for all the products that go on those vehicles. There's an attachment for each one of those power units, and it gives established companies, or entrepreneurs who are starting up today, the opportunity to open doors in terms of their thinking and growth possibilities, and in designing new and innovative products.

What are the challenges for future development?

From the perspective of a company operating in a small town, more and more individuals and services are drawn to the cities, and that's a challenge for us. Infrastructure development is critical for rural areas.

Training and skills development is also critical. We have to be able to deliver people with the right skills to the right place. It's a challenge to understand which skills will be required in the labour market, and ensure that our training system is preparing people for current and emerging opportunities.

Jamie Pegg

General Manager, Honey Bee Manufacturing Ltd.

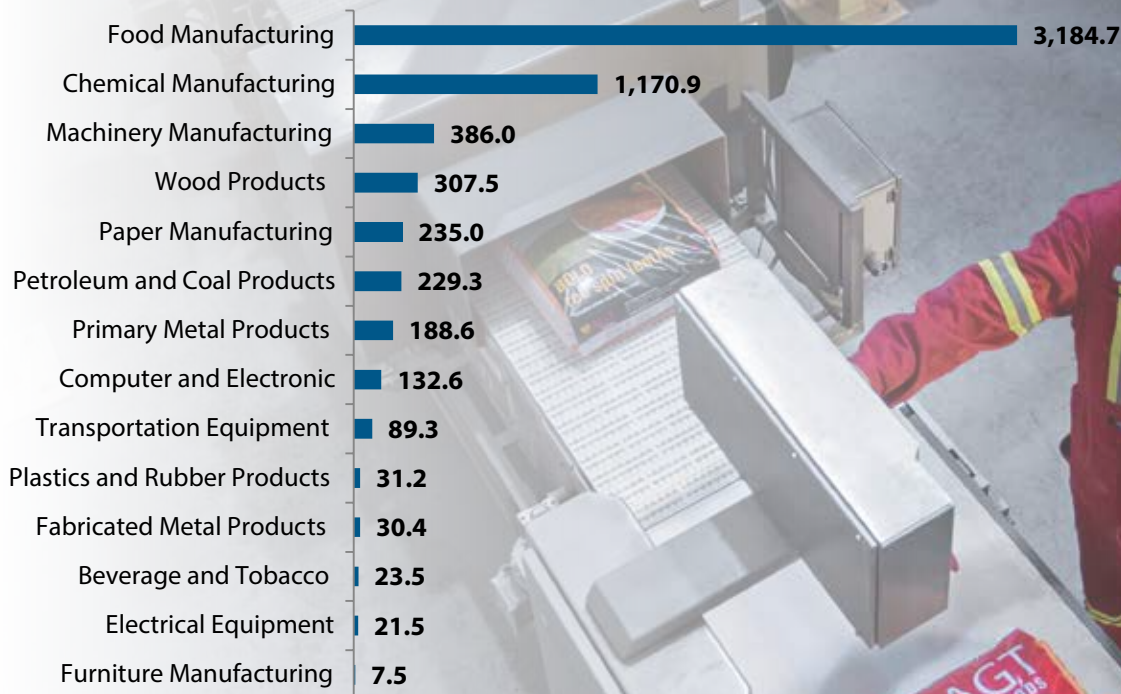
Interview date: Nov. 6 2017

11. International Exports

- Between 2006 and 2016, Saskatchewan's manufacturing exports grew from \$3.4B to \$6.0B, increasing by 79.6%, for an average growth rate of 6.0% per year. The three fastest-growing manufacturing export categories were beverage and tobacco (103.6% annual average growth rate), food manufacturing (20.4% AAGR), and computer and electronics (4.5% AAGR).
- Saskatchewan manufacturing exports have grown strongly since 2006, with the exception of declines related to downturns in 2009 and 2010, and again in 2013 and 2014. Following a decline of 1.5% in 2014, manufacturing exports increased by 5.5% in 2015 and 3.4% in 2016
- Manufacturing exports accounted for 22.5% of the province's total exports of goods in 2016, up from 20.5% in 2006. Manufacturing was the third-largest goods export sector in 2016, behind agriculture, forestry, fishing and hunting (41.9%) and mining and oil and gas extraction (35.1%).
- In 2016, Saskatchewan's food manufacturing industry exported \$3.2B worth of products, representing the largest share (52.6%) of the province's manufacturing exports. Other subsectors with large exports in 2016 were chemical manufacturing (\$1.2B), machinery (\$386.0M), and wood products (\$307.5M). These three subsectors accounted for 19.4%, 6.4%, and 5.1%, respectively, of the province's manufacturing exports in 2016.

Top Saskatchewan Manufacturing Exports (International) by Subsector, 2016 (\$M)

Source: Statistics Canada, Industry Canada, Trade Data Online.



12. Destination of Exports

- The United States (U.S.) is, by far, the leading international market for Saskatchewan's manufactured products, accounting for 71.1% of all manufacturing exports in 2016. Saskatchewan's manufacturers shipped over \$4.3B worth of goods to the U.S. in 2016, compared to \$2.3B in 2006, an increase of 84.7%, or \$2.0B.
- China was the number two destination for Saskatchewan's manufacturing exports in 2016, with exports increasing from \$46.6M in

2006 to \$887.2M in 2016. This was an increase of 1,804.3%, or \$840.6M.

- India was the number three destination for Saskatchewan's manufacturing exports in 2016, at \$123.3M.
- The value of Saskatchewan's manufacturing exports has also grown since 2006 to other destinations that now appear on the top 10 list of export markets in 2016: Australia (+ \$48.1M) and South Korea (+ \$46.3M).

- United Kingdom, France, Thailand, Russia and Netherlands all dropped off the list of top 10 markets in 2016, compared to 2006, while countries like Malaysia and Indonesia found their way into the top 10.
- Together, the top 10 countries accounted for 95.6% of all Saskatchewan's international exports of manufactured goods in 2016.

Top 10 International Destinations for Saskatchewan's Manufacturing Exports

2006				2016			
#	Country	\$M	Share	#	Country	\$M	Share
1	United States	2,329.1	69.2%	1	United States	4,301.7	71.1%
2	United Kingdom	393.8	11.7%	2	China	887.2	14.7%
3	France (incl. Monaco, French Antilles)	114.3	3.4%	3	India	123.3	2.0%
4	Japan	72.5	2.2%	4	Mexico	113.5	1.9%
5	Germany	49.7	1.5%	5	Australia	76.4	1.3%
6	Mexico	47.6	1.4%	6	Germany	69.7	1.2%
7	China	46.6	1.4%	7	Korea, South	66.9	1.1%
8	Thailand	39.3	1.2%	8	Malaysia	52.7	0.9%
9	Russia	34.2	1.0%	9	Japan	47.9	0.8%
10	Netherlands	30.5	0.9%	10	Indonesia	41.9	0.7%

Source: Statistics Canada, Industry Canada, Trade Data Online.

13. International Exports by Province

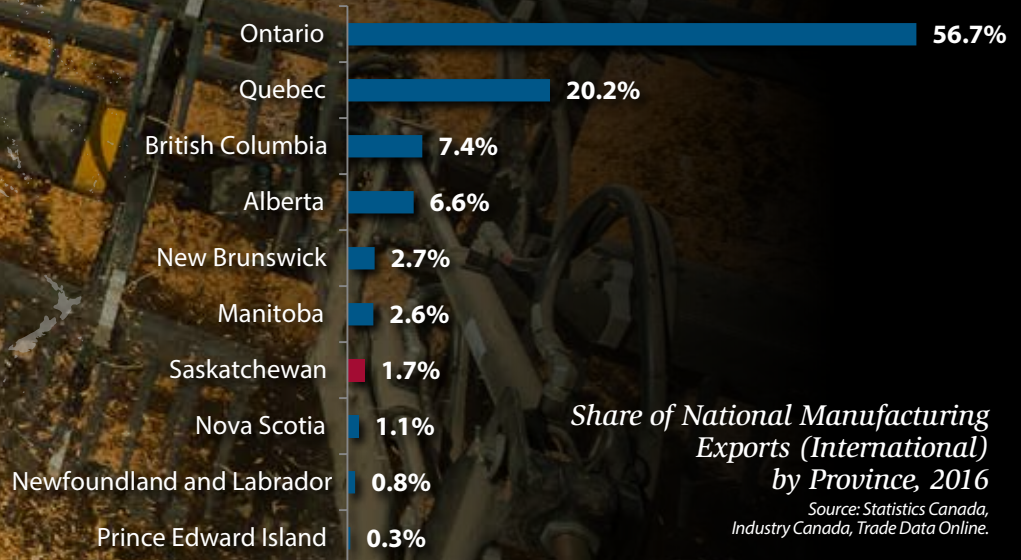
- Saskatchewan accounted for 1.7% (\$6.0B) of Canada's manufacturing exports in 2016, up from 1.1% in 2006. Saskatchewan's share of the national total in 2016 was the seventh-highest in Canada.
- Among the western provinces, B.C. had the largest share of Canada's international exports of manufactured goods at 7.4% (\$26.4B), unchanged from its 7.4% share in 2006. Alberta's share was 6.6% in 2016 (\$23.4B), down from 7.4% in 2006.

Manitoba's share was at 2.6% in 2016, up from 2.4% in 2006.

- Ontario had the largest proportion of Canada's manufacturing exports, accounting for more than half of the Canadian total in 2016, at 56.7% (\$201.0B), up from 55.1% in 2006.
- Saskatchewan's manufacturing exports grew at an average rate of 6.0% a year between 2006 and 2016. This was well above the national average rate of 1.2%. Saskatchewan's

growth rate was the highest in Canada, ahead of Prince Edward Island (+5.1%), and Manitoba and Nova Scotia (both +1.7%) in this period.

- In 2016, Saskatchewan's manufacturing exports went up by 3.4%. Nationally, manufacturing exports increased by 1.6% in 2016.



Share of National Manufacturing Exports (International) by Province, 2016

Source: Statistics Canada, Industry Canada, Trade Data Online.

14. Establishments

- The Business Register provides data on number of business establishments for all industries. Establishments with no payroll employees are classified as “non-employer”. The establishments in this category do not maintain employee payroll accounts, but they may have a workforce.
- As of December 31, 2016, there were 1,926 manufacturing establishments in Saskatchewan, according to the Business Register. Of these, 56.1% (1,081) had one or more payroll employees while 43.9% (845) were classified as non-employers.
- In 2016, there were 961 manufacturing establishments with 1-49 employees: 358 establishments had 1-4 employees, 467 establishments had 5-19 employees, and 136 establishments reported having 20-49 employees. These small businesses accounted for 88.9% of manufacturers with employees.
- Of the 117 medium-sized businesses, there were 24 engaged in fabricated metals manufacturing, 22 in machinery production, 21 in food manufacturing, and 11 in wood products. Three manufacturing establishments had 500 or more employees in machinery manufacturing.

Manufacturing Establishments by Subsector, Saskatchewan, 2016

	Total	Non Employers	Employers	Small (1-49)	Medium (50-499)	Large (500+)
Manufacturing	1,926	845	1,081	961	117	3
Food Manufacturing	264	114	150	129	21	0
Beverage and Tobacco	36	8	28	27	1	0
Textile Mills	8	4	4	4	0	0
Textile Product Mills	36	8	28	26	2	0
Clothing Manufacturing	35	26	9	9	0	0
Leather and Allied Products	14	10	4	4	0	0
Wood Products	121	65	56	45	11	0
Paper Manufacturing	4	2	2	0	2	0
Printing and Related Support	117	48	69	69	0	0
Petroleum and Coal Products	24	7	17	14	3	0
Chemical Manufacturing	61	20	41	34	7	0
Plastics and Rubber Products	46	10	36	34	2	0
Non-Metallic Mineral Products	100	29	71	67	4	0
Primary Metal Products	25	11	14	12	1	1
Fabricated Metal Products	328	152	176	152	24	0
Machinery Manufacturing	242	104	138	114	22	2
Computer and Electronic	35	18	17	15	2	0
Electrical Equipment	27	13	14	9	5	0
Transportation Equipment	48	20	28	21	7	0
Furniture Manufacturing	115	54	61	59	2	0
Miscellaneous Manufacturing	240	122	118	117	1	0

Source: Statistics Canada, Business Register.

15. Establishments by Province

- Saskatchewan's 1,081 manufacturing establishments with one or more payroll employees, as of December 31, 2016, represented 2.1% of the 50,817 manufacturing establishments with payroll employees in Canada, and 7.3% of those in western Canada (14,871). In comparison to Saskatchewan, B.C. had 7,268 manufacturing establishments with at least one payroll employee, Alberta had 5,134, and Manitoba had 1,388.
- The bulk of Saskatchewan's manufacturing establishments were in the small business (1-49 employees) category. Eighty-eight point nine per cent of the province's manufacturers (with at least one payroll employee) had less than 50 employees, compared with 86.3% at the national level. For other provinces, the corresponding percentages were 90.3% in B.C., 88.3% in Alberta, 83.5% in Manitoba, and 85.5% in Ontario.
- In Saskatchewan, 10.8% of the manufacturing establishments were medium-sized (50-499 employees), as of December 31, 2016, compared with 15.1% in Manitoba, 13.8% in Ontario, 11.3% in Alberta, and 9.5% in B.C.
- As for large manufacturers (those with 500 or more employees), Saskatchewan had three at year-end 2016, compared with 137 in Ontario, 22 in Alberta, 19 in Manitoba, and 16 in B.C. In total, there were 287 large manufacturing establishments in Canada, of which 60 were located in western Canada.

Manufacturing Establishments by Province in 2016

	Total	Non Employers	Employers	Small (1-49)	Medium (50-499)	Large (500+)
Canada	90,116	39,299	50,817	43,864	6,666	287
Newfoundland and Labrador	661	245	416	349	62	5
Prince Edward Island	341	124	217	188	28	1
Nova Scotia	1,700	680	1,020	870	145	5
New Brunswick	1,270	431	839	694	138	7
Quebec	23,045	9,827	13,218	11,238	1,908	71
Ontario	36,452	16,270	20,182	17,258	2,787	137
Manitoba	2,422	1,034	1,388	1,159	210	19
Saskatchewan	1,926	845	1,081	961	117	3
Alberta	9,195	4,061	5,134	4,534	578	22
British Columbia	13,019	5,751	7,268	6,560	692	16

Source: Statistics Canada, Business Register.

16. Earnings

- Average earnings for Saskatchewan's manufacturing workers have grown over the past 10 years, increasing by 38.1% from \$821.69 per week (\$42,728 a year) in 2006 to \$1,134.98 per week (\$59,019 a year) in 2016. This represents an average increase of 3.3% a year. In 2016, manufacturing workers earned 1.4% more than they earned in 2015.
- In comparison, the average worker in Saskatchewan earned approximately \$988.41 per week (\$51,397 a year) in 2016, an increase of 0.7% compared to 2015, and 39.3% compared to 2006.
- On average in 2016, employees in the mining, quarrying, and oil and gas extraction sector (\$1,959.75 per week), and construction (\$1,242.88 per week) earned more than manufacturing workers (\$1,134.98) within the province's goods-producing industries. (It should be noted that the forestry, logging, and support and the utilities sectors' data are suppressed from 2010 because of confidentiality requirements of the Statistics Act.)

\$1,134.98
2016

**Saskatchewan
Manufacturing
Average
Weekly
Earnings**

\$821.69 2006

Source: Statistics Canada,
CANSIM Table 281-0027.

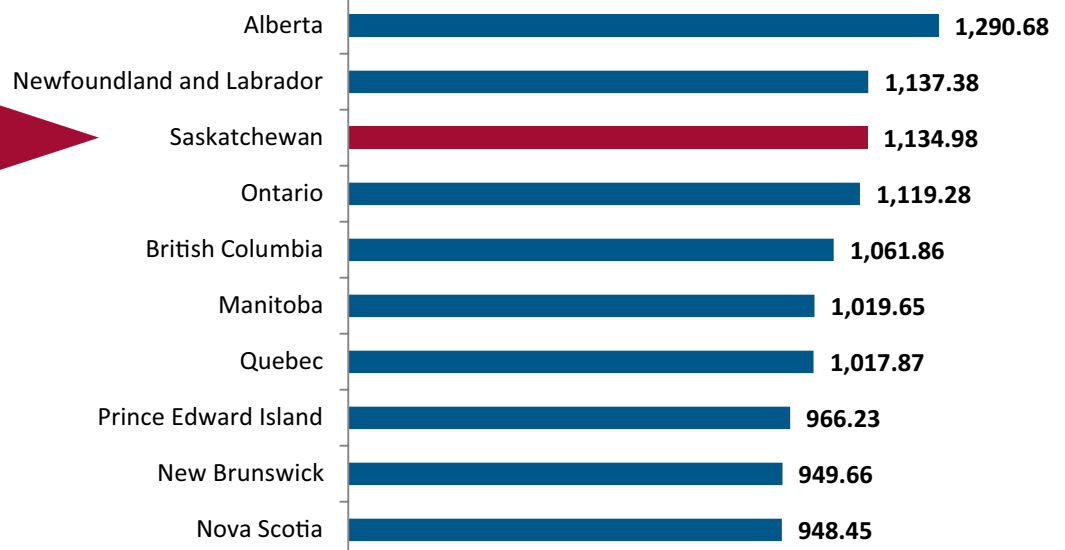
17. Earnings by Province

- In 2016, employees in Saskatchewan's manufacturing sector earned \$1,134.98 a week, the third-highest amount in Canada. Alberta's manufacturing employees had the highest weekly earnings (\$1,290.68); Newfoundland and Labrador had the second-highest weekly earnings (\$1,137.38). The national average was \$1,088.88.
- Saskatchewan's manufacturing sector weekly earnings were 104.2% of the national average in 2016, and compared with Alberta at 118.5% of the national average, B.C. at 97.5% and Manitoba at 93.6%.
- Average weekly earnings among manufacturing workers increased in nine provinces in 2016, compared to 2015. Saskatchewan's growth rate of 1.4% ranked sixth among the provinces. In the other western provinces the growth rates were -0.6% in Alberta, 0.1% in Manitoba, and 1.7% in B.C.
- Between 2006 and 2016, national average weekly earnings grew by 1.9% per year on average. Saskatchewan's growth rate of 3.3% was the highest among the provinces in this period.

Between 2006 and 2016, national average weekly earnings grew by 1.9% per year on average. Saskatchewan's growth rate of 3.3% was the highest among the provinces in this period.

Manufacturing Average Weekly Earnings by Province, 2016

Source: Statistics Canada, CANSIM Table 281-0027.



18. Capital Investment

Total new capital investment in Saskatchewan totaled \$14.1B in 2016.

- New capital investment in Saskatchewan's manufacturing sector totaled \$557.7M in 2016. Saskatchewan's manufacturing capital investment rose from \$413.6M in 2006 to \$1.1B in 2010 and 2011 (following the completion of a major expansion by the Co-op Refinery). Total new capital investment in Saskatchewan totaled \$14.1B in 2016.
- In 2016, new capital investment in the manufacturing sector decreased by 29.5% from 2015, following a decrease of 45.8% from 2014 to 2015.
- In 2016, manufacturing investment constituted 4.0% of the province's total private and public capital investment (\$14.1B), compared to 5.4% in 2006. Over the period 2006 to 2016, manufacturing's share of total investment in the province averaged 5.0%.

Saskatchewan Manufacturing Capital Investment (\$M)

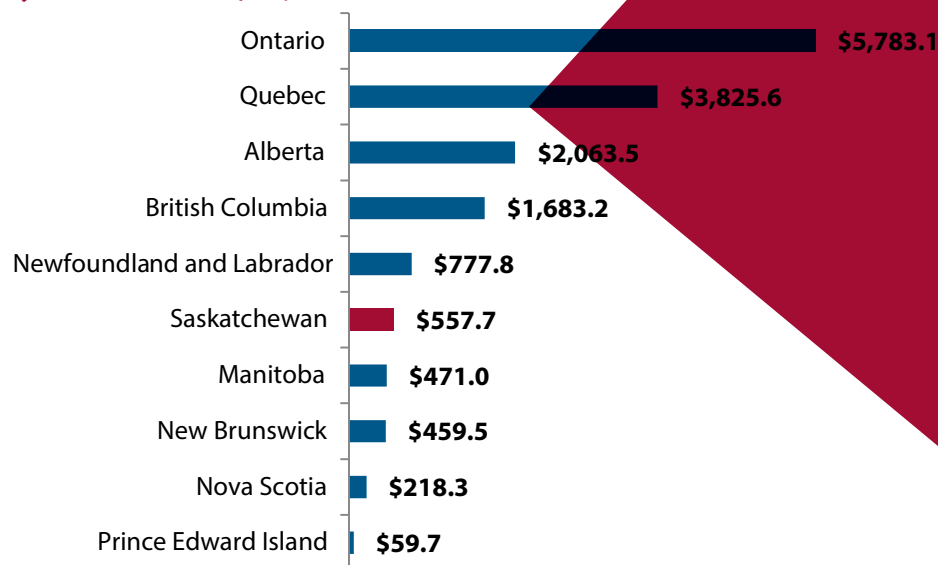
Source: Statistics Canada, CANSIM Table 029-0045.



19. Capital Investment by Province

- In 2016, capital investment in Canada's manufacturing sector amounted to \$15.9B, according to Statistics Canada's survey of capital expenditures by private and public sector organizations.
- Ontario had the largest share of Canada's manufacturing investment at 36.4% or \$5.8B in 2016. In western Canada, Alberta had \$2.1B (13.0% of the total), B.C. had \$1.7B in manufacturing investment (10.6% of the Canadian total), Saskatchewan had \$557.7M (3.5% of the total), and Manitoba had \$471.0M (3.0% of the total).
- In 2016, manufacturing investment increased in two of the ten provinces. In percentage terms, Prince Edward Island ranked number one, with an increase of 36.6% from 2015. Nationally, manufacturing investment decreased by 14.9%.
- Between 2006 and 2016, manufacturing investment experienced a decline of 0.7% per year on average in Canada. The highest growth occurred in Newfoundland and Labrador at 18.7% per year, and Saskatchewan ranked the third-highest with an average annual growth rate of 3.0%.

Manufacturing Capital Investment by Province, 2016 (\$M)



Source: Statistics Canada, CANSIM Table 029-0045.



What is the key to your success?

It's our people – our employees who have chosen to make Crestline Coach their professional home. It's also the diversity of our employees, our staff of almost 200 represents 11 different nationalities with over 19% of our employees being female. Over 21% of our technical staff are also female which reflects our commitment to ensuring women continue to engage in technical and manufacturing careers. The ability of the company to attract people from across Saskatchewan, Canada and, most recently, internationally, speaks to what Saskatchewan has to offer and Crestline's compelling vision.

There is also a reputation about the quality of work that comes out of companies in Canada, specifically Crestline Coach. We have a history of innovation, and our way of staying focused and on task can be summarized in a little saying that I use a lot: That which interests our customers should fascinate us. I think that allows us to continue to pursue advances in our product, advances in our company and to be viewed in our industry as one of the more progressive and innovative companies.

What are the major benefits of manufacturing in Saskatchewan?

There's just something to be said about the work ethic, the ingenuity, and the commitment that comes from people in this part of the world. I don't ever hear our staff saying, "That's too hard," so there's a drive to find a way to get it done. Those elements,

when combined with our ability to attract talented people, are the ingredients for a successful commercial venture.

We've had the pleasure of a provincial government that's pro-business. I think the current government's focus on being the most competitive, in terms of corporate tax rates and incentives, is key. Programs like manufacturer and processor tax credits, low tax rates, and even most recently the Saskatchewan Commercial Innovation Incentive program are all things that support the creation of a competitive environment.

How do you see the future for Saskatchewan's manufacturing sector?

It will evolve in the direction of greater digitalization of the manufacturing environment – Industry 4.0 – a shift that is already aggressively building off of advancements in additive manufacturing technologies, focuses on integrating manufacturing environments and data collection to allow for enhanced, real time decision making, a key to tackling the productivity gap. We will continue getting more sophisticated in the types of data we collect, utilizing the internet of things to allow us to better manage our companies and to make better-informed decisions.

Key aspects of the future, for our industry, will be for Saskatchewan to continue pursuing its diversification strategy, with core programs that specifically support manufacturing.

What are the challenges for future development?

We need to catch up and lead in terms of tackling the productivity gap. Saskatchewan leads the nation in manufacturing productivity, but Canada is behind many of its competitors. We have to aggressively grow our market presence and our focus on new market entry and we have to sharpen our ability to compete. Canadians – and even more so, people in Saskatchewan – are a humble bunch; we need to grow pride in "Made in Saskatchewan" and "Made in Canada," and have a little swagger out there. We need to aggressively expand trade outside of our traditional markets, and we also need a tax system that takes some of the risk out of journeying up the learning curve.

Steve Hoffrage

Chief Executive Officer, Crestline Coach Ltd.

Interview date: Nov. 3, 2017

Appendix: Data Tables

Real GDP by Subsector, Saskatchewan (\$M)

	2006	2014	2015	2016	%chg 2015-16	AAGR 2006-16	Share 2016
All industries	47,612	60,192	59,389	58,809	-1.0%	2.1%	100.0%
Agriculture, forestry, fishing and hunting	2,556	3,978	4,020	4,234	5.3%	5.2%	7.2%
Crop and animal production	2,343	3,743	3,771	3,979	5.5%	5.4%	6.8%
Forestry and logging	79.0	34.8	38.9	42.3	8.7%	-6.1%	0.1%
Fishing, hunting and trapping	0.8	0.1	0.0	0.0	-	-100.0%	-
Support activities for agriculture and forestry	134	185	199	197	-0.9%	3.9%	0.3%
Mining, quarrying, and oil and gas extraction	12,264	12,560	12,649	12,079	-4.5%	-0.2%	20.5%
Oil and gas extraction	8,283	9,046	8,833	8,540	-3.3%	0.3%	14.5%
Mining and quarrying (except oil and gas)	2,828	2,504	2,929	2,852	-2.6%	0.1%	4.8%
Support activities for mining and oil and gas extraction	1,143	1,189	833	668	-19.8%	-5.2%	1.1%
Manufacturing	2,960	3,984	3,787	3,896	2.9%	2.8%	6.6%
Construction	2,980	5,834	4,725	4,055	-14.2%	3.1%	6.9%
Utilities	1,173	1,255	1,306	1,321	1.2%	1.2%	2.2%

Source: Statistics Canada, CANSIM Table 379-0030.

Manufacturing Real GDP's as a Percentage of Total GDP, by Province

	2006	2012	2013	2014	2015	2016	Average 2006-16
Canada	13.5%	10.8%	10.5%	10.8%	10.5%	10.4%	11.2%
Newfoundland and Labrador	4.1%	4.1%	3.8%	4.1%	4.1%	3.7%	3.8%
Prince Edward Island	9.0%	8.8%	9.3%	8.8%	10.1%	10.2%	9.4%
Nova Scotia	8.8%	8.3%	8.0%	8.3%	7.9%	8.0%	8.2%
New Brunswick	12.0%	10.7%	11.2%	10.7%	10.9%	10.9%	11.0%
Quebec	17.8%	14.5%	14.1%	14.5%	14.3%	14.0%	15.2%
Ontario	17.1%	13.2%	12.9%	13.2%	12.8%	12.7%	13.8%
Manitoba	10.9%	10.5%	10.3%	10.5%	9.8%	9.8%	10.4%
Saskatchewan	6.2%	6.7%	6.7%	6.7%	6.4%	6.6%	6.5%
Alberta	7.7%	6.3%	6.2%	6.3%	6.0%	5.7%	6.5%
British Columbia	8.9%	7.3%	7.1%	7.3%	7.2%	7.3%	7.5%

Source: Statistics Canada, CANSIM Table 379-0030.

Productivity by Sector, Saskatchewan (GDP per worked hour (\$))

	2011	2014	2015	2016	%chg 2011-16	%chg 2015-16	AAGR 2011-16
All Industries	55.3	57.3	57.0	57.3	3.6%	0.5%	0.7%
Agriculture, forestry, fishing and hunting	42.0	53.0	54.8	56.8	35.2%	3.6%	6.2%
Mining and Oil and Gas	272.3	227.5	243.5	246.5	-9.5%	1.2%	-2.0%
Construction	43.2	43.9	37.1	34.0	-21.3%	-8.4%	-4.7%
Manufacturing	59.8	66.8	69.2	73.9	23.6%	6.8%	4.3%

Source: Statistics Canada, CANSIM Table 383-0033.

Manufacturing Productivity by Province (GDP per worked hour (\$))

	2011	2014	2015	2016	%chg 2015-16	AAGR 2011-16
Canada	53.6	57.7	57.1	58.2	1.9%	1.7%
Newfoundland and Labrador	44.1	62.3	64.0	62.0	-3.1%	7.1%
Prince Edward Island	35.7	38.5	38.4	40.7	6.0%	2.7%
Nova Scotia	38.6	38.9	40.0	42.8	7.0%	2.1%
New Brunswick	50.1	41.9	41.7	43.5	4.3%	-2.8%
Quebec	52.8	55.0	54.1	53.3	-1.5%	0.2%
Ontario	54.7	59.8	59.7	61.6	3.2%	2.4%
Manitoba	43.0	45.9	45.2	48.2	6.6%	2.3%
Saskatchewan	59.8	66.8	69.2	73.9	6.8%	4.3%
Alberta	63.1	72.7	71.2	71.7	0.7%	2.6%
British Columbia	49.2	52.1	51.7	53.7	3.9%	1.8%

Source: Statistics Canada, CANSIM Table 383-0033.

Manufacturing Shipments by Subsector, Saskatchewan (\$M)

	2006	2015	2016	%chg 2006-16	%chg 2015-16	AAGR 2006-16	Share 2016
Manufacturing	9,865.5	14,026.8	14,141.5	43.3%	0.8%	3.7%	100.0%
Food Manufacturing	2,295.7	x	4,078.9	77.7%	--	5.9%	28.8%
Beverage and Tobacco	x	x	10.5	--	--	--	0.1%
Textile Mills	x	x	1.7	--	--	--	0.0%
Textile Product Mills	x	x	x	--	--	--	--
Clothing Manufacturing	30.0	x	5.9	-80.3%	--	-15.0%	0.0%
Leather and Allied Products	1.7	x	x	--	--	--	--
Paper Manufacturing	140.1	484.3	x	--	--	--	--
Printing and Related Support	122.7	x	18.0	-85.3%	--	-17.5%	0.1%
Petroleum and Coal Products	x	x	x	--	--	--	--
Chemical Manufacturing	946.2	2,240.4	1,885.5	99.3%	-15.8%	7.1%	13.3%
Plastics and Rubber Products	116.3	x	x	--	--	--	--
Wood Products	485.6	484.3	588.8	21.3%	21.6%	1.9%	4.2%
Non-Metallic Mineral Products	x	x	105.1	--	--	--	0.7%
Primary Metal Products	x	x	x	--	--	--	--
Fabricated Metal Products	664.7	685.5	662.4	-0.3%	-3.4%	0.0%	4.7%
Machinery Manufacturing	785.4	1,135.2	1,135.0	44.5%	0.0%	3.8%	8.0%
Computer and Electronic	x	x	45.9	--	--	--	0.3%
Electrical Equipment	253.7	x	109.6	-56.8%	--	-8.1%	0.8%
Transportation Equipment	0.0	x	x	--	--	--	--
Furniture Manufacturing	84.9	x	32.5	-61.7%	--	-9.2%	0.2%
Miscellaneous Manufacturing	74.6	x	x	--	--	--	--

Source: Statistics Canada, CANSIM Table 304-0015
x - Data are suppressed to meet the confidentiality requirements of the Statistics Act.

Growth Rates and Shares of Manufacturing Shipments by Province

				%chg	%chg	AAGR	Share
	2006	2015	2016	2006-16	2015-16	2006-16	2016
Canada	605,527	605,527	612,505	1.2%	1.2%	0.1%	100.0%
Newfoundland and Labrador	4,293	5,538	4,688	9.2%	-15.4%	0.9%	0.8%
Prince Edward Island	1,333	1,600	1,678	25.9%	4.8%	2.3%	0.3%
Nova Scotia	9,558	7,729	8,053	-15.7%	4.2%	-1.7%	1.3%
New Brunswick	14,730	16,920	16,269	10.4%	-3.8%	1.0%	2.7%
Quebec	145,580	143,415	143,204	-1.6%	-0.1%	-0.2%	23.4%
Ontario	295,636	286,331	297,649	0.7%	4.0%	0.1%	48.6%
Manitoba	14,862	17,158	17,382	17.0%	1.3%	1.6%	2.8%
Saskatchewan	9,865	14,027	14,142	43.4%	0.8%	3.7%	2.3%
Alberta	65,091	68,178	62,703	-3.7%	-8.0%	-0.4%	10.2%
British Columbia	44,480	44,548	46,649	4.9%	4.7%	0.5%	7.6%

Source: Statistics Canada, CANSIM Tables 304-0014 and 304-0015.

Manufacturing Employment by Subsector, Saskatchewan (000s)

				chg	%chg	AAGR	Share
	2006	2015	2016	2015-16	2015-16	2006-16	2016
Manufacturing	29.6	26.2	25.7	-0.5	-1.9%	-1.4%	100.0%
Food Manufacturing	6.0	4.1	4.1	0.0	0.0%	-3.7%	16.0%
Beverage and Tobacco	0.6	0.5	0.0	--	--	--	--
Textile Mills and Textile Products	0.0	0.0	0.6	--	--	--	2.3%
Clothing and Leather Products	0.0	0.0	0.0	--	--	--	--
Wood Products	1.9	2.5	1.5	-1.0	-40.0%	-2.3%	5.8%
Paper Manufacturing	0.5	0.0	0.0	--	--	--	--
Printing and Related Support	1.0	0.5	0.6	0.1	20.0%	-5.0%	2.3%
Petroleum and Coal Products	0.7	1.3	1.5	0.2	15.4%	7.9%	5.8%
Chemical Manufacturing	1.5	1.2	1.8	0.6	50.0%	1.8%	7.0%
Plastics and Rubber Products	0.7	0.6	0.5	-0.1	-16.7%	-3.3%	1.9%
Non-Metallic Mineral Products	0.9	1.0	0.7	-0.3	-30.0%	-2.5%	2.7%
Primary Metal Products	2.0	1.5	1.7	0.2	13.3%	-1.6%	6.6%
Fabricated Metal Products	3.4	3.8	3.4	-0.4	-10.5%	0.0%	13.2%
Machinery Manufacturing	4.4	4.7	4.4	-0.3	-6.4%	0.0%	17.1%
Computer and Electronic	1.1	0.5	0.6	0.1	20.0%	-5.9%	2.3%
Electrical Equipment	0.6	0.0	0.0	--	--	--	--
Transportation Equipment	1.8	1.2	0.7	-0.5	-41.7%	-9.0%	2.7%
Furniture Manufacturing	1.3	0.0	1.0	--	--	-2.6%	3.9%
Miscellaneous Manufacturing	0.7	1.2	1.4	0.2	16.7%	7.2%	5.4%

Source: Statistics Canada, Labour Force Survey. - Note: Where data are less than 500, Statistics Canada reports the numbers as zero.

Manufacturing Employment by Province (000s)

				chg	%chg	AAGR	Share
	2006	2015	2016	2015-16	2015-16	2006-16	2016
Canada	2,102.2	1,712.4	1,694.8	-17.6	-1.0%	-2.1%	100.0%
Newfoundland and Labrador	15.4	11.4	9.8	-1.6	-14.0%	-4.4%	0.6%
Prince Edward Island	6.5	6.0	6.0	0.0	0.0%	-0.8%	0.4%
Nova Scotia	39.2	28.7	29.1	0.4	1.4%	-2.9%	1.7%
New Brunswick	36.5	29.8	30.4	0.6	2.0%	-1.8%	1.8%
Quebec	579.9	488.6	493.1	4.5	0.9%	-1.6%	29.1%
Ontario	996.9	744.6	751.4	6.8	0.9%	-2.8%	44.3%
Manitoba	66.0	64.6	63.6	-1.0	-1.5%	-0.4%	3.8%
Saskatchewan	29.6	26.2	25.7	-0.5	-1.9%	-1.4%	1.5%
Alberta	140.9	139.9	115.5	-24.4	-17.4%	-2.0%	6.8%
British Columbia	191.3	172.5	170.1	-2.4	-1.4%	-1.2%	10.0%

Source: Statistics Canada, Labour Force Survey (LFS)

Manufacturing Exports (International) by Subsector, Saskatchewan (\$M)

				%chg	AAGR	% Mfg. Exp.	% Tot. Exp.
	2006	2015	2016	2015-16	2006-16	2016	2016
Manufacturing	3,367	5,848.1	6,049.3	3.4%	6.0%	100.0%	22.5%
Food Manufacturing	543.2	2,645.8	3,184.7	20.4%	19.3%	52.6%	11.9%
Beverage and Tobacco	0.019	35.5	23.5	-33.8%	103.6%	0.4%	0.1%
Textile Mills	0.1	0.2	0.1	-50.9%	4.8%	0.0%	0.0%
Textile Product Mills	3.9	0.3	0.3	-10.2%	-23.6%	0.0%	0.0%
Clothing Manufacturing	3.7	2.8	1.8	-36.5%	-7.1%	0.0%	0.0%
Leather and Allied Products	0.7	0.1	0.1	-40.5%	-22.9%	0.0%	0.0%
Wood Products	262.6	263.2	307.5	16.8%	1.6%	5.1%	1.1%
Paper Manufacturing	229.6	165.1	235.0	42.3%	0.2%	3.9%	0.9%
Printing and Related Support	16.9	0.3	0.3	-23.7%	-34.1%	0.0%	0.0%
Petroleum and Coal Products	201.8	307.1	229.3	-25.3%	1.3%	3.8%	0.9%
Chemical Manufacturing	933.9	1,062.7	1,170.9	10.2%	2.3%	19.4%	4.4%
Plastics and Rubber Products	48.7	28.2	31.2	10.3%	-4.4%	0.5%	0.1%
Non-Metallic Mineral Products	6.4	4.2	3.5	-14.8%	-5.7%	0.1%	0.0%
Primary Metal Products	397.6	659.8	188.6	-71.4%	-7.2%	3.1%	0.7%
Fabricated Metal Products	67.7	24.6	30.4	23.6%	-7.7%	0.5%	0.1%
Machinery Manufacturing	433.5	410.4	386.0	-5.9%	-1.2%	6.4%	1.4%
Computer and Electronic	73.0	126.9	132.6	4.5%	6.2%	2.2%	0.5%
Electrical Equipment	25.0	20.9	21.5	2.6%	-1.5%	0.4%	0.1%
Transportation Equipment	93.5	82.6	89.3	8.1%	-0.5%	1.5%	0.3%
Furniture Manufacturing	19.0	2.9	7.5	159.8%	-8.9%	0.1%	0.0%
Miscellaneous Manufacturing	7.1	4.4	5.3	22.2%	-2.9%	0.1%	0.0%
Total, All Industries	16,398	32,664	26,853	-17.8%	5.1%	100.0%	100.0%

Source: Statistics Canada, Industry Canada, Trade Data Online.

Growth Rates and Shares of Manufacturing Exports (International) by Province (\$M)

				chg	%chg	AAGR	Share
	2006	2015	2016	2015-2016	2015-2016	2006-16	2016
Canada	316,091	349,210	354,742	5,532	1.6%	1.2%	100.0%
Newfoundland and Labrador	3,789	4,014	2,724	-1,290	-32.1%	-3.2%	0.8%
Prince Edward Island	571	934	941	7	0.8%	5.1%	0.3%
Nova Scotia	3,365	3,951	3,974	23	0.6%	1.7%	1.1%
New Brunswick	9,362	10,749	9,560	-1,189	-11.1%	0.2%	2.7%
Quebec	66,910	73,059	71,503	-1,556	-2.1%	0.7%	20.2%
Ontario	174,064	191,231	200,974	9,742	5.1%	1.4%	56.7%
Manitoba	7,742	9,050	9,160	109	1.2%	1.7%	2.6%
Saskatchewan	3,367	5,848	6,049	201	3.4%	6.0%	1.7%
Alberta	23,359	25,628	23,406	-2,222	-8.7%	0.0%	6.6%
British Columbia	23,538	24,727	26,425	1,699	6.9%	1.2%	7.4%

Source: Statistics Canada, Industry Canada, Trade Data Online.

Manufacturing Average Weekly Earnings by Province (\$)

				chg	%chg	chg	%chg	AAGR	Share
	2006	2015	2016	2006-16	2006-16	2015-16	2015-16	2006-16	2016
Canada	905.21	1,078.86	1,088.88	183.67	20.3%	10.02	0.9%	1.7%	100.0%
Newfoundland and Labrador	803.09	1,067.20	1,137.38	334.29	41.6%	70.18	6.6%	3.2%	104.5%
Prince Edward Island	713.51	870.39	966.23	252.72	35.4%	95.84	11.0%	2.8%	88.7%
Nova Scotia	808.34	946.38	948.45	140.11	17.3%	2.07	0.2%	1.5%	87.1%
New Brunswick	791.70	932.07	949.66	157.96	20.0%	17.59	1.9%	1.7%	87.2%
Quebec	838.17	1,002.59	1,017.87	179.70	21.4%	15.28	1.5%	1.8%	93.5%
Ontario	961.39	1,107.35	1,119.28	157.89	16.4%	11.93	1.1%	1.4%	102.8%
Manitoba	786.01	1,018.74	1,019.65	233.64	29.7%	0.91	0.1%	2.4%	93.6%
Saskatchewan	821.69	1,119.51	1,134.98	313.29	38.1%	15.47	1.4%	3.0%	104.2%
Alberta	967.86	1,298.63	1,290.68	322.82	33.4%	-7.95	-0.6%	2.7%	118.5%
British Columbia	891.48	1,043.88	1,061.86	170.38	19.1%	17.98	1.7%	1.6%	97.5%

Source: Statistics Canada, CANSIM Table 281-0027.

Manufacturing Capital Investment by Province (\$M)

				chg	%chg	chg	%chg	AAGR	Share
	2006	2015	2016	2006-2016	2006-2016	2015-2016	2015-2016	2006-2016	2016
Canada	17,084.8	18,693.9	15,901.3	-1,184	-6.9%	-2,793	-14.9%	-0.7%	100.0%
Newfoundland and Labrador	140.5	812.3	777.8	637	453.6%	-35	-4.2%	18.7%	4.9%
Prince Edward Island	46.7	43.7	59.7	13	27.8%	16	36.6%	2.5%	0.4%
Nova Scotia	355.8	352.6	218.3	-138	-38.6%	-134	-38.1%	-4.8%	1.4%
New Brunswick	548.4	609.9	459.5	-89	-16.2%	-150	-24.7%	-1.8%	2.9%
Quebec	3,446.5	3,583.0	3,825.6	379	11.0%	243	6.8%	1.0%	24.1%
Ontario	7,851.8	6,742.6	5,783.1	-2,069	-26.3%	-960	-14.2%	-3.0%	36.4%
Manitoba	447.5	528.2	471.0	24	5.3%	-57	-10.8%	0.5%	3.0%
Saskatchewan	413.6	790.6	557.7	144	34.8%	-233	-29.5%	3.0%	3.5%
Alberta	2,366.4	2,599.5	2,063.5	-303	-12.8%	-536	-20.6%	-1.4%	13.0%
British Columbia	1,464.9	2,629.0	1,683.2	218	14.9%	-946	-36.0%	1.4%	10.6%

Source: Statistics Canada, CANSIM Table 029-0005.

Sources of Data

The data used in the report were obtained from the following Statistics Canada sources:

- Statistics Canada,
CANSIM Tables 304-0014, 304-0015 – Monthly Survey of Manufacturing.
- Statistics Canada,
CANSIM Table 379-0030 - Gross Domestic Product (GDP) at basic prices.
- Statistics Canada,
CANSIM Table 029-0045 - Capital and Repair Expenditures Survey.
- Statistics Canada,
CANSIM Table 281-0027 – Average Weekly Earnings by Industry.
- Statistics Canada,
CANSIM Table 383-0033 – Labour Productivity by Business Sector.
- Statistics Canada,
CANSIM Tables 358-0161, 358-0510, 358-0518, 358-0024 – Business Research and Development Characteristics.
- Statistics Canada,
Industry Canada, Trade Data Online (Industry Canada website).
- Statistics Canada,
Business Register.
- Statistics Canada,
Labour Force Survey (LFS).

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