

Overview of the Manufacturing Sector in Saskatchewan 2022



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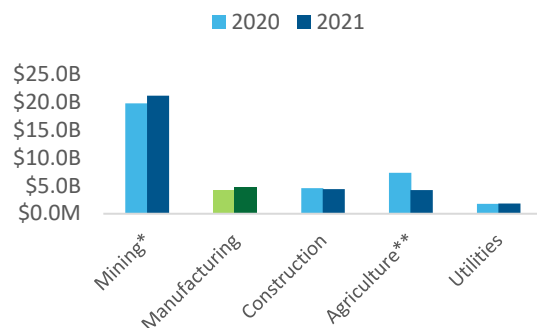
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Key Facts

The 2021 Overview of the Manufacturing Sector report provides an update of Saskatchewan's manufacturing industry, reporting on indicators such as Gross Domestic Product (GDP), investment, sales, employment, number of establishments, exports, and earnings.

Manufacturing continues to be an important industrial sector for economic growth and diversification in Saskatchewan. The manufacturing sector contributed \$5.1 billion to Saskatchewan's total 2021 real GDP of \$77.4 billion. This represents about 6.6% of Saskatchewan's GDP and 2.7% of total Canadian manufacturing GDP (\$187 billion).

Industry's Real GDP (\$B) in 2020 - 2021



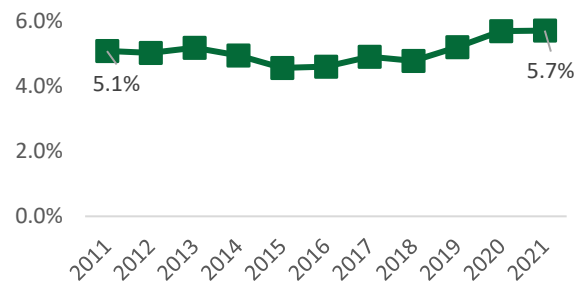
Source: Statistics Canada

Employment in the manufacturing sector increased by 2.9% in 2021. This increase is partly due to growth in global and domestic demand. At \$91.4 per hour worked, Saskatchewan ranked second highest in manufacturing productivity among the provinces in 2021.

Saskatchewan had 1,892 manufacturing establishments in 2021 and most (94.1%) of them were small businesses (0-49 employees). The fabricated metal products sector had the highest number of manufacturing establishments (341) followed by food

manufacturing (287), and machinery manufacturing (229).

Share of Manufacturing Employment in Total Employment (2011 – 2021)



Source: Statistics Canada

Saskatchewan's manufacturing shipments amounted to \$20.4B in 2021, with food manufacturing contributing over 31% of the total. Between 2011 and 2021, Saskatchewan's manufacturing shipments grew at an average rate of 4.9% a year (third highest among the provinces).

Saskatchewan's international exports of manufactured goods totaled \$7.6 billion in 2021 and made up 20.6% of Saskatchewan's net exports. Manufacturing's share of exports was behind mining and oil and gas extraction (43.2%) and the agriculture sector (35.8%).

Export growth in wood products, transportation equipment, and food manufacturing have contributed to the increase in manufacturing exports in the last 10 years.

Saskatchewan's export markets for manufactured goods have continued to diversify in the last 10 years to include countries such as Chile, Lithuania, and India.

*Mining, quarrying, and oil and gas extraction; **Agriculture, forestry, fishing, and hunting

Introduction

This report provides updated statistical information on Saskatchewan's manufacturing sector using the most current available data – 2021. The report provides an update of Saskatchewan's manufacturing sector and its performance from 2011 to 2021. It reviews the size of Saskatchewan's manufacturing sector, examines growth trends in several indicators for the sector and its main subsectors. It also compares the size and performance of Saskatchewan's manufacturing sector with that of other provinces and the national average. The major indicators covered in this report are manufacturing GDP, establishments, employment, shipments, earnings, exports, and capital investment.

Manufacturing is one of the key goods-producing sectors in Saskatchewan's economy. Saskatchewan's manufacturing sector employs a significant percentage of the province's labour force and accounts for a large share of total provincial output. The expanding manufacturing sector is one of several indicators that show economic diversification is occurring within Saskatchewan.

How are we defining manufacturing?

The North American Industry Classification System (NAICS) 2017 defines the manufacturing sector as all establishments that are primarily engaged in the physical or chemical transformation of raw materials or substances into new products, including activities such as assembly, blending, or finishing. These products may be ready for final consumption or used for further processing.

Manufacturing processes vary considerably among industries. Some processes are labour intensive, involving limited changes to materials used in production. Other processes are highly complex, requiring extensive research and development to bring the product from conception to its final form. The industry supports the creation of high-paying jobs, not just in production plants themselves, but also in areas such as engineering and consulting, software, and specialized skilled trades.

A more detailed definition of the manufacturing sector and its many component industries is available in Appendices B and C.

Annual data, up to December 2021, was used in the report, obtained from Statistics Canada. Further details can be found in Appendix A. Except for GDP numbers, the data are in current dollars and have not been adjusted to remove the effects of inflation.

Other data, updated up to December 2021, were obtained from the Business Register¹ and Trade Data Online.

¹ The Business Register provides data on the number of business establishments for all industries.

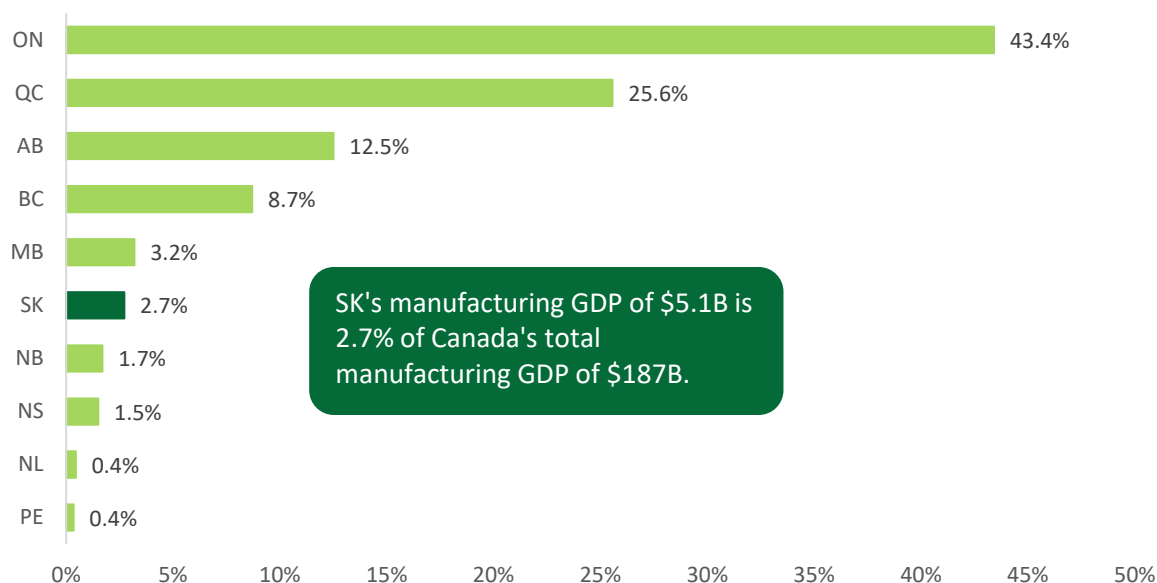
1. Manufacturing Real GDP

GDP Contribution

Manufacturing GDP (also known as manufacturing value-added) measures net output². Manufacturing GDP provides an indication of the degree of transformation of goods that occurs within the manufacturing industry. Canada's manufacturing GDP (\$187 billion) contributed 9.5% to total GDP (\$1,977 billion) in 2021. Two-thirds (69%) of Canada's manufacturing GDP was contributed by Ontario and Quebec, and 27.1% was contributed by the western provinces. Prince Edward Island contributed 0.3% (\$632 million), the lowest among the provinces.

Saskatchewan's manufacturing GDP of \$5.1 billion represented 2.7% of Canada's manufacturing GDP in 2021. Saskatchewan's manufacturing GDP contributed 6.6% to the province's total real GDP of \$77.4 billion. Compared to Saskatchewan's other goods-producing sectors, manufacturing's share of total GDP ranked behind only the mining, quarrying, and oil and gas sector (26.6% of real GDP). All the other good producing sectors; agriculture (6.0% of real GDP), construction (5.8% of real GDP) and utilities (2.3% of real GDP) ranked lower.

Figure 1: Provincial Share of National Manufacturing Real GDP, 2021



Source: Statistics Canada Table 36-10-0402-01

Saskatchewan's 2021 manufacturing GDP is 3.4% above the 2011 value of \$4.6 billion. However, the 2021 manufacturing sector share (6.1%) of total provincial GDP was 0.2 percentage points lower than the 2011 share of 6.3%. From 2011 to 2021, Saskatchewan's manufacturing sector had an annual average growth rate (AAGR) of 0.3%. This 0.3% AAGR in manufacturing ranked seventh highest among the provinces. In comparison, Saskatchewan's total real GDP grew, on average, by 0.6% per year in the same period. The national annual AAGR of manufacturing GDP from 2011 to 2021 was 0.4%. Prince Edward Island had the highest manufacturing AAGR at 5.3%.

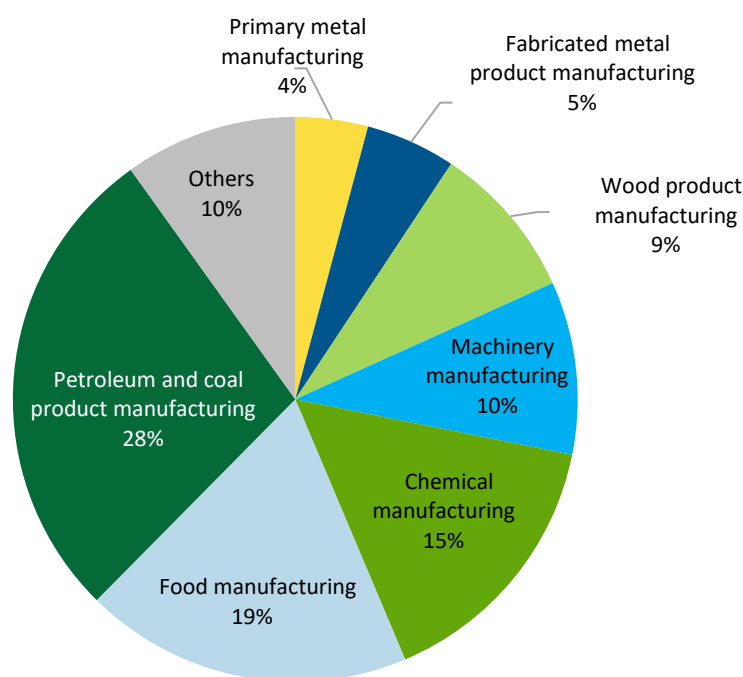
² Net output is gross output less purchased inputs that have been embodied in the value of the manufactured products.

GDP by manufacturing subsector and other industries

Saskatchewan's manufacturing GDP increased 7.5% from \$4.7 billion in 2020 to \$5.1 billion in 2021, ranking fourth among the provinces. Between 2020 and 2021, manufacturing subsectors with GDP greater than \$200 million that contributed to this growth included wood product manufacturing (39.4%), machinery manufacturing (20.7%), primary metal manufacturing (3.1%), petroleum and coal product manufacturing (11.7%), and chemical manufacturing (3.8%), Food manufacturing and fabricated metal product manufacturing are the only subsectors with GDP greater than \$200 million to experience a decline of 7.4% and 3.6% respectively.

In 2021, there were seven manufacturing subsectors that contributed at least 4% to total manufacturing GDP; petroleum and coal product manufacturing (25.0%), food manufacturing (20.0%), chemical manufacturing (14.0%), machinery manufacturing (11.0%), wood product manufacturing (8.0%), fabricated metal product manufacturing (7.0%), and primary metal manufacturing (5%).

Figure 2: Subsector Share of Saskatchewan Manufacturing Real GDP, 2021 (% of Total)



Source: Statistics Canada Table 36-10-0402-01

In 2021, five Saskatchewan industries had a higher GDP than the value of manufacturing GDP; mining, quarrying, and oil and gas extraction (\$20.6 billion, accounting for 27.4% of total provincial GDP), finance, insurance & real estate (\$11 billion, accounting for 14.3% of total provincial GDP), education & healthcare (\$8.4 billion, accounting for 11.0% of total provincial GDP), wholesale and retail trade (\$7.3 billion, accounting for 10.0% of total provincial GDP), and transportation, warehousing & utilities (\$5.3 billion, accounting for 7.0% of total provincial GDP).

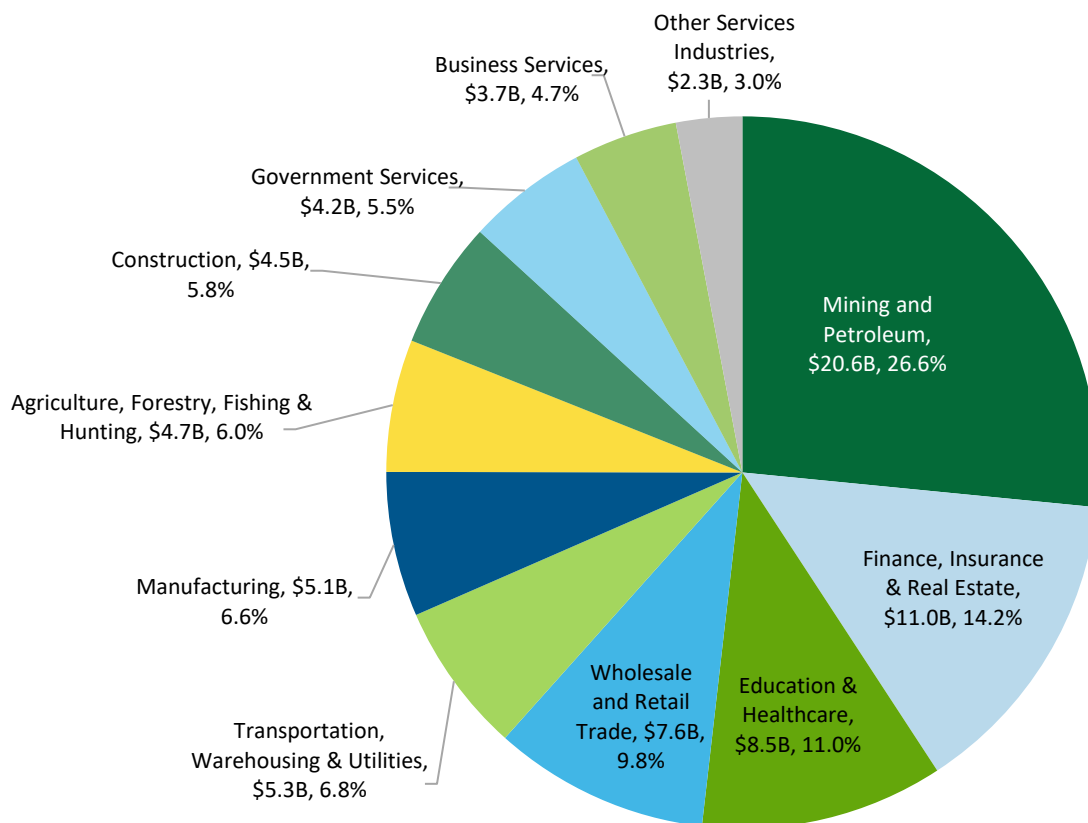
Table 1: Saskatchewan Real GDP (\$ millions), by industry 2021

GDP Industry Breakdown	2020	2021	%chg 2020-2021	2021 Share	2021 Rank
All Industries	77,921.8	77,412.9	-0.7%	100.0%	
Mining and Petroleum	19,475.4	20,559.4	5.6%	26.6%	1
Finance, Insurance & Real Estate	10,683.3	11,014.1	3.1%	14.2%	2
Education & Healthcare	7,978.0	8,538.1	7.0%	11.0%	3
Wholesale and Retail Trade	7,256.3	7,583.0	4.5%	9.8%	4
Transportation, Warehousing & Utilities	5,302.6	5,293.2	-0.2%	6.8%	5
Manufacturing	4,737.2	5,090.9	7.5%	6.6%	6
Agriculture, Forestry, Fishing & Hunting	7,491.7	4,653.4	-37.9%	6.0%	7
Construction	4,498.2	4,470.6	-0.6%	5.8%	8
Government Services	4,154.9	4,226.4	1.7%	5.5%	9
Business Services	3,496.5	3,663.0	4.8%	4.7%	10
Other Services Industries	2,847.7	2,320.8	-18.5%	3.0%	11

Note: Business services industries include: Information and culture industries; Professional, scientific and technical services; Administrative and support, waste management and remediation services.

Source: Statistics Canada Table 36-10-0402-01

Figure 3: Saskatchewan Real GDP, by industry 2021



Source: Statistics Canada Table 36-10-0402-01

2. Labour Productivity

Manufacturing Productivity

Manufacturing GDP per worked hour is one measure of labour productivity in the manufacturing sector. It measures the extent to which labour is efficiently used in the sector. In 2021, Saskatchewan's manufacturing GDP per hour worked was \$91.4. This is \$29.2 above the national average of \$62.2. Saskatchewan's 2021 manufacturing productivity ranked second among the provinces only behind Alberta's manufacturing productivity of \$101.2.

Figure 4: Productivity in the Manufacturing Sector by Province (GDP per worked hour \$), 2021

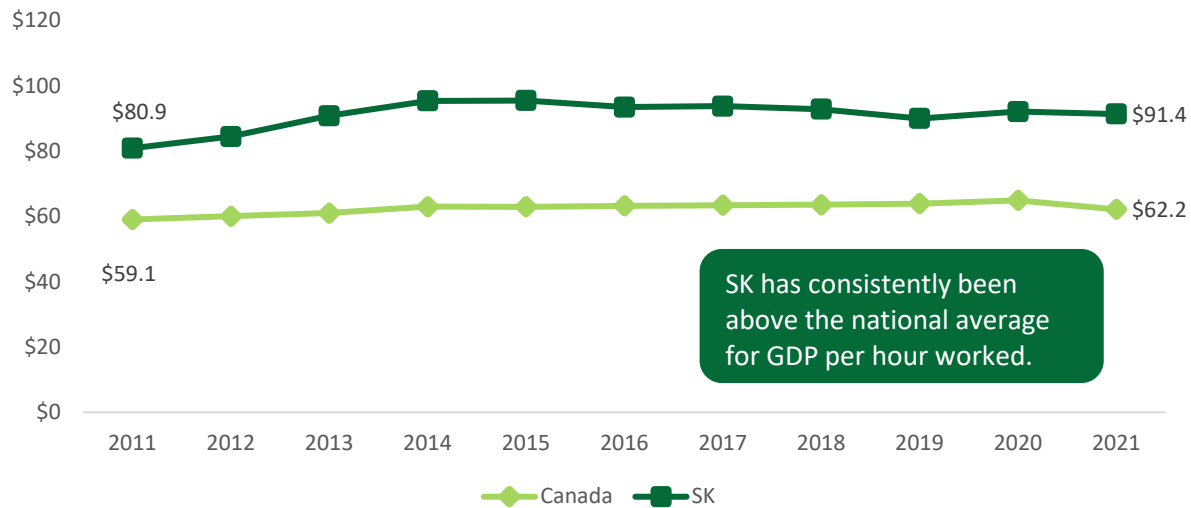


Source: Statistics Canada, Table 36-10-0489-01 and 36-10-0402-01

Saskatchewan's manufacturing productivity decreased slightly by 0.8% from \$92.1 per worked hour in 2020 to \$91.4 in 2021, ranking fourth among the provinces and above the national manufacturing productivity decline of 4.2%. This decrease was as a result of growth in manufacturing hours worked (8.4%), exceeding growth in manufacturing GDP growth (3.6%). All other provinces experienced a decline in manufacturing productivity from 2020 to 2021 except Prince Edward Island with 3.8% growth.

From 2011 to 2021, Saskatchewan's manufacturing GDP per hour worked increased at an average rate of 1.1% per year, ranking fifth among the provinces. Saskatchewan's manufacturing GDP per hour worked has consistently been above the national level since 2011.

Figure 5: Saskatchewan and Canada's Productivity 2011-2021



Source: Statistics Canada, Table 36-10-0489-01 and 36-10-0402-01

Productivity by manufacturing subsectors and other industries

In 2021, out of nineteen manufacturing subsectors, four recorded a higher labour productivity than the average provincial manufacturing productivity of \$91.4. These subsectors include petroleum and coal product manufacturing (\$557.4), chemical manufacturing (\$267.5), wood product manufacturing (\$130.9), food manufacturing (\$99.2), and primary metal manufacturing (\$86.2).

Figure 6: Saskatchewan Manufacturing Productivity by Subsector, 2021 (GDP per worked hour)

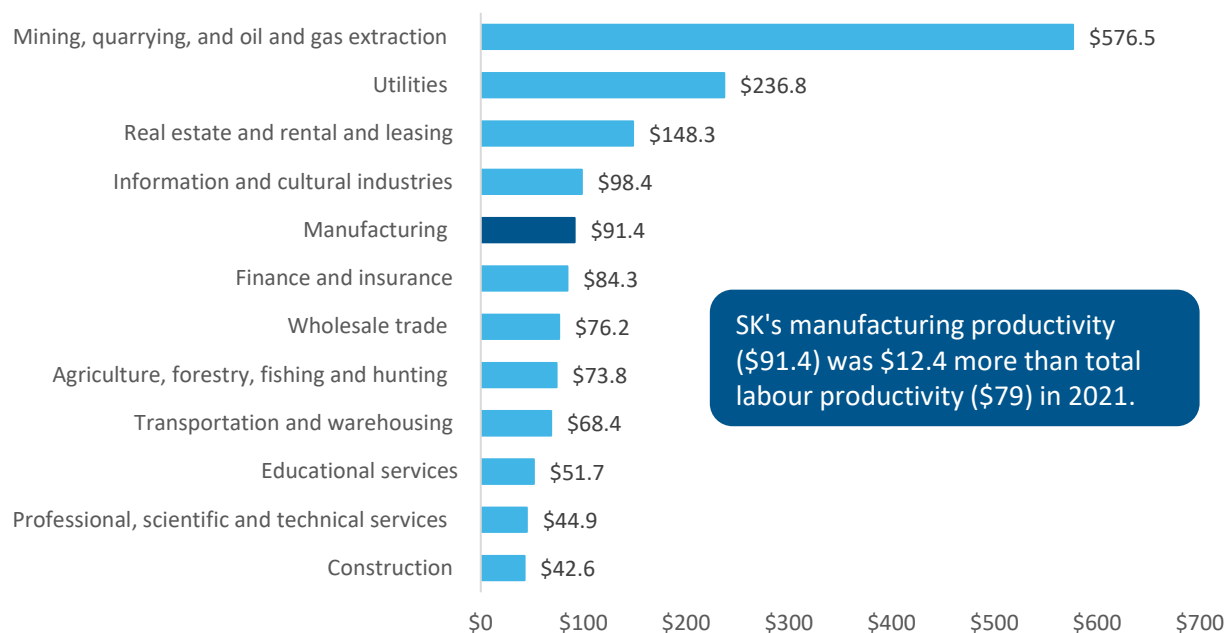


Source: Statistics Canada, Table 36-10-0480-01

Between 2011 and 2021, productivity in the wood manufacturing subsector grew by an average annual growth rate of 11.3%, productivity in the food manufacturing subsector grew at an annual average growth rate of 3.4% while the petroleum and coal product manufacturing subsector increased at an average annual growth rate of 3.5%.

In 2021, four Saskatchewan industries had a higher labour productivity than the overall manufacturing industry; mining, quarrying, and oil and gas extraction (\$576.5), utilities (\$236.8), real estate and rental and leasing³ (\$148.3), and information and cultural industries (\$98.4). In 2021, manufacturing productivity was \$6.3 above the total provincial labour productivity of \$78.6 per worked hour.

Figure 7: Saskatchewan Productivity by Sector, 2021 (GDP per worked hour)



Source: Statistics Canada, Table 36-10-0489-01 and 36-10-0402-01

³ Productivity in this industry is calculated by excluding owner occupied dwellings from GDP.

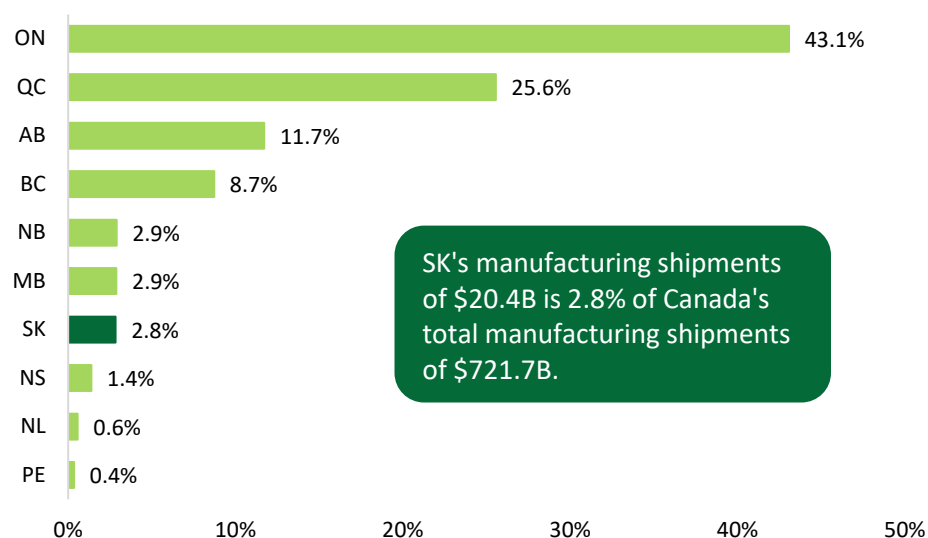
3. Shipments

Manufacturing Sales

Canada's manufacturing shipments⁴ were worth \$721.7 billion in 2021. At \$20.4 billion, Saskatchewan's manufacturing shipments accounted for 2.8% of Canada's manufacturing shipments in 2021. Saskatchewan's share of Canada's manufacturing shipments in 2021 was the seventh highest among the provinces. Ontario had the highest share of manufacturing shipments in 2021 at 43.1% (\$310.8 billion).

In Western Canada, Alberta had the largest share of Canada's 2021 manufacturing shipments at 11.7% (\$84.6 billion), compared to British Columbia's share of 8.7% (\$62.9 billion) and Manitoba's share of 2.9% (\$20.8 billion).

Figure 8: Provincial Share of National Manufacturing Shipments, 2021

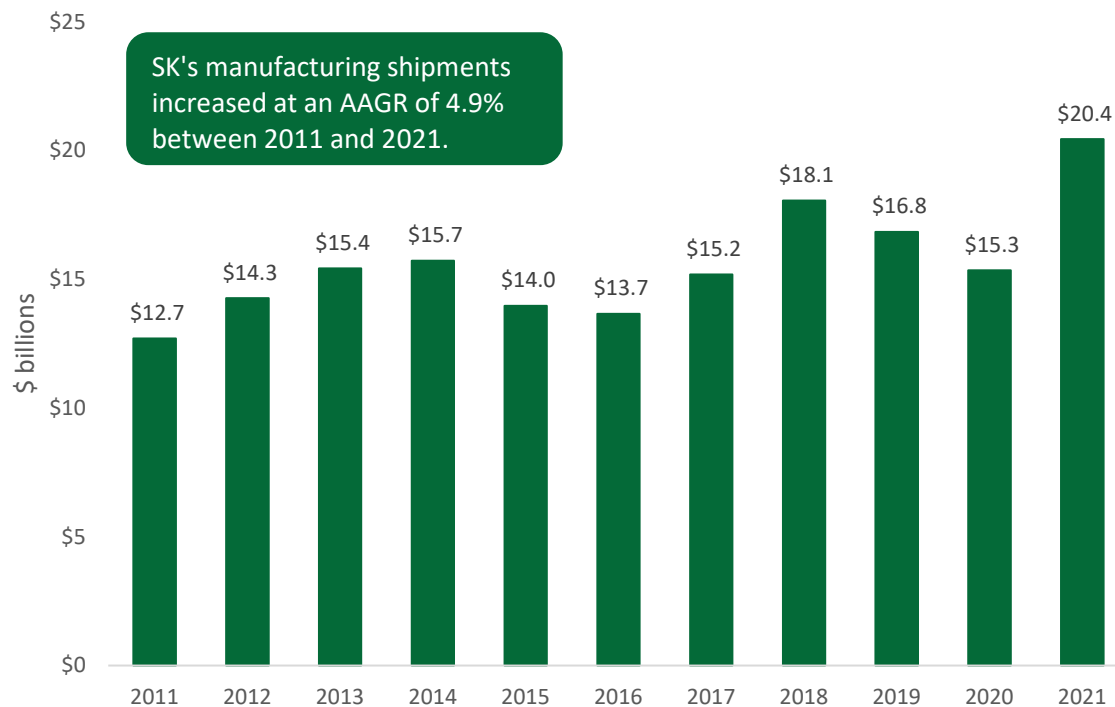


In 2021, Saskatchewan's manufacturing shipments increased by 33.2% from \$15.3 billion in 2020 to \$20.4 billion in 2021, ranking second among the provinces. Only New Brunswick (37.5%) had a higher increase in 2021 compared to 2020.

Food manufacturing was the largest manufacturing shipments subsector in Saskatchewan, with shipments of \$6.4 billion (31.2% of total manufacturing shipments) in 2021. The chemical manufacturing subsector recorded shipments of \$2.3 billion (11.2% of the total), the machinery manufacturing subsector recorded shipments of \$1.6 billion (7.7% of the total), while the wood manufacturing subsector recorded shipments totaling \$1.5 billion (7.2%). Data for other major subsectors were not reported; values were suppressed to meet confidentiality requirements.

⁴ Manufacturing shipments refer to the value of manufactured goods produced and destined for 1) retail and wholesale markets in Saskatchewan and other parts of Canada, 2) exports to international markets, or 3) used as inputs by other industries.

Figure 9: Total Saskatchewan Manufacturing Shipments (\$ Billion [B]), 2011-2021



Source: Statistics Canada Table 16-10-0048-0

The value of Saskatchewan's manufacturing shipments increased from \$12.7 billion in 2011 to \$20.4 billion in 2021, with an average growth rate of 4.9% per year (third highest among the provinces). This growth rate is above the national average at 2.4%, Alberta's rate of 2.0%, and Manitoba's rate of 2.6%. Shipments of four major manufacturing subsectors grew during this period with an average annual growth rate of 21.6% in wood product manufacturing, 9.2% in food manufacturing, 3.8% in fabricated metal products, and 2.9% in chemical manufacturing.

4. Employment

Manufacturing employment

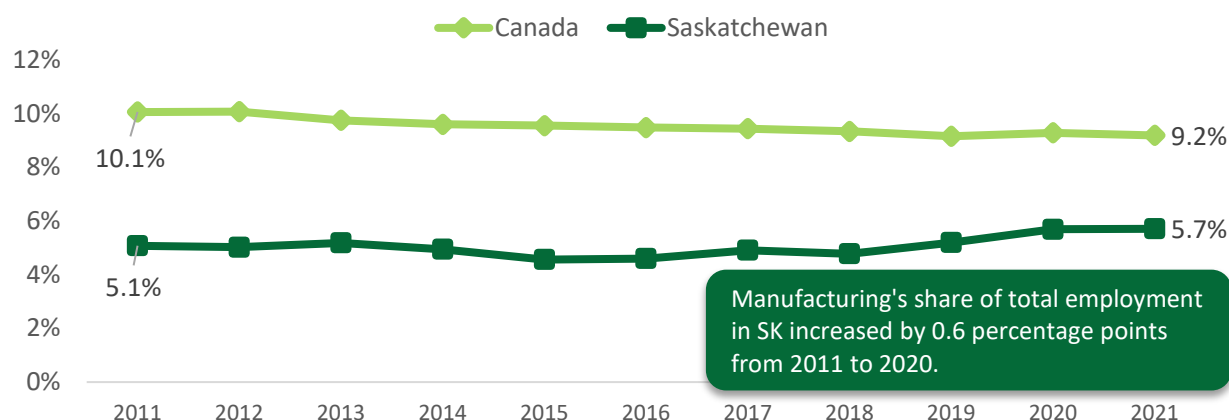
The number of employees in Saskatchewan's manufacturing sector was 31,900⁵ in 2021, representing 1.8% of total Canadian manufacturing employment. In Western Canada, British Columbia employed 179,300 people in the manufacturing industry (10.3% of total Canadian manufacturing employment), Alberta employed 122,300 people (7.0% of the national manufacturing employment), and Manitoba 63,800 people (3.7% of the national manufacturing employment). Together, the four western provinces had 397,300 manufacturing employees in 2021, or 22.9% of the national manufacturing employment. In 2021, the number of payroll employees in the manufacturing industry in Saskatchewan was 24,346⁶, representing 1.6% of total Canadian manufacturing payroll employees (1,513,911).

Saskatchewan manufacturing employment increased by 2.9% from 31,000 in 2020 to 31,900 in 2021, ranking sixth among the provinces. In 2021, growth in manufacturing employment (21.8%) in Newfoundland and Labrador ranked first among the provinces.

Employment in Canada's manufacturing sector increased slightly (0.3%) from 1.729 million people in 2011 to 1.735 million people in 2021. In comparison, Saskatchewan manufacturing employment increased by 17.3% between 2011 and 2021 (from 27,200 to 31,900) at an average growth rate of 1.6% per year, ranking second among the provinces.

In 2021, the manufacturing sector's share of total employment in Saskatchewan was 5.7%. The manufacturing sector's share of Saskatchewan's workforce averaged 5.1% from 2011 to 2021, the second lowest share among the provinces. Québec, at 11.9%, had the highest average share over this period, followed by Ontario, at 10.9%. In the west, Manitoba had the highest share (9.9%), followed by British Columbia (7.0%) and Alberta (5.9%). The national average stood at 9.5%.

Figure 10: Share of Manufacturing Employment out of Total Employment 2011-2021.



Source: Statistics Canada, Labor Force Survey.

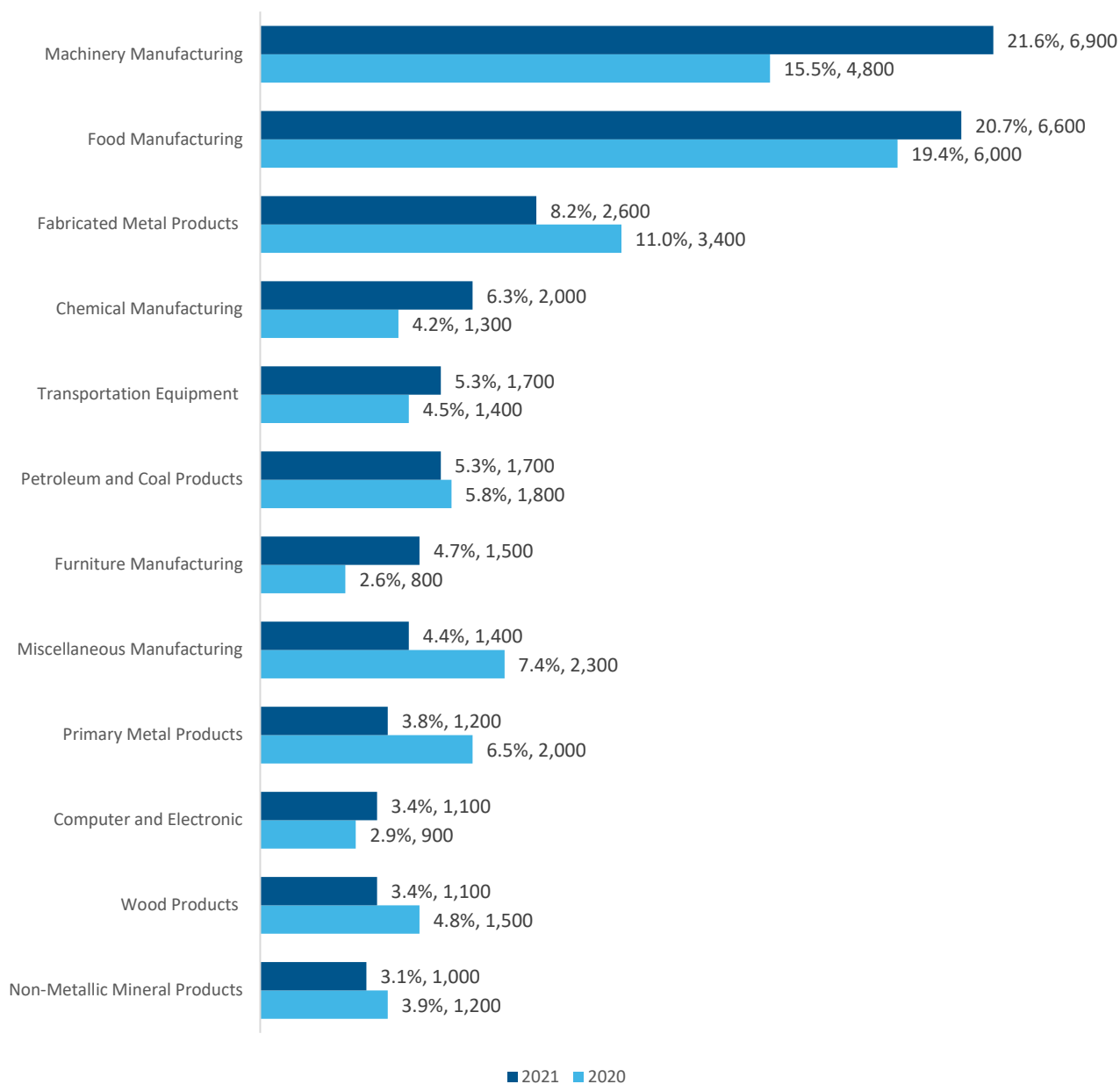
⁵ Data is from the Labour force survey (LFS) which provides the first timely picture of overall labour market conditions, with total employment, unemployment and unemployment rate, as well as information on which groups of Canadians are most affected by changes in the labour market.

⁶ Data is from the Survey of Employment, Payrolls and Hours (SEPH) which provides payroll employment of the same month by industry, along with estimations of earnings and hours worked.

Employment by Manufacturing subsectors

Machinery manufacturing and food manufacturing were the largest employers among the subsectors, with 6,900 and 6,600 employees, respectively, in 2021. Between 2020 and 2021, employment in the machinery manufacturing sector increased by 43.8% (2,100 employees) and accounted for 21.6% of total manufacturing employment. Employment in the food manufacturing sector increased by 10.0% (600 employees) and accounted for 20.7% of total manufacturing employment. Together these subsectors accounted for 42.3% of manufacturing employment in 2021, a 7.5 percentage point increase over the 2020 share of 34.8%.

Figure 11: Share of Saskatchewan Manufacturing Employment by Subsector, 2021



Source: Statistics Canada, Labor Force Survey.

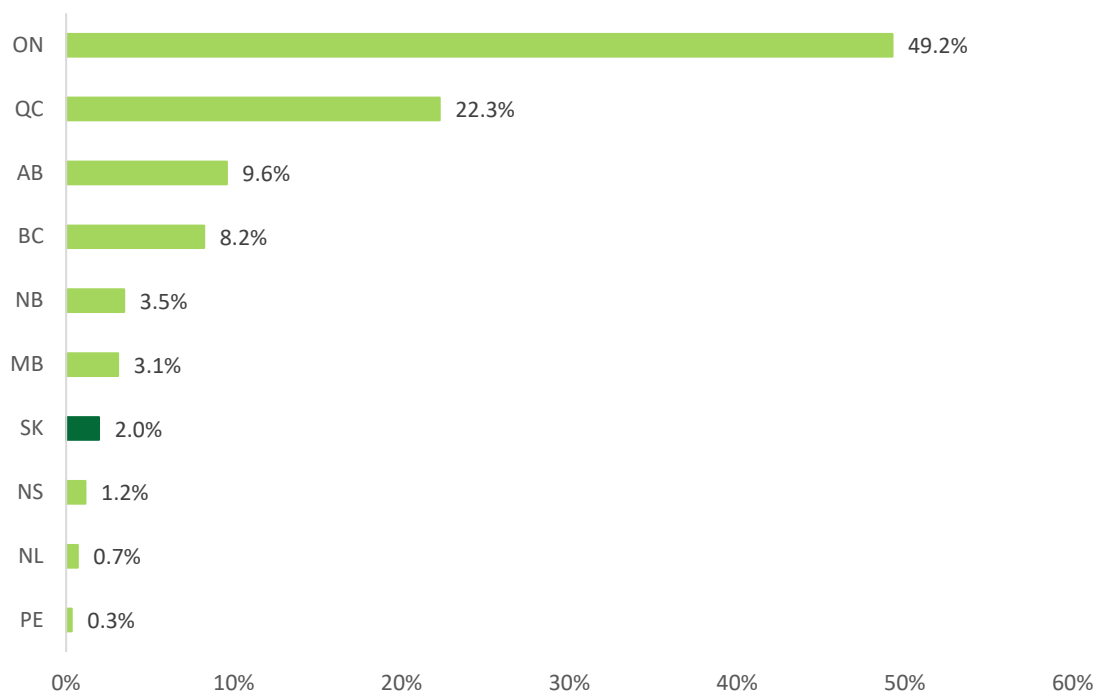
5. International Exports

Merchandise exports

Manufacturing exports accounted for 20.6% of the province's total exports of goods in 2021, amounting to \$7.6 billion worth of products. Total Canadian manufacturing exports in 2021 were \$387.6 billion and Saskatchewan accounted for 2.0% of Canada's manufacturing exports, which was the seventh highest among the provinces.

Among the western provinces, Alberta had the largest share of Canada's international exports of manufactured goods at 9.6% (\$37.1 billion), British Columbia's share was 8.2% (\$31.9 billion), and Manitoba's share was 3.1% (\$12 billion) in 2021. Ontario had the largest proportion of Canada's manufacturing exports, accounting for nearly half, at 49.2% (\$190.8 billion).

Figure 12: Share of National Manufacturing Exports (International) by Province, 2021

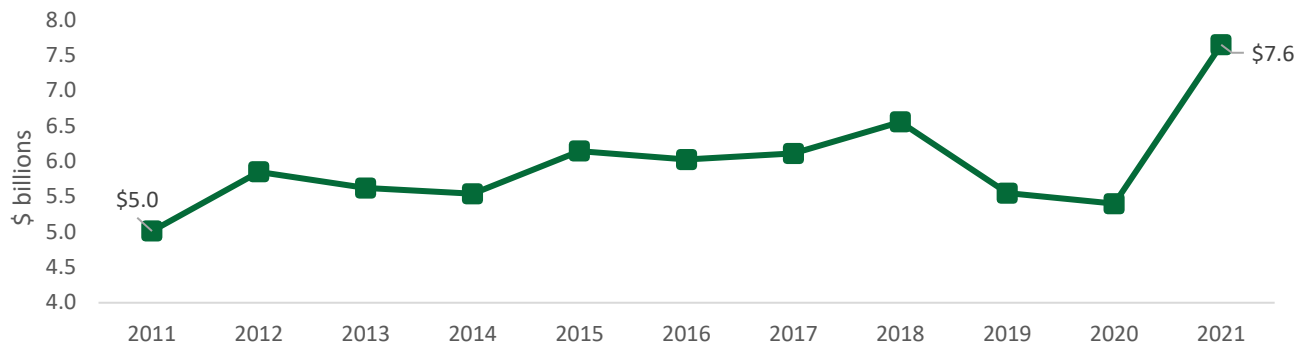


Source: Statistics Canada, Industry Canada, Trade Data Online.

Saskatchewan's manufacturing exports increased 41.6% in 2021 compared to 2020 ranking second among the provinces. All other export industries increased; with mining and oil and gas extraction increasing 44.5% and agriculture, forestry, fishing and hunting increasing 0.5% within the period. In 2021, out of the three main Saskatchewan export industries, manufacturing had the smallest share (20.6%) of total exports behind mining and oil and gas extraction (43.2%) and agriculture, forestry, fishing and hunting (35.8%).

Between 2011 and 2021, Saskatchewan's manufacturing exports grew by 52.6%, from \$5.0 billion to \$7.6 billion, at an average growth rate of 4.31% per year. This growth was above the national average annual growth rate of 3.3%. Saskatchewan's manufacturing export growth was the fifth highest among the provinces, ahead of Alberta (4.30%), Nova Scotia (2.8%) Ontario (2.6%), New Brunswick (0.1%) and Newfoundland and Labrador (-2.3%).

Figure 14: Saskatchewan Manufacturing Exports (International) (\$ Billion), 2011 – 2021



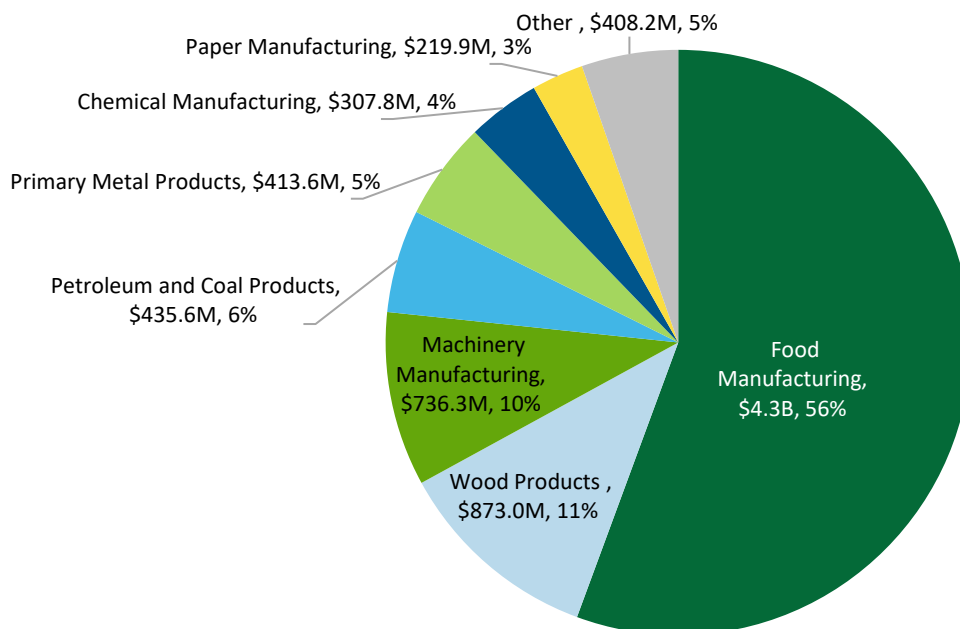
Source: Statistics Canada, Industry Canada, Trade Data Online.

Manufacturing exports by subsector

Between 2020 and 2021, manufacturing subsectors with exports greater than \$200 million that contributed to growth in manufacturing exports include wood product manufacturing (98.8%), machinery manufacturing (19.7%), primary metal manufacturing (225.1%), petroleum and coal product manufacturing (66.0%), chemical manufacturing (45.7%), and food manufacturing (34.7%). Paper manufacturing is the only subsector with exports greater than \$200 million to experience a decline (8.5%) in 2021 compared with 2020. (See Appendix A).

In 2021, food manufacturing exports were the largest of the manufacturing subsector exports in Saskatchewan, with exports of \$4.3 billion (55.6% of total manufacturing exports), followed by wood product manufacturing \$873 million (11.4%), and machinery manufacturing \$736 million (9.6%).

Figure 13: Share of Saskatchewan Manufacturing Exports (International) by Subsector, 2021



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

The three fastest-growing manufacturing export categories (with at least 10% share of total manufacturing exports) were wood products with an average annual growth rate of 28.3% from 2011 to 2021, followed by food manufacturing (6.2%) and petroleum and coal products (5.1%).

International Destinations for Saskatchewan's Manufacturing Exports

The United States (U.S.) was the leading international market for Saskatchewan's manufactured products, accounting for 76.1% of all manufacturing exports in 2021. Saskatchewan's manufacturers shipped about \$5.8 billion worth of goods to the U.S. in 2021, compared to \$3.3 billion in 2011, an increase of approximately \$2.4 billion (72.4%). China received the second highest share of Saskatchewan's international manufacturing exports in 2021. Exports to China grew from \$440.9 million in 2011 to \$923.0 million in 2021, an increase of \$482.1 million (109.3%). Mexico had the third highest share of Saskatchewan's international manufacturing exports in 2021, at \$175.9 million, a 436.7% increase from 2011 to 2021.

Export markets for Saskatchewan manufactured goods have changed in the last 10 years: Chile, Lithuania, and India have replaced Indonesia, Netherlands, and France in the top 10 manufacturing export markets.

The top 10 countries accounted for 97.8% of Saskatchewan total international exports of manufactured goods in 2021.

Table 2: Top 10 International Destinations for Saskatchewan's Manufacturing Exports

2011				2021			
#	Country	\$M	Share	#	Country	\$M	Share
1	United States	\$3,348.6	66.8%	1	United States	\$5,771.6	75.5%
2	United Kingdom	\$698.5	13.9%	2	China	\$923.0	12.1%
3	China	\$440.9	8.8%	3	Mexico	\$175.9	2.3%
4	Indonesia	\$94.6	1.9%	4	Korea, South	\$153.2	2.0%
5	Japan	\$59.1	1.2%	5	Chile	\$126.4	1.7%
6	Netherlands	\$50.0	1.0%	6	Australia	\$107.1	1.4%
7	France	\$46.5	0.9%	7	United Kingdom	\$82.1	1.1%
8	Australia	\$42.9	0.9%	8	Lithuania	\$67.7	0.9%
9	Korea, South	\$37.9	0.8%	9	Japan	\$48.1	0.6%
10	Mexico	\$32.8	0.7%	10	India	\$26.8	0.4%

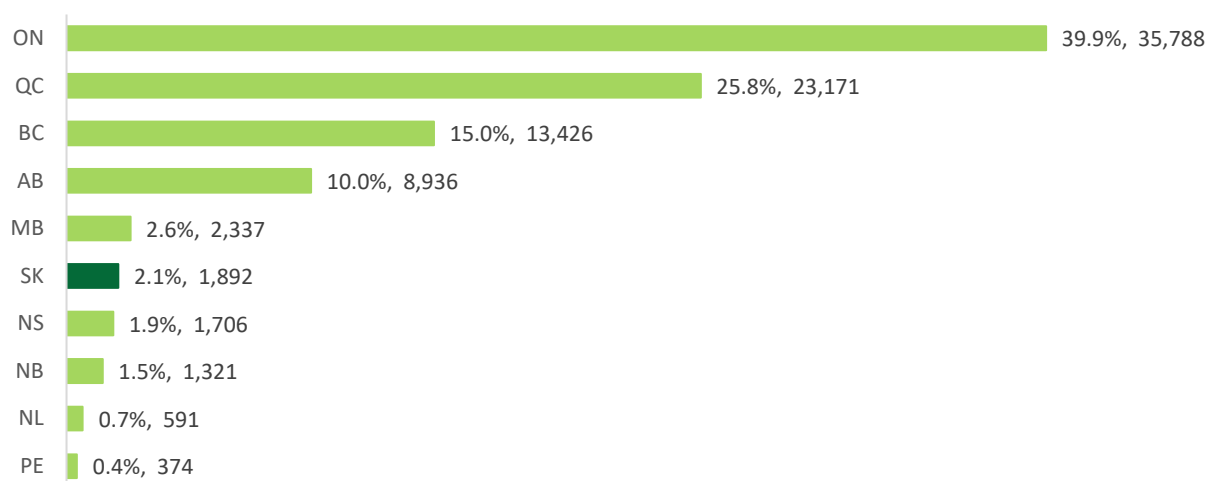
Source: Statistics Canada, Industry Canada, Trade Data Online.

6. Manufacturing Establishments

Manufacturing business by number of employees

Canada had more than 89,000 manufacturing establishments in 2021. Nearly two-thirds of Canada's manufacturing establishments (65.8%) were located in Ontario and Quebec, and 29.7% were in the western provinces. Saskatchewan's 1,892 manufacturing businesses represent 2.1% of all Canadian manufacturing. Across the country, most manufacturing businesses are small, employing 0-49 people. In 2021, over 82,000 (92.2%) of the total Canadian manufacturing businesses were small.

Figure 15: Share of National Manufacturing establishments by Province, 2021



Source: Statistics Canada Tables 33-10-0105-01 and 33-10-0106-01, Business Registry

Table 3: Manufacturing Establishments by Province in 2021

	Total	Non Employers	Employers	Small (1-49)	Small (0-49)	Medium (50-499)	Large (500+)
Canada	89,643	39,047	50,596	43,637	82,684	6,657	302
Newfoundland and Labrador	591	208	383	324	532	53	6
Prince Edward Island	374	133	241	209	342	31	1
Nova Scotia	1,706	646	1,060	916	1,562	138	6
New Brunswick	1,321	436	885	742	1,178	140	3
Quebec	23,171	9,555	13,616	11,537	21,092	1,998	81
Ontario	35,788	16,044	19,744	16,826	32,870	2,771	147
Manitoba	2,337	974	1,363	1,139	2,113	203	21
Saskatchewan	1,892	863	1,029	917	1,780	108	4
Alberta	8,936	4,148	4,788	4,247	8,395	524	17
British Columbia	13,426	5,997	7,429	6,724	12,721	689	16

Source: Statistics Canada, Business Register

In 2021, out of the 1,892 manufacturing businesses in Saskatchewan, 1,780 (94.1%) were small (0-49 employees), 108 (5.7%) were medium (50-499 employees), and 4 (0.2%) were large (500 or more employees). In 2021, Saskatchewan had 1,029 manufacturing establishments with one or more payroll employees, representing 2.0% of the 50,596 manufacturing establishments with payroll employees in Canada and 7.0% of those in Western Canada (14,609). In comparison, British Columbia had 7,429 (14.7%) of total Canadian manufacturing businesses with payroll employees, Alberta had 4,788 (9.5%) of total Canadian manufacturing businesses with payroll

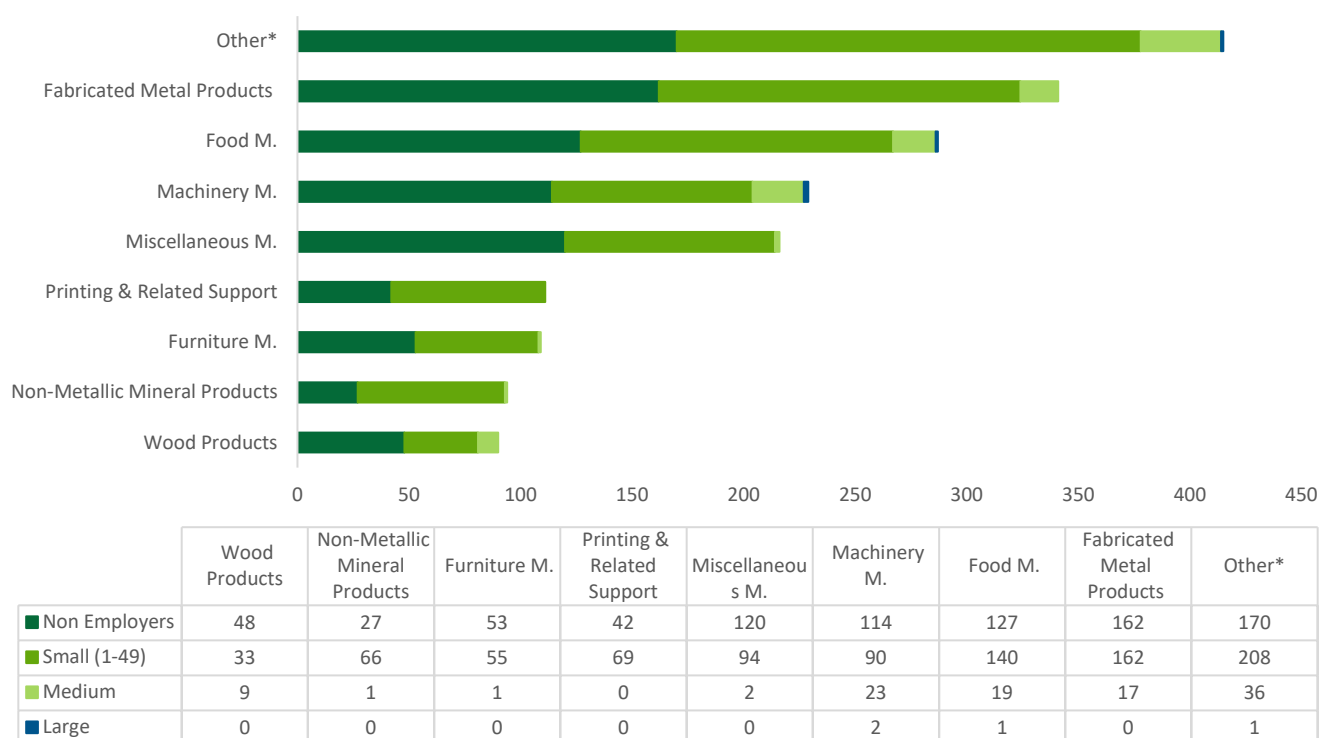
employees, and Manitoba had 1,363 (2.7%) of total Canadian manufacturing businesses with payroll employees. Out of the 1,892 manufacturing establishments in Saskatchewan 863 (45.6%) were classified as non-employers⁷ in 2021.

Saskatchewan's Manufacturing Establishments by subsector

Of the 108 medium-sized businesses (50-499 employees) in Saskatchewan, there were 23 engaged in machinery production, 19 in food manufacturing, 17 in fabricated metals manufacturing, 9 in wood products, 8 in transport equipment, 6 in chemical manufacturing, and 6 in beverage and tobacco.

Of the 6 manufacturing establishments that had 500 or more employees (large), there were 2 engaged in machinery manufacturing, 1 in petroleum and coal products, and 1 in food manufacturing.

Figure 16: Manufacturing Establishments by Subsector, Saskatchewan, 2021



Source: Statistics Canada, Business Register.

Others* include clothing, electrical equipment, textile product mills, computer and electronics, primary metal products, petroleum and coal products, leather and allied products, textile and mills, paper manufacturing, chemical manufacturing, beverage and tobacco, plastic and rubber.

⁷ Establishments with no payroll employees are classified as “non-employers”. The establishments in this category do not maintain employee payroll accounts, but they may have a workforce consisting of contracted workers, family members or business owners.

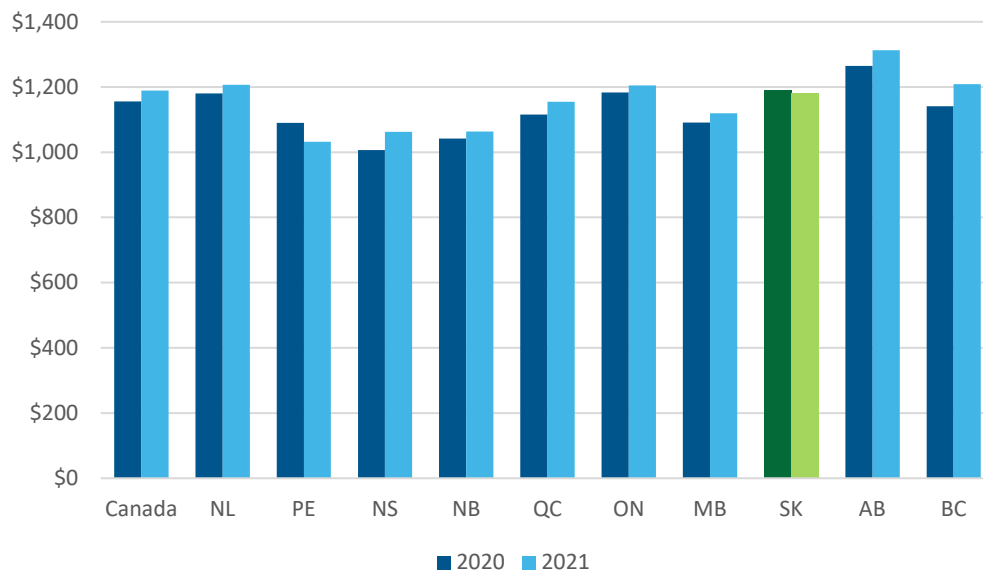
7. Earnings

Average weekly earnings

The average weekly earnings in Saskatchewan's manufacturing sector were approximately \$1,180 per week (\$61,357 a year) in 2021. This represents the fifth-highest amount among the provinces. Alberta's manufacturing employees had the highest weekly earnings (\$1,312) and British Columbia had the second-highest weekly earnings (\$1,209). The national average was \$1,189 per week.

In 2021, Saskatchewan's manufacturing sector average weekly earnings fell 0.8% below the national average. Alberta's and British Columbia's average weekly earnings were 10.4% and 1.7% above the national average, and Manitoba was 5.8% below the national average.

Figure 17: Manufacturing Average Weekly Earnings 2020 - 2021 by Province

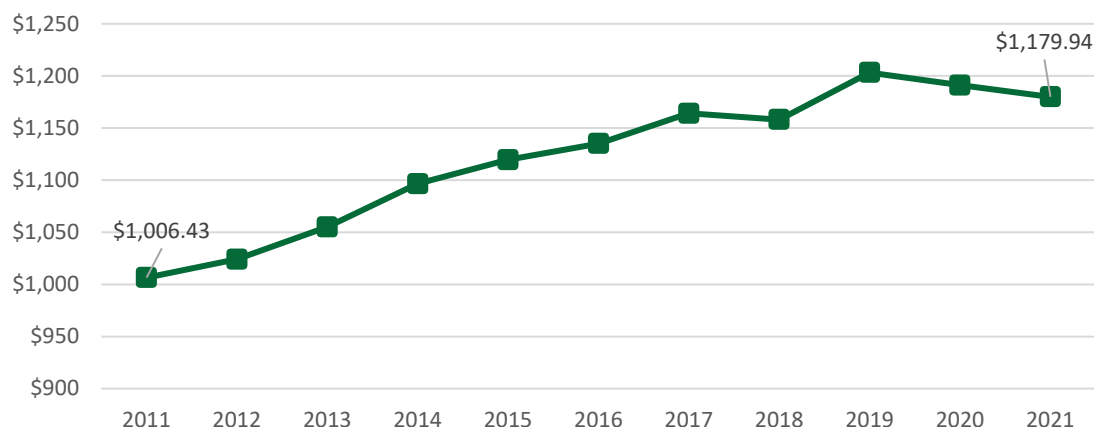


Source: Statistics Canada, Table 14-10-0204-01.

Manufacturing workers in Saskatchewan earned 0.9% less in 2021 than they earned in 2020, ranking ninth among the provinces. From 2020 to 2021, average weekly earnings among manufacturing workers increased in most provinces such as Manitoba, Alberta, and British Columbia with a 2.6%, 3.8% and 6.0% growth in average weekly earnings, respectively.

Average weekly earnings for Saskatchewan's manufacturing workers have grown over the past 10 years, increasing by 17.2% from \$1,006 per week (\$52,334 annually) in 2011 to \$1,180 per week (\$61,357 annually) in 2021. This represents an average annual growth rate of 1.6% per year, ninth highest among the provinces and below the national average weekly earnings growth rate of 1.9%.

Figure 18: Saskatchewan Manufacturing Average Weekly Earnings



Source: Statistics Canada, Table 14-10-0204-01

Average weekly earnings by manufacturing subsectors and other industries

In 2021, there were two manufacturing subsectors that recorded average weekly earnings above the province's manufacturing average of \$1,180: fabricated metal product manufacturing \$1,292 (9.5%) and wood product manufacturing \$1,276.7 (8.2%). Printing and related support activities (\$734), food manufacturing (\$933), and machinery manufacturing (\$1,169) were below the province's weekly manufacturing average earnings.

Between 2020 and 2021, wood product manufacturing (5.0%) and fabricated metal product manufacturing (7.0%) experienced increases in average weekly earnings while food manufacturing experienced a decline of 8.6%. Data for all other subsectors were suppressed because of confidentiality requirements of the Statistics Act.

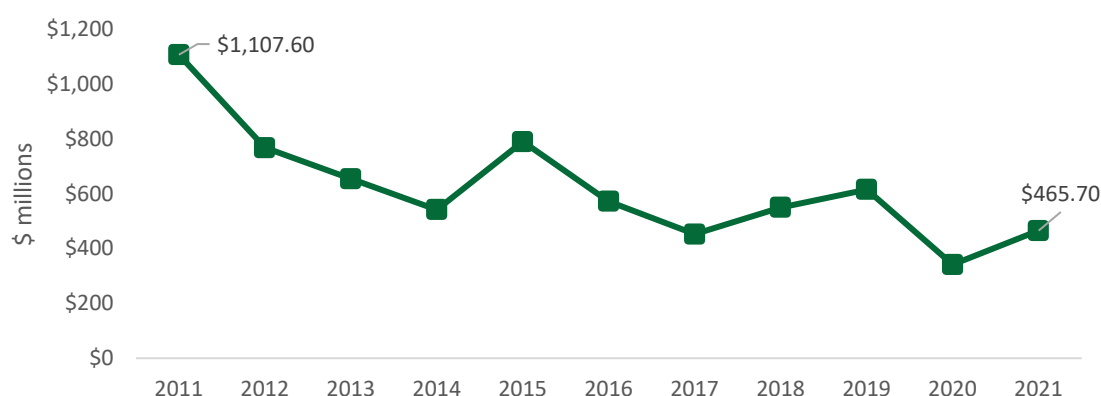
In 2021, on average in Saskatchewan, employees in the mining, quarrying, and oil and gas extraction sector (\$2,099.8 per week) and management of companies and enterprises sector (\$1,493.74 per week) earned more than manufacturing workers (\$1,179.9 per week) within the province's goods-producing industries. Data for the forestry, logging and support, and the utilities sectors was suppressed from 2011 because of confidentiality requirements of the Statistics Act.

8. Capital Investment

In 2021, capital investment in Canada's manufacturing sector amounted to \$21.8 billion. Saskatchewan had \$465.7 million worth of manufacturing investment, representing 2.1% of the Canadian total. In western Canada, Alberta had \$3.5 billion (15.9% of the Canadian total), British Columbia had \$1.6 billion (7.2% of the Canadian total) and Manitoba had \$768.7 million (3.5% of the Canadian total).

Capital investment in Saskatchewan's manufacturing sector increased by 36.2% from \$341.9 million in 2020 to \$465.7 million in 2021, ranking first among the provinces. Nationally, manufacturing investment increased by 8.5% in the same time period. In western Canada, Alberta's capital investment in the manufacturing sector grew by 15.5% while Manitoba (-14.6%) and British Columbia (-7.4%) experienced declines in the same time period.

Figure 19: Saskatchewan Manufacturing Capital Investment (\$M)



Source: Statistics Canada, Table 34-10-0035-01.

In Canada, manufacturing investment increased 3.6% per year on average between 2011 and 2021. The highest average annual growth occurred in Alberta at 7.7%, followed by Prince Edward Island at 6.8% per year. In 2010 and 2011 Saskatchewan received record high investments in the manufacturing industry which has declined at an average rate of 8.3% per year between 2011 and 2021. Manufacturing capital investment in Saskatchewan grew by 232.4% from \$333.2 million in 2007 to \$1.1 billion in 2011.

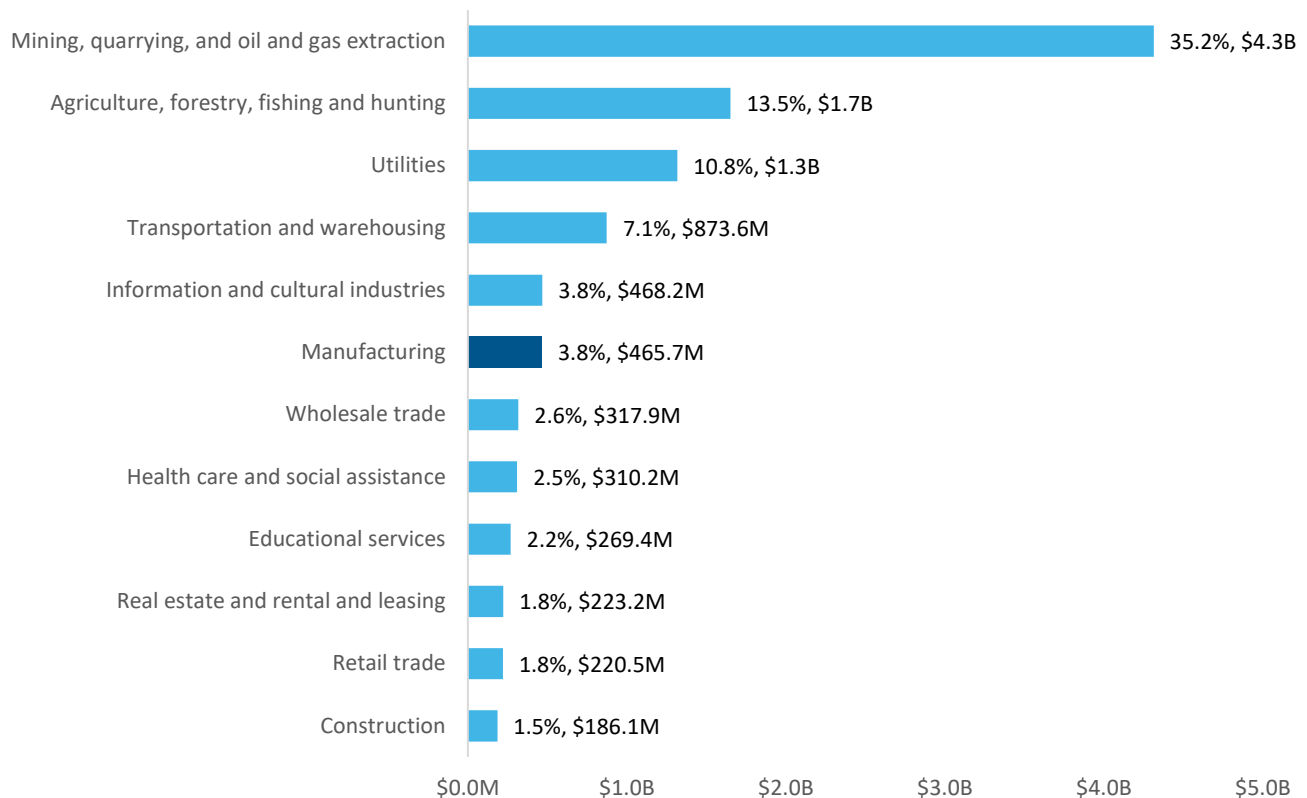
Capital Investment by manufacturing subsectors and other industries

The following Saskatchewan manufacturing subsectors had increases in capital investment between 2020 and 2021: chemical manufacturing (18.9%), miscellaneous⁸ manufacturing (38.2%), and wood product manufacturing (2.2%). Saskatchewan manufacturing subsectors with the largest declines in capital investment from 2020 to 2021 include non-metallic mineral product manufacturing (-60.9%), electrical equipment, appliance and component manufacturing (-35.8%), plastics and rubber products manufacturing (-37.9%), and food manufacturing (-14.2%). Data for all other subsectors were suppressed because of confidentiality requirements of the Statistics Act.

⁸ Miscellaneous manufacturing includes medical equipment and supplies manufacturing, medical equipment and supplies manufacturing, jewellery and silverware manufacturing, sporting and athletic goods manufacturing, doll, toy and game manufacturing, office supplies (except paper) manufacturing, sign manufacturing and all other miscellaneous manufacturing.

In 2021, five Saskatchewan industries had higher capital investment than the manufacturing industry: mining, quarrying, and oil and gas extraction (\$4.3 billion, accounting for 35.2% of total capital investment in Saskatchewan), agriculture, forestry, fishing and hunting (\$1.7 billion, accounting for 13.5% of total capital investment in Saskatchewan), utilities (\$1.3 billion, accounting for 10.8% of total capital investment in Saskatchewan), transportation and warehousing (\$873.6 million, accounting for 7.1% of total capital investment in Saskatchewan), and information and cultural industries (\$468.2 million, accounting for 3.8% of total capital investment in Saskatchewan).

Figure 20: Saskatchewan Capital Investment by Sector, 2021



Source: Statistics Canada, Table 34-10-0035-01.

Appendix A: Data Tables

Real GDP by Industry, Saskatchewan (\$M)

				%chg	AAGR	Share
	2011	2020	2021	2020-2021	2011-2021	2021
All industries	72,612	77,922	77,413	-0.7%	0.6%	100.0%
Agriculture, forestry, fishing and hunting	5,228	7,492	4,653	-37.9%	-1.2%	6.0%
Crop and animal production	5,041	7,196	4,335	-39.8%	-1.5%	5.6%
Forestry and logging	50.4	55.0	73.1	32.9%	3.8%	0.1%
Fishing, hunting and trapping	1.1	1.2	1.2	-	0.9%	-
Support activities for agriculture and forestry	135	216	223	3.4%	5.1%	0.3%
Mining, quarrying, and oil and gas extraction	19,905	19,475	20,559	5.6%	0.3%	26.6%
Oil and gas extraction	11,217	10,556	10,770	2.0%	-0.4%	13.9%
Mining and quarrying (except oil and gas)	7,481	8,366	8,933	6.8%	1.8%	11.5%
Support activities for mining and oil and gas extraction	1,134	771	993	28.8%	-1.3%	1.3%
Manufacturing	4,577	4,737	5,091	7.5%	1.1%	6.6%
Construction	5,858	4,498	4,471	-0.6%	-2.7%	5.8%
Utilities	1,543	1,773	1,798	1.4%	1.5%	2.3%

Source: Statistics Canada, Table 36-10-0402-01.

Manufacturing Real GDP by Subsector, Saskatchewan (\$M)

				%chg	AAGR	Share
	2011	2020	2021	2020-2021	2011-2021	2021
Manufacturing	\$4,577	\$4,737	\$5,091	7.5%	1.1%	100.0%
Food manufacturing	\$809	\$1,032	\$956	-7.4%	1.7%	18.8%
Beverage and tobacco product manufacturing	\$14	\$53	\$62	18.2%	15.8%	1.2%
Textile and textile product mills	\$31	\$31	\$34	9.0%	0.8%	0.7%
Clothing and leather and allied product manufacturing	\$12	\$2	\$3	30.0%	-14.5%	0.1%
Wood product manufacturing	\$116	\$326	\$455	39.4%	14.7%	8.9%
Paper manufacturing	\$31	\$36	\$34	-5.9%	1.0%	0.7%
Printing and related support activities	\$47	\$34	\$30	-10.3%	-4.2%	0.6%
Petroleum and coal product manufacturing	\$1,036	\$1,262	\$1,410	11.7%	3.1%	27.7%
Chemical manufacturing	\$751	\$760	\$789	3.8%	0.5%	15.5%
Plastics and rubber products manufacturing	\$34	\$37	\$44	18.5%	2.5%	0.9%
Non-metallic mineral product manufacturing	\$126	\$66	\$90	36.3%	-3.3%	1.8%
Primary metal manufacturing	\$305	\$203	\$211	3.9%	-3.6%	4.2%
Fabricated metal product manufacturing	\$351	\$272	\$263	-3.6%	-2.9%	5.2%
Machinery manufacturing	\$578	\$418	\$504	20.7%	-1.4%	9.9%
Computer and electronic product manufacturing	\$73	\$71	\$83	17.4%	1.3%	1.6%
Electrical equipment, appliance and component manufacturing	\$83	\$79	\$64	-19.1%	-2.7%	1.2%
Transportation equipment manufacturing	\$91	\$65	\$75	16.3%	-1.9%	1.5%
Furniture and related product manufacturing	\$48	\$24	\$23	-6.6%	-7.2%	0.4%
Miscellaneous manufacturing	\$51	\$57	\$74	30.2%	3.8%	1.4%

Source: Statistics Canada, Table 36-10-0402-01.

Manufacturing GDP and Growth of Manufacturing GDP by Province (\$B)

	\$M			%chg	AAGR	Share
	2011	2020	2021	2020-2021	2011-2021	2021
Canada	180,460	178,981	187,019	4.5%	0.4%	100.0%
Newfoundland and Labrador	788	707	840	18.8%	0.6%	0.4%
Prince Edward Island	377	611	659	7.8%	5.7%	0.4%
Nova Scotia	2,698	2,600	2,809	8.0%	0.4%	1.5%
New Brunswick	2,988	3,041	3,180	4.6%	0.6%	1.7%
Quebec	45,534	45,144	47,816	5.9%	0.5%	25.6%
Ontario	79,495	78,338	81,187	3.6%	0.2%	43.4%
Manitoba	5,991	5,803	5,976	3.0%	0.0%	3.2%
Saskatchewan	4,577	4,737	5,091	7.5%	1.1%	2.7%
Alberta	23,775	22,592	23,399	3.6%	-0.2%	12.5%
British Columbia	14,272	15,850	16,282	2.7%	1.3%	8.7%

Source: Statistics Canada, Table 36-10-0402-01.

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

				chg	%chg	AAGR
	2011	2020	2021	2020-21	2020-21	2011-21
All industries	73.3	84.4	79.0	-5.39	-6.4%	0.7%
Agriculture, forestry, fishing and hunting	59.5	100.7	73.8	-26.92	-26.7%	2.0%
Mining, quarrying, and oil and gas extraction	475.0	602.2	576.5	-25.68	-4.3%	1.8%
Utilities	205.4	223.4	236.8	13.46	6.0%	1.3%
Construction	54.8	50.1	42.6	-7.46	-14.9%	-2.3%
Manufacturing	80.9	92.1	91.4	-0.78	-0.8%	1.1%
Wholesale trade	79.3	79.2	76.2	-3.03	-3.8%	-0.4%
Retail trade	32.4	38.0	38.0	0.00	0.0%	1.4%
Transportation and warehousing	53.2	73.3	68.4	-4.93	-6.7%	2.3%
Information and cultural industries	77.4	103.3	98.4	-4.91	-4.8%	2.2%
Finance and insurance	62.5	80.5	84.3	3.80	4.7%	2.8%
Real estate and rental and leasing	149.0	147.1	148.3	1.17	0.8%	0.0%
Professional, scientific and technical services	53.3	45.5	44.9	-0.54	-1.2%	-1.5%
Admin. and support, waste mgt. and remediation	27.9	26.2	25.1	-1.04	-4.0%	-0.9%
Educational services	43.4	51.9	51.7	-0.19	-0.4%	1.6%
Health care and social assistance	37.1	37.7	36.9	-0.82	-2.2%	-0.1%
Arts, entertainment and recreation	34.6	24.1	26.8	2.71	11.3%	-2.3%
Accommodation and food services	20.2	20.2	20.1	-0.09	-0.5%	-0.1%
Other services (except public administration)	24.9	30.0	29.8	-0.22	-0.7%	1.6%

Source: Statistics Canada, Tables 36-10-0402-01 and 36-10-0489-01.

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

				chg	%chg	AAGR
	2011	2020	2021	2020-21	2020-21	2011-21
Canada	59.1	64.9	62.2	-2.75	-4.2%	0.5%
Newfoundland and Labrador	35.8	47.8	47.7	-0.05	-0.1%	2.7%
Prince Edward Island	38.0	58.5	60.7	2.21	3.8%	4.3%
Nova Scotia	39.5	48.3	46.7	-1.59	-3.3%	1.5%
New Brunswick	52.2	53.7	53.5	-0.23	-0.4%	0.2%
Quebec	55.1	58.1	56.6	-1.52	-2.6%	0.2%
Ontario	58.7	64.5	62.6	-1.95	-3.0%	0.6%
Manitoba	50.6	53.9	51.3	-2.63	-4.9%	0.1%
Saskatchewan	80.9	92.1	91.4	-0.78	-0.8%	1.1%
Alberta	86.0	113.4	101.2	-12.21	-10.8%	1.5%
British Columbia	53.7	58.3	51.8	-6.46	-11.1%	-0.3%

Source: Statistics Canada, Tables 36-10-0402-01 and 36-10-0489-01.

Manufacturing Shipments by Subsector, Saskatchewan (\$M)

				%chg	AAGR	Share
	2011	2020	2021	2020-2021	2011-2021	2021
Manufacturing	12,700.8	15,344.0	20438.0	33.2%	4.9%	100.0%
Food Manufacturing	2,644.1	5,368.6	6380.4	18.8%	9.2%	31.2%
Beverage and Tobacco	x	x	x	--	--	--
Textile Mills	x	x	x	--	--	--
Textile Product Mills	x	x	x	--	--	--
Clothing Manufacturing	x	x	x	--	--	--
Leather and Allied Products	x	x	x	--	--	--
Paper Manufacturing	x	x	x	--	--	--
Printing and Related Support	109.8	59.2	x	--	--	--
Petroleum and Coal Products	x	x	x	--	--	--
Chemical Manufacturing	1,714.5	2,142.1	2288.2	6.8%	2.9%	11.2%
Plastics and Rubber Products	x	x	x	--	--	--
Wood Products	208.2	780.0	1467.9	88.2%	21.6%	7.2%
Non-Metallic Mineral Products	184.1	x	132.4	--	-3.2%	0.6%
Primary Metal Products	x	x	x	--	--	--
Fabricated Metal Products	826.6	855.7	943.3	10.2%	1.3%	4.6%
Machinery Manufacturing	1,263.5	1,269.8	1567.3	23.4%	2.2%	7.7%
Computer and Electronic	155.7	x	x	--	--	--
Electrical Equipment	205.6	x	x	--	--	--
Transportation Equipment	218.3	x	316.0	--	3.8%	1.5%
Furniture Manufacturing	99.1	x	x	--	--	--
Miscellaneous Manufacturing	x	x	x	--	--	--

Source: Statistics Canada, Table 16-10-0048-01

x - Data are suppressed to meet the confidentiality requirements of the Statistics Act.

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

				%chg	AAGR	Share
	2011	2020	2021	2020-2021	2011-2021	2021
Canada	568,282	612,975	721,660	17.7%	2.4%	100.0%
Newfoundland and Labrador	5,463	3,960	4,123	4.1%	-2.8%	0.6%
Prince Edward Island	1,214	2,225	2,571	15.5%	7.8%	0.4%
Nova Scotia	10,631	8,774	10,029	14.3%	-0.6%	1.4%
New Brunswick	19,887	15,174	20,864	37.5%	0.5%	2.9%
Quebec	138,894	153,735	184,412	20.0%	2.9%	25.6%
Ontario	255,615	278,562	310,826	11.6%	2.0%	43.1%
Manitoba	16,153	18,210	20,791	14.2%	2.6%	2.9%
Saskatchewan	12,701	15,344	20,438	33.2%	4.9%	2.8%
Alberta	69,679	64,800	84,592	30.5%	2.0%	11.7%
British Columbia	37,998	52,118	62,944	20.8%	5.2%	8.7%

Source: Statistics Canada, Tables 16-10-0047-01 and 16-10-0048-01.

Manufacturing Employment by Subsector, Saskatchewan (000s)

				%chg	AAGR	Share
	2011	2020	2021	2020-21	2011-21	2021
Manufacturing	27.6	31.0	31.9	2.9%	1.5%	100.0%
Food Manufacturing	4.5	6.0	6.6	10.0%	3.9%	20.7%
Wood Products	1.9	1.5	1.1	-26.7%	-5.3%	3.4%
Paper Manufacturing	0.7	0.6	0.0	-100.0%	-100.0%	0.0%
Printing and Related Support	0.8	0.8	0.0	-100.0%	-100.0%	0.0%
Petroleum and Coal Products	1.4	1.8	1.7	-5.6%	2.0%	5.3%
Chemical Manufacturing	1.7	1.3	2.0	53.8%	1.6%	6.3%
Non-Metallic Mineral Products	1.1	1.2	1.0	-16.7%	-0.9%	3.1%
Primary Metal Products	1.8	2.0	1.2	-40.0%	-4.0%	3.8%
Fabricated Metal Products	3.3	3.4	2.6	-23.5%	-2.4%	8.2%
Machinery Manufacturing	5.0	4.8	6.9	43.8%	3.3%	21.6%
Computer and Electronic	0.7	0.9	1.1	22.2%	4.6%	3.4%
Transportation Equipment	1.0	1.4	1.7	21.4%	5.4%	5.3%
Furniture Manufacturing	0.7	0.8	1.5	87.5%	7.9%	4.7%
Miscellaneous Manufacturing	0.7	2.3	1.4	-39.1%	7.2%	4.4%

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	AAGR	Share
	2011	2020	2021	2020-21	2011-21	2021
Canada	1,729.5	1,672.9	1,735.1	3.7%	0.0%	100.0%
Newfoundland and Labrador	10.7	8.7	10.6	21.8%	-0.1%	0.6%
Prince Edward Island	4.8	6.7	7.1	6.0%	4.0%	0.4%
Nova Scotia	32.8	31.7	32.5	2.5%	-0.1%	1.9%
New Brunswick	31.4	29.6	29.0	-2.0%	-0.8%	1.7%
Quebec	498.0	474.0	482.5	1.8%	-0.3%	27.8%
Ontario	771.8	737.5	776.2	5.2%	0.1%	44.7%
Manitoba	60.6	60.0	63.8	6.3%	0.5%	3.7%
Saskatchewan	27.2	31.0	31.9	2.9%	1.6%	1.8%
Alberta	135.8	125.8	122.3	-2.8%	-1.0%	7.0%
British Columbia	156.5	167.9	179.3	6.8%	1.4%	10.3%

Source: Statistics Canada, Labour Force Survey (LFS)

Manufacturing Establishments by Subsector, Saskatchewan, 2021

	Total	Non Employers	Employers	Small (0-49)	Medium (50-499)	Large (500+)	Small	Medium	Large
Manufacturing	1,892	863	1029	1780	108	4	94.1%	5.7%	0.2%
Food Manufacturing	287	127	160	267	19	1	93.0%	6.6%	0.3%
Beverage and Tobacco	72	22	50	66	6	0	91.7%	8.3%	0.0%
Textile Mills	8	3	5	8	0	0	100.0%	0.0%	0.0%
Textile Product Mills	25	9	16	23	2	0	92.0%	8.0%	0.0%
Clothing Manufacturing	35	25	10	35	0	0	100.0%	0.0%	0.0%
Leather and Allied Products	14	12	2	14	0	0	100.0%	0.0%	0.0%
Wood Products	90	48	42	81	9	0	90.0%	10.0%	0.0%
Paper Manufacturing	8	4	4	7	1	0	87.5%	12.5%	0.0%
Printing and Related Support	111	42	69	111	0	0	100.0%	0.0%	0.0%
Petroleum and Coal Products	23	8	15	20	2	1	87.0%	8.7%	4.3%
Chemical Manufacturing	76	32	44	70	6	0	92.1%	7.9%	0.0%
Plastics and Rubber Products	43	11	32	39	4	0	90.7%	9.3%	0.0%
Non-Metallic Mineral Products	94	27	67	93	1	0	98.9%	1.1%	0.0%
Primary Metal Products	17	7	10	16	1	0	94.1%	5.9%	0.0%
Fabricated Metal Products	341	162	179	324	17	0	95.0%	5.0%	0.0%
Machinery Manufacturing	229	114	115	204	23	2	89.1%	10.0%	0.9%
Computer and Electronic	26	14	12	23	3	0	88.5%	11.5%	0.0%
Electrical Equipment	25	10	15	22	3	0	88.0%	12.0%	0.0%
Transportation Equipment	43	13	30	35	8	0	81.4%	18.6%	0.0%
Furniture Manufacturing	109	53	56	108	1	0	99.1%	0.9%	0.0%
Miscellaneous Manufacturing	216	120	96	214	2	0	99.1%	0.9%	0.0%

Source: Statistics Canada Tables 33-10-0105-01 and 33-10-0106-01, Business Registry

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

	2011	2020	2021	%chg 2020-2021	AAGR 2011-2021	Share 2020
Manufacturing	5013.6	5401.6	7649.0	41.6%	4.3%	100.0%
Food Manufacturing	2339.7	3159.7	4254.6	34.7%	6.2%	55.6%
Beverage and Tobacco	26.9	19.2	9.5	-50.7%	-9.9%	0.1%
Textile Mills	0.1	0.2	0.2	38.0%	14.1%	0.0%
Textile Product Mills	3.8	0.7	0.8	17.0%	-14.4%	0.0%
Clothing Manufacturing	4.4	2.7	1.7	-35.3%	-8.9%	0.0%
Leather and Allied Products	0.2	0.1	0.2	77.0%	-2.1%	0.0%
Wood Products	72.2	439.0	873.0	98.8%	28.3%	11.4%
Paper Manufacturing	198.7	240.4	219.9	-8.5%	1.0%	2.9%
Printing and Related Support	0.7	0.2	0.4	90.1%	-4.4%	0.0%
Petroleum and Coal Products	264.1	262.4	435.6	66.0%	5.1%	5.7%
Chemical Manufacturing	1019.2	211.2	307.8	45.7%	-11.3%	4.0%
Plastics and Rubber Products	25.9	46.2	64.7	39.8%	9.6%	0.8%
Non-Metallic Mineral Products	4.5	6.7	9.5	41.7%	7.8%	0.1%
Primary Metal Products	319.5	127.2	413.6	225.1%	2.6%	5.4%
Fabricated Metal Products	29.0	28.6	34.2	19.4%	1.7%	0.4%
Machinery Manufacturing	522.3	614.9	736.3	19.7%	3.5%	9.6%
Computer and Electronic	79.3	89.3	110.9	24.2%	3.4%	1.4%
Electrical Equipment	19.5	14.3	17.8	24.9%	-0.9%	0.2%
Transportation Equipment	67.3	122.6	141.7	15.6%	7.7%	1.9%
Furniture Manufacturing	11.0	4.5	7.7	70.0%	-3.6%	0.1%
Miscellaneous Manufacturing	5.3	11.4	8.9	-22.1%	5.3%	0.1%

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

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

	2011	2020	2021	%chg 2020-2021	AAGR 2011-2021	Share 2021
Canada	279,319	335,539	387,459	15.5%	3.3%	100.0%
Newfoundland and Labrador	3,390	2,386	2,679	12.3%	-2.3%	0.7%
Prince Edward Island	490	1,121	1,298	15.8%	10.2%	0.3%
Nova Scotia	3,397	3,857	4,460	15.6%	2.8%	1.2%
New Brunswick	13,311	9,070	13,411	47.9%	0.1%	3.5%
Quebec	56,624	74,177	86,246	16.3%	4.3%	22.3%
Ontario	147,169	175,626	190,786	8.6%	2.6%	49.2%
Manitoba	7,044	10,839	12,007	10.8%	5.5%	3.1%
Saskatchewan	5,014	5,402	7,649	41.6%	4.3%	2.0%
Alberta	24,133	28,019	37,123	32.5%	4.4%	9.6%
British Columbia	18,734	25,034	31,845	27.2%	5.4%	8.2%

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

Manufacturing Average Weekly Earnings by Province (\$)

	2011	2020	2021	%chg 2020-21	AAGR 2011-21
Canada	\$984	\$1,156	\$1,189	2.9%	1.9%
Newfoundland and Labrador	\$830	\$1,180	\$1,207	2.2%	3.8%
Prince Edward Island	\$810	\$1,090	\$1,032	-5.3%	2.5%
Nova Scotia	\$886	\$1,006	\$1,063	5.6%	1.8%
New Brunswick	\$862	\$1,042	\$1,063	2.0%	2.1%
Quebec	\$932	\$1,116	\$1,154	3.5%	2.2%
Ontario	\$1,006	\$1,183	\$1,205	1.8%	1.8%
Manitoba	\$907	\$1,091	\$1,120	2.6%	2.1%
Saskatchewan	\$1,006	\$1,191	\$1,180	-0.9%	1.6%
Alberta	\$1,162	\$1,265	\$1,312	3.8%	1.2%
British Columbia	\$961	\$1,141	\$1,209	6.0%	2.3%

Source: Statistics Canada, Table 14-10-0204-01.

Manufacturing Capital Investment by Province (\$M)

	2011	2020	2021	%chg 2020-2021	AAGR 2011-	Share 2021
Canada	15,330.1	20,081.9	21,791.6	8.5%	3.6%	100.0%
Newfoundland and Labrador	1,057.5	152.5	x	--	--	--
Prince Edward Island	44.7	88.9	86.1	-3.1%	6.8%	0.4%
Nova Scotia	212.5	280.4	272.1	-3.0%	2.5%	1.2%
New Brunswick	503.2	546.8	589.6	7.8%	1.6%	2.7%
Quebec	3,996.8	4,649.5	5,266.1	13.3%	2.8%	24.2%
Ontario	5,198.7	8,440.7	x	--	--	--
Manitoba	422.9	900.2	768.7	-14.6%	6.2%	3.5%
Saskatchewan	1,107.6	341.9	465.7	36.2%	-8.3%	2.1%
Alberta	1,641.9	2,995.5	3,459.1	15.5%	7.7%	15.9%
British Columbia	1,140.3	1,683.7	1,559.3	-7.4%	3.2%	7.2%

Source: Statistics Canada, Table 34-10-0035-01.

Appendix B: Defining the Manufacturing Sector

This sector includes establishments primarily engaged in the chemical, mechanical or physical transformation of materials or substances into new products. Related activities, such as the assembly of the component parts of manufactured goods; the blending of materials; and the finishing of manufactured products by dyeing, heat-treating, plating, and similar operations are also treated as manufacturing activities.

Manufacturing establishments are known by a variety of trade designations, such as plants, factories, or mills. Manufacturing establishments may own the materials which they transform, or they may transform materials owned by other establishments. Manufacturing may take place in factories or in workers' homes, using either machinery or hand tools. Certain activities involving the transformation of goods are classified in other sectors. Some examples are post-harvest activities of agricultural establishments such as crop drying; logging; the beneficiating of mineral ores; the production of structures by construction establishments; and various activities conducted by retailers, such as meat cutting and the assembly of products such as bicycles and computers.

The 2017 NAICS industry classification used in this document identifies 21 industries within the manufacturing sector. More details on specific NAICS definitions and information on sub-industries within the more broadly defined manufacturing industrial categories are available on the Statistics Canada's website.

Appendix C: Industries in the Manufacturing Sector

The following table lists the 21 broadly defined industrial groups within the manufacturing sector as identified by NAICS 2017.

NAICS	Industry Description
311	Food Manufacturing
312	Beverage and Tobacco
313	Textile Mills
314	Textile Product Mills
315	Clothing Manufacturing
316	Leather and Allied Products
321	Wood Products
322	Paper Manufacturing
323	Printing and Related Support
324	Petroleum and Coal Products
325	Chemical Manufacturing
326	Plastics and Rubber Products
327	Non-Metallic Mineral Products
331	Primary Metal Products
332	Fabricated Metal Products
333	Machinery Manufacturing
334	Computer and Electronic
335	Electrical Equipment
336	Transportation Equipment
337	Furniture Manufacturing
339	Miscellaneous Manufacturing

Appendix D: Glossary of Terms

Here are the definitions of some of the special industry groupings used in this document:

Goods sector

The goods sector includes the following industries, which produce goods that are either consumed by individuals or used as inputs by other industries:

Agriculture, forestry, fishing, and hunting
 Crop & animal production
 Forestry
 Fishing, hunting, and trapping
 Support activities for agriculture and forestry
Mining and oil and gas extraction
 Mining
 Oil and gas extraction
 Support activities
Construction
Utilities (gas and electricity distribution)
Manufacturing

Service sector

The service sector includes the following industries:

Wholesale trade
Retail trade
Transportation and warehousing
Information and cultural services
Finance, insurance, real estate & leasing
Professional, scientific & technical services
Administration & support
Education
Healthcare & social assistance
Arts, entertainment & recreation
Accommodation & food services
Other services
Public administration

Sources of Data

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

Statistics Canada, Tables 16-10-0047-01, 16-10-0048-01 – Monthly Survey of Manufacturing.

Statistics Canada, Tables 36-10-0402-01 – Gross Domestic Product (GDP) at basic prices.

Statistics Canada, Table 34-10-0035-01 – Capital and Repair Expenditures Survey.

Statistics Canada, Table 14-10-0204-01 – Average Weekly Earnings by Industry.

Statistics Canada, Table 36-10-0489-01 – Labour Productivity by Business Sector.

Statistics Canada, Tables 16-10-0117-01– Principal Statistics for manufacturing industries.

Statistics Canada Tables 33-10-0105-01, 33-10-0106-01 – Canadian Business Counts

Statistics Canada, Industry Canada, Trade Data Online (Industry Canada website).

Statistics Canada, Business Register.

Statistics Canada, Labour Force Survey (LFS).

Ministry of Trade and Export Development

The Ministry of Trade and Export Development advances economic growth to generate wealth and opportunity in Saskatchewan. The Economic Research and Analytics Unit operates within the Strategic Policy and Competitiveness Division to provide the government with statistical information and analytical services to support informed decision-making and policy development.