

# Overview of the Manufacturing Sector in Saskatchewan 2023



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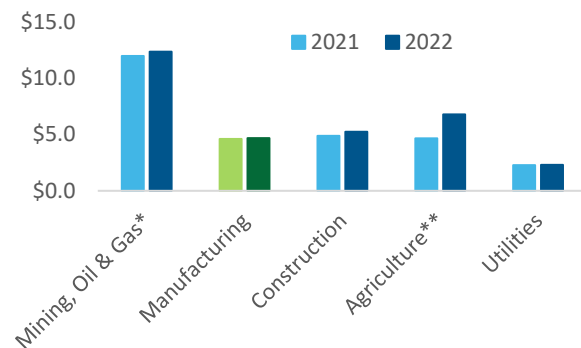
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## Key Facts

Saskatchewan's *2023 Overview of the Manufacturing Sector* provides an update on Saskatchewan's manufacturing industry, reporting on indicators such as Gross Domestic Product (GDP), capital investment, sales, employment, business counts, exports, and earnings.

Manufacturing continues to be an important sector for economic growth and diversification in Saskatchewan. The manufacturing sector contributed \$4.7 billion to Saskatchewan's total 2022 real GDP of \$76.7 billion. This represents about 6.1% of Saskatchewan's GDP and 2.2% of the national total<sup>1</sup> manufacturing GDP (\$213.7 billion).

### Real GDP by Industry (\$ Billions), 2021-2022



Source: Statistics Canada

Employment in the manufacturing sector increased by 0.9% in 2022. This is partly due to growth in global and domestic demand. At \$81.5 per hour worked, Saskatchewan ranked second highest in manufacturing productivity among the provinces in 2022.

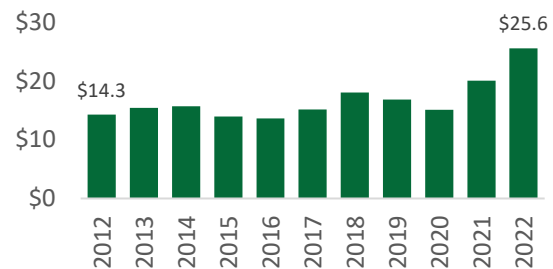
Saskatchewan had 1,972 manufacturing establishments in 2022 and 88.3% of them were small businesses (0-49 employees). The fabricated metal products subsector had the highest number of manufacturing establishments (353), followed by food

<sup>1</sup> The combined total manufacturing GDP for all provinces and territories from Statistics Canada table 36-10-0402-01.

manufacturing (302) and machinery manufacturing (215).

Saskatchewan's manufacturing shipments were \$25.6 billion in 2022, with food manufacturing contributing over 28% of the total (\$7.2 billion). Between 2012 and 2022, Saskatchewan's manufacturing shipments grew at an average rate of 6.0% a year, the second highest growth rate among the provinces.

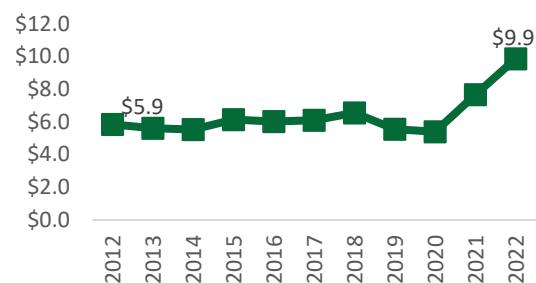
### Total Saskatchewan Manufacturing Shipments (\$ Billions), 2012-2022



Source: Statistics Canada

Saskatchewan's international exports of manufactured goods were a record \$9.9 billion in 2022 and made up 18.8% of Saskatchewan's total international merchandise exports.

### Saskatchewan International Manufacturing Exports (\$ Billions), 2012-2022



Source: Statistics Canada

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

## Introduction

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This report provides updated statistical information on Saskatchewan's manufacturing sector using the most current available data – 2022. The report provides an update of Saskatchewan's manufacturing sector and its performance from 2012 to 2022. 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) 2022 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 sector 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 2022, 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 2022, were obtained from the Business Register<sup>2</sup> and Trade Data Online.

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<sup>2</sup> The Business Register provides data on the number of business establishments for all industries.

# 1. Manufacturing Real GDP

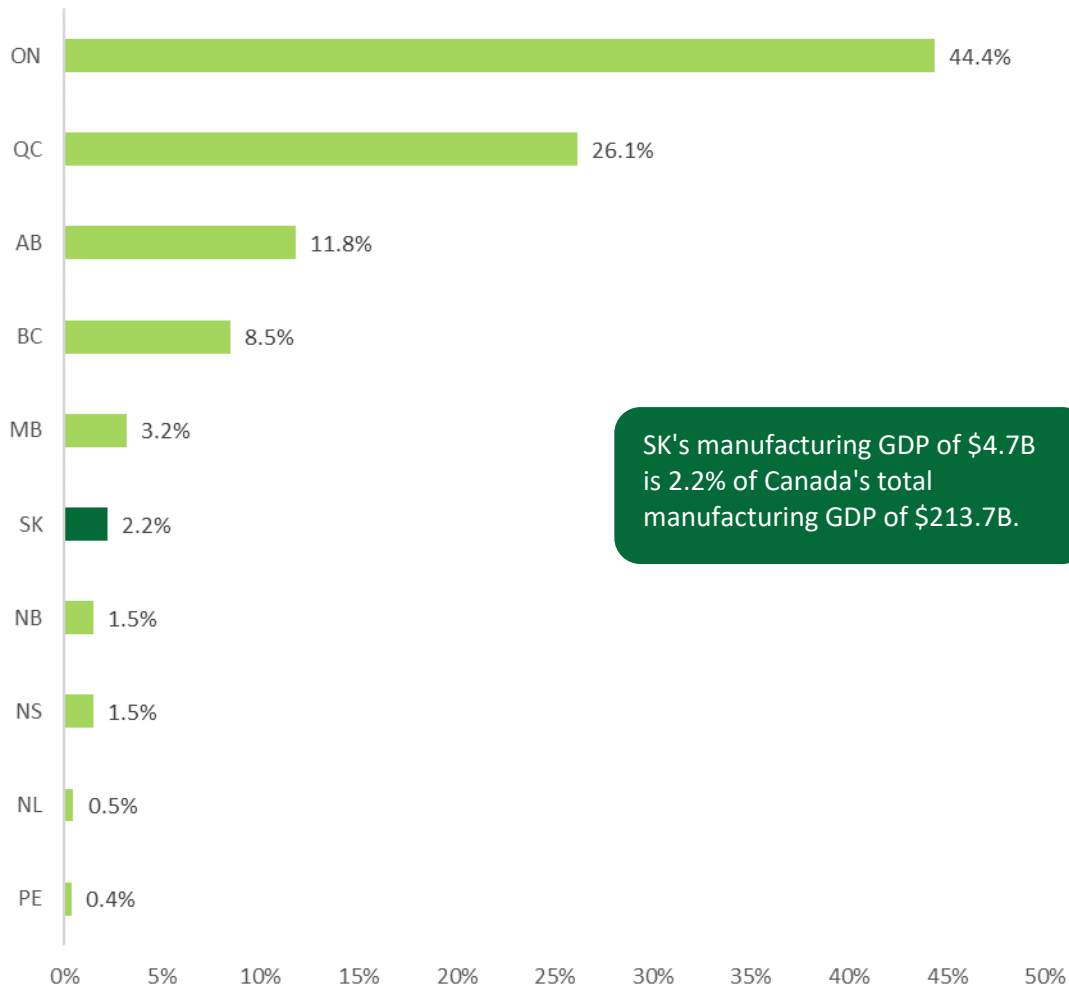
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## GDP Contribution

Manufacturing GDP (also known as manufacturing value-added) measures net output<sup>3</sup>. Manufacturing GDP provides an indication of the degree of transformation of goods that occurs within the manufacturing industry. The national total manufacturing GDP (\$213.7 billion) contributed 9.9% to total GDP (\$2,169.3 billion) in 2022. Overall, 70.5% of Canada's manufacturing GDP was contributed by Ontario and Quebec, and 25.7% was contributed by the western provinces.

Saskatchewan's manufacturing GDP of \$4.7 billion accounted for 2.2% of Canada's manufacturing GDP in 2022. Saskatchewan's manufacturing GDP contributed 6.1% to the province's total real GDP of \$76.7 billion. Compared to Saskatchewan's other goods-producing sectors, manufacturing's share of total GDP ranked behind the mining, quarrying, and oil and gas sector (16.1% of real GDP), the agriculture sector (8.8%), and the construction sector (6.8%). The utilities sector (3.0%) ranked lower.

**Figure 1: Provincial Share of National Manufacturing Real GDP, 2022**



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

<sup>3</sup> Net output is gross output less purchased inputs that have been embodied in the value of the manufactured products.

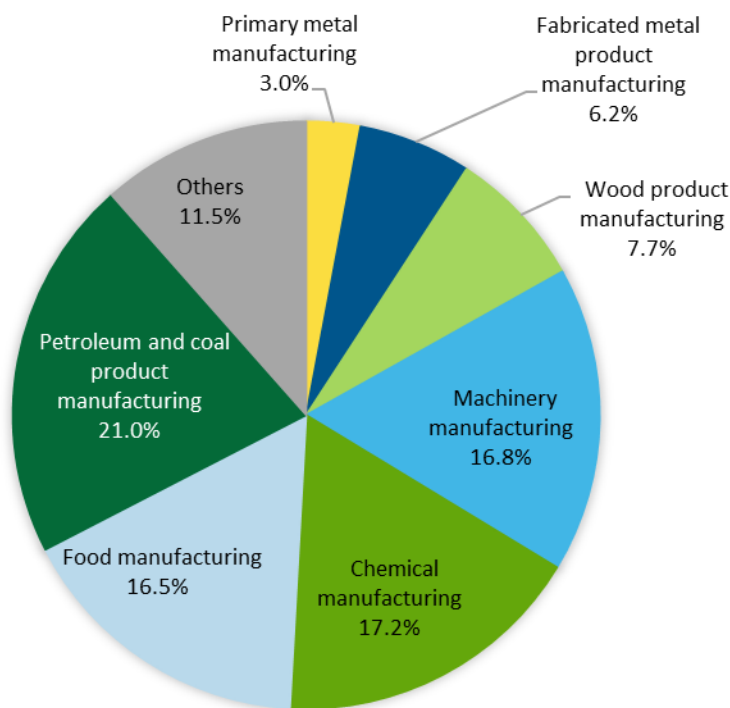
Saskatchewan's 2022 manufacturing GDP is 6.9% above the 2012 value of \$4.4 billion. However, the 2022 manufacturing sector share (6.1%) of total provincial GDP was 0.3 percentage points lower than the 2012 share of 6.4%. From 2012 to 2022, Saskatchewan's manufacturing sector had an annual average growth rate (AAGR) of 0.7%, sixth highest among the provinces. In comparison, Saskatchewan's total real GDP grew, on average, by 1.1% per year in the same period. The national annual AAGR of manufacturing GDP from 2012 to 2022 was 1.9%.

*GDP by manufacturing subsector and other industries*

Saskatchewan's manufacturing GDP increased 1.6% from \$4.4 billion in 2021 to \$4.7 billion in 2022, ranking seventh among the provinces. Between 2021 and 2022, manufacturing subsectors with GDP greater than \$200 million that contributed to this growth included machinery manufacturing (+43.5%), primary metal manufacturing (+27.5%) and food manufacturing (+0.4%). Subsectors with GDP greater than \$200 million experiencing decreases from 2021 to 2022 include wood product manufacturing (-8.5%), chemical manufacturing (-7.3%), and petroleum and coal product manufacturing (-3.5%).

In 2022, six manufacturing subsectors contributed at least 4% to total manufacturing GDP: petroleum and coal product manufacturing (21.0%), food manufacturing (16.5%), chemical manufacturing (17.2%), machinery manufacturing (16.8%), wood product manufacturing (7.7%), and fabricated metal product manufacturing (6.2%).

**Figure 2: Subsector Share of Saskatchewan Manufacturing Real GDP, 2022 (% of Total)**



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



In 2022, eight Saskatchewan sectors had higher GDP than manufacturing: mining and petroleum (\$12.3 billion, accounting for 16.1% of total provincial GDP), finance, insurance and real estate (\$11.8 billion, 15.3%), education and healthcare (\$9.5 billion, 12.4%), wholesale and retail trade (\$8.2 billion, 10.7%), agriculture, forestry, fishing and hunting (\$6.8 billion, 8.8%), transportation, warehousing & utilities (\$5.6 billion, 7.3%), construction (\$5.2 billion, 6.8%) and government services (\$5.0 billion, 6.5%).

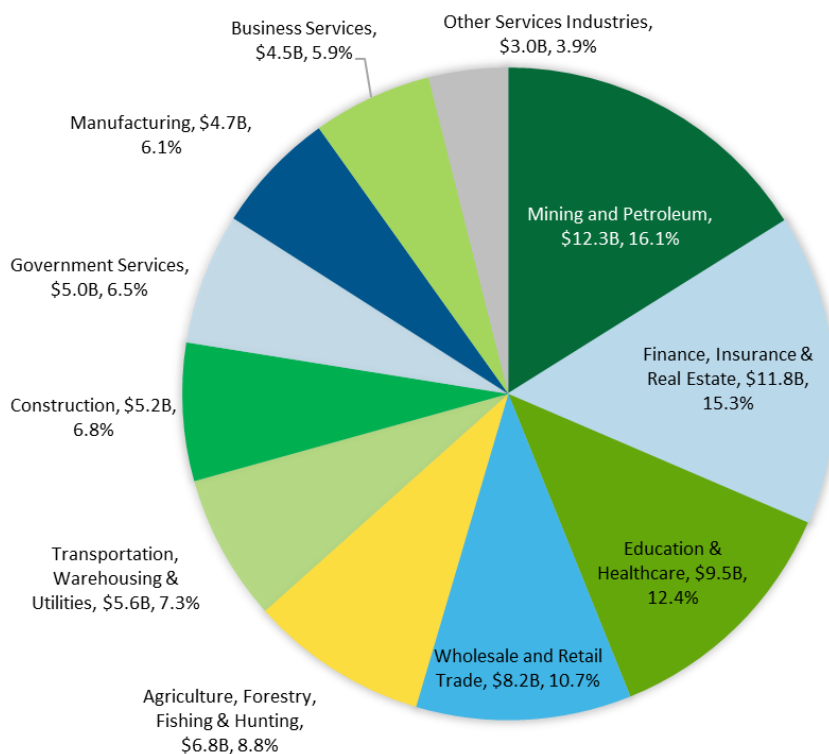
**Table 1: Saskatchewan Real GDP (\$ millions), by industry 2021-2022**

GDP Industry Breakdown	2021	2022	%chg 2021-2022	2022 Share	2022 Rank
All Industries	\$72.3B	\$76.7B	6.0%	100.0%	
Mining and Petroleum	\$12.0B	\$12.3B	3.2%	16.1%	1
Finance, Insurance & Real Estate	\$11.5B	\$11.8B	2.0%	15.3%	2
Education & Healthcare	\$9.4B	\$9.5B	1.6%	12.4%	3
Wholesale and Retail Trade	\$8.2B	\$8.2B	-0.4%	10.7%	4
Agriculture, Forestry, Fishing & Hunting	\$4.7B	\$6.8B	45.6%	8.8%	5
Transportation, Warehousing & Utilities	\$5.5B	\$5.6B	2.2%	7.3%	6
Construction	\$4.9B	\$5.2B	7.4%	6.8%	7
Government Services	\$4.9B	\$5.0B	1.1%	6.5%	8
<b>Manufacturing</b>	<b>\$4.6B</b>	<b>\$4.7B</b>	<b>1.6%</b>	<b>6.1%</b>	<b>9</b>
Business Services	\$4.3B	\$4.5B	5.2%	5.9%	10
Other Services Industries	\$2.4B	\$3.0B	27.6%	3.9%	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 2022**



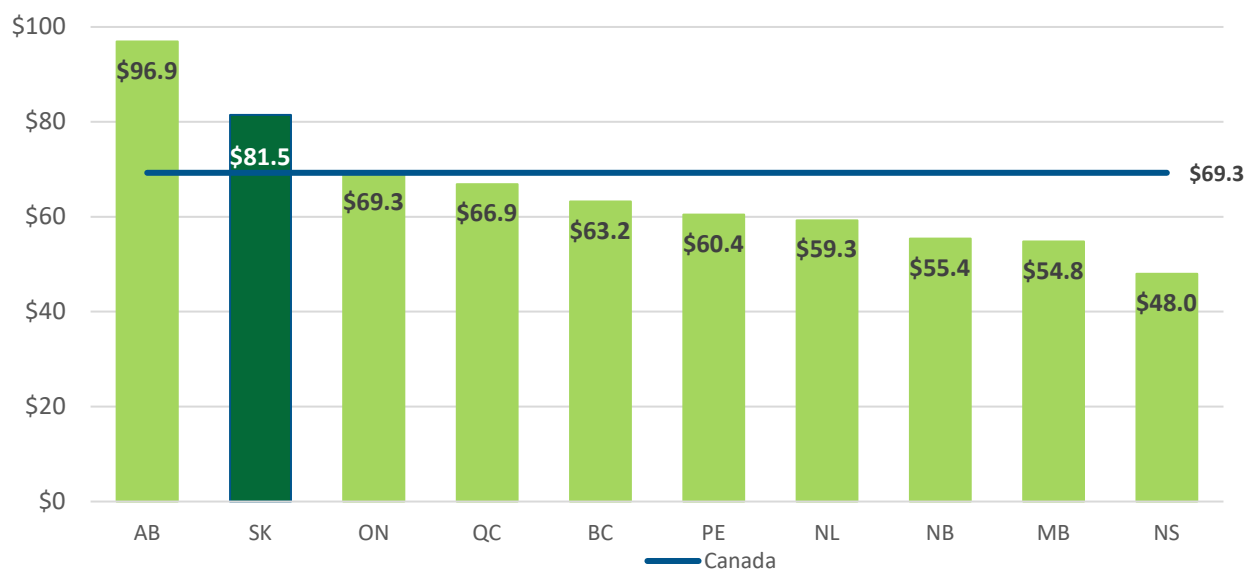
**Source:** Statistics Canada Table 36-10-0402-01

## 2. Labour Productivity

### Manufacturing Productivity

Manufacturing GDP per hour worked is one measure of labour productivity in the manufacturing sector. It measures the extent to which labour is efficiently used in the sector. In 2022, Saskatchewan's manufacturing GDP per hour worked was \$81.5. This is \$12.2 above the national average of \$69.3. Saskatchewan's 2022 manufacturing productivity ranked second among the provinces behind Alberta (\$96.9).

**Figure 4: Productivity in the Manufacturing Sector by Province (GDP per hour worked), 2022**



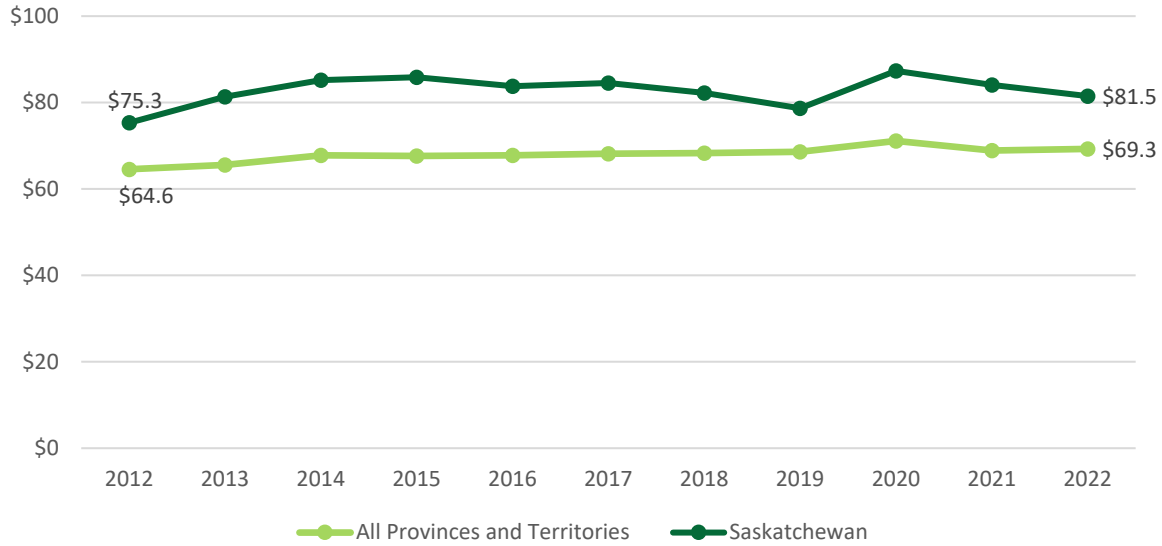
Source: Statistics Canada, Tables 36-10-0489-01 and 36-10-0402-01

Saskatchewan's manufacturing productivity decreased by 3.1% from \$84.1 per hour worked in 2021 to \$81.5 in 2022, ranking seventh among the provinces and below the national manufacturing productivity increase of 0.5%. British Columbia experienced the highest growth in manufacturing productivity from 2021 to 2022 (9.4%).

From 2012 to 2022, Saskatchewan's manufacturing GDP per hour worked increased at an average rate of 0.8% per year, ranking fourth among the provinces. Saskatchewan's manufacturing GDP per hour worked has consistently been above the national level since 2012.



**Figure 5: Saskatchewan and Canada's Productivity (GDP per hour worked), 2012-2022**

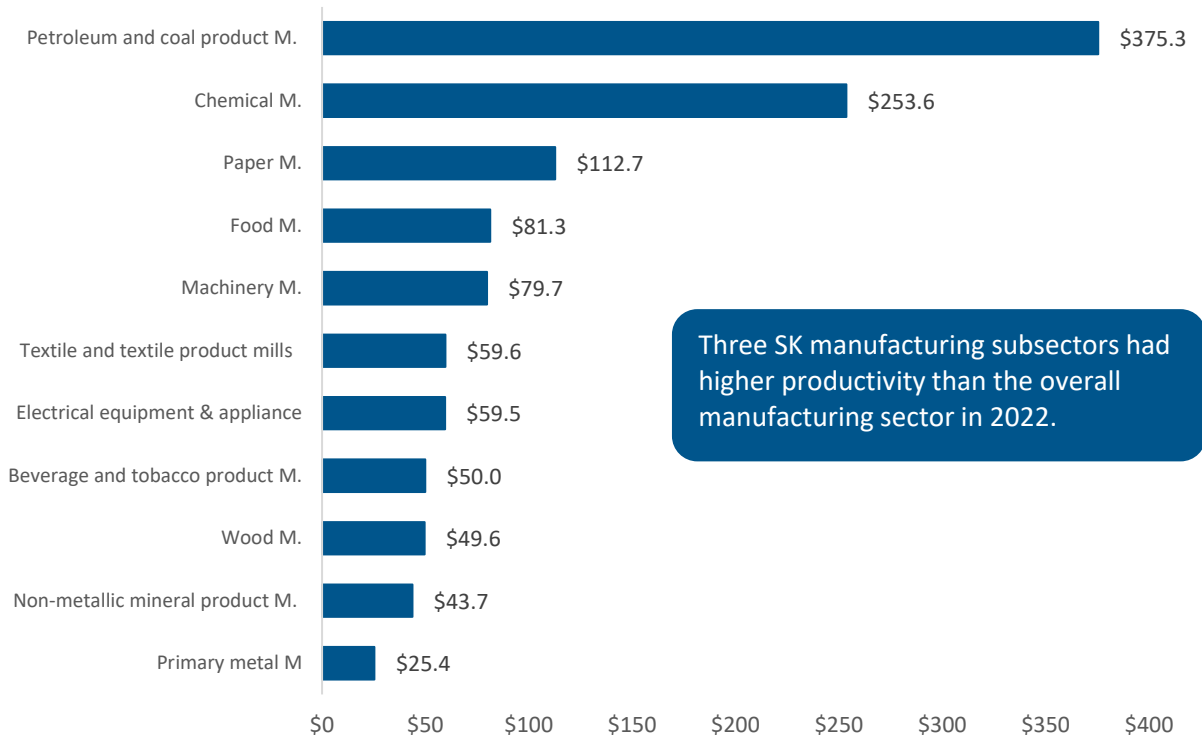


Source: Statistics Canada, Table 36-10-0489-01 and 36-10-0402-01

*Productivity by manufacturing subsectors and other industries*

In 2022, three of the nineteen manufacturing subsectors had higher labour productivity than the average provincial manufacturing productivity of \$81.5. These subsectors are petroleum and coal product manufacturing (\$375.3), chemical manufacturing (\$253.6), and paper manufacturing (\$112.7).

**Figure 6: Saskatchewan Manufacturing Productivity by Subsector, 2022 (GDP per hour worked)**

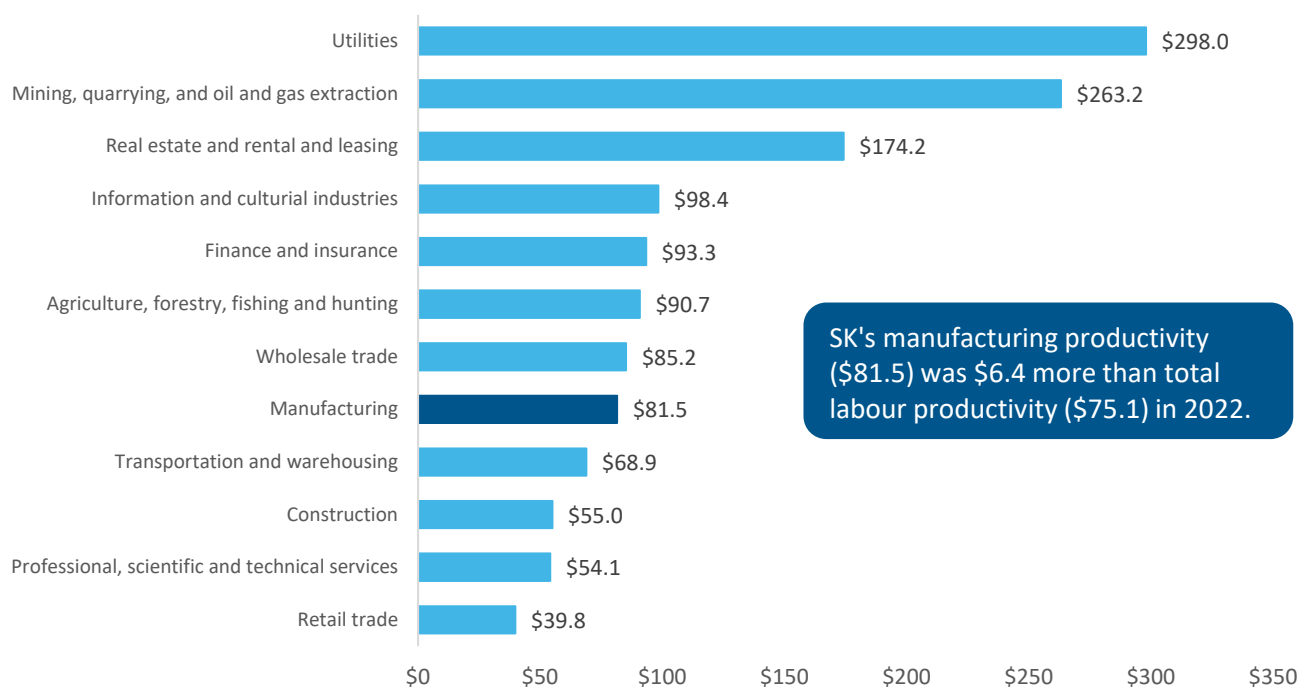


Source: Statistics Canada, Table 36-10-0402-01 and 36-10-0480-01

Between 2012 and 2022, the manufacturing subsectors with highest average annual growth rate (AAGR) in productivity included: Petroleum and coal manufacturing (4.1%), Machinery manufacturing (3.5%), Plastics and rubber products manufacturing (2.5%) and Beverage and tobacco product manufacturing (2.2%).

In 2022, eight Saskatchewan sectors had higher labour productivity than the overall manufacturing sector: utilities (\$298.0), mining, quarrying, and oil and gas extraction (\$263.2), real estate and rental and leasing<sup>4</sup> (\$174.2), information and cultural industries (\$98.4), finance and insurance (\$93.3), agriculture, forestry, fishing, and hunting (\$90.7) and wholesale trade (\$85.2). Between 2012 and 2022, manufacturing productivity achieved a peak of \$87.3 in 2020.

**Figure 7: Saskatchewan Productivity by Sector, 2022 (GDP per hour worked)**



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

<sup>4</sup> Productivity in this sector is calculated by excluding owner occupied dwellings from GDP.

### 3. Shipments

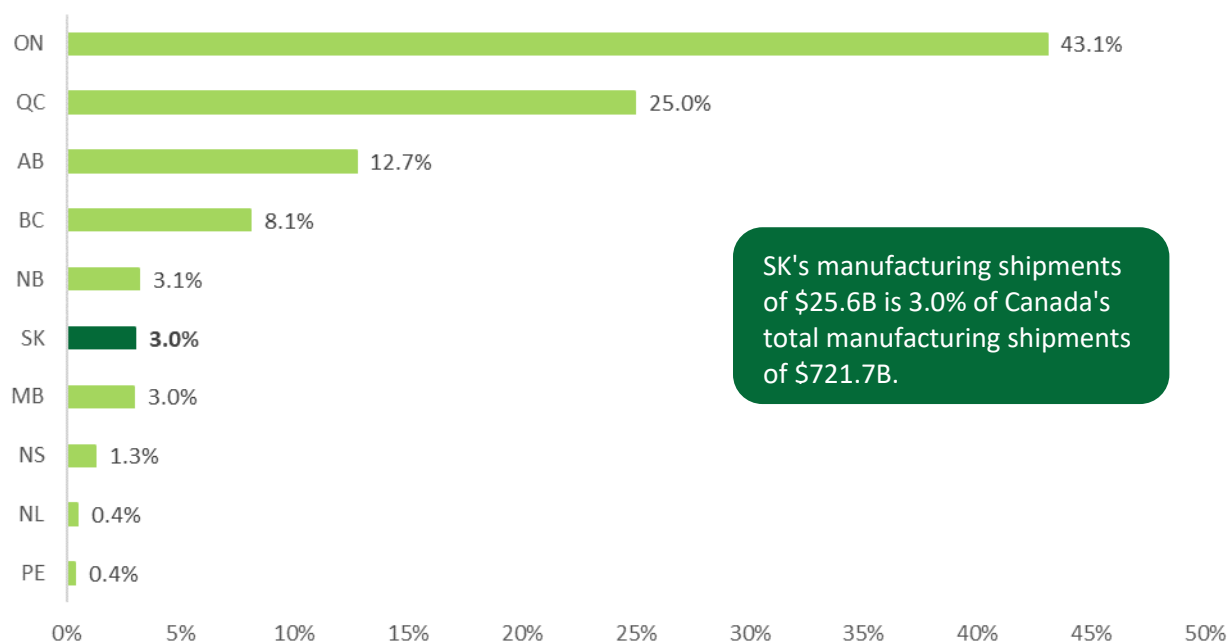
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#### Manufacturing Sales

Canada's manufacturing shipments<sup>5</sup> were worth \$853.6 billion in 2022. At \$25.6 billion, Saskatchewan's manufacturing shipments accounted for 3.0% the Canadian total in 2022. Saskatchewan had the sixth highest share of Canada's overall manufacturing shipments in 2022. Ontario had the highest share of manufacturing shipments in 2022 at 43.1% (\$367.5 billion).

In Western Canada, Alberta had the largest share of Canada's 2022 manufacturing shipments at 12.7% (\$108.5 billion), compared to British Columbia's share of 8.1% (\$69.0 billion) and Manitoba's share of 2.96% (\$25.3 billion).

**Figure 8: Provincial Share of National Manufacturing Shipments, 2022**



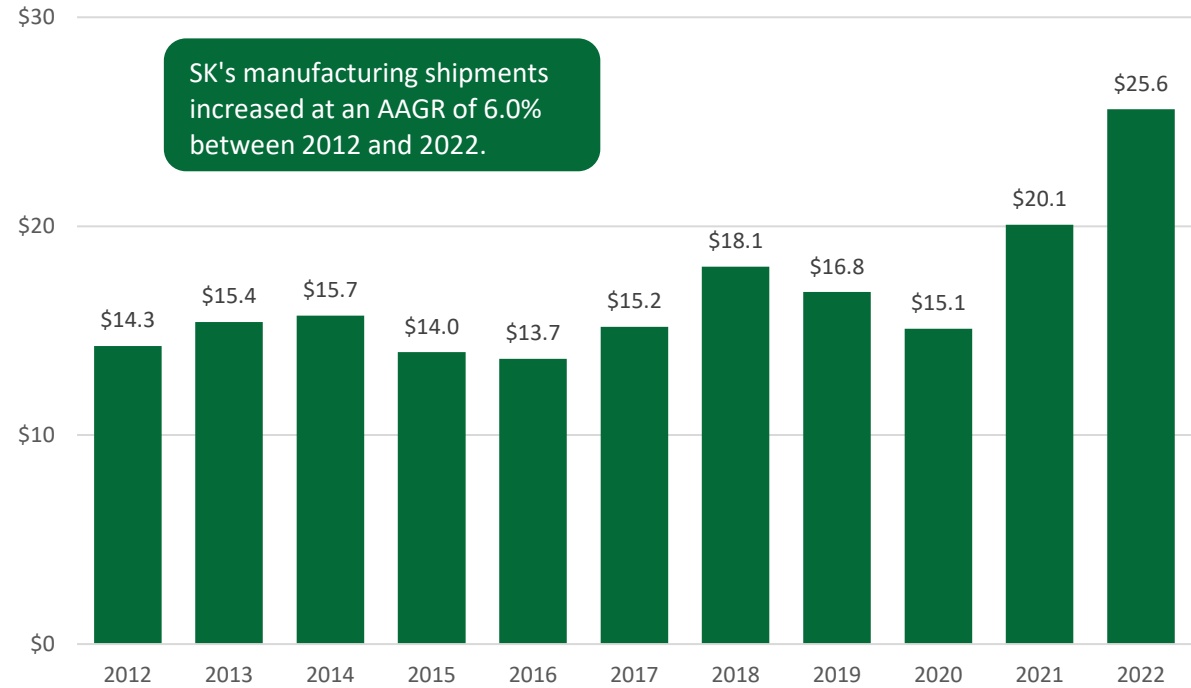
Saskatchewan's manufacturing shipments increased by 27.5% from \$20.1 billion in 2021 to \$25.6 billion in 2022, ranking second among the provinces. Only New Brunswick (28.6%) had a higher increase in 2022 compared to 2021.

Food manufacturing was Saskatchewan's largest subsector for manufacturing shipments in 2022, with shipments of \$7.2 billion (28.1% of total manufacturing shipments). The chemical manufacturing subsector recorded shipments of \$3.5 billion (13.6%), the machinery manufacturing subsector recorded shipments of \$2.4 billion (9.5%), while the wood manufacturing subsector recorded shipments totaling \$1.2 billion (4.7%). Data for other major subsectors was not reported, as values were suppressed to meet confidentiality requirements.

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<sup>5</sup> 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 (\$ Billions), 2012-2022**



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

The value of Saskatchewan’s manufacturing shipments increased from \$14.3 billion in 2012 to \$25.6 billion in 2022, with an average annual growth rate of 6.0%, second highest among the provinces. This growth rate is above the national average of 3.8%, Alberta’s rate of 4.3%, and Manitoba’s rate of 4.5%. Shipments from four major manufacturing subsectors grew during this period with average annual growth rates of 12.8% in wood product manufacturing, 8.3% in food manufacturing, 6.0% in chemical manufacturing, and 4.3% in machinery manufacturing.

## 4. Employment

### Manufacturing employment

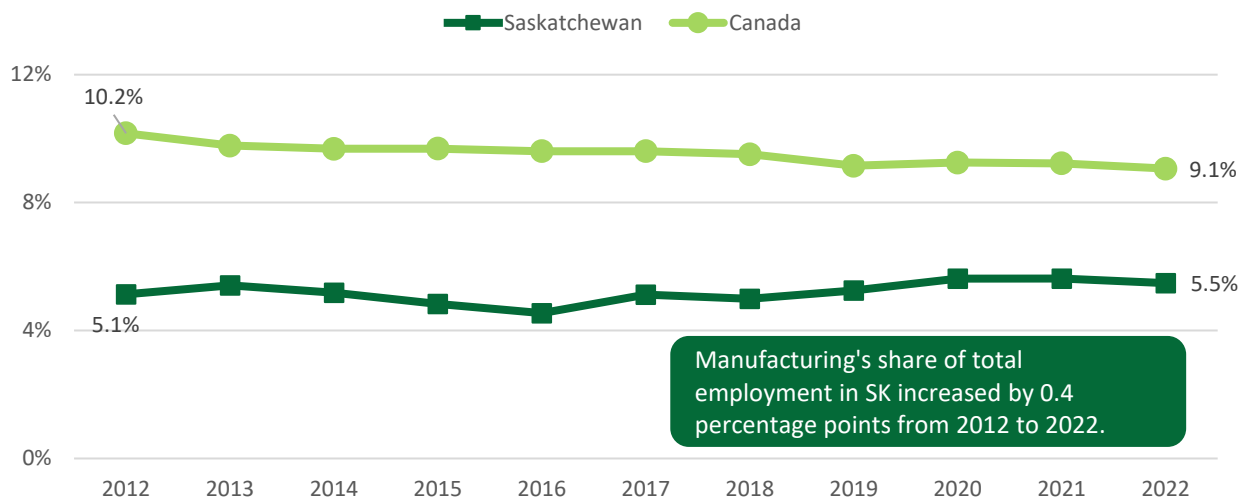
The number of employees in Saskatchewan's manufacturing sector was 31,900<sup>6</sup> in 2022, representing 1.79% of Canada's total manufacturing employment. In Western Canada, British Columbia employed 184,100 people in the manufacturing industry (10.3% of total Canadian manufacturing employment), Alberta employed 130,500 people (7.3%), and Manitoba 68,100 people (3.8%). Together, the four western provinces had 414,600 manufacturing employees in 2022, accounting for 23.2% of national manufacturing employment. In 2022, the number of payroll employees in the manufacturing industry in Saskatchewan was 25,924<sup>7</sup>, representing 1.7% of total Canadian manufacturing payroll employees (1,562,397).

Saskatchewan's manufacturing employment increased by 0.9% from 31,600 in 2021 to 31,900 in 2022, ranking seventh among the provinces. During the same period, Prince Edward Island had the highest growth among the provinces for manufacturing employment (19.7%).

Employment in Canada's manufacturing sector increased slightly (0.5%) from 1.78 billion people in 2012 to 1.79 billion people in 2022. In comparison, Saskatchewan manufacturing employment increased by 13.1% between 2012 and 2022 (from 28,200 to 31,900) at an average growth rate of 1.2% per year, ranking second among the provinces.

In 2022, the manufacturing sector's share of total employment in Saskatchewan was 5.5%. The manufacturing sector's share of Saskatchewan's workforce averaged 5.2% from 2012 to 2022. Québec had the highest average share over this period (11.8%), followed by Ontario (10.9%). In the west, Manitoba had the highest share (9.9%), followed by British Columbia (7.0%) and Alberta (5.5%). The national average was 9.5%.

**Figure 10: Saskatchewan Manufacturing Share of Total Employment, 2012-2022**



Source: Statistics Canada, Labor Force Survey.

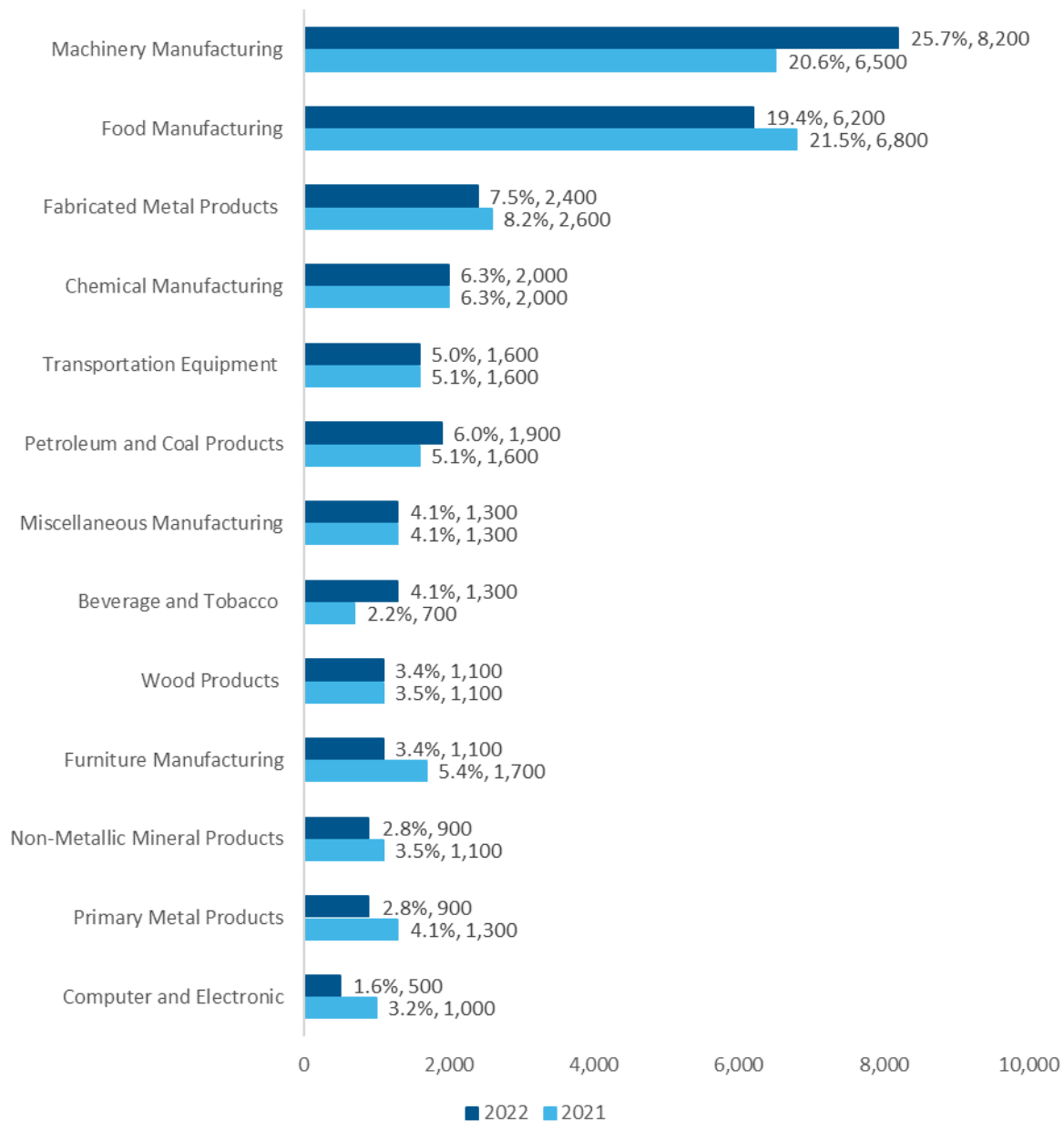
<sup>6</sup> Data is from the Labour force survey (LFS) which provides the first timely picture of overall labour market conditions, with total employment, unemployment and unemployment rate, as well as information on which groups of Canadians are most affected by changes in the labour market.

<sup>7</sup> 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

In 2022, machinery manufacturing and food manufacturing were the largest employers among the subsectors, with 8,200 and 6,200 employees, respectively. Between 2021 and 2022, employment in the machinery manufacturing subsector increased by 26.2% (1,700 employees) and accounted for 25.7% of total manufacturing employment. Employment in the food manufacturing subsector decreased by 8.8% (600 employees) and accounted for 19.4% of total manufacturing employment. Together, these subsectors accounted for 45.5% of manufacturing employment in 2022, an increase of 3.0 percentage points from 2021 (42.1%).

**Figure 11: Share of Saskatchewan Manufacturing Employment by Subsector, 2021-2022**



Source: Statistics Canada, Labor Force Survey.



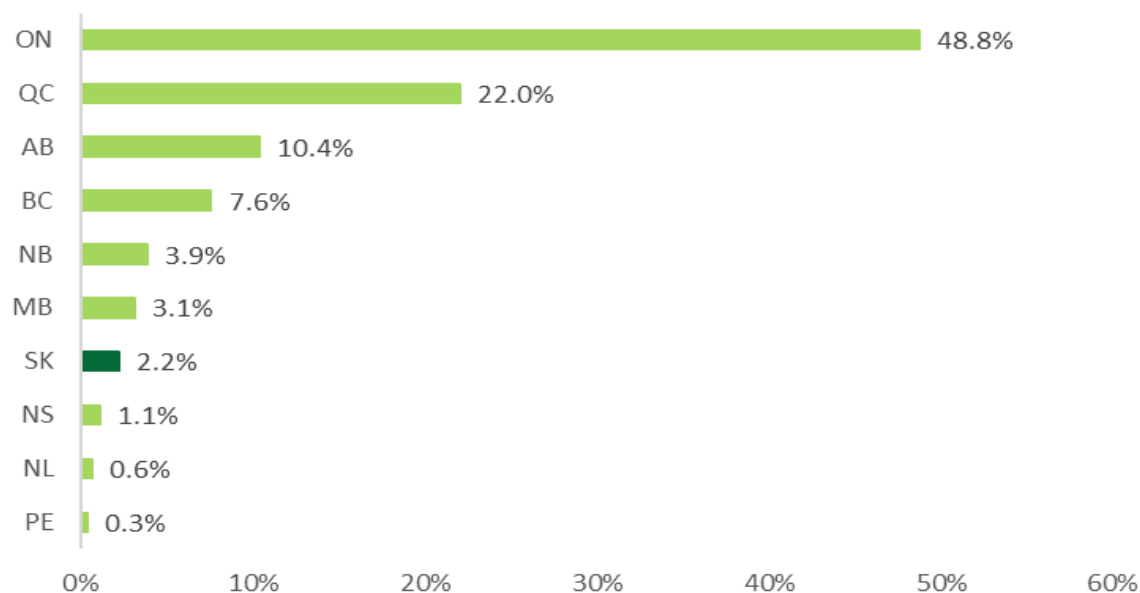
## 5. International Exports

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### Merchandise exports

Manufacturing exports reached a record high of \$9.9 billion in 2022, accounting for 18.8% of the province's total exports of goods in 2022. Saskatchewan accounted for 2.2% of Canada's total manufacturing exports in 2022, seventh highest among the provinces.

**Figure 12: Share of National Manufacturing Exports (International) by Province, 2022**

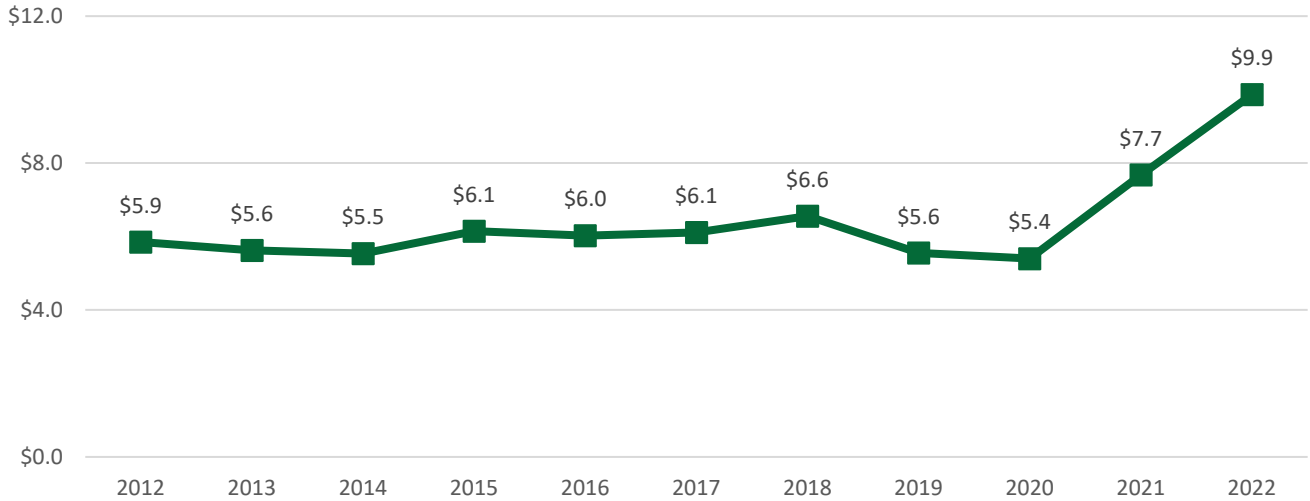


Source: Statistics Canada, Innovation, Science and Economic Development (ISED) Canada, Trade Data Online.

Saskatchewan's manufacturing exports increased 28.5% in 2022 compared to 2021, ranking second among the provinces. From 2021 to 2022, the mining and oil and gas extraction exports increased 85.5%, while agriculture, forestry, fishing and hunting exports decreased 3.1% within the period. In 2022, out of the three main Saskatchewan export industries, manufacturing had the smallest share (18.8%) of total exports behind mining and oil and gas extraction (56.6%) and agriculture, forestry, fishing, and hunting (24.5%).

Between 2012 and 2022, Saskatchewan's manufacturing exports grew by 68.6%, from \$5.9 billion to \$9.9 billion, at an average growth rate of 5.4% per year. This growth was above the national average annual growth rate (AAGR) of 4.5%. Saskatchewan's manufacturing export AAGR was sixth highest among the provinces, ahead of Nova Scotia (4.4%), Ontario (3.5%), New Brunswick (2.4%) and Newfoundland and Labrador (-4.5%).

**Figure 14: Saskatchewan Manufacturing Exports (International) (\$ Billions), 2012 – 2022**



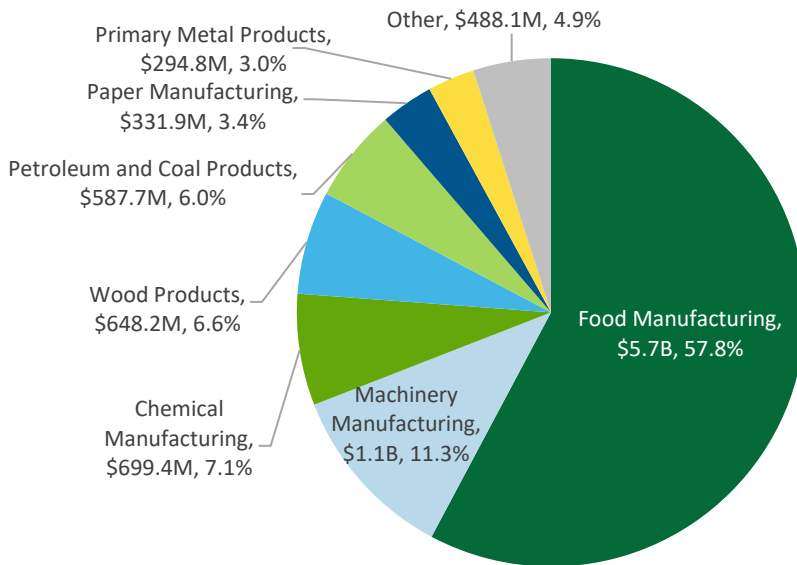
Source: Statistics Canada, Industry Canada, Trade Data Online.

**Manufacturing exports by subsector**

From 2021 to 2022, manufacturing subsectors with exports greater than \$200 million that contributed to growth in manufacturing exports include chemical manufacturing (+106%), machinery manufacturing (+51.3%), paper manufacturing (+51%), petroleum and coal product manufacturing (+34.9%), and food manufacturing (+34.0%). The primary metal manufacturing (-28.7%) and wood product manufacturing (-25.7%) subsectors had exports greater than \$200 million and experienced declines from 2021 to 2022. (See Appendix A).

In 2022, food manufacturing made up the largest share of Saskatchewan’s manufacturing exports, with exports of \$5.7 billion (57.8% of total manufacturing exports), followed by machinery manufacturing \$1.1 billion (11.3%), and chemical manufacturing \$700 million (7.1%).

**Figure 13: Share of Saskatchewan Manufacturing Exports (International) by Subsector, 2022**



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 AAGR of 14.0% from 2012 to 2022, followed by plastic and rubber products (12.5%) and transportation equipment (11.2%).

#### *International Destinations for Saskatchewan's Manufacturing Exports*

The United States (U.S.) was the leading international market for Saskatchewan's manufactured products, accounting for 74.1% of all manufacturing exports in 2022. Saskatchewan's manufacturers shipped about \$7.3 billion worth of goods to the U.S. in 2022, compared to \$3.9 billion in 2012, an increase of about \$3.4 billion (88.7%). China received the second highest amount of Saskatchewan's international manufacturing exports in 2022. Manufacturing exports to China grew from \$605.3 million in 2012 to \$1.1 billion in 2022, an increase of \$489.4 million (80.9%). Mexico was the third largest destination for Saskatchewan's international manufacturing exports in 2022, at \$265.7 million.

Export markets for Saskatchewan's manufactured goods have changed since 2012: Mexico, Chile and Germany have replaced France, Indonesia, and Japan in the province's top 10 manufacturing export destinations.

The top 10 destination countries accounted for 96.9% of Saskatchewan total international exports of manufactured goods in 2022.

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

2012				2022			
#	Country	\$M	Share	#	Country	\$M	Share
1	United States	\$3,874.4	66.2%	1	United States	\$7,311.1	74.1%
2	China	\$605.3	10.3%	2	China	\$1,094.7	11.1%
3	United Kingdom	\$565.3	9.7%	3	Mexico	\$265.7	2.7%
4	France (incl. Monaco)	\$256.1	4.4%	4	United Kingdom	\$223.1	2.3%
5	Indonesia	\$76.8	1.3%	5	Australia	\$158.6	1.6%
6	Australia	\$67.9	1.2%	6	Netherlands	\$139.2	1.4%
7	Japan	\$60.6	1.0%	7	Korea, South	\$126.3	1.3%
8	Korea, South	\$43.0	0.7%	8	Chile	\$101.7	1.0%
9	Netherlands	\$41.8	0.7%	9	Germany	\$74.3	0.8%
10	Lithuania	\$32.0	0.5%	10	Lithuania	\$67.4	0.7%

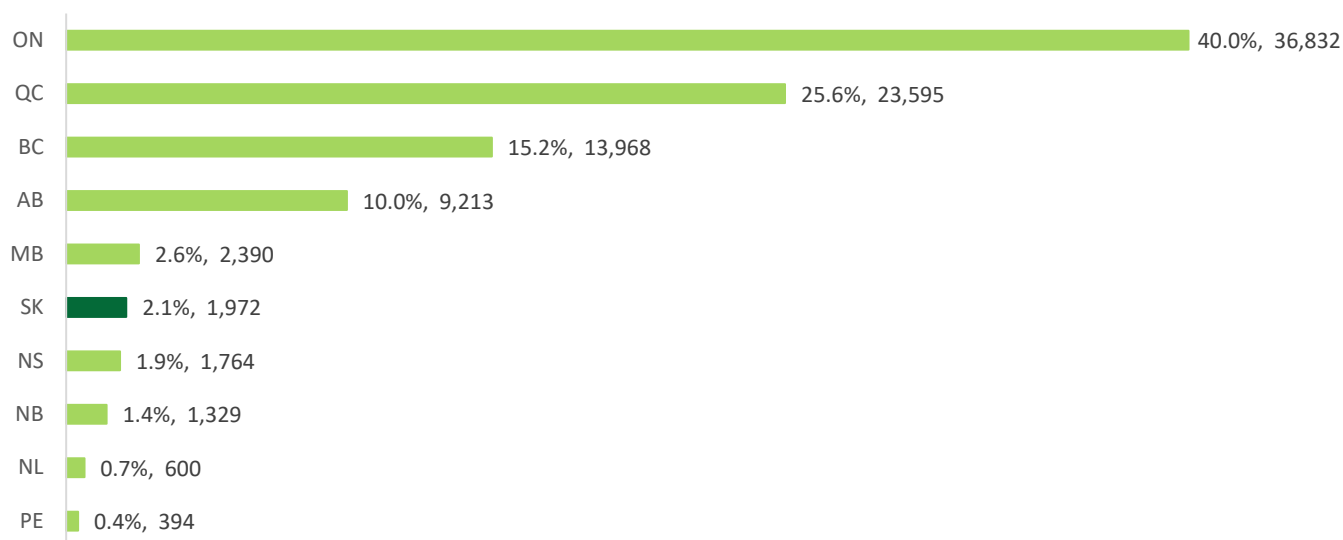
Source: Statistics Canada, Innovation, Science and Economic Development (ISED) Canada, Trade Data Online.

## 6. Manufacturing Establishments

### *Manufacturing business by number of employees*

Canada had more than 92,000 manufacturing establishments in 2022. Nearly two-thirds of these establishments (65.6%) were in Ontario and Quebec, and 29.9% were in the western provinces. Saskatchewan's 1,972 manufacturing businesses represent 2.1% of all Canadian manufacturing businesses. In 2022, over 85,000 of Canada's manufacturing businesses were small (0-49 people), accounting for 92.3% of all manufacturing businesses.

**Figure 15: National Manufacturing Establishments by Province, 2022**



Source: Statistics Canada Tables 33-10-0661-01 and 33-10-0662-01, Business Registry

**Table 3: Manufacturing Establishments by Province in 2022**

	Total	Non Employers	Employers	Small (1-49)	Small (0-49)	Medium (50-499)	Large (500+)
Canada	92,181	40,455	51,726	44,618	85,073	6,809	299
Newfoundland and Labrador	600	222	378	320	542	50	8
Prince Edward Island	394	129	265	233	362	31	1
Nova Scotia	1,764	689	1,075	929	1,618	140	6
New Brunswick	1,329	437	892	749	1,186	139	4
Quebec	23,595	9,791	13,804	11,708	21,499	2,023	73
Ontario	36,832	16,513	20,319	17,351	33,864	2,823	145
Manitoba	2,390	1,019	1,371	1,136	2,155	216	19
<b>Saskatchewan</b>	<b>1,972</b>	<b>912</b>	<b>1,060</b>	<b>936</b>	<b>1,848</b>	<b>120</b>	<b>4</b>
Alberta	9,213	4,260	4,953	4,376	8,636	559	18
British Columbia	13,968	6,424	7,544	6,816	13,240	707	21

Source: Statistics Canada, Business Register

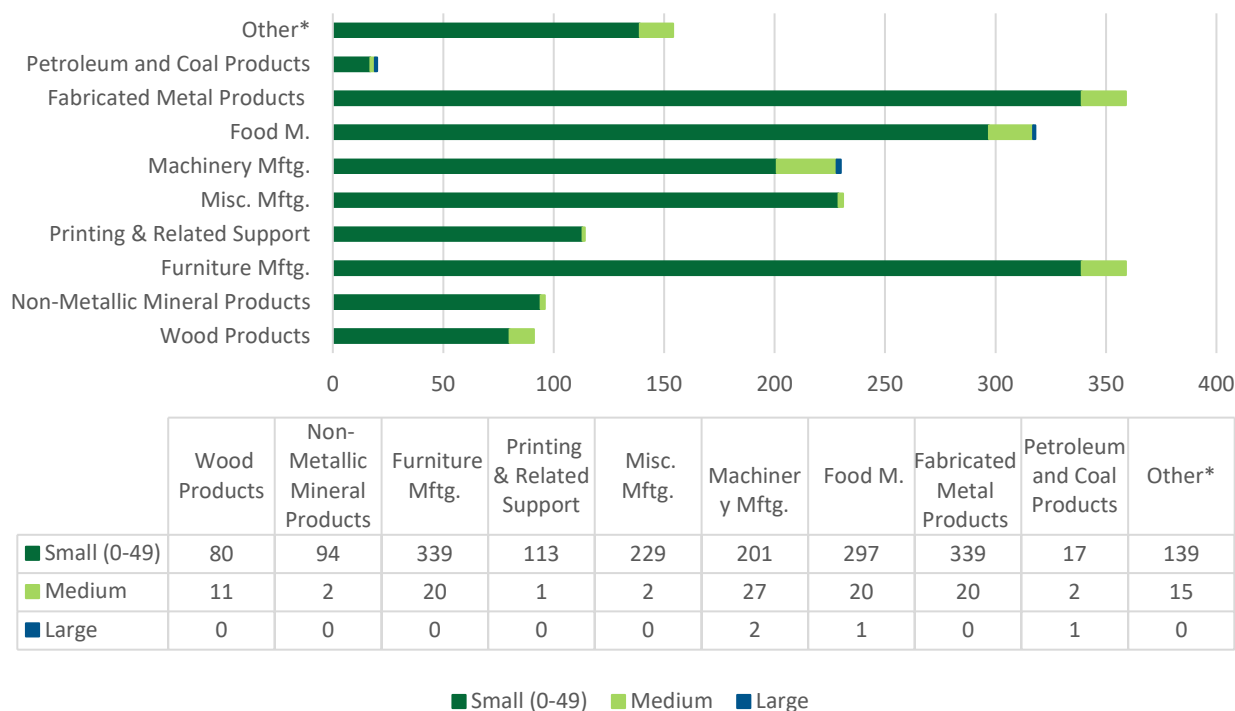
Of the 1,972 manufacturing businesses in Saskatchewan in 2022, 1,848 (93.7%) were small (0-49 employees), 120 (6.1%) were medium (50-499 employees), and 4 (0.2%) were large (500 or more employees). In 2022, Saskatchewan had 1,060 manufacturing establishments with one or more payroll employees, representing 2.0% of the 51,726 manufacturing establishments with payroll employees in Canada and 7.1% of those in Western Canada (14,928). In comparison, British Columbia had 7,544 (14.6%) of total Canadian manufacturing businesses with payroll employees, Alberta had 4,953 (9.6%) and Manitoba had 1,371 (2.7%). Of the 1,972 manufacturing establishments in Saskatchewan 912 (46.2%) were classified as non-employers<sup>8</sup> in 2022.

### Saskatchewan’s manufacturing establishments by subsector

In 2022, Saskatchewan had 1,848 small-sized manufacturing businesses with 0-49 employees, including 339 in fabricated metal products, 297 in food manufacturing, 229 in miscellaneous manufacturing, 201 in machinery manufacturing, 105 in furniture manufacturing, 94 in non-metallic mineral manufacturing, 80 in wood products, 70 in beverage and tobacco, and 66 in chemical manufacturing.

Of the 120 medium-sized businesses (50-499 employees) in Saskatchewan, there were 27 engaged in machinery production, 20 in food manufacturing, 20 in fabricated metal products, 11 in wood products, 9 in transport equipment, and 8 in chemical manufacturing. Of the 4 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, 2022**



Source: Statistics Canada, Business Register

\*Other includes clothing, electrical equipment, textile product mills, computer and electronics, primary metal products, leather and allied products, paper manufacturing, chemical manufacturing, beverage and tobacco, plastic and rubber.

<sup>8</sup> 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

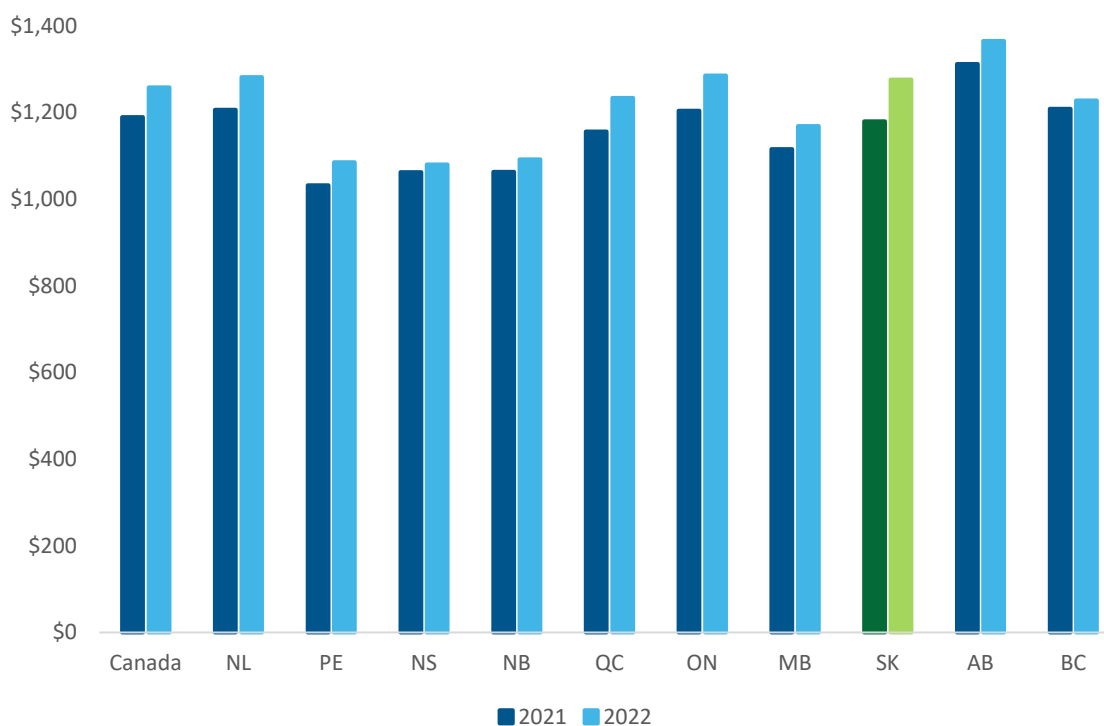
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### Average weekly earnings

The average earnings in Saskatchewan's manufacturing sector were approximately \$1,276 per week (\$66,368 annually) in 2022. This is the fourth-highest amount among the provinces. Alberta's manufacturing employees had the highest weekly earnings (\$1,366), followed by Ontario (\$1,286), and Newfoundland and Labrador (\$1,282). The national average was \$1,258 per week.

In 2022, average weekly earnings for Saskatchewan's manufacturing sector were 1.4% above the national average. Alberta's average weekly earnings were 8.6% above the national average, while British Columbia and Manitoba were below the national average by 2.4% and 7.1%, respectively.

**Figure 17: Manufacturing Average Weekly Earnings 2021-2022 by Province**



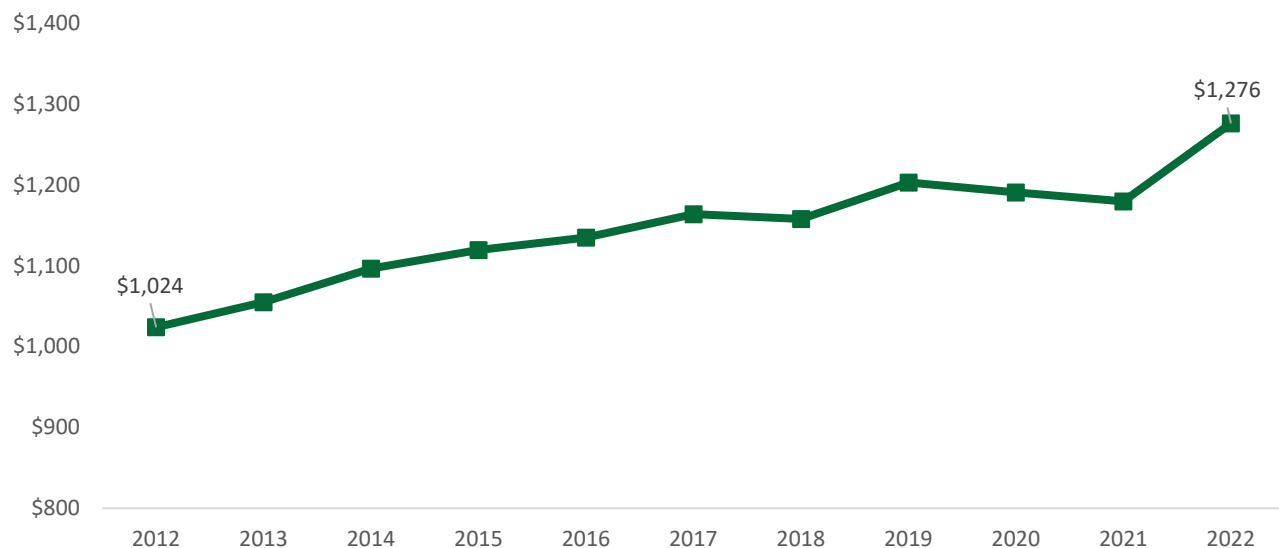
Source: Statistics Canada, Table 14-10-0204-01.

Manufacturing workers in Saskatchewan earned 8.2% more in 2022 than they earned in 2021, the highest percentage increase among the provinces. From 2021 to 2022, average weekly earnings for manufacturing workers increased in all provinces. Nationally, average weekly earnings for manufacturing workers increased by 5.8%.



Average weekly earnings for Saskatchewan’s manufacturing workers have grown over the past 10 years, increasing by 24.6% from \$1,024 per week (\$53,249 annually) in 2012 to \$1,276 per week (\$66,368 annually) in 2022. This is an average annual growth rate of 2.2% per year, fifth highest among the provinces and in line with the national average weekly earnings growth rate of 2.2%.

**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 2022, three manufacturing subsectors had average weekly earnings above the province’s manufacturing average of \$1,276: chemical manufacturing (\$1,817), machinery manufacturing (\$1,364) and fabricated metal product manufacturing (\$1,279). Wood product manufacturing (\$1,170), food manufacturing (\$1,056) and printing and related support activities (\$948) were below the province’s average earnings for manufacturing. Data for some manufacturing subsectors was suppressed for 2022 due to confidentiality requirements of the *Statistics Act*.

Between 2021 and 2022, average weekly earnings increased for machinery manufacturing (16.7%), food manufacturing (13.2%) and chemical manufacturing (7.4%). During the same time, average weekly earnings decreased for wood product manufacturing (8.3%) and fabricated metal product manufacturing ( 1.0%). Data for all other subsectors were suppressed because of confidentiality requirements of the *Statistics Act*.

In 2022, Saskatchewan’s average weekly earnings for manufacturing were below the earnings for some other goods-producing sectors, including mining, quarrying, and oil and gas extraction (\$2,200 per week), management of companies and enterprises (\$1,542 per week), construction (\$1,364) and transportation and warehousing (\$1,295) earned more than manufacturing workers (\$1,276 per week). Data for the forestry, logging and support, and the utilities sectors was suppressed from 2011 because of confidentiality requirements of the *Statistics Act*.

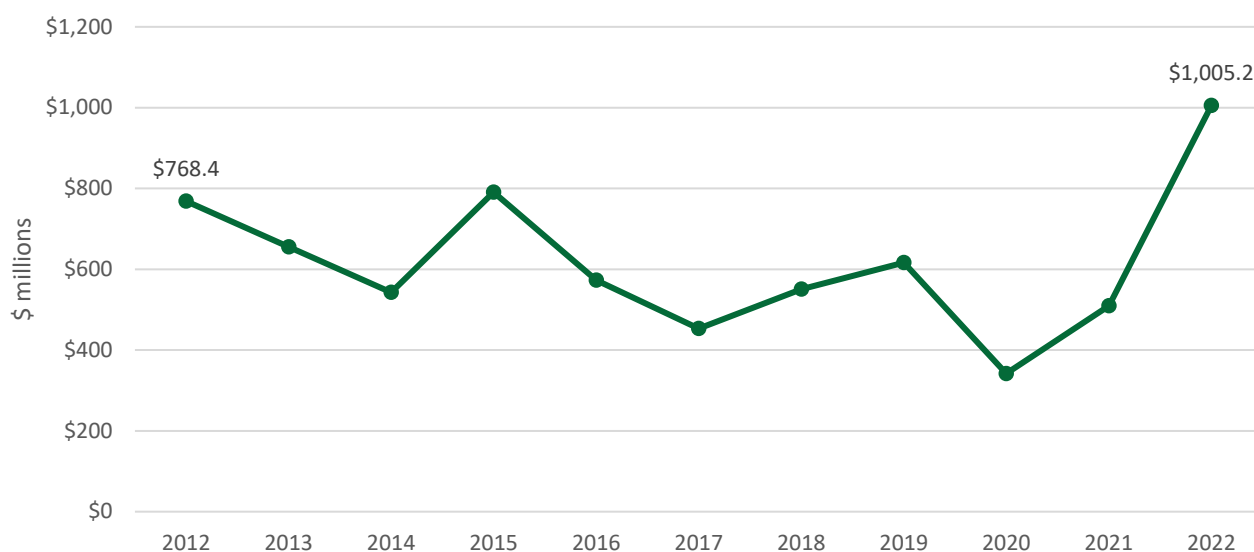
## 8. Capital Investment

### Capital investment

In 2022, capital investment in Canada's manufacturing sector was \$24.2 billion. Saskatchewan's manufacturing sector had capital investment of \$1.0 billion, representing 4.2% of the Canadian total. In Western Canada, Alberta had \$2.6 billion (10.6% of the Canadian total), British Columbia had \$1.6 billion (6.6% of the Canadian total), and Manitoba had \$699.4 million (2.9% of the Canadian total).

Capital investment in Saskatchewan's manufacturing sector increased by 97.3% from \$509.6 million in 2021 to \$1,005 million in 2022, the highest percentage increase among the provinces. Nationally, manufacturing investment decreased by 3.4% in the same period. In Western Canada, Alberta, Manitoba and British Columbia's capital investment in the manufacturing sector experienced declines in the same time period by 31.2%, 7.1% and 5.8%, respectively.

**Figure 19: Saskatchewan Manufacturing Capital Investment (\$ millions)**



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

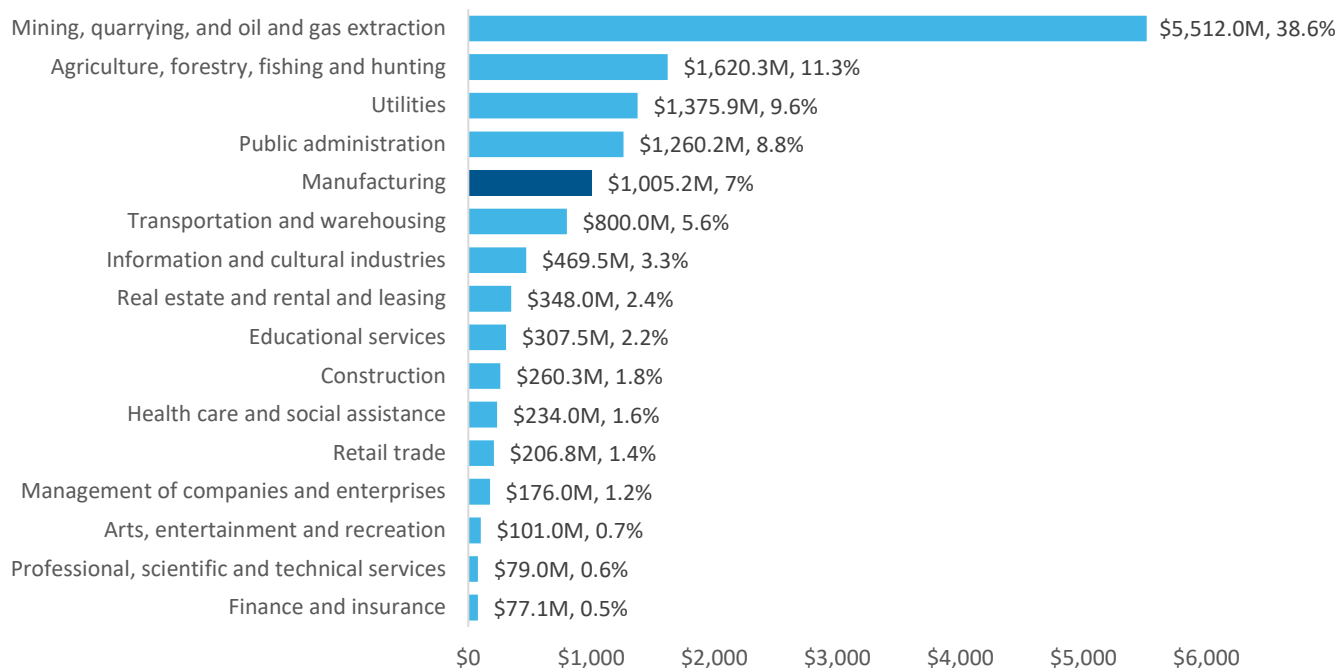
From 2012 to 2022, Saskatchewan's capital investment in manufacturing increased an average of 2.7% per year, below the national average of 4.8%. During this time, Ontario had the highest average annual growth at 7.9% per year, followed by Nova Scotia at 5.9% per year.

### Capital Investment by manufacturing subsectors and other industries

Several Saskatchewan manufacturing subsectors had increases in capital investment between 2021 and 2022, including food manufacturing (157.8%), wood product manufacturing (121.3%), chemical manufacturing (68.4%), and machinery manufacturing (63.1%). The province's manufacturing subsectors with the largest declines in capital investment during this time were clothing manufacturing (-50.0%), non-metallic mineral product manufacturing (-38.7%), and electrical equipment, appliance and component manufacturing (-28.6%). Data for all other subsectors were suppressed because of confidentiality requirements of the *Statistics Act*.

In 2022, four Saskatchewan sectors had higher capital investment than the manufacturing sector: mining, quarrying and oil and gas extraction (\$5.5 billion, accounting for 38.6% of total capital investment in Saskatchewan), agriculture, forestry, fishing and hunting (\$1.6 billion, 11.3%), utilities (\$1.4 billion, 9.6%), and public administration (\$1.3 billion, 8.8%).

**Figure 20: Saskatchewan Capital Investment by Sector, 2022 (\$ millions)**



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

## Appendix A: Data Tables

### Real GDP by Industry, Saskatchewan (\$M)

	2012	2021	2022	% chg 2021-2022	AAGR 2022	Share 2022
<b>All Industries</b>	68,647	72,335	76,673	6.0%	1.1%	100.0%
Agriculture, forestry, fishing and hunting	5,010	4,657	6,782	45.6%	3.1%	8.8%
Crop and animal production	4,812	4,370	6,439	47.3%	3.0%	8.4%
Forestry and logging	49.0	50.4	47.4	-6.0%	-0.3%	0.1%
Fishing, hunting and trapping	2.8	3.1	3.1	0.0%	1.0%	0.0%
Support activities for agriculture and forestry	161	229	276	20.6%	5.6%	0.4%
Mining, quarrying, and oil and gas extraction	11,176	11,968	12,348	3.2%	1.0%	16.1%
Oil and gas extraction	6,952	6,476	6,593	1.8%	-0.5%	8.6%
Mining and quarrying (except oil and gas)	3,286	4,684	4,827	3.1%	3.9%	6.3%
Support activities for mining, and oil and gas extraction	1,138	705	833	18.1%	-3.1%	1.1%
<b>Manufacturing</b>	<b>4,376</b>	<b>4,604</b>	<b>4,676</b>	<b>1.6%</b>	<b>0.7%</b>	<b>6.1%</b>
Construction	7,030	4,879	5,241	7.4%	-2.9%	6.8%
Utilities	1,895	2,278	2,305	1.2%	2.0%	3.0%

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

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

	2012	2021	2022	%chg 2021-2022	AAGR 2012-2022	Share 2022
<b>Manufacturing</b>	<b>\$4,376</b>	<b>\$4,604</b>	<b>\$4,676</b>	<b>1.6%</b>	<b>0.7%</b>	<b>100.0%</b>
Food manufacturing	\$743	\$770	\$773	0.4%	0.4%	16.5%
Beverage and tobacco product manufacturing	\$15	\$60	\$67	11.9%	16.0%	1.4%
Textile and textile product mills	\$38	\$27	\$28	5.2%	-3.0%	0.6%
Clothing and leather and allied product manufacturing	\$15	\$3	\$5	64.3%	-11.2%	0.1%
Wood product manufacturing	\$145	\$393	\$359	-8.5%	9.5%	7.7%
Paper manufacturing	\$52	\$61	\$60	-2.9%	1.4%	1.3%
Printing and related support activities	\$48	\$35	\$34	-2.6%	-3.4%	0.7%
Petroleum and coal product manufacturing	\$648	\$1,020	\$984	-3.5%	4.3%	21.0%
Chemical manufacturing	\$735	\$868	\$805	-7.3%	0.9%	17.2%
Plastics and rubber products manufacturing	\$38	\$44	\$49	11.5%	2.7%	1.1%
Non-metallic mineral product manufacturing	\$123	\$79	\$76	-3.3%	-4.7%	1.6%
Primary metal manufacturing	\$213	\$109	\$139	27.5%	-4.2%	3.0%
Fabricated metal product manufacturing	\$413	\$290	\$291	0.3%	-3.4%	6.2%
Machinery manufacturing	\$756	\$548	\$786	43.5%	0.4%	16.8%
Computer and electronic product manufacturing	\$89	\$79	\$76	-4.7%	-1.7%	1.6%
Electrical equipment, appliance and component manufacturing	\$83	\$51	\$50	-2.5%	-5.0%	1.1%
Transportation equipment manufacturing	\$111	\$65	\$58	-11.5%	-6.4%	1.2%
Furniture and related product manufacturing	\$54	\$21	\$24	10.3%	-8.0%	0.5%
Miscellaneous manufacturing	\$64	\$61	\$60	-0.7%	-0.6%	1.3%

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

## Manufacturing GDP and Growth of Manufacturing GDP by Province (\$M)

	\$M			%chg	AAGR	Share
	2012	2021	2022	2021-2022	2012-2022	2022
All Provinces and Territories	197,036	206,504	213,728	3.5%	0.8%	100.0%
Newfoundland and Labrador	1,507	1,065	993	-6.7%	-4.1%	0.5%
Prince Edward Island	463	801	849	6.1%	6.3%	0.4%
Nova Scotia	2,904	3,142	3,104	-1.2%	0.7%	1.5%
New Brunswick	2,953	3,244	3,218	-0.8%	0.9%	1.5%
Quebec	50,915	54,317	55,860	2.8%	0.9%	26.1%
Ontario	86,988	90,548	94,792	4.7%	0.9%	44.4%
Manitoba	6,523	6,491	6,835	5.3%	0.5%	3.2%
<b>Saskatchewan</b>	<b>4,376</b>	<b>4,604</b>	<b>4,676</b>	<b>1.6%</b>	<b>0.7%</b>	<b>2.2%</b>
Alberta	24,526	24,723	25,258	2.2%	0.3%	11.8%
British Columbia	15,823	17,516	18,089	3.3%	1.3%	8.5%

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

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

	2012	2021	2022	chg	%chg	AAGR
				2021-2022	2021-2022	2012-2022
All industries	67.0	73.6	75.1	1.4	1.9%	1.1%
Agriculture, forestry, fishing and hunting	57.5	66.4	90.7	24.3	36.6%	4.7%
Mining and oil and gas extraction	244.0	268.4	263.2	-5.2	-1.9%	0.8%
Utilities	311.7	306.8	298.0	-8.8	-2.9%	-0.4%
Construction	56.4	53.1	55.0	1.9	3.6%	-0.3%
<b>Manufacturing</b>	<b>75.3</b>	<b>84.1</b>	<b>81.5</b>	<b>-2.6</b>	<b>-3.1%</b>	<b>0.8%</b>
Wholesale trade	87.1	87.7	85.2	-2.5	-2.9%	-0.2%
Retail trade	34.3	41.5	39.8	-1.7	-4.1%	1.5%
Transportation and warehousing	47.7	67.7	68.9	1.2	1.7%	3.7%
Information and cultural industries	79.6	98.3	98.4	0.1	0.1%	2.1%
Finance and insurance	73.1	90.0	93.3	3.3	3.7%	2.5%
Real estate, rental and leasing	151.7	161.3	174.2	12.9	8.0%	1.4%
Professional, scientific and technical services	73.0	84.0	77.6	-6.5	-7.7%	0.6%
Admin. and support, waste mgt. and remediation	68.3	88.6	87.7	-0.9	-1.1%	2.5%
Educational services	21.5	15.1	16.4	1.4	9.3%	-2.7%
Health care and social assistance	25.1	6.9	4.2	-2.7	-39.3%	-16.4%
Arts, entertainment and recreation	17.1	17.5	15.0	-2.6	-14.6%	-1.3%
Accommodation and food services	76.6	79.5	79.5	0.0	0.0%	0.4%
Other services (except public administration)	62.5	67.7	68.9	1.2	1.7%	1.0%

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

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

				chg	%chg	AAGR
	2012	2021	2022	2021-2022	2021-2022	2012-2022
All Provinces and Territories	64.6	68.9	69.3	0.4	0.5%	0.7%
Newfoundland and Labrador	78.8	66.5	59.3	-7.3	-10.9%	-2.8%
Prince Edward Island	45.7	64.9	60.4	-4.5	-6.9%	2.8%
Nova Scotia	44.4	48.8	48.0	-0.8	-1.6%	0.8%
New Brunswick	47.2	55.0	55.4	0.4	0.7%	1.6%
Quebec	62.3	66.1	66.9	0.8	1.2%	0.7%
Ontario	64.3	69.6	69.3	-0.2	-0.4%	0.8%
Manitoba	55.1	54.8	54.8	0.0	-0.1%	-0.1%
<b>Saskatchewan</b>	<b>75.3</b>	<b>84.1</b>	<b>81.5</b>	<b>-2.6</b>	<b>-3.1%</b>	<b>0.8%</b>
Alberta	92.6	101.0	96.9	-4.1	-4.1%	0.5%
British Columbia	55.8	57.8	63.2	5.4	9.4%	1.3%

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

## Manufacturing Shipments by Subsector, Saskatchewan (\$M)

				%chg	AAGR	Share
	2012	2021	2022	2021-2022	2012-2022	2022
<b>Manufacturing</b>	<b>14,270.1</b>	<b>20,071.4</b>	<b>25,599.0</b>	<b>27.5%</b>	<b>6.0%</b>	<b>100.0%</b>
Food manufacturing	3,251.5	6,028.5	7,201.4	19.5%	8.3%	28.1%
Beverage and tobacco product manufacturing	x	x	x	--	--	--
Textile mills	x	x	0.4	--	--	0.0%
Textile product mills	x	x	21.2	--	--	0.1%
Leather and allied product manufacturing	x	0.3	1.0	278.6%	--	0.0%
Paper manufacturing	x	x	x	--	--	--
Printing and related support activities	108.3	16.3	17.5	7.3%	-16.7%	0.1%
Petroleum and coal product manufacturing	x	x	x	--	--	--
Chemical manufacturing	1,936.6	2,288.0	3,469.9	51.7%	6.0%	13.6%
Plastics and rubber products manufacturing	x	x	x	--	--	--
Wood product manufacturing	358.7	1,468.7	1,193.2	-18.8%	12.8%	4.7%
Non-metallic mineral product manufacturing	201.1	134.1	58.7	-56.2%	-11.6%	0.2%
Primary metal manufacturing	x	x	x	--	--	--
Fabricated metal product manufacturing	846.4	944.8	1,011.3	7.0%	1.8%	4.0%
Machinery manufacturing	1,585.7	1,557.6	2,420.7	55.4%	4.3%	9.5%
Computer and electronic product manufacturing	x	x	x	--	--	--
Electrical equipment, appliance and component manufacturing	x	193.7	128.2	-33.8%	--	0.5%
Transportation equipment manufacturing	129.2	316.1	79.7	-74.8%	-4.7%	0.3%
Furniture and related product manufacturing	x	x	x	--	--	--
Miscellaneous manufacturing	32.7	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
	2012	2021	2022	2021-2022	2012-2022	2022
Canada	585,336	722,980	853,615	18.1%	3.8%	100.0%
Newfoundland and Labrador	7,161	4,032	3,827	-5.1%	-6.1%	0.4%
Prince Edward Island	1,286	2,578	3,015	17.0%	8.9%	0.4%
Nova Scotia	10,460	10,068	10,823	7.5%	0.3%	1.3%
New Brunswick	19,527	20,860	26,824	28.6%	3.2%	3.1%
Quebec	138,302	182,520	213,135	16.8%	4.4%	25.0%
Ontario	268,118	311,432	367,525	18.0%	3.2%	43.1%
Manitoba	16,333	21,483	25,285	17.7%	4.5%	3.0%
<b>Saskatchewan</b>	14,270	20,071	25,599	<b>27.5%</b>	<b>6.0%</b>	3.0%
Alberta	71,324	86,791	108,544	25.1%	4.3%	12.7%
British Columbia	38,491	63,074	68,954	9.3%	6.0%	8.1%

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

## Manufacturing Employment by Subsector, Saskatchewan (000s)

				%chg	AAGR	Share
	2012	2021	2022	2021-2022	2012-2022	2022
<b>Manufacturing</b>	<b>28.2</b>	<b>31.6</b>	<b>31.9</b>	<b>0.9%</b>	<b>1.2%</b>	<b>100.0%</b>
Food Manufacturing	4.2	6.8	6.2	-8.8%	4.0%	19.4%
Beverage and Tobacco Product Man	0.0	0.7	1.3	85.7%	--	4.1%
Textile Mills	-	-	0.0	--	--	0.0%
Textile Product Mills	0.0	0.0	0.0	--	--	0.0%
Clothing Manufacturing	0.0	0.0	0.0	--	--	0.0%
Leather & Allied Product Manufactu	0.0	-	0.0	--	--	0.0%
Wood Product Manufacturing	2.5	1.1	1.1	0.0%	-7.9%	3.4%
Paper Manufacturing	0.0	0.0	0.0	--	--	0.0%
Printing Manufacturing	1.1	0.0	0.5	--	-7.6%	1.6%
Petroleum and Coal Product Manufi	1.6	1.6	1.9	18.8%	1.7%	6.0%
Chemical Manufacturing	1.3	2.0	2.0	0.0%	4.4%	6.3%
Plastics and Rubber Manufacturing	0.6	0.7	0.0	-100.0%	-100.0%	0.0%
Non-Mettallic Mineral Manufacturi	1.0	1.1	0.9	-18.2%	-1.0%	2.8%
Primary Metal Manufacturing	1.9	1.3	0.9	-30.8%	-7.2%	2.8%
Fabricated Metal Product Manufac	3.0	2.6	2.4	-7.7%	-2.2%	7.5%
Machinery Manufacturing	5.3	6.5	8.2	26.2%	4.5%	25.7%
Computer and Electronic Manufact	1.0	1.0	0.5	-50.0%	-6.7%	1.6%
Electric Equipment appliance Manu	0.0	0.5	1.0	100.0%	--	3.1%
Transportation Equipment Manufac	1.6	1.6	1.6	0.0%	0.0%	5.0%
Furniture and Related Manufacturir	0.6	1.7	1.1	-35.3%	6.2%	3.4%
Miscellaneous Manufacturing	0.9	1.3	1.3	0.0%	3.7%	4.1%

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)

	2012	2021	2022	%chg 2021-2022	AAGR 2012-2022	Share 2022
Canada	1,776.6	1,747.8	1,785.1	2.1%	0.0%	100.0%
Newfoundland and Labrador	11.9	10.4	10.1	-2.9%	-1.6%	0.6%
Prince Edward Island	5.3	7.1	8.5	19.7%	4.8%	0.5%
Nova Scotia	34.3	33.0	34.7	5.2%	0.1%	1.9%
New Brunswick	28.9	29.8	27.7	-7.0%	-0.4%	1.6%
Quebec	503.7	487.2	502.3	3.1%	0.0%	28.1%
Ontario	788.2	775.2	787.1	1.5%	0.0%	44.1%
Manitoba	63.2	65.5	68.1	4.0%	0.7%	3.8%
<b>Saskatchewan</b>	<b>28.2</b>	<b>31.6</b>	<b>31.9</b>	<b>0.9%</b>	<b>1.2%</b>	<b>1.8%</b>
Alberta	139.3	124.6	130.5	4.7%	-0.7%	7.3%
British Columbia	173.7	183.4	184.1	0.4%	0.6%	10.3%

Source: Statistics Canada, Labour Force Survey (LFS)

## Manufacturing Establishments by Subsector, Saskatchewan, 2022

	Total	Non Employers	Employers	Small (0-49)	Medium (50-499)	Large (500+)	Small	Medium	Large
<b>Manufacturing</b>	<b>1,972</b>	<b>912</b>	<b>1,060</b>	<b>1,848</b>	<b>120</b>	<b>4</b>	<b>93.7%</b>	<b>6.1%</b>	<b>0.2%</b>
Food manufacturing	318	145	173	297	20	1	93.4%	6.3%	0.3%
Beverage and tobacco	73	25	48	70	3	0	95.9%	4.1%	0.0%
Textile Mills	11	5	6	11	0	0	100.0%	0.0%	0.0%
Textile Product Mills	22	7	15	21	1	0	95.5%	4.5%	0.0%
Clothing Manufacturing	41	30	11	41	0	0	100.0%	0.0%	0.0%
Leather and allied Products	15	12	3	15	0	0	100.0%	0.0%	0.0%
Wood Products	91	42	49	80	11	0	87.9%	12.1%	0.0%
Paper Manufacturing	6	3	3	5	1	0	83.3%	16.7%	0.0%
Printing and Related Support	114	48	66	113	1	0	99.1%	0.9%	0.0%
Petroleum and Coal Products	20	6	14	17	2	1	85.0%	10.0%	5.0%
Chemical Manufacturing	74	27	47	66	8	0	89.2%	10.8%	0.0%
Plastics and Rubber Products	48	13	35	44	4	0	91.7%	8.3%	0.0%
Non-metallic Mineral Products	96	27	69	94	2	0	97.9%	2.1%	0.0%
Primary Metal Products	21	7	14	20	1	0	95.2%	4.8%	0.0%
Fabricated Metal Products	359	174	185	339	20	0	94.4%	5.6%	0.0%
Machinery Manufacturing	230	121	109	201	27	2	87.4%	11.7%	0.9%
Computer and Electronic	25	15	10	22	3	0	88.0%	12.0%	0.0%
Electrical Equipment	24	10	14	21	3	0	87.5%	12.5%	0.0%
Transportation Equipment	46	16	30	37	9	0	80.4%	19.6%	0.0%
Furniture Manufacturing	107	45	62	105	2	0	98.1%	1.9%	0.0%
Miscellaneous Manufacturing	231	134	97	229	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)

				%chg	AAGR	Share
	2012	2021	2022	2021-2022	2012-2022	2022
<b>Manufacturing</b>	5,851.5	7,681.1	9,866.7	28.5%	5.4%	100.0%
Food Manufacturing	2,566.9	4,254.6	5,701.7	34.0%	8.3%	57.8%
Beverage and Tobacco	24.2	9.5	3.1	-67.8%	-18.7%	0.0%
Textile Mills	0.2	0.2	0.3	27.6%	3.1%	0.0%
Textile Product Mills	1.2	0.8	0.8	-6.6%	-4.7%	0.0%
Clothing Manufacturing	3.9	1.7	1.7	-4.2%	-8.1%	0.0%
Leather and Allied Products	0.2	0.2	0.1	-16.3%	-0.8%	0.0%
Wood Products	174.7	873.0	648.2	-25.7%	14.0%	6.6%
Paper Manufacturing	200.4	219.9	331.9	51.0%	5.2%	3.4%
Printing and Related Support	0.3	0.4	0.4	-6.4%	3.7%	0.0%
Petroleum and Coal Products	360.2	435.6	587.7	34.9%	5.0%	6.0%
Chemical Manufacturing	1,117.2	339.5	699.4	106.0%	-4.6%	7.1%
Plastics and Rubber Products	24.5	64.6	79.3	22.7%	12.5%	0.8%
Non-metallic Mineral Products	5.3	9.5	12.8	34.8%	9.3%	0.1%
Primary Metal Products	470.0	413.6	294.8	-28.7%	-4.6%	3.0%
Fabricated Metal Products	38.4	34.2	71.1	108.1%	6.4%	0.7%
Machinery Manufacturing	651.7	736.8	1,114.8	51.3%	5.5%	11.3%
Computer and Electronic	127.5	110.9	126.7	14.3%	-0.1%	1.3%
Electrical Equipment	20.3	17.8	15.6	-12.1%	-2.6%	0.2%
Transportation Equipment	52.6	141.7	152.0	7.3%	11.2%	1.5%
Furniture Manufacturing	7.6	7.7	15.1	96.4%	7.1%	0.2%
Miscellaneous Manufacturing	4.4	8.9	8.9	0.2%	7.3%	0.1%

Source: Statistics Canada, Innovation, Science and Economic Development (ISED) Canada, Trade Data Online.

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

				%chg	AAGR	Share
	2012	2021	2022	2021-2022	2012-2022	2022
Canada	288,867	387,650	446,980	15.3%	4.5%	100.0%
Newfoundland and Labrador	4,617	2,687	2,899	7.9%	-4.5%	0.6%
Prince Edward Island	606	1,298	1,531	18.0%	9.7%	0.3%
Nova Scotia	3,117	4,469	4,778	6.9%	4.4%	1.1%
New Brunswick	13,600	13,414	17,302	29.0%	2.4%	3.9%
Quebec	56,848	86,358	98,374	13.9%	5.6%	22.0%
Ontario	154,370	190,708	217,999	14.3%	3.5%	48.8%
Manitoba	7,396	12,007	14,034	16.9%	6.6%	3.1%
<b>Saskatchewan</b>	<b>5,852</b>	<b>7,681</b>	<b>9,867</b>	<b>28.5%</b>	<b>5.4%</b>	<b>2.2%</b>
Alberta	23,242	37,129	46,415	25.0%	7.2%	10.4%
British Columbia	19,202	31,884	33,768	5.9%	5.8%	7.6%

Source: Statistics Canada, Innovation, Science and Economic Development (ISED) Canada, Trade Data Online.

## Manufacturing Average Weekly Earnings by Province (\$)

	2012	2021	2022	%chg 2021-22	AAGR 2012-22	Can x Prov. 2022
Canada	\$1,008	\$1,189	\$1,258	5.8%	2.2%	100.0%
Newfoundland and Labrador	\$931	\$1,207	\$1,282	6.2%	3.3%	101.9%
Prince Edward Island	\$831	\$1,032	\$1,085	5.2%	2.7%	86.3%
Nova Scotia	\$889	\$1,063	\$1,080	1.6%	2.0%	85.9%
New Brunswick	\$886	\$1,063	\$1,092	2.7%	2.1%	86.8%
Quebec	\$949	\$1,156	\$1,234	6.7%	2.7%	98.1%
Ontario	\$1,037	\$1,205	\$1,286	6.7%	2.2%	102.2%
Manitoba	\$929	\$1,116	\$1,169	4.7%	2.3%	92.9%
<b>Saskatchewan</b>	<b>\$1,024</b>	<b>\$1,180</b>	<b>\$1,276</b>	<b>8.2%</b>	<b>2.2%</b>	<b>101.4%</b>
Alberta	\$1,166	\$1,312	\$1,366	4.1%	1.6%	108.6%
British Columbia	\$986	\$1,209	\$1,228	1.6%	2.2%	97.6%

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

## Manufacturing Capital Investment by Province (\$M)

	2012	2021	2022	%chg 2021-2022	AAGR 2012-2022	Share 2022
Canada	15,190	25,035	24,173	-3.4%	4.8%	100.0%
Newfoundland and Labrador	x	69	71	2.0%	--	0.3%
Prince Edward Island	x	x	98	--	--	0.4%
Nova Scotia	210	380	372	-2.1%	5.9%	1.5%
New Brunswick	x	695	767	10.3%	--	3.2%
Quebec	3,884	5,436	5,810	6.9%	4.1%	24.0%
Ontario	5,251	x	11,185	--	7.9%	46.3%
Manitoba	459	753	699	-7.1%	4.3%	2.9%
<b>Saskatchewan</b>	<b>768</b>	<b>510</b>	<b>1,005</b>	<b>97.3%</b>	<b>2.7%</b>	<b>4.2%</b>
Alberta	1,526	3,723	2,560	-31.2%	5.3%	10.6%
British Columbia	1,430	1,705	1,606	-5.8%	1.2%	6.6%

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 2022 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 2022.

<b>NAICS</b>	<b>Industry Description</b>
311	Food manufacturing
312	Beverage and tobacco product manufacturing
313	Textile mills
314	Textile product mills
315	Apparel manufacturing
316	Leather and allied product manufacturing
321	Wood product manufacturing
322	Paper manufacturing
323	Printing and related support activities
324	Petroleum and coal product manufacturing
325	Chemical manufacturing
326	Plastics and rubber products manufacturing
327	Non-metallic mineral product manufacturing
331	Primary metal manufacturing
332	Fabricated metal product manufacturing
333	Machinery manufacturing
334	Computer and electronic product manufacturing
335	Electrical equipment, appliance and component manufacturing
336	Transportation equipment manufacturing
337	Furniture and related product 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:

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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

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### Service sector

The service sector includes the following industries:

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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

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## Sources of Data

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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 statistics consistent with the System of National Accounts (SNA), by job category and industry.

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, Innovation, Science and Economic Development (ISED) Canada, Trade Data Online (ISED 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 Strategy, Analysis and Metrics 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.