



# Labour Market Bulletin

## Alberta

### August 2019



This Labour Market Bulletin provides an analysis of Labour Force Survey results for the province of Alberta, including the regions of Calgary, Edmonton, Central Alberta and Mountain Parks, Southern Alberta, and Northern Alberta.

## OVERVIEW

Net employment in Alberta was little changed in August, following a sharp drop in jobs in the previous month. At 2.34 million, overall employment increased by a small margin (+600). Gains in full-time employment (+1,200) were offset by losses in part-time positions (-600).

### Alberta Monthly Labour Force Statistics

Seasonally Adjusted Monthly Data	August 2019	July 2019	August 2018	Monthly Variation		Yearly Variation	
				Number	%	Number	%
<b>Population 15 + ('000)</b>	3,534.0	3,528.8	3,477.6	5.2	0.1	56.4	1.6
<b>Labour Force ('000)</b>	2,526.9	2,521.3	2,508.2	5.6	0.2	18.7	0.7
<b>Employment ('000)</b>	2,344.3	2,343.7	2,340.2	0.6	0.0	4.1	0.2
Full-Time ('000)	1,919.7	1,918.5	1,908.0	1.2	0.1	11.7	0.6
Part-Time ('000)	424.6	425.2	432.2	-0.6	-0.1	-7.6	-1.8
<b>Unemployment ('000)</b>	182.6	177.6	168.0	5.0	2.8	14.6	8.7
<b>Unemployment Rate (%)</b>	7.2	7.0	6.7	0.2	-	0.5	-
<b>Participation Rate (%)</b>	71.5	71.4	72.1	0.1	-	-0.6	-
<b>Employment Rate (%)</b>	66.3	66.4	67.3	-0.1	-	-1.0	-

Note: Totals may not add due to rounding

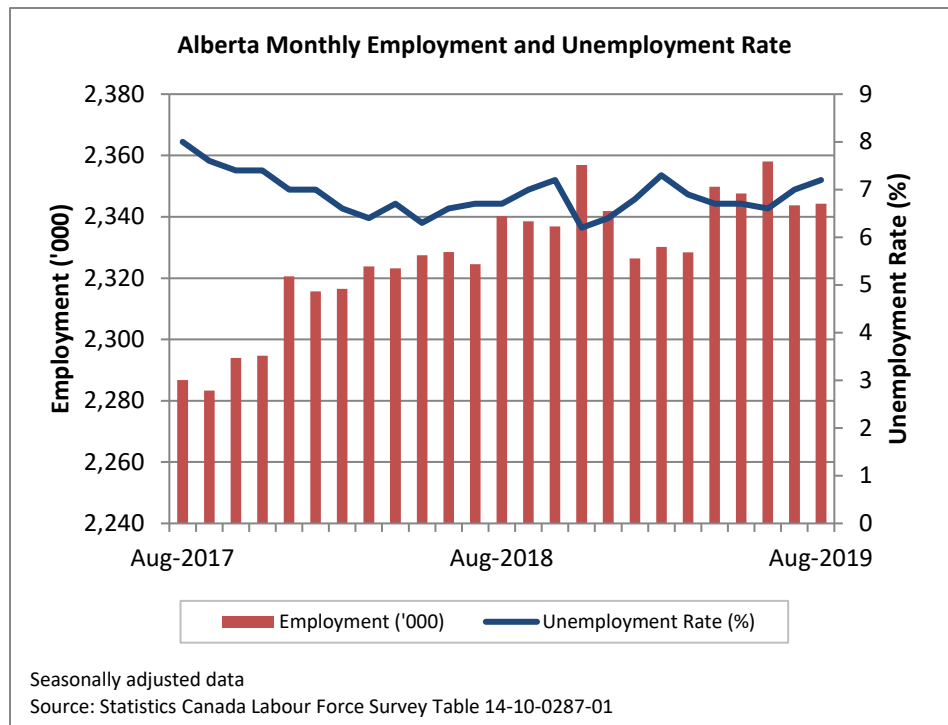
Source: Statistics Canada Labour Force Survey – Table 14-10-0287, formerly CANSIM 282-0087

Taking a longer view, overall employment edged up slightly (0.2%) from August of last year (+4,100). However, gains in both private sector (+36,500) and public sector (+11,100) employment were almost entirely offset by a pullback in self-employment (-43,500).<sup>1</sup>

Hourly paid Albertans worked 31.0 hours on average in June (the most recent data available). This was the third among provinces and higher than the corresponding figure nationwide (29.7 hours). Meanwhile at \$1,169.85 per week, average earnings in Alberta remain the highest among provinces, despite declining three times through the first six months of the year.<sup>2</sup>

In June 2019, the number of regular Employment Insurance beneficiaries dropped for the fourth consecutive month to 47,730. Year over year, the number of regular EI recipients in Alberta was 11.0% lower than in June 2018, more than double the decline seen nationwide (4.6%).<sup>3</sup>

The number of unemployed increased in August, up 5,000, as more people entered the job market. At 182,600, unemployment in the province was up 14,600 over the same month last year. At 7.2%, the unemployment rate was the highest west of New Brunswick – exceeding the national average by 1.5 percentage points. In July, the average duration of unemployment in Alberta was 20.1 weeks, well above the national average of 15.9 weeks and the lengthiest amongst the provinces.<sup>4</sup>



## Unemployment by major demographic grouping

At 7.2%, Alberta's overall unemployment rate edged slightly upward in August and was up 0.5 percentage points (pp) on the year. Year over year, young workers fared the worst, with young men facing an unemployment rate of 16.0% compared to a rate of 10.9% for their female contemporaries. The outlook facing older men mirrored that of their younger counterparts, with the unemployment rate for men 25 years and older (7.4%) solidly higher than that of women (4.8%) from the same age group.

**Alberta Monthly Unemployment Rates, by Gender and Age**

Seasonally Adjusted Data	August 2019 (%)	July 2019 (%)	August 2018 (%)	Monthly Variation (% points)	Yearly Variation (% points)
<b>Total</b>	7.2	7.0	6.7	0.2	0.5
<b>25 years and over</b>	6.3	6.2	5.9	0.1	0.4
Men - 25 years and over	7.4	6.9	5.9	0.5	1.5
Women - 25 years and over	4.8	5.3	5.9	-0.5	-1.1
<b>15 to 24 years</b>	13.5	12.9	11.9	0.6	1.6
Men - 15 to 24 years	16.0	13.3	14.0	2.7	2.0
Women - 15 to 24 years	10.9	12.3	9.6	-1.4	1.3

*Note: Totals may not add due to rounding*

*Source: Statistics Canada Labour Force Survey – Table 14-10-0287, formerly CANSIM 282-0087*

## EMPLOYMENT BY INDUSTRY

In August, there was little change in Alberta's overall employment picture. At the industry level, however, things were much more complicated. Collectively, the province's goods-producing industries (e.g. construction) saw employment drop by 1.0% (-6,000). By contrast, the services-producing industries (e.g. Professional, scientific and technical services) saw employment expand by 0.4% (+6,700).

**Alberta Monthly Labour Force Statistics, by Industry**

Seasonally Adjusted Data ('000)	August 2019	July 2019	August 2018	Monthly Variation		Yearly Variation	
				Number	%	Number	%
<b>Total employed, all industries</b>	2,344.3	2,343.7	2,340.2	0.6	0.0	4.1	0.2
<b>Goods-producing sector</b>	589.6	595.6	602.1	-6.0	-1.0	-12.5	-2.1
Agriculture	49.9	50.7	48.5	-0.8	-1.6	1.4	2.9
Forestry, fishing, mining, quarrying, oil and gas	138.3	144.3	154.4	-6.0	-4.2	-16.1	-10.4
Utilities	24.5	24.1	23.7	0.4	1.7	0.8	3.4
Construction	241.9	242.1	246.5	-0.2	-0.1	-4.6	-1.9
Manufacturing	134.9	134.5	129.0	0.4	0.3	5.9	4.6
<b>Services-producing sector</b>	1,754.8	1,748.1	1,738.1	6.7	0.4	16.7	1.0
Trade	339.3	340.0	337.1	-0.7	-0.2	2.2	0.7
Transportation and warehousing	139.4	140.0	138.3	-0.6	-0.4	1.1	0.8
Finance, insurance, real estate and leasing	105.7	107.2	102.3	-1.5	-1.4	3.4	3.3
Professional, scientific and technical services	187.2	185.4	181.5	1.8	1.0	5.7	3.1
Business, building and other support services	83.2	84.4	88.6	-1.2	-1.4	-5.4	-6.1
Educational services	157.2	157.7	160.7	-0.5	-0.3	-3.5	-2.2
Health care and social assistance	292.4	290.6	278.8	1.8	0.6	13.6	4.9
Information, culture and recreation	79.0	74.3	78.7	4.7	6.3	0.3	0.4
Accommodation and food services	140.4	136.7	146.6	3.7	2.7	-6.2	-4.2
Other services	115.1	118.2	116.7	-3.1	-2.6	-1.6	-1.4
Public administration	116.0	113.6	108.8	2.4	2.1	7.2	6.6

Note: Totals may not add due to rounding

Source: Statistics Canada Labour Force Survey – Table 14-10-0355, formerly CANSIM 282-0088

Notably, Alberta's goods-producing sector represents a far larger share of the economy than it does in other provinces. Despite job losses on both the month and year, the outsized sector's share still accounted for more than one-quarter of total employment in the province, 4.4 percentage points above the national average.

At 138,300, the combined employment in forestry, fishing, mining, quarrying, oil and gas was roughly 25% below the 183,600 posted in September 2014.

### Oil and gas

Oil production in the province expanded sharply last year, due in large part to the completion of Suncor Energy's huge new Fort Hills oilsands mine. As a result, 2018 was officially the year in which oil production in Alberta

exceeded pipeline take away capacity. While oil extraction occurs in every corner of the province, the oilsands region produces by far the largest provincial share. In June 2019, oilsands operations accounted for 84% of total oil production in the province.<sup>5</sup>

In recent years, Alberta's oil and gas firms have struggled to remain competitive with their U.S. counterparts, particularly with respect to attracting investment capital. The draw down in oil and gas investment is not just limited to Alberta or Canada, however. Globally, investment in oil production fell by about 40% between 2014 and 2018.<sup>6</sup>

Late last year, a combination of pipeline constraints, refinery closures, and falling international oil prices threatened the viability of the provincial energy sector. In November 2018, the price of Western Canada Select (WCS), Alberta's benchmark bitumen crude, averaged just \$18 USD per barrel for the entire month.

Attempting to limit job losses and bankruptcies, the Government of Alberta placed an overall cap (curtailment) on oil production in the province, effective January 2019. The curtailment has successfully raised the price of WCS, which touched \$55 USD per barrel in April. Since then the price of WCS has fallen along with oil prices worldwide, as trade disruptions limit global oil demand growth.

Despite the WCS price hike, Alberta's curtailment policy remains deeply unpopular with the province's largest oil producers. Because integrated firms with their own refineries can still make money when crude prices are low, these firms tend to oppose government intervention to various degrees.

Ending curtailment may be easier said than done, however. While oil by rail continues to expand, industry is still pinning its hopes on the completion of any two of the three export pipeline projects currently in advanced stages: Trans Mountain Expansion (TMX); Keystone XL; and the Line 3 replacement project. Of these, Line 3 is still the most likely to first come on stream – although it may again be delayed due to court challenges in Minnesota. In June, the federal government reapproved TMX. In September, the Federal Court of Appeal adjudicated on 12 further appeals of TMX, dismissed six outright, while agreeing to hear the other six simultaneously and on an expedited basis.<sup>7</sup> The project would twin an aging pipeline from Alberta to tidewater in Burnaby B.C., almost tripling capacity from 300,000 barrels per day (bpd) to 890,000 bpd.<sup>8</sup>

### Other goods-producing industries

Looking at Alberta's other goods-producing industries, **construction** posted a moderate year over year job loss in July (-1.9%). In July (the most recent data available), the total value of building permits issued in the province – including both new product and renovations – shrank by 12.5% compared to July 2018.<sup>9</sup> There have also been troubling signs of residential overbuilding. In July, completed and sold – i.e. absorbed – new housing units in Alberta's two major centres of Calgary and Edmonton accounted for 26% of all large-city units absorbed nationwide. At the same time, however, the two cities accounted for 35% of all large-city *unabsorbed* (completed and unsold) units.<sup>10</sup>

After a poor 2018, Alberta's **agriculture** industry had hoped for a recovery year in 2019. However, starting in March, China systematically revoked all licences to import Canadian canola.<sup>11</sup> More recently, China halted the importation of all Canadian meat products, following the discovery of counterfeit Canadian veterinary

certificates.<sup>12</sup> In a somewhat surprising development, China has accelerated importation of Canadian wheat year to date.<sup>13</sup>

While low energy prices are a huge negative for resource extraction firms, they are a significant plus for the province's booming petrochemical **manufacturing** industry. Inter Pipeline is currently building a \$3.5 billion petrochemical complex in Alberta's Industrial Heartland, just outside Edmonton's city limits. The project is a major undertaking for Inter. Calgary-based Pembina Pipeline Corporation's \$4.5 billion joint venture with Kuwait's national petrochemical company is also being built in the Industrial Heartland. In September, the Globe and Mail reported that Inter Pipeline had rejected an unsolicited takeover bid from Hong Kong billionaire Li Ka-Shing's CK Infrastructure Holdings Ltd.<sup>14</sup>

### Services-producing industries

Turning to the services-producing sector, at 1.755 million, overall employment increased in July, as the **accommodation and food services** industry recovered many of the jobs it shed the previous month. **Wholesale and retail trade**, Alberta's largest industry by employment, saw a dip in jobs on the month (-700) – while up marginally year over year (+2,200). In May, total retail sales declined by 0.4% in the province.<sup>15</sup>

Wholesale and retail trade has been one of the service industries deeply hurt by the prolonged slump in the provincial energy sector. For example, over the five-year period from June 2014 to June 2019, the total value of retail sales in Alberta increased by just 2.5% – compared to 20% Canada-wide. Wholesale trade fared even worse; total sales in June 2019 were 2.0% **below** the level of June 2014.<sup>16</sup>

In August, **Health care and social assistance**, Alberta's second largest industry by employee count, posted job gains on both the month (+0.6%) and on the year (+4.9%). Health care, along with educational services, and public administration are **public sector** industries. In general, public sector job growth tends to reflect population increase, somewhat independent of economic conditions. As such, these industries have been less affected by the oil and gas downturn than have private sector industries such as trade. That being said, the recently released Blue Ribbon Panel on Alberta's Finances commissioned by the Government of Alberta recommends broad public sector spending cuts, including making greater use of private clinics to deliver health services and to renegotiate fees paid to doctors.<sup>17</sup>

## REGIONAL ANALYSIS

Compared to August 2018, year over year employment increased in three of the province's seven economic regions. On a percentage basis, Calgary continued to lead the province in job growth (+4.9) while Camrose-Drumheller recorded the largest annual decline despite showing some improvement from the previous month.

### Alberta Monthly Labour Force Statistics, by Economic Region

3-Month Moving Averages Seasonally Unadjusted Data	Employment			Unemployment Rate		
	August 2019 ('000)	August 2018 ('000)	Yearly Variation (%)	August 2019 (%)	August 2018 (%)	Yearly Variation (% points)
<b>Alberta</b>	2,366.8	2,350.9	0.7	7.2	6.9	0.3
<b>Economic Regions</b>						
Lethbridge - Medicine Hat	148.0	147.5	0.3	7.1	5.1	2.0
Camrose - Drumheller	96.8	105.2	-8.0	5.6	4.4	1.2
Calgary	932.4	888.6	4.9	7.4	8.1	-0.7
Banff - Jasper - Rocky Mountain House and Athabasca - Grand Prairie - Peace River	189.3	194.2	-2.5	5.4	5.9	-0.5
Red Deer	114.8	120.7	-4.9	7.3	6.7	0.6
Edmonton	801.4	811.0	-1.2	7.8	6.6	1.2
Wood Buffalo - Cold Lake	84.1	83.7	0.5	6.3	6.0	0.3

Note: Totals may not add due to rounding

Source: Statistics Canada Labour Force Survey – Table 14-10-0293, formerly CANSIM 282-0122

In **Lethbridge-Medicine Hat**, employment increased by 0.3% compared to July 2018. The area's unemployment rate recorded the largest yearly percentage point (pp) increase of all regions, climbing 2.0 pp to 7.1%. Manufacturing led an otherwise sluggish goods-producing sector while job prospects in the healthcare and social assistance industry led the services-producing sector. Looking ahead, a number of advancing green energy projects raise the prospect of construction jobs. Four wind energy projects, TransAlta's Windrise project in Fort Macleod, Suncor Energy's Forty Mile Granlea Wind Project near Bow Island, EDF Renewables' Cypress Wind project southeast of Dunmore and Elemental Energy Renewables Inc.'s Brooks Solar II Power plant, will begin construction in 2020. They will join Capital Power's Whitla Wind Farm near Bow Island, which is on schedule to complete construction of its 56-turbine project by December.

Employment fell by 8.0% in **Camrose-Drumheller** year over year, with job losses occurring in both the goods-producing and services-producing sectors. At 5.6%, the region had the second lowest unemployment in the province. Employment growth in the construction and professional, scientific and technical services industries is likely to continue as three large green projects move forward. Mechanical construction is underway on Pembina Pipeline's \$120 million Natural Gas Liquids Extraction facility near Empress. The facility is expected to be operational in late 2020. Prompted by improvements in solar panel efficiencies, Greengate Power Corporation is moving ahead with its \$500 million Travers Solar power project near the Village of Lomond. The project will quadruple the size of the next largest solar energy farm in Canada and have a generating capacity of 400 megawatts. The company anticipates requiring several hundred workers when construction begins in mid 2020. To the north, a \$10.5M clean technology demonstration project underway near Forestburg will use municipal

organic waste to replenish the land around the Paintearth coal mine. A willow crop grown on the land will then be used as a biomass feedstock for renewable energy.<sup>18</sup>

Overall employment decreased in **Banff-Jasper-Rocky Mountain House** and **Athabasca-Grande Prairie-Peace River** in comparison to August 2018 (-2.5%). The region's unemployment rate dropped slightly from the previous month and continues to be the province's lowest rate at 5.4%.

Job losses throughout the services-producing sector were only partially offset by goods-producing employment growth. New major projects contributed more than 7,000 jobs in the construction industry alone over the past year. These include Tolko Industries Ltd.'s partnership with Pinnacle Renewable Energy to build a \$53 million pellet plant and \$33 million thermal energy plant in High Level. Construction is expected to begin this month and be completed towards the end of 2020. Three other construction projects are also advancing towards their projected 2020 completion dates. Veresen Midstream has secured approval from both the County of Grande Prairie and the Alberta Energy Regulator on its \$380 million Hythe Brainard Gas Plant expansion and pipeline project. To the south, Maxim Power Corporation has signed its final contract for the completion of its 204 megawatt natural gas-fired power plant near Grande Cache. The \$143 million project is expected to be completed in April 2020. Meanwhile, Razor Energy is proceeding with its \$15-\$20 million geothermal energy project in the Swan Hills area near Slave Lake.

Year over year, **Red Deer** continued to see job losses, with employment falling 4.9%, accompanied by an increase of 0.6 percentage points to the unemployment rate (7.3%). Many of the employment losses occurred in the services-producing sector, particularly in the education, and transportation and warehousing industries. On the goods-producing side, employment gains in the resource extraction sector (forestry, fishing, mining, oil and gas) offset continuing job losses in agriculture (-2,200). Ongoing trade uncertainties, including China's on-going bans on Canadian meat and canola seed imports dim the outlook for the sector. On a positive note, Athabasca Minerals Inc. has signed a 10-year agreement with Montana First Nation to process and sell sand and gravel materials from MFN's Colchester property near Ponoka. The company is committed to providing meaningful employment to members of the First Nation.

Employment changed little over the year (0.5%) in **Wood Buffalo-Cold Lake**, with job gains evenly split between the goods-producing and services-producing sectors. The region enjoyed the third lowest unemployment rate in the province (6.3%), almost a full percentage point below the provincial average.

The Wood Buffalo-Cold Lake region is home to over 80% of all oil production in Alberta, making it susceptible to any significant investments or curtailments in oil sands operations. After months of economic downturns, the longer term prospects for the region's oil industry look more positive. First, construction on the Trans Mountain Pipeline expansion resumed in late summer following its re-approval by the federal government in June. The following month, Teck Resources' \$20.6 billion Frontier Oil Sands Mine was approved by a joint review panel of the Alberta Energy Regulator and the Canadian Environmental Assessment Agency. The company estimates the project will employ up to 7,000 workers during peak construction and up to 2,500 during operation. Then in August, an off-grid solar project in Fort Chipewyan designed to displace 650,000 litres of diesel power generation received a \$4.5 million contribution from the federal government to reach its final price tag.<sup>19</sup>



At 7.8%, **Edmonton's** unemployment rate rose slightly compared to August of last year and continued as the highest rate in the province for the second consecutive month. Employment was down sharply in all goods-producing industries, with the exception of manufacturing. On the services-producing side, growth continued to be robust in the wholesale and retail trade sector, which added 26,900 positions since August 2018. Looking ahead, prospects may improve in the local construction industry with Trans Mountain Corporation resuming work on the right of way for its pipeline between Edmonton and Edson and at its Edmonton Terminal. North of the city, Pembina Pipeline Corporation is moving ahead with its \$4.5 billion polypropylene joint-venture plant. The provincial government is also improving the local infrastructure with work underway to twin and upgrade Highway 15 and build a second bridge.

In **Calgary**, the regional labour market added the most jobs (+43,800) of all Alberta regions, up 4.9% on the year. Over the same period, the regional unemployment rate declined 0.7 percentage points to 7.4%. Job growth occurred mostly in the services-producing sector, led by combined hiring in the public sector industries of education, public administration and health care totalling 32,000.

Decisions made by Calgary's city council during the summer months significantly impacted the regional labour landscape. In July, the City of Calgary reached an agreement with the Calgary Flames to build a new \$550 million, 19,000 seat arena to replace the aging Saddledome. Construction is anticipated to begin in 2021 and take at least three years to complete. In contrast, the council also announced it would be cutting 115 positions across 48 different service lines due to a \$60 million budget shortfall. The cuts will affect services ranging from public transit to fire hall staffing.<sup>20</sup> More recently, all levels of government joined together to address the city's challenging housing market by committing \$28.4 million towards the 665 new affordable housing units. The federal government is providing an additional \$1.48 million to assist local organizations in addressing the housing and employment needs of veterans.

*Note: In preparing this document, the authors have taken care to provide clients with labour market information that is timely and accurate at the time of publication. Since labour market conditions are dynamic, some of the information presented here may have changed since this document was published. Users are encouraged to also refer to other sources for additional information on the local economy and labour market. Information contained in this document does not necessarily reflect official policies of Employment and Social Development Canada.*

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**For information on the Labour Force Survey**, please visit the Statistics Canada Web site at: [www.statcan.gc.ca](http://www.statcan.gc.ca)

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- <sup>13</sup> Bloomberg/Financial Post, As canola spat steals headlines, China quietly buys other Canadian crops; August 15, 2019. Accessed September 6, 2019 <https://business.financialpost.com/commodities/agriculture/as-canola-spat-steals-headlines-china-quietly-buys-canada-crops>
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<sup>18</sup> EnergyNow.ca, “Alberta coal mine reclamation project to provide green energy source”; September 3, 2019. <https://energynow.ca/2019/09/alberta-coal-mine-reclamation-project-to-provide-green-energy-source/>

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