



# Environmental Scan

## Saskatchewan

2018



Once a year, Service Canada develops Economic/Environmental Scans (E-Scan) that provide a general overview of demographic, economic and labour market conditions and trends. E-scans will be of interest to those who seek to know more about the state of a provincial or regional economy and labour market. Facts and statistics presented in this document reflect information available as of April 2018.

### HIGHLIGHTS

- Saskatchewan's real gross domestic product (GDP) is anticipated to grow 1.3% in 2017 after registering two consecutive drops, as the provincial economy recovers from low commodity prices; however weak demand for uranium continues to adversely affect the local economy.
- The U.S. remains the largest market for Saskatchewan exports; however, provincial exports to China have been increasing and accounted for more than 12% in 2017.
- The province's population continued to grow in 2017 and is up 1.3% from the previous year. Meanwhile, the age structure of Saskatchewan's population has changed considerably over the past two decades, and there are many more seniors in the province than there were 20 years ago.
- Saskatchewan's unemployment rate remained unchanged at 6.3% in 2017 – in-line with the provincial average. At the same time, the province's labour force dropped, resulting in fewer Saskatchewanians looking for work.
- Employment losses were concentrated in Saskatchewan's goods-producing sector in 2017, while the number of people employed in services-producing industries edged up during this period.
- Employment fell in three out of five economic regions in Saskatchewan in 2017, with most the significant decline registered in Swift Current – Moose Jaw (-2,100).
- Saskatchewan has the second largest concentration of Indigenous peoples among the provinces, accounting for 16% of the total population. This share is significantly higher than the national average of five percent. In

2017, the unemployment rate for Saskatchewan’s off-reserve Indigenous population was 14.8%, nearly three times the rate of the non-Indigenous population (5.4%).

## ECONOMIC CONTEXT

### Global Outlook: Good Times for Now

The International Monetary Fund (2018) predicts continued global economic growth (3.9%) over the next two years.<sup>1</sup> Though advanced economies are better positioned to capitalize on the rising tide of global investment and trade, developing countries are expected to grow at an even faster pace (5.0%) this year.<sup>2</sup> The European Union appears to be avoiding the negative economic consequences of the United Kingdom’s exit. Nonetheless, high levels of personal and corporate debt, coupled with growing trade protectionism, have reduced prospects for growth across much of Europe.

Despite a slow start in 2018, the US economy is expected to grow with increased consumer spending and reductions to personal and corporate taxes. The Bank of Canada’s most recent Monetary Report pegs growth in real GDP in the US to average 2.5% over the 2017-2019 forecast period. However, the current U.S. administration’s willingness to explore protectionist trade policies introduces a new level of market uncertainty.

# WORLD ECONOMIC OUTLOOK

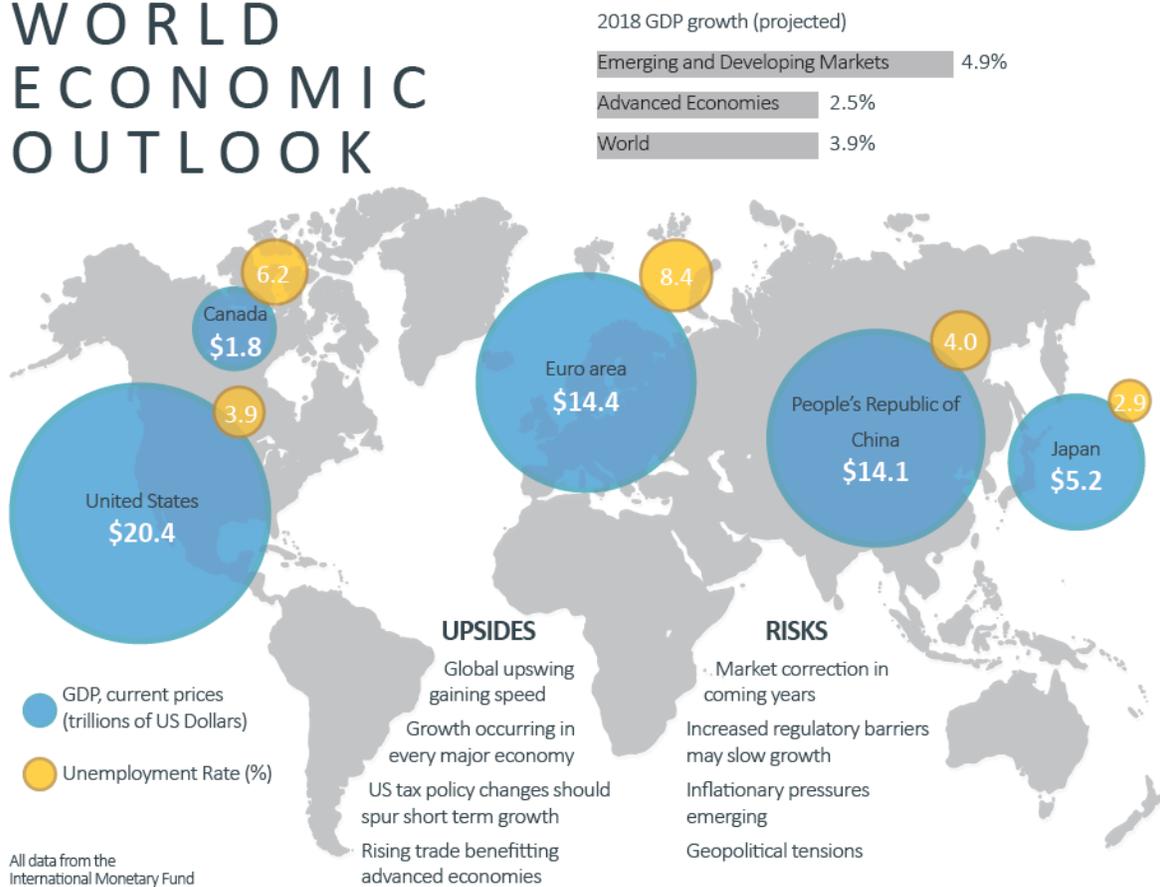


Figure 1  
Source: International Monetary Fund, World Economic Outlook Update, April 2018

## Canada Struggling to Keep Pace with Strengthening World Economy

Despite challenges in previous years, the economies of the European Union and Latin America are expanding. Further, post-2018, economic growth in Canada is expected to be more moderate. According to the Bank of Canada, Canada's overall GDP growth should decline from 3.0% in 2017 to 2.2% in 2018 and weaken further to 1.6% growth next year.<sup>3</sup>

Consumer spending will continue to act as the primary driver of growth in 2018, though at a slower pace compared to the previous year. Job growth will ease as baby boomers continue exiting the workforce, creating a tighter labour market. That tightness will likely drive wages upwards as employers compete for labour; however, increases will not be enough to offset a reduction in spending caused by record high debt levels among Canadian households. Borrowing costs are also expected to increase in the spring of 2018 as the Bank of Canada signals an interest rate increase to keep inflation in check. All told, disposable income growth is expected to drop to 2.4% this year, down from 3.7% in 2017.<sup>4</sup>

Canadian businesses have so far sent mixed signals about their investment intentions in 2018. The Bank of Canada's business outlook survey shows a significant portion of companies (+24%) planning to expand and update facilities and equipment this year.<sup>5</sup> The Conference Board of Canada's has a more conservative view. Specifically, the Board notes that Canada will find economic growth more challenging in the future because of trade uncertainty, U.S. corporate tax cuts, and capacity issues within the Canadian economy. Regardless, business investment is unlikely to return to pre-2014 levels in the near term.<sup>6</sup>

Canadian exports continue to underperform in spite of strong demand from the US and a low Canadian dollar. The Conference Board of Canada predicts non-energy exports will remain stagnant over the next two years. Meanwhile, oil exports are hitting a transportation bottleneck as production exceeds current pipeline capacity. Relying on more expensive rail transport to ship excess product has increased costs and negatively impacted producers' bottom line. And the export outlook could become worse depending on the outcome of NAFTA renegotiations. Though these negotiations appear to be heading in a positive direction for Canada with a resolution expected this summer, the US has signalled its willingness to enact tariffs that may result in trade wars elsewhere. Canada could experience collateral damage from the resulting fallout.

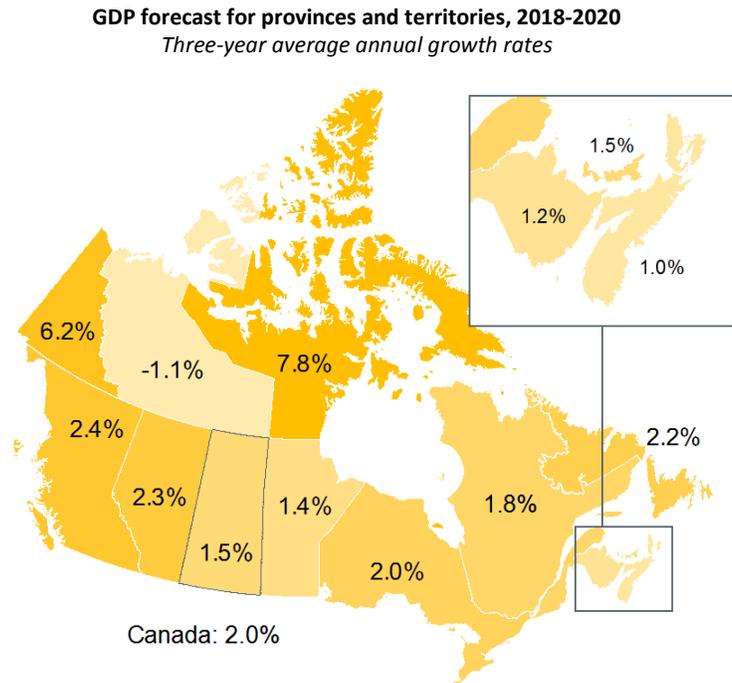


Figure 2  
Source: Conference Board of Canada, Provincial Outlook Economic Forecast: Winter 2018

## Provincial Overview

After two consecutive declines in the real gross domestic product (GDP), Saskatchewan's economy is projected to grow 1.3% in 2017 as the price of oil and outlook for potash improves.<sup>7</sup> Despite an increase in real GDP, the province remained challenged on many fronts this year amid ongoing challenges in the oversupplied uranium market and difficult agricultural conditions.

A drop in oil prices and potash prices has led to a sharp decline in investment over the past two years. According to the Conference Board of Canada, business investment contracted nearly 20% in 2016 and 2017. Despite recent challenges for the resource extraction industry, investment conditions are getting better. For instance, work is underway on projects such as Enbridge's \$5.3 billion Line 3 Replacement project, which transports Western Canadian crude oil to refinery markets in the United States (U.S.) and Canada, and Husky Energy's two new cost-effective thermal extraction plants worth \$350 million.

On the consumer spending front, Saskatchewan's average weekly earnings increased 2.2% to reach \$1,010.47 in 2017.<sup>8</sup> There was an increase in wages in both the goods- (+\$21.44) as well as the services-producing (+\$22.36) sectors this year.<sup>9</sup> Despite improving wages, the standard of living has remained unchanged in Saskatchewan as the inflation rate has kept pace with wage growth. According to Statistics Canada, the provincial Consumer Price Index (CPI) rose by 2.2% on an annual basis in 2017 – higher than the national rate of 2.0%.<sup>10</sup> Overall, with little job creation expected in 2018, Saskatchewan consumers are likely to limit spending to the necessities.

Meanwhile, the Government of Saskatchewan's 2018-19 budget, which was released on April 10, 2018, shows that the Province's budget deficit is now down to \$595 million – \$101 million lower than last year's projections.<sup>11</sup> The Province states that it is on track to return to a balanced budget, projecting a deficit of \$365.3 million for 2018-19 and a modest \$6 million surplus in the following fiscal year.

In the 2018-19 fiscal year, the Province plans to spend \$5.77 billion on health care. The health care budget includes \$3.5 billion for the provincial health authority, while \$49.4 million will go towards physician services, which supports the recruitment of new specialists and primary physicians.<sup>12</sup> On the education front, the budget restores \$30 million in funding for K-12 education that will allow school divisions to hire up to 400 teachers and other educational support staff. However, financial support for post-secondary students has been cut back by \$12 million.<sup>13</sup> The Province also plans to save \$70 million over the next two years by implementing efficiency measures within its public sector employee ranks.

All in all, Saskatchewan's economy is expected to recover moderately over the next few years as conditions pick up in the agriculture and resource extraction industries and business investment increases. The

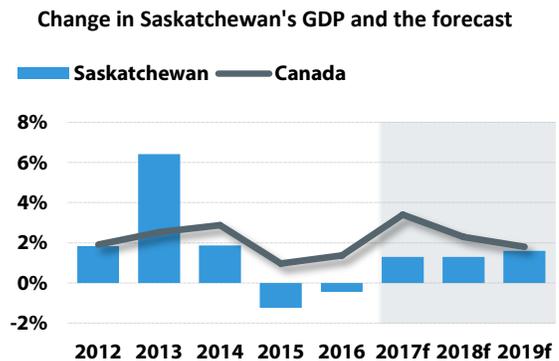


Figure 3

Sources: Statistics Canada CANSIM Tables 379-0030, 379-0031; Conference Board of Canada Economic Forecast

Conference Board of Canada anticipates that Saskatchewan’s real GDP will rise 1.3% in 2018, and by another 1.6% in 2019.

**Key global trading partners**

Saskatchewan has developed trade relations with a diversified group of partners. The three primary markets for Saskatchewan’s exports are the U.S., China and India. In 2017, the U.S. accounted for nearly 56% of the province’s total exports.<sup>14</sup> Meanwhile, Saskatchewan’s exports to China have been on the rise. In 2017, the provincial exports to China rose 4.2% compared to the previous year. Meanwhile, the exports to India dropped from \$1.45 billion in 2016 to \$1.15 billion 2017.

Saskatchewan’s largest exports in 2017 were mineral fuels, mineral oils, bituminous substances and mineral waxes, which were valued at \$7.4 billion. This category includes crude oil, natural gas as well as coal. The U.S. was the only importer of Saskatchewan’s crude oil. And this specific industry represented nearly \$7 billion in trade with the U.S. in 2017 or about a quarter of the province’s trade activity.<sup>15</sup>

Potash was the second largest export for Saskatchewan in 2017, accounting for nearly 18% of the province’s total exports. The mineral is used all around the world for crop fertilization. While the U.S. remains the largest importer of Saskatchewan potash, countries such as Brazil, China, India and Indonesia are also significant trading partners for the crop nutrient.<sup>16</sup>

Traditionally fertilizers have been a large driver of trade with China and India, but oilseeds and dried legumes are now by far the largest exports to these Asian countries. Dried legumes alone comprised over 64% of Saskatchewan’s exports to India in 2017, while more than 60% of Saskatchewan’s exports to China consisted of oilseed products or dried legumes.<sup>17</sup>



Figure 4  
Source: Industry Canada, Trade Data Online (accessed March 2, 2018)

## POPULATION TRENDS

Saskatchewan’s population increased 1.3% in 2017, higher than the national average of 1.2%. The province remains heavily reliant on international immigration to grow its population. In fact, Saskatchewan’s natural population increase was just under 6,000 people in 2016/17, with births adding only 15,750 infants to the population and deaths accounting for 9,759.<sup>18</sup>

Saskatchewan welcomed over 14,000 international immigrants to the province in 2016/17, with just 836 people emigrating to other countries. However, the trend is very different when it comes to interprovincial migration. Since 2013/14, Saskatchewan’s net interprovincial migration has been negative.<sup>19</sup> In 2016/17, 15,065 interprovincial immigrants came to Saskatchewan. However, Saskatchewan lost 20,680 people due to out-migration, with the majority of Saskatchewan residents relocating to Alberta (8,476), Ontario (4,881) and British Columbia (4,505).

Saskatchewan has the second largest concentration of Indigenous populations among the provinces. According to the 2016 Census, 16% of the province’s population identified as Indigenous, compared to five percent of the Canada’s population. Between 2011 and 2016, Saskatchewan’s Indigenous population grew nearly 11%, more than twice the rate of the non-indigenous population (5.2%). In 2016, the average age of Saskatchewan’s Indigenous population (28.6) is significantly lower than the overall population (40.6).

**Inter-provincial migration in Saskatchewan  
2012/13 to 2016/17**

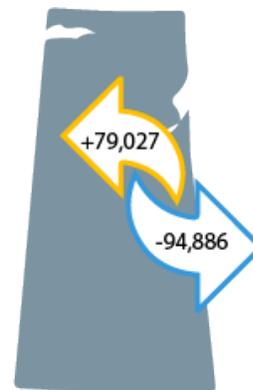


Figure 5  
Source: Statistics Canada CANSIM Table 051-0019

**Saskatchewan's Indigenous Population: 2016 Census**

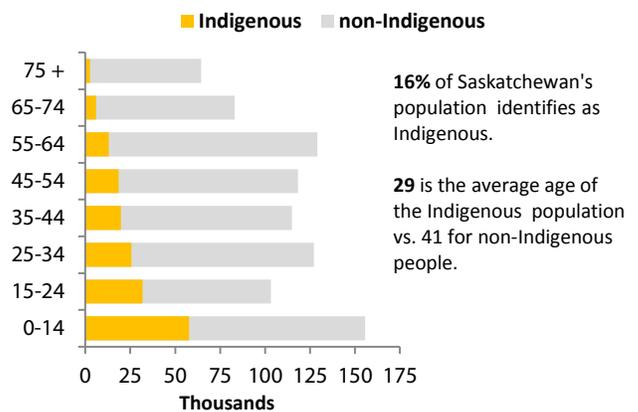


Figure 6  
Source: Statistics Canada, 2016 Census

### Age Structure

Saskatchewan has one of the youngest populations in Canada. The median age in the province stood at 37.0 years in 2017, significantly lower than the national median of 40.6 years.

The age structure of Saskatchewan’s population has changed considerably over the past two decades. There are more seniors in the province than there were 20 years ago. In 1997, 18.5% of Saskatchewan’s population was above the age of 60 years. In comparison, the proportion of population comprising of seniors has risen to 21.1% in 2017. And this trend is anticipated to continue over the next two decades. According to Statistics Canada, 26.4% of the population will be above the age of 60 years by 2037.<sup>20</sup> This change is largely because the baby-boomer cohort (those born between 1946 and 1965) is aging.

Demographic shifts in Saskatchewan: 1997-2037

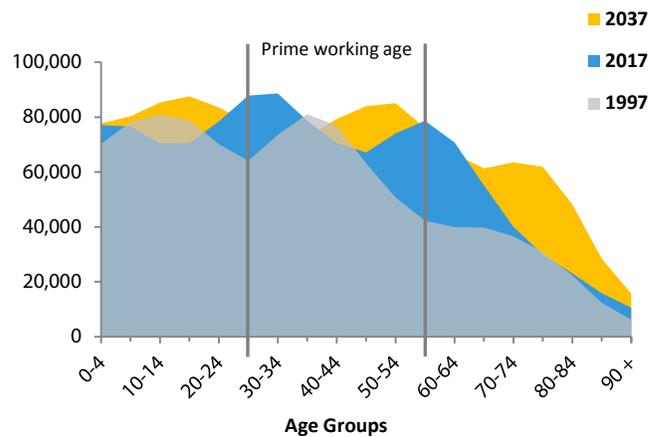


Figure 6b  
Sources: Statistics Canada  
CANSIM Tables 051-0001, 052-0005 (projection scenario M1)

Meanwhile, the proportion of children and young adults (under the age of 25) has dropped over the last 20 years, from 37.2% in 1997 to 32.1% in 2017. Whereas the prime working age population (aged 25 to 54 years) has remained consistent during this period. However, this trend is expected to change as the proportion of those between the ages of 25 and 54 years drops four percentage points between 2017 and 2037.<sup>21</sup>

## LABOUR MARKET CONDITIONS

Saskatchewan’s economy remained challenged on many fronts this year amid ongoing challenges in the oversupplied uranium market and lower oil and gas prices. And this continued to have a negative impact on the provincial labour market. There were 567,600 people employed in the province this year, down 900 from 2016. Overall, Saskatchewan was one of the two provinces in Canada to record a drop in employment in 2017, with the other being Newfoundland and Labrador.

| Saskatchewan            |  | Population growth | Labour Force growth | Employment rate | Unemployment rate | Participation rate | Average weekly earnings |
|-------------------------|--|-------------------|---------------------|-----------------|-------------------|--------------------|-------------------------|
| <b>2017</b>             |  | <b>876,800</b>    | <b>605,600</b>      | <b>64.7%</b>    | <b>6.3%</b>       | <b>69.1%</b>       | <b>\$1,010</b>          |
| <b>Change over 2016</b> |  | <b>0.9%</b> ▲     | <b>-0.2%</b> ▬      | <b>-0.7</b> ▼   | <b>0.0</b> ▬      | <b>-0.7</b> ▼      | <b>2.2%</b> ▲           |

Figure 7  
Source: Statistics Canada Labour Force Survey – CANSIM Tables 282-0002, 281-0027

The provincial unemployment rate remained unchanged in 2017, after recording a substantial increase in the previous year (+1.3 percentage points). Saskatchewan’s unemployment rate was in-line with the national rate

of 6.3% during the same period. Moreover, the provincial labour force decreased in 2017, resulting in fewer Saskatchewanians seeking employment (-0.8%) compared to a year ago.

Despite weak employment numbers, the demand for workers has slightly increased in the province as activity picks up in the oil industry and outlook for potash improves. According to Statistics Canada’s latest Job Vacancy and Wage Survey, Saskatchewan employers had a total of 9,430 job vacancies in the fourth quarter of 2017 – up 11.5% compared to the same period in 2016. Accommodation and food services (1,750) and retail trade (1,190) were the two industries that recorded the most significant number of opportunities. Overall, there were 39,290 job vacancies recorded in the province in 2017, 5.8% higher than 2016 levels.<sup>22</sup>

Overall, employment conditions are anticipated to remain sluggish in Saskatchewan over the short-term. According to the Conference Board of Canada’s latest provincial outlook summary, the number of people employed in the province is anticipated to drop 5,000 in 2018 and by another 4,000 in 2019.<sup>23</sup> Despite the pick-up in global demand for potash and oil, conditions in the agriculture and uranium industry remain uncertain. In 2017, the agriculture industry suffered from dry weather conditions, with some regions experiencing driest conditions in 130 years, causing industry output to drop.<sup>24</sup> Meanwhile, one of the largest uranium producers in Canada, Cameco Corporation, cut back production as well as jobs at the beginning of February 2018.<sup>25</sup>

### Employment by Sector

Annual employment losses were concentrated entirely in Saskatchewan’s goods-producing sector (-3,700), while employment in the services-producing sector increased (+2,800). A difficult crop year and weakness in the uranium market negatively impacted the goods-producing sector. The only goods-producing industry with positive year over year employment growth was manufacturing (+2,300).

The agriculture industry registered the largest decline in employment in 2017 (-4,200). Producers across the province faced difficult farming conditions this year. Seeding was delayed at the beginning of the 2017 crop season due to excessive moisture. This was followed by arid conditions in most of the province’s southern areas throughout the crop season, as well as wildfires in a few areas of Saskatchewan in October.<sup>26</sup> Apart from challenging weather conditions, India imposed a 50% import tax on peas due to an oversupplied pulse market at the end of 2017. India’s decision to impose a steep tariff on pea imports is anticipated to have a major impact on Saskatchewan farmers.<sup>27</sup> In spite of these challenges, there is positive news for the industry going forward. In February 2018, the Government of Saskatchewan reinstated the provincial sales tax (PST) exemption on crop, livestock and hail insurance premiums, which will help farmers save money and make larger-scale investments.<sup>28</sup> The federal government

Saskatchewan industries with largest job growth and decline in 2017



Figure 8  
Source: Statistics Canada Labour Force Survey, CANSIM Table 282-0008

has also announced that it is granting Protein Industries Canada (PIC) between \$150M and \$250M over five years through its Innovation Superclusters Initiative. PIC is made up of more than 120 stakeholders from Western Canada and will focus on developing plant-based proteins.<sup>29</sup> Moreover, the federal and provincial governments signed the Canadian Agricultural Partnership agreement in March 2018, which grants \$388 million over five years to strengthen Saskatchewan's agriculture and agri-food sectors.<sup>30</sup>

There were 28,000 people employed in Saskatchewan's manufacturing industry in 2017, up 2,300 from the previous year. Manufacturing employment has increased because of ongoing major projects in the region.<sup>31</sup> For example, Evraz's steelmaking plant in Regina is supplying the majority of the steel required for Enbridge's \$5.3 billion Line 3 Replacement project, which transports Western Canadian crude oil to refinery markets in the United States and Canada. The project replaces over 1,600kms of the pipeline from Hardisty, Alberta through Saskatchewan to Superior, Wisconsin.<sup>32</sup> Evraz has also been selected to provide 75% of the steel that Kinder Morgan requires for its \$7.4 billion Trans Mountain pipeline if the project moves forward.<sup>33</sup> Also, some of new manufacturing firms are planning to establish and expand their presence in the province. Some of the upcoming projects include Minhas Sask Ventures' multi-million dollar distillery in Regina, BASF's expansion of its inoculant manufacturing facilities in Saskatchewan, and Verdient Foods investing in an organic pea-processing plant in Vanscoy.<sup>34</sup>

Employment in Saskatchewan's resource extraction industry (forestry, fishing, mining, quarrying, oil and gas) decreased 1,300 on a year over year basis. Saskatchewan's uranium market remains oversupplied and price of the resource continues to be low. Cameco Corporation – one of the largest uranium companies in Canada – has faced challenges since the Fukushima nuclear disaster in 2011, which severely curbed demand for reactor fuel. At the beginning of February 2018, the company temporarily halted production at its McArthur River and Key Lake uranium mines in Northern Saskatchewan, leaving 845 people out of work for 10 months.<sup>35</sup>

In contrast to the uranium market, crude oil prices have been recovering since the West Texas Intermediate (WTI) fell as low as US\$30 a barrel in 2016. The stability in prices is due in part to production cuts by OPEC and Russia. According to the Conference Board of Canada, oil and gas output in Saskatchewan recovered to 0.5% growth in 2017, after contracting 3.8% in 2016.<sup>36</sup> Furthermore, the province's oil industry is benefiting from new cost-effective thermal extraction technologies which are anticipated to boost investment over the next few years.<sup>37</sup> For instance, Calgary-based Husky Energy plans to spend between \$2.9 billion and \$3.1 billion in Alberta and Saskatchewan in 2018. The spending includes development of two new cost-effective thermal extraction plants in the Prince Albert and Northern Saskatchewan economic region, which will cost \$700 million.<sup>38</sup>

Meanwhile, conditions in the province's potash industry are improving, buoyed by increasing demand for the mineral and strengthening potash prices. PotashCorp (now known as Agrium) and K+S Potash ramped up production from their expanded Rocanville mine and Bethune mine in 2017, which increased output from the non-metal mining industry.<sup>39</sup>

Employment in wholesale and retail trade has increased significantly during the past year. There are 3,800 more individuals employed in this industry than in 2016. Companies such as Save-on Foods and Loblaws are expanding their presence and plan to open additional stores in the province. For instance, Save-on Foods' newest store is slated to open in Saskatoon's Kensington neighbourhood this year and the company intends to

open another five stores within the city.<sup>40</sup> Similarly, a new Real Canadian Superstore recently opened its doors in Regina, as Loblaw expands its Saskatchewan operations.<sup>41</sup>

Reduced demand due to weak economic conditions in the province, coupled with rising food costs, is presenting challenges for businesses that are a part of the accommodation and food services industry. According to Statistics Canada, sales at Saskatchewan’s food services and drinking places totalled nearly \$1.87 billion in 2017, down \$10.4 million compared to a year ago. The survey shows that Saskatchewan was the only province to see a decline in receipts in 2017. This drop in sales has coincided with an increase in provincial sales tax (PST), which took effect in April and added a six percent charge on restaurant meals.<sup>42</sup> Overall, employment in the industry declined 1,700 on an annual basis.

With an increasing number of firms using technology to deliver services to the public and internet-based services rising in general, there has been significant growth in Saskatchewan’s tech-sector over the past two years. The number of people employed in the province’s professional, scientific and technical services industry rose 2,100 in 2017. Some technology start-ups have set up shop or are expanding operations in the province including Vendasta, Noodlecake Studios Inc., Solido Design Automation Inc. and 7Shifts Inc.<sup>43</sup>

### Labour Market Conditions by Economic Region

Employment is down in three out of five economic regions in Saskatchewan on an annual basis. Meanwhile, unemployment rates increased in two of the five economic regions in 2017.

| Regina-Moose Mountain   |                   |                     |                 |                   |                    |
|-------------------------|-------------------|---------------------|-----------------|-------------------|--------------------|
|                         | Population growth | Labour Force growth | Employment rate | Unemployment rate | Participation rate |
| <b>2017</b>             | <b>269,300</b>    | <b>193,100</b>      | <b>68.0%</b>    | <b>5.1%</b>       | <b>71.7%</b>       |
| <b>Change over 2016</b> | <b>1.1% ▲</b>     | <b>-0.4% ▼</b>      | <b>-1.0 ▼</b>   | <b>-0.2 ▼</b>     | <b>-1.1 ▼</b>      |

Figure 9.1  
Source: Statistics Canada Labour Force Survey – CANSIM Table 282-0123

Strong economic growth over the past decade has made Regina-Moose Mountain an attractive destination for immigrants. The region is a hub for the agriculture and resource extraction industries, and many of Regina’s manufacturing companies provide equipment for the resource sector. Persisting weakness in the resource extraction industry constrained employment growth in the region in 2017. All in all, employment in Regina-Moose Mountain declined 500 in 2017 – led by heavy losses in the agriculture industry (-1,200). However, manufacturing was a bright spot in the region, adding 2,300 positions on the year, and this trend is anticipated to continue as conditions improve in the oil and potash markets.<sup>44</sup>

**Swift Current-Moose Jaw**

|                         | Population growth | Labour Force growth | Employment rate | Unemployment rate | Participation rate |
|-------------------------|-------------------|---------------------|-----------------|-------------------|--------------------|
| <b>2017</b>             | <b>81,600</b>     | <b>53,100</b>       | <b>62.5%</b>    | <b>3.8%</b>       | <b>65.1%</b>       |
| <b>Change over 2016</b> | <b>-0.6% ▼</b>    | <b>-3.8% ▼</b>      | <b>-2.2 ▼</b>   | <b>0.0 ▬</b>      | <b>-2.1 ▼</b>      |

Figure 9.2  
Source: Statistics Canada Labour Force Survey – CANSIM Table 282-0123

Key industries in the Swift Current-Moose Jaw region include agriculture, manufacturing, wholesale trade and retail trade. Farming operations struggled in the region, as hot and dry weather conditions damaged this year’s crop.<sup>45</sup> This caused employment to decline in Swift Current-Moose Jaw in 2017 (-2,100). Overall, the unemployment rate in the region remained unchanged at 3.8% in 2017 compared to the previous year.

**Saskatoon-Biggar**

|                         | Population growth | Labour Force growth | Employment rate | Unemployment rate | Participation rate |
|-------------------------|-------------------|---------------------|-----------------|-------------------|--------------------|
| <b>2017</b>             | <b>305,300</b>    | <b>213,400</b>      | <b>64.7%</b>    | <b>7.5%</b>       | <b>69.9%</b>       |
| <b>Change over 2016</b> | <b>1.7% ▲</b>     | <b>2.0% ▲</b>       | <b>-0.5 ▼</b>   | <b>1.0 ▲</b>      | <b>0.2 ▲</b>       |

Figure 9.3  
Source: Statistics Canada Labour Force Survey – CANSIM Table 282-0123

Saskatchewan’s most populous region, Saskatoon-Biggar, has one of the most diversified economies in Canada. The province’s mining, energy and agricultural industries support growth in the region’s manufacturing, transportation and service industries. Saskatoon’s central location also makes it a hub for mining companies and several resource extraction companies are headquartered in this region.

The services-producing sector was responsible for all employment gains in Saskatoon-Biggar in 2017, with the trade industry registering the largest increase in employment (+2,400).<sup>46</sup> In spite of an increase in employment, Saskatoon-Biggar’s unemployment rate rose one percentage point and now stands at 7.5% due in part to a substantial increase in the region’s labour force (+4,200).

**Yorkton-Melville**

|                         | Population growth | Labour Force growth | Employment rate | Unemployment rate | Participation rate |
|-------------------------|-------------------|---------------------|-----------------|-------------------|--------------------|
| <b>2017</b>             | <b>61,000</b>     | <b>40,600</b>       | <b>63.3%</b>    | <b>5.2%</b>       | <b>66.6%</b>       |
| <b>Change over 2016</b> | <b>-1.3% ▼</b>    | <b>2.5% ▲</b>       | <b>3.4 ▲</b>    | <b>-1.4 ▼</b>     | <b>2.5 ▲</b>       |

Figure 9.4  
Source: Statistics Canada Labour Force Survey – CANSIM Table 282-0123

Agriculture, healthcare and social assistance, and trade are the strengths of Yorkton-Melville’s economy. In addition, the region is home to some of the world’s largest reserves of potash. Apart from resource extraction, the manufacturing industry is booming in this region. Several manufacturers are either planning to set up operations or are expanding their presence in Yorkton-Melville. For example, Canopy Growth Corp. plans to expand its marijuana production facility and will be hiring 40 to 50 workers for operations.<sup>47</sup> Also, Grain Millers

is expanding its oat plant in Yorkton; the \$100 million project will create 25 permanent jobs, along with 110 positions during the construction phase.<sup>48</sup> Overall, employment in Yorkton-Melville increased 1600 this year.

| Prince Albert and Northern |                   |                     |                 |                   |                    |
|----------------------------|-------------------|---------------------|-----------------|-------------------|--------------------|
|                            | Population growth | Labour Force growth | Employment rate | Unemployment rate | Participation rate |
| <b>2017</b>                | <b>159,500</b>    | <b>105,400</b>      | <b>60.9%</b>    | <b>7.8%</b>       | <b>66.1%</b>       |
| <b>Change over 2016</b>    | <b>0.4%</b> ▲     | <b>-3.1%</b> ▼      | <b>-1.6</b> ▼   | <b>-1.0</b> ▼     | <b>-2.4</b> ▼      |

Figure 9.5

Source: Statistics Canada Labour Force Survey – CANSIM Table 282-0123

The Prince Albert and Northern region is rich in natural resources, and is largely dependent on uranium as well as oil sands activity for its economic growth. Low global demand for uranium as well as slow oil and gas activity continued to hamper growth in the region in 2017. Weak economic conditions in the North have resulted in companies deferring larger infrastructure projects. SaskPower, for instance, deferred development of its \$630 million Tazi Twé hydroelectric project in Northern Saskatchewan.<sup>49</sup> Overall, the number of people employed in the region slumped further in 2017 (-2,000).

Looking ahead, there is some positive news for Prince Albert and Northern region. SSR Mining Inc. is planning a \$90M expansion over seven years at its Seabee gold mine near La Ronge, to boost production, reduce operating costs and extend the mine's lifespan.<sup>50</sup> In addition, Husky Energy Inc. plans to develop two steam-assisted heavy oil extraction plants in Westhazel and Edam. The proposed facilities are anticipated to be operational in 2021.<sup>51</sup>

## LABOUR MARKET OUTCOMES FOR CLIENT SEGMENTS

### Indigenous People

In 2017, the unemployment rate for Saskatchewan's off-reserve Indigenous population stood at 14.8%, nearly three times the rate for the non-Indigenous population (5.4%).<sup>52</sup> A large portion of Saskatchewan's Indigenous workforce is employed by mining firms in Northern Saskatchewan. Cameco Corp., for example, is one of the largest Indigenous employers in Canada. Over the past two years, the company has undertaken a number of cost cutting measures to deal with the drop in uranium prices. In April 2016, Cameco shuttered its Rabbit Lake uranium mine in Northern Saskatchewan, resulting in roughly 500 job losses. This was followed by 120 workers being laid-off from the McArthur River, Key Lake and Cigar Lake operations by the end of 2017. Most recently, Cameco temporarily suspend production at its McArthur River uranium mine and Key Lake mill in northern Saskatchewan for 10 months at the beginning of February 2018. Overall, Saskatchewan's Indigenous unemployment rate was the highest in the country in 2017 – higher than the national average of 11.3%.

### Immigrants and Newcomers

Saskatchewan's immigrant labour force has grown rapidly over the last five years. Between 2012 and 2017, the number of landed immigrants in the provincial labour force expanded by an average annual rate of 9.0%; whereas, the Canadian born labour force remained unchanged over the same period. Overall, Saskatchewan's

immigrant population is relatively small when compared to other provinces. In 2017, immigrants made up 12.9% of Saskatchewan's population, compared to 31.7% in BC, 23.6% in Alberta, and 21.0% in Manitoba.

The unemployment rate of recent immigrants (landed within the past five years) tends to be higher than the rate for Canadian-born workers. In 2016, the unemployment rate for recent immigrants in Saskatchewan stood at 8.1% considerably higher than the rate for those born in Canada (6.0%).<sup>53</sup>

## Youth

At 11.8%, Saskatchewan's youth unemployment rate was more than double the overall provincial average but much lower than most provinces. While youth unemployment remained virtually unchanged in 2017 (+0.1 percentage point), the unemployment rate among young men declined by 1.0 percentage point between 2016 and 2017 and now stands at 13.2%. Conversely, the unemployment rate for young women increased 1.3 percentage points during this period and now sits at 10.3%.

## Older Workers

The number of older workers in Saskatchewan (55 years and over) has grown at more than twice the rate compared to the working age population (25 to 54 years) over the past five years. An aging population and a growing demand for experienced workers have resulted in older job seekers remaining in the labour force past retirement age. Between 2012 and 2017, employment in the 55 and over age group advanced by 2.5% on average, far outpacing the 0.8% growth rate for the prime working age group. At the same time, the unemployment rate for older workers was 4.8% in 2017, 0.7 percentage points below the rate for those between the ages of 25 and 54 years.

## Seniors

Although traditionally 65 is considered the age of retirement, more seniors are choosing to remain in the labour force well into their golden years. This may in part be due to longer life spans and fallout from the 2009 recession. In 2017, the labour force participation rate rose to 19.9%, up from 13.6% in 2007. Moreover, the employment rate for those aged 65 and older increased from 16.8% in 2011 to 19.1% in 2016. In fact, Saskatchewan has the highest employment rate for seniors among provinces, well above the national average of 13.5%. Moreover, the unemployment rate for this age group stood at 4.1% in 2016, significantly lower than the unemployment rate for those below the age of 64 years (6.4%).

## People with Disabilities

In 2012, 15.0% of Saskatchewan's population (aged 15 and over) self-identified as having some type of disability. Saskatchewan's disability prevalence rate was the second highest among Western Canadian provinces, behind only Manitoba. Nationally, the overall disability prevalence rate stood at 13.7% during this period.

The labour force participation rate among Saskatchewan's disabled population (between the ages of 15 and 64) was 65.1% in 2012 – considerably higher than the national average of 53.6%. However, participation rates for

persons with a disability in Saskatchewan remain well below the rate for those without a disability (83.1%). As well, the unemployment rate for the province's disabled population was much higher than it was for the non-disabled population (6.9% vs. 5.4%).<sup>54</sup>

**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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