



# Labour Market Bulletin

## Alberta

January 2020



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

Employment in Alberta fell for the third straight month to 2,318,500. This represents a monthly drop of 18,900 (-0.8%) and an annual loss of 9,300. Job losses were concentrated in part-time positions down 15,200 in the month of January, compared to a more modest decrease in full-time jobs, down 3,600.<sup>1</sup>

#### Alberta Monthly Labour Force Statistics

Seasonally Adjusted Monthly Data	January 2020	December 2019	January 2019	Monthly Variation		Yearly Variation	
				Number	%	Number	%
<b>Population 15 + ('000)</b>	3,557.7	3,554.4	3,498.9	3.3	0.1	58.8	1.7
<b>Labour Force ('000)</b>	2,500.1	2,513.6	2,497.6	-13.5	-0.5	2.5	0.1
<b>Employment ('000)</b>	2,318.5	2,337.4	2,327.8	-18.9	-0.8	-9.3	-0.4
Full-Time ('000)	1,895.0	1,898.6	1,907.2	-3.6	-0.2	-12.2	-0.6
Part-Time ('000)	423.5	438.7	420.6	-15.2	-3.5	2.9	0.7
<b>Unemployment ('000)</b>	181.7	176.3	169.8	5.4	3.1	11.9	7.0
<b>Unemployment Rate (%)</b>	7.3	7.0	6.8	0.3	-	0.5	-
<b>Participation Rate (%)</b>	70.3	70.7	71.4	-0.4	-	-1.1	-
<b>Employment Rate (%)</b>	65.2	65.8	66.5	-0.6	-	-1.3	-

Note: Totals may not add due to rounding

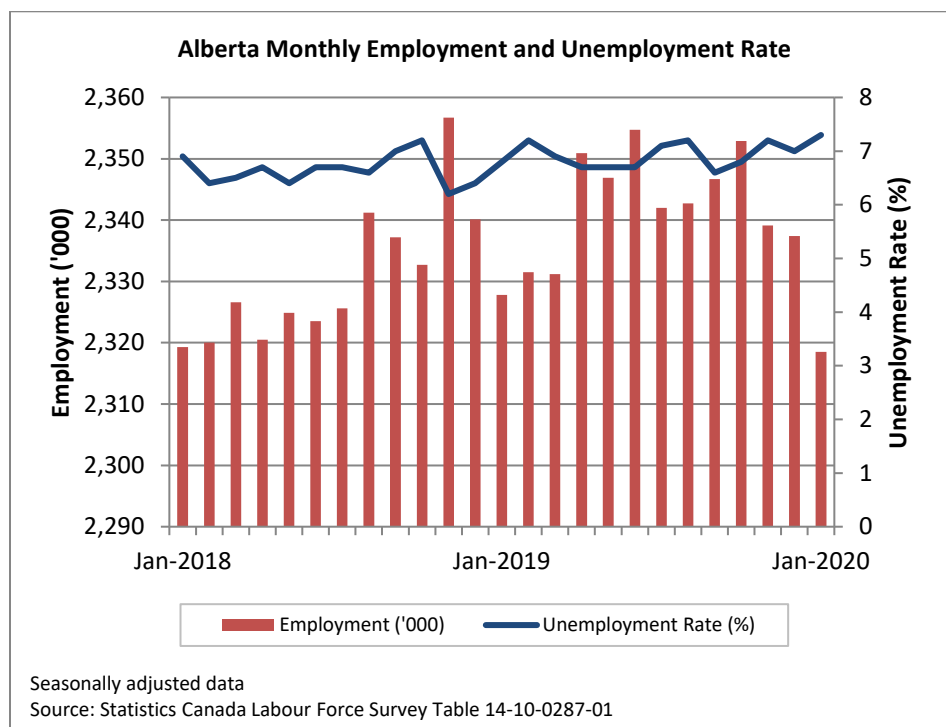
Source: Statistics Canada Labour Force Survey – Table 14-10-0287, formerly CANSIM 282-0087

On the month, job losses were concentrated in the private sector, which shed 34,200. Meanwhile, public sector and self-employment increased by 4,500 and 10,700 respectively. Employment followed the same pattern on a year-over-basis; private sector employment was down by 22,100 (-1.45%), while public sector employment (+5,100) and self-employment (+7,500) are up.<sup>2</sup>

Hourly paid Albertans worked 31.1 hours per week on average in November 2019 (the most recent data available). This was the third highest among provinces and well above the national average of 30.2 hours. Meanwhile at \$1,180 per week, average weekly earnings in Alberta remain the highest among provinces, despite posting five monthly declines through the first eleven months of 2019.<sup>3</sup>

In November (again, the most recent data available), the number of regular Employment Insurance beneficiaries increased for the third consecutive month. Compared to November 2018, beneficiaries in Alberta were up 0.6%, which follows the nationwide trend, up 1.1%.<sup>4</sup>

In January, 181,700, the number of unemployed in the province was 5,400 higher than in December 2019. Alberta's unemployment rate climbed to 7.3%, the highest rate west of New Brunswick.<sup>5</sup>



### Unemployment by major demographic grouping

At 7.3%, Alberta's overall unemployment rate is 0.5 percentage points higher than it was a year ago. Young men fared the worst, at 16.4% their unemployment rate was 3.6 percentage points higher than in January 2019. This is a significant improvement from September 2019, when it peaked at 19.8%,<sup>6</sup> although considerably higher than their female counterparts.

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

Seasonally Adjusted Data	January 2020 (%)	December 2019 (%)	January 2019 (%)	Monthly Variation	Yearly Variation
				(% points)	(% points)
<b>Total</b>	7.3	7.0	6.8	0.3	0.5
<b>25 years and over</b>	6.3	5.8	6.1	0.5	0.2
Men - 25 years and over	6.0	6.0	6.7	0.0	-0.7
Women - 25 years and over	6.7	5.6	5.4	1.1	1.3
<b>15 to 24 years</b>	13.9	14.7	11.7	-0.8	2.2
Men - 15 to 24 years	16.4	18.7	12.8	-2.3	3.6
Women - 15 to 24 years	11.3	10.5	10.5	0.8	0.8

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

Turning to employment by industry, the province's goods-producing sector (e.g. construction) saw job losses both on the month (-300) and year-over-year (-16,100). By contrast, the services-producing sector (e.g. wholesale and retail trade) saw employment contract on the month (-18,500) but expand compared to January of last year (+6,800).

Alberta's goods-producing sector represents a far larger share of the economy than it does in other major provinces. Yet despite ongoing job losses, the outsized sector's share still accounted for almost one-quarter of total employment in the province, 4.2 percentage points above the national average.

### Alberta Monthly Labour Force Statistics, by Industry

Seasonally Adjusted Data ('000)	January 2020	December 2019	January 2019	Monthly Variation		Yearly Variation	
				Number	%	Number	%
<b>Total employed, all industries</b>	2,318.5	2,337.3	2,327.8	-18.8	-0.8	-9.3	-0.4
<b>Goods-producing sector</b>	577.2	577.5	593.3	-0.3	-0.1	-16.1	-2.7
Agriculture	50.6	49.6	46.0	1.0	2.0	4.6	10.0
Forestry, fishing, mining, quarrying, oil and gas	140.3	136.1	150.3	4.2	3.1	-10.0	-6.7
Utilities	22.6	24.2	22.1	-1.6	-6.6	0.5	2.3
Construction	229.0	235.2	237.3	-6.2	-2.6	-8.3	-3.5
Manufacturing	134.7	132.4	137.6	2.3	1.7	-2.9	-2.1
<b>Services-producing sector</b>	1,741.3	1,759.8	1,734.5	-18.5	-1.1	6.8	0.4
Trade	330.6	339.6	333.5	-9.0	-2.7	-2.9	-0.9
Transportation and warehousing	128.4	132.3	134.6	-3.9	-2.9	-6.2	-4.6
Finance, insurance, real estate and leasing	107.8	108.8	104.6	-1.0	-0.9	3.2	3.1
Professional, scientific and technical services	190.7	192.6	177.6	-1.9	-1.0	13.1	7.4
Business, building and other support services	73.8	76.9	91.8	-3.1	-4.0	-18.0	-19.6
Educational services	162.7	163.5	153.8	-0.8	-0.5	8.9	5.8
Health care and social assistance	301.8	302.6	285.6	-0.8	-0.3	16.2	5.7
Information, culture and recreation	77.6	77.1	76.5	0.5	0.6	1.1	1.4
Accommodation and food services	156.6	154.4	142.8	2.2	1.4	13.8	9.7
Other services	105.2	105.0	119.3	0.2	0.2	-14.1	-11.8
Public administration	106.0	107.3	114.4	-1.3	-1.2	-8.4	-7.3

Note: Totals may not add due to rounding

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

## Oil and gas

Oil production in Alberta expanded sharply in 2018, the year in which oil production in the province officially 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 December 2019, oilsands operations accounted for 84.2% of total oil production in Alberta. However, while direct employment in oil and gas extraction is down by roughly 20% since Q3-2014, oil production is up by about one-third.<sup>7</sup>

In late 2018, a combination of pipeline constraints, refinery closures, and falling international oil prices threatened the viability of the provincial energy sector. That November, the price of Western Canada Select (WCS), Alberta's benchmark bitumen crude, averaged just \$18 USD per barrel over the entire month, far below the cost of production. 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. Initially the policy raised the price of WCS, which touched \$55 USD per barrel in April. Since then WCS has fallen along with other oil prices worldwide, as trade disruptions, and action on climate change by other countries, limit global oil demand

growth.<sup>8</sup> In December 2019, WCS averaged \$39.11 USD, roughly \$20 USD below the benchmark price of U.S. oil (WTI).<sup>9</sup>

Despite the WCS price hike, Alberta's curtailment policy remains deeply unpopular with the province's largest oil producers. Integrated firms with their own refineries can still make money when crude prices are low, because of that these firms tend to oppose government intervention. Regardless, although curtailment remains on the books – and will likely remain through 2020, firms can now increase production, providing they ship extra barrels by rail and not by pipeline.<sup>10</sup>

While oil by rail continues to expand, the 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 most likely to first come on stream. On February 3, 2020, the Minnesota Public Utilities Commission voted to accept a revised environmental impact statement and issue a 'certificate of need' for the Line 3 replacement through the state. Once complete, the pipeline will transport 390,000 barrels of oil per day from Hardisty, Alberta to Superior, Wisconsin. Replacement of the Canadian segment has finished and commercial service began in December 2019. The pipeline is operating at a reduced capacity until the U.S. section is complete, which could be as soon as early 2021.<sup>11</sup> Meanwhile, the Federal Court of Appeal upheld Trans Mountain pipeline approval. The Court ruled on February 4, 2020 that the federal government fulfilled its obligations to consult with Indigenous people when it re-approved the project in 2019, thus dismissing an application by four Indigenous groups seeking to halt the project. This decision lessens the uncertainty of the \$12.6 billion project that would triple the current pipeline capacity from Alberta's oilsands to a shipping terminal in Burnaby, British Columbia. It is expected that the project will be completed in late 2022.<sup>12</sup>

### Other goods-producing industries

Looking at Alberta's other goods-producing industries, **construction** posted a significant job loss in January (-2.6%). Cold weather may have been partly responsible for the decline; during the week the Labour Force Survey was conducted, the entire province was under an extreme cold warning with daily temperatures hovering around the -25C mark, feeling much colder with the wind chill.<sup>13</sup>

In December 2019 (the most recent data available), the seasonally-adjusted value of building permits issued in the province – including both new product and renovations – increased, following a turbulent year. However, at just over \$1 billion, building permits are 9.3% lower than December 2018.<sup>14</sup> There have also been troubling signs of residential overbuilding in the province. Completions of single and semi-detached homes has again outstripped their absorptions. In December, there were about 2,600 newly built but vacant single and semi-detached homes in the province.<sup>15</sup><sup>16</sup> Slow economic growth and more stringent mortgage financing rules are two of the main reasons for the decrease in demand for new houses.

After a poor 2018, Alberta's **agriculture** industry had hoped for a recovery year in 2019. However, starting in March, trade issues emerged as China systematically revoked all licences to import Canadian canola.<sup>17</sup> The country then halted the importation of all Canadian meat products from June to November, following its discovery of counterfeit Canadian veterinary certificates.<sup>18</sup> The trade disputes resulted in lower exports from Alberta to China. In 2019, the value of farm and food product exports was 35.8% lower compared to 2018 levels.<sup>19</sup>

Last year's harvest did not go well, as winter arrived early in Alberta. As of December, only 90% of crops had been harvested with little prospects of the remaining 10% being removed profitably in spring 2020.<sup>20</sup>

While low energy prices are a huge negative for resource extraction firms, they are a significant plus for the province's 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. In addition, Dow Inc. has approved a \$225 million USD expansion of its petrochemical facility, just north of Edmonton. This expansion will increase capacity at its ethylene plant by about 130,000 tonnes per year.<sup>21</sup>

Manufacturing sales looked promising through the first five month of 2019. However from June through November (the most recent data available), sales were lower in 2019 than each comparable month of 2018. Monthly manufacturing sales in Alberta fell by 2.6% in November and by 4.7% on a year over year basis.<sup>22</sup>

### Services-producing industries

Turning to the services-producing sector, at 1.735 million, overall employment decreased by 18,500 in January, while remaining up by just 6,800 on the year.

**Wholesale and retail trade**, Alberta's largest industry by employment, saw job losses on the month (-9,000) and year over year (-2,900). The industry has been deeply hurt by the prolonged slump in the provincial energy sector. The combined sales in Alberta were down by 2% in November compared to October. At just over \$13.2 billion, November's sales were down by 2.9% compared to the previous November. Looking farther back, over the five-year period from November 2014 to November 2019, the total value of retail sales in Alberta decreased by 0.2% – compared to an almost 20% gain Canada-wide<sup>23</sup>. Wholesale trade fared even worse; total sales in November 2019 were 7.3% below the level of November 2014.<sup>24</sup> Slowing sales points to dampened business activity and will likely persist until oil and gas investments begin to increase again.

In January, **Health care and social assistance**, Alberta's second largest industry by employee count, posted a slight decline in job gains on the month (-0.3%) but remained up on the year (+5.7%). 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, in its first Budget, Alberta's new government proposes a course change and a 2.8% reduction in provincial operating expenses. The Province intends to reduce its public service by 7.7% over four years through hiring restraints and attrition, and to reduce post-secondary institutions' operating grants by up to 7.9%.<sup>25</sup>

## REGIONAL ANALYSIS

Over the past year, employment increased in three of Alberta's economic regions. On a percentage basis, Camrose-Drumheller led the province in job growth (+9.4%), while Red Deer was the worst performing region (-10.9%).

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

3-Month Moving Averages Seasonally Unadjusted Data	Employment			Unemployment Rate		
	January 2020 ('000)	January 2019 ('000)	Yearly Variation (%)	January 2020 (%)	January 2019 (%)	Yearly Variation (% points)
<b>Alberta</b>	2,318.5	2,325.7	-0.3	7.0	6.3	0.7
<b>Economic Regions</b>						
Lethbridge - Medicine Hat	142.7	138.3	3.2	4.5	5.4	-0.9
Camrose - Drumheller	99.7	91.1	9.4	5.1	7.8	-2.7
Calgary	909.4	896.1	1.5	6.9	6.9	0.0
Banff - Jasper - Rocky Mountain House and Athabasca - Grand Prairie - Peace River	181.0	185.5	-2.4	6.5	4.8	1.7
Red Deer	107.4	120.6	-10.9	7.4	4.4	3.0
Edmonton	800.3	812.8	-1.5	7.9	6.2	1.7
Wood Buffalo - Cold Lake	78.0	81.3	-4.1	5.3	5.6	-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 was up 3.2% compared to January 2019. The unemployment rate correspondingly fell by 0.9 percentage points to 4.5% - the lowest of any region in the province. Growth was fuelled by a strong services-producing sector, which offset job losses in the goods-producing sector. Looking forward, there is optimism that the goods-producing sector will strengthen in 2020 as a number of renewable energy projects are slated to begin construction. This includes the first phase Suncor Energy's Forty Mile wind farm, located on 50,000 acres of land between Lethbridge and Medicine Hat<sup>26</sup>. Two additional wind farms near Medicine Hat are expected to begin construction next summer as they clear regulatory hurdles<sup>27</sup>.

In January, year-over-year employment increased by 9.4% to approximately 99,700 in **Camrose-Drumheller**. On an industry basis, a decline in agriculture and wholesale and retail trade were offset by sizeable job gains in construction and in manufacturing. It is expected that the construction industry will continue to grow following a funding announcement for one of the largest solar power projects in North America. Denmark-based Copenhagen Infrastructure Partners is providing \$500 million in funding for the Travers Solar project located in Vulcan country. Construction is set to begin in mid-2020, which will create more than 500 jobs. Once complete, the project will consist of 1.5 million solar panels that will generate 800 million kWh per year, enough to power more than 100,000 homes.<sup>28</sup>

Employment decreased in **Banff-Jasper-Rocky-Mountain House and Athabasca-Grande Prairie-Peace River** by a 2.4%, compared to January 2019. As a result, the region's unemployment rate increased by 1.7pp to 6.5%. In energy news, Pipestone Energy Corp. is planning \$145-\$155 million in capital spending for 2020. This includes a forecasted 24 wells drilled, up from ten in 2019.<sup>29</sup>

On a year-over-year basis, **Red Deer** employment contracted by 13,200 (-10.9%) in January, and the unemployment rate increased by three percentage points to 7.4%. At 107,400, this is the lowest employment in the region has been since May 2016 during the provincial recession. Red Deer's prosperity has been closely tied to the conventional oil and gas industry; a down turn in prices and drilling negatively affects the region. However, the Canadian Association of Petroleum Producers forecasts non-oils sands and natural gas investment to increase by 4% from 2019 levels.<sup>30</sup> To encourage investment, the Government of Alberta has allowed producers to drill new conventional oil wells without being restricted by production limits.<sup>31</sup>

In the northeast, **Wood Buffalo-Cold Lake** employment stood at approximately 81,300, down 4.1% on the year. Over the same period, the regional unemployment rate declined by 0.3 percentage points to 5.3% as around 3,700 (-4.3%) people left the labour force. Employment has been stagnant in the region in the absence of new oilsands projects. However, that may change as Teck Resources' proposed \$20.6 billion Frontier oilsands mine awaits federal Cabinet approval. If constructed, the massive operation will employ upwards of 7,000 people during construction and up to 2,500 during its 40-year operation. It is important to note, that even if the federal government approves the mine, there is no guarantee that it will be built. The CEO of Teck stated that for the project to go forward three conditions need to be met: the Trans Mountain pipeline needs to be built, they need a partner to build the mine, and the price of oil to be adequately high.<sup>32</sup> Analysts have pointed out that for the mine to be profitable over its 40-year life span the price of oil will need to be \$75 USD, nearly \$20 higher than it is currently trading. The federal government has until February 28, 2020 to make a decision.

Two oilsands projects have been approved by regulators, but await corporate investment decisions: Grizzly Oil Sands' \$200 million May River project and Imperial Oil's \$2.6 billion Aspen mine.

The **Edmonton** region's labour market continued to slow in January. Year-over-year employment across the region decreased by 1.5% (-12,500) to roughly 800,300. At 7.9%, the region has the highest unemployment rate in the province. Job gains in the goods-producing sector were offset by losses in the services-producing sector. Employment in the public sector fared the worst in the province. Looking ahead, this is likely to be a trend in 2020 as provincial budget cuts trickle down to municipalities and school districts.

Edmonton Public Schools is introducing a retirement incentive program for teachers, support staff and administrators. The incentive is aimed to support budget planning in the wake of reduced funding from the provincial education budget and increasing student numbers. The district's chief human resources officer noted that this program is not a direct response to the provincial funding cuts – but is related.<sup>33</sup>

Employment in **Calgary** increased by over 13,000 (+1.5%) on a year-over-year basis. However, the unemployment rate in the region remained at 6.9% as the labour force also increased. The employment increase is due to a strong performance by the services-producing sector. A new training program for displaced oil and gas professionals will help keep this momentum going. EDGE UP targets professionals, such as engineers and geoscientists, displaced by the structural change in the oil and gas sector in recent years. Participants will gain skills to access jobs in the high demand tech industry. The first cohort of this two-year pilot program starts in February 2020.<sup>34</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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**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>1</sup> Statistics Canada. Table 14-10-0287-01 Labour force characteristics, monthly, seasonally adjusted and trend-cycle, last 5 months; Accessed February 7, 2020 <https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=1410028701>

<sup>2</sup> Statistics Canada. Table 14-10-0288-01 Employment by class of worker, monthly, seasonally adjusted and unadjusted, last 5 months (x 1,000); Accessed on February 7, 2020 <https://www150.statcan.gc.ca/t1/tbl1/en/cv.action?pid=1410028801>

<sup>3</sup> Statistics Canada. Table 14-10-0222-01 Employment, average hourly and weekly earnings (including overtime), and average weekly hours for the industrial aggregate excluding unclassified businesses, monthly, seasonally adjusted. Accessed on February 6, 2020 <https://www150.statcan.gc.ca/t1/tbl1/en/cv.action?pid=1410022201>

<sup>4</sup> Statistics Canada. Table 14-10-0011-01 Employment insurance beneficiaries (regular benefits) by province and territory, monthly, seasonally adjusted; Accessed February 6, 2020 <https://www150.statcan.gc.ca/t1/tbl1/en/cv.action?pid=1410001101>

<sup>5</sup> Statistics Canada. Table 14-10-0287-01 Labour force characteristics, monthly, seasonally adjusted and trend-cycle, last 5 months; Accessed February 7, 2020 <https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=1410028701>

<sup>6</sup> Ibid

<sup>7</sup> The Government of Alberta's Economic Dashboard, Oil Production; February 5, 2020. Accessed February 6, 2020 <https://economicdashboard.alberta.ca/OilProduction>

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<sup>11</sup> Financial Post. Enbridge clears last hurdle on \$9-billion Line 3 pipeline project; February 3, 2020. Accessed February 6, 2020 <https://business.financialpost.com/commodities/energy/enbridge-line-3-oil-pipeline-clears-hurdle-minnesota-regulator-rules-environment-statement-adequate-2>

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- <sup>14</sup> Statistics Canada, Table 34-10-0066-01 Building permits, by type of structure and type of work (x 1,000) – Seasonally adjusted. Accessed February 10, 2020 <https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3410006601>
- <sup>15</sup> Statistics Canada, Table 34-10-0143-01 Canada Mortgage and Housing Corporation, housing starts, under construction and completions in centres 10,000 and over, Canada, provinces, selected census metropolitan areas. Accessed February 11, 2020 <https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3410014301>
- <sup>16</sup> Statistics Canada, Table 34-10-0149-01 Canada Mortgage and Housing Corporation, absorptions and unabsorbed inventory, newly completed dwellings, by type of dwelling unit in census metropolitan areas. Accessed February 7, 2020 <https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=3410014901>
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- <sup>19</sup> Statistics Canada, Table 12-10-0119-01 International merchandise trade by province, commodity, and Principal Trading Partners (x 1,000). Accessed February 10, 2020 <https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=1210011901>
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- <sup>22</sup> Statistics Canada, Table 16-10-0048-01 Manufacturing sales by industry and province, monthly (dollars otherwise noted) (x1,000); Accessed February 6, 2020 <https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=1610004801>
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