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Indigenous Economic Impacts in Saskatchewan's Manufacturing and Construction Sectors

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Thank you

Thank you to the interviewees, who work in the manufacturing and construction industries, Indigenous economic development, and public Indigenous procurement. Your knowledge of Indigenous economic activity in manufacturing and construction made this report much stronger.

Indigenous Manufacturing & Contracting Network

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Executive Summary

This report analyzes Indigenous economic participation in Saskatchewan's manufacturing and construction sectors using input–output modelling, labour force data, and sectoral analysis. The findings demonstrate that Indigenous peoples make substantial contributions to these sectors, while also identifying structural barriers that limit further growth.

Indigenous economic activity in Saskatchewan's manufacturing and construction sectors generated $2.6 billion in total output, contributed $931.6 million to provincial GDP, and supported 5,154 full time equivalent (FTE) jobs in 2022.

Construction accounts for the majority of the economic impacts due to its strong regional supply chains and high labour intensity. For every $1 million in Indigenous spending in the construction sector, Saskatchewan sees a total impact of $2.25M in output, $0.91M in GDP, and 5.5 FTE jobs.

Manufacturing impacts are smaller in comparison, reflecting the sector's reliance on imported goods and services. For every $1 million in Indigenous spending in the manufacturing sector, Saskatchewan sees a total impact of $1.60M in output, $0.40M in GDP, and 1.4 FTE jobs.

Indigenous procurement produces significantly stronger local economic returns than non-Indigenous or out-of-province supply chains. Indigenous owned businesses also generate disproportionately higher Indigenous employment outcomes. Despite measurable progress, Indigenous employment remains below population parity, particularly in manufacturing and management roles.

The evidence of this report supports a coordinated approach to economic reconciliation that aligns procurement policy, workforce investment, and accountability mechanisms. Strengthening Indigenous participation in these sectors represents both an economic opportunity and a practical strategy for long term provincial growth.

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Acronyms and abbreviations

AFN Assembly of First Nations

CWB Community Well-Being

FTE full-time equivalent

GDP gross domestic product

I-O input-output
IBD Indigenous Business Directory
IMCN Indigenous Manufacturing and Contracting Network
IPEA Indigenous Peoples Economic Account

NAICS North American Industry Classification System
NOC National Occupational Classification

PPE personal protective equipment

StatCan Statistics Canada

Glossary

full-time equivalent (FTE) A method to normalize hours worked across different types of employment. Standard calculations take total hours worked and divide by average annual hours worked in full-time jobs. In this report full-time is set to 40 hours per week. There, if someone worked 35 hours a week, their employment would be a 0.875 FTE job (35÷40).

gross domestic product (GDP) Total market value of all final goods and services. The value of intermediate goods or services, which are used in the production of a good or service, is not included in GDP.

Indigenous Peoples Economic Account (IPEA) A suite of economic statistics that aims to measure the economic contribution, in terms of gross domestic income (GDI) and jobs, of Indigenous people to the Canadian economy.

input-output (I-O) model A system of linear equations that describe the distribution of output throughout an economy.

North American Industry Classification System (NAICS) Classifies economic activities by supply-side or production-oriented principles. NAICS has a hierarchical structure. At the 2-digit level, the economy is divided into 20 sectors.

output The measure of all sales of goods and services, both final and intermediate.

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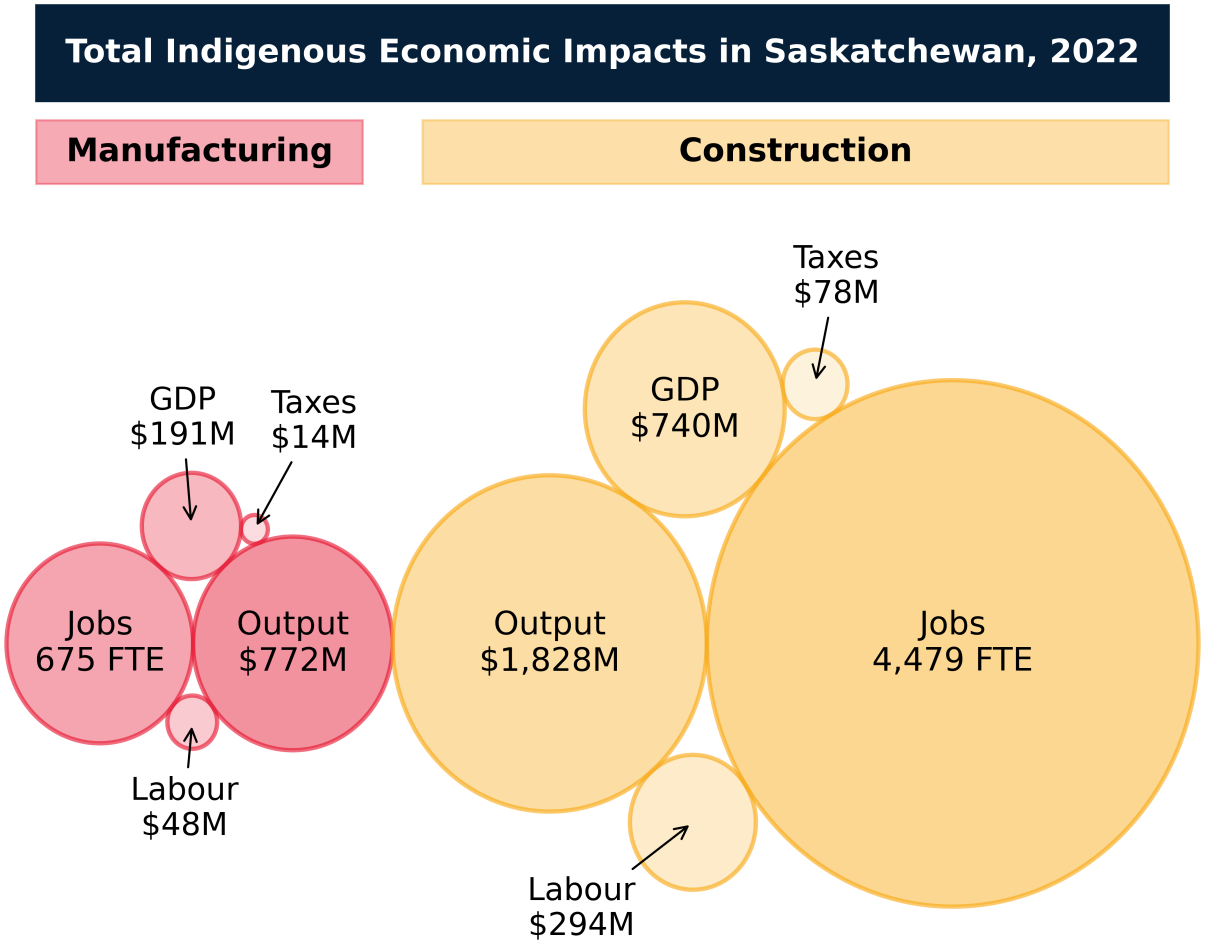
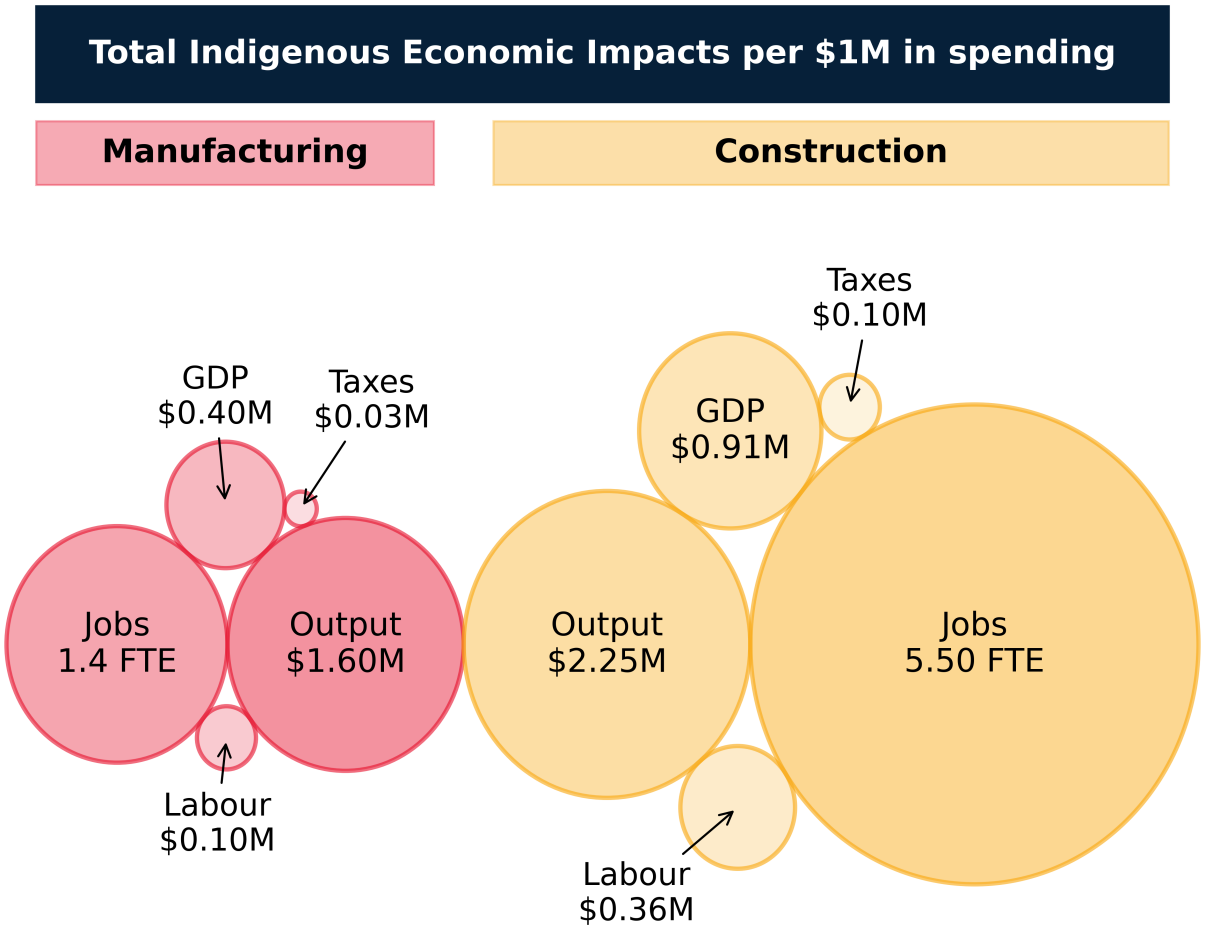
1. Introduction

A key part of economic reconciliation in Canada involves Indigenous peoples taking an active role in shaping the country's future. While there has been progress in Indigenous economic development, disparities persist, particularly in employment, income, and labour force participation. Indigenous communities, businesses, and organizations have all emphasized the importance of increasing Indigenous economic activity through procurement, partnerships, ownership, and employment.

This report uses input-output modelling and statistical research to analyse Indigenous economic participation in Saskatchewan's manufacturing and construction sectors.[1]The analysis of Indigenous economic participation will demonstrate that Indigenous peoples make significant contributions to these sectors. The combined total output of Indigenous economic impacts in these sectors summed to $2.6 billion in 2022. This size of output drives other economic impacts. For example, the total Indigenous impact in Saskatchewan's manufacturing and construction sectors helped produce 5,154 FTE jobs.

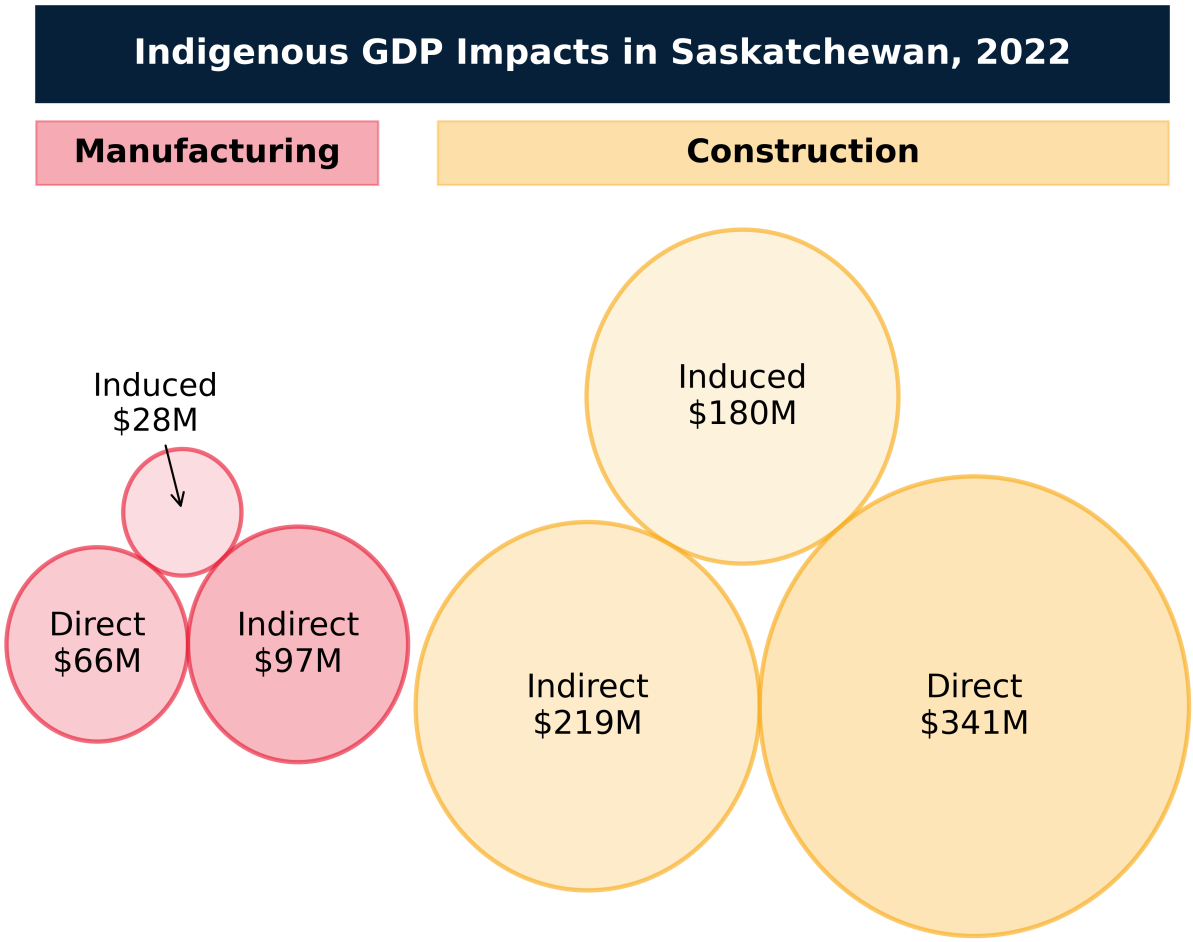




Indigenous economic impacts can also be measured per dollars in spending. For every $1 million in Indigenous spending in the construction sector, Saskatchewan sees a total impact of $2.25M in output, $0.91M in GDP, and 5.5 FTE jobs. For every $1 million in Indigenous spending in the manufacturing sector, Saskatchewan sees a total impact of $1.60M in output, $0.40M in GDP, and 1.4 FTE jobs.

In 2022, the direct Indigenous GDP impact in the manufacturing and construction sectors totalled $407.26 million. Direct Indigenous economic contributions also have cascading effects across Saskatchewan's economy. Indirect Indigenous economic contributions measure the effects of Indigenous-owned businesses using revenues to purchase goods and services from other businesses. The 2022 indirect Indigenous GDP impact in the manufacturing and construction sectors totalled $315.94 million. The induced Indigenous GDP impact, which is household spending that can be attributed to the indirect business-to-business purchases, totalled $208.41 million.

[1]The patron of this report, the Indigenous Manufacturing and Contracting Network (IMCN), uses "contracting" in its branding, reporting, and other activities in support of Indigenous economic development. Because StatCan data uses the North American Industry Classification System (NAICS) to analyze economic activities by industry, the report uses "construction" instead of "contracting".



This report also identifies barriers to Indigenous economic participation in the manufacturing and construction sectors. While many of the economic statistics in this report speak to the successes of Indigenous peoples participating in the manufacturing and construction sectors, Indigenous economic participation could be larger. Indigenous peoples are still under-represented in many measurements of employment. Access to capital is also a major barrier in Indigenous business growth and entrepreneurship.

1.1 Definitions of the construction and manufacturing sectors

This report uses sector definitions from the 2022 version of the North American Industrial Classification System (NAICS):

Construction (NAICS 23) Establishments primarily engaged in constructing, repairing and renovating buildings and engineering works, and in subdividing and developing land.

Manufacturing (NAICS 31-33) Establishments primarily engaged in the chemical, mechanical or physical transformation of materials or substances into new products.

1.2 Definition of Indigenous economic participation

Indigenous economic participation includes employment, business ownership, and government expenditure undertaken by Indigenous peoples and Indigenous owned entities. This report adopts the Indigenous Peoples Economic Account (IPEA) definition used by Statistics Canada (StatCan) to ensure consistency and transparency.

Debates surrounding Indigenous business verification and ownership thresholds are acknowledged but are not the focus of the analysis.[2] Where relevant, emphasis is placed on measurable economic outcomes of total Indigenous economic activity in Saskatchewan or in its cities.

Indigenous government expenditures or activity are defined with NAICS code 914, Indigenous public administration, which is a subsector of NAICS code 91, public administration.[3] Establishments within Indigenous governments would include:

- First Nations Band Councils
- First Nations Self-Governments
- First Nations Tribal Councils
- Métis Self-Governments
- Inuit Self-Governments

1.3 Structure of Report

Section 2 of the report provides context for an analysis of the Indigenous participation in Saskatchewan's manufacturing and construction sectors. Figures within the section show historical shares of manufacturing and construction output in Canada and its provinces. Data are also presented on the impacts of large subsectors.

Section 3 uses input-output (I-O) modelling to analyse Indigenous economic impact in Saskatchewan and for four of its cities: Saskatoon, Regina, Prince Albert, and Moose Jaw. Economic impact is broken down by type of effect – e.g., direct, indirect, and induced – and measured across such indicators as output, gross domestic product (GDP), wages, and full-time equivalent (FTE) employment.

Section 4 analyses barriers to Indigenous economic development in the manufacturing and construction sectors. The section looks at three trends in the weakening of Indigenous economic impact in Saskatchewan:

[2] Debates about the definition of "Indigenous business" are ongoing. For example, different methods of Indigenous identification – e.g, individual self-identity vs. community verified – can change the ability for a business to claim that it is majority owned by Indigenous peoples. Section 4.3 acknowledges the advocacy of Indigenous organizations to raise the standards and methods for businesses to claim to being Indigenous-owned.

[3] NAICS defines Indigenous governments to be establishments that "are primarily engaged in providing a wide variety of services to [Indigenous] citizens that would otherwise be provided by federal, provincial or municipal levels of governments" [914 - Indigenous public administration].

- The average non-Indigenous-owned private sector firm contributes much less to Indigenous employment in Saskatchewan's private sector than the average Indigenous-owned private sector firm.
- Indigenous-owned businesses are underrepresented in the manufacturing and construction sectors, relative to the Indigenous-owned shares in other sectors.
- Relative to the Indigenous population share of a city in Saskatchewan, there can be large gaps in proportional shares of Indigenous employment.

In Section 5, the report concludes with forecasts of Indigenous economic output in the construction and manufacturing sectors in Saskatchewan. In recognition that output could increase from greater opportunities, recommendations to increase Indigenous economic participation are provided.

2. Manufacturing and construction in Saskatchewan

The economic impacts of Indigenous peoples in Saskatchewan's manufacturing and construction sectors can grow or decline with the ups and downs of larger sector dynamics. This section will analyse trends in national and provincial outputs in manufacturing and construction. Output is defined as the measure of all sales of goods and services, both final and intermediate.

Figure 1 shows how the construction sector has grown as a share of total output in Canada and within several provinces. The construction sector was roughly 6% of Canadian economic output in the 1990s and it grew to above 8% in the 2010s. The importance of construction to Saskatchewan can be seen in two ways. First, the share of its construction sector is higher than the national average. A key period was between 2008 and 2016, when the construction sector accounted for more than 10% of output. Second, the size and directions of Saskatchewan and Alberta's shares are similar. Their construction trends are likely tied to common developments in mining and natural resources.

Figure 2 demonstrates how the manufacturing sector in Canada, as a share of economic output, experienced annual declines from 2000 to 2008. The decline of manufacturing's share output has slowed since 2008, but many provinces, including Ontario and Quebec, have not seen their provincial shares of manufacturing output grow in the last two decades. Exceptionally, Saskatchewan's manufacturing sector, as a share of provincial output, has grown. Its share is below the Canadian average, but its manufacturing sector has stayed above 10% and is approaching 15% of provincial output.

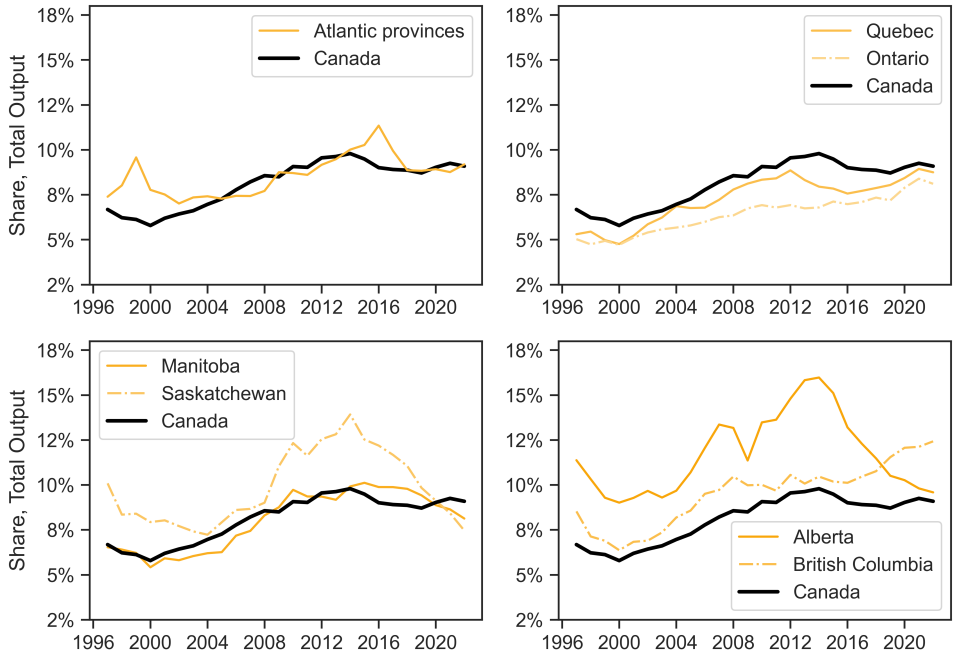


Figure 1: Construction sectors in Canada, as a share of total output. Canada's construction sector has grown from the 1990s to 2010s, and Saskatchewan's construction sector has frequently had a higher share than the national average.

Source: StatCan Table: 36-10-0488-01, "Output, by sector and industry, provincial and territorial (x 1,000,000)."

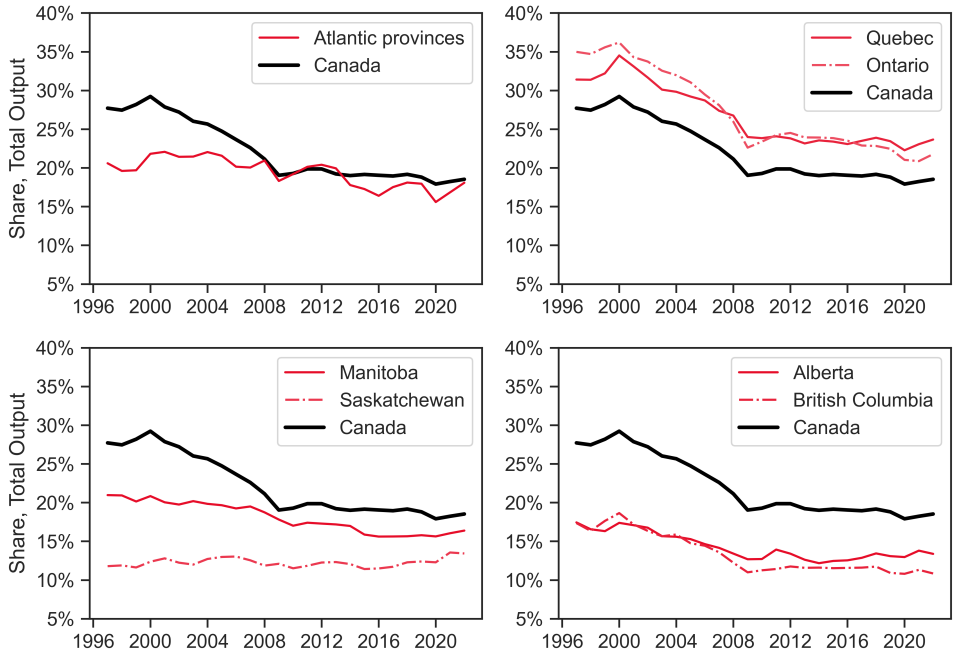


Figure 2: Manufacturing sectors in Canada, as a share of total output. The share of output of Canada's manufacturing sector declined from 2000 to 2008 and then plateaued. The share of output of Saskatchewan's manufacturing sector is below the national average, but it has grown.

Source: See Figure 1.

Figure 3 and Figure 4 provide sectoral breakdowns of economic output. Figure 3 shows the three largest contributors to construction outputs for Quebec, Ontario, Manitoba, and Saskatchewan. The shares of construction outputs in all four provinces are driven by three subsectors of construction:

C-A Residential building construction

C-B Non-residential building construction

C-C Engineering construction

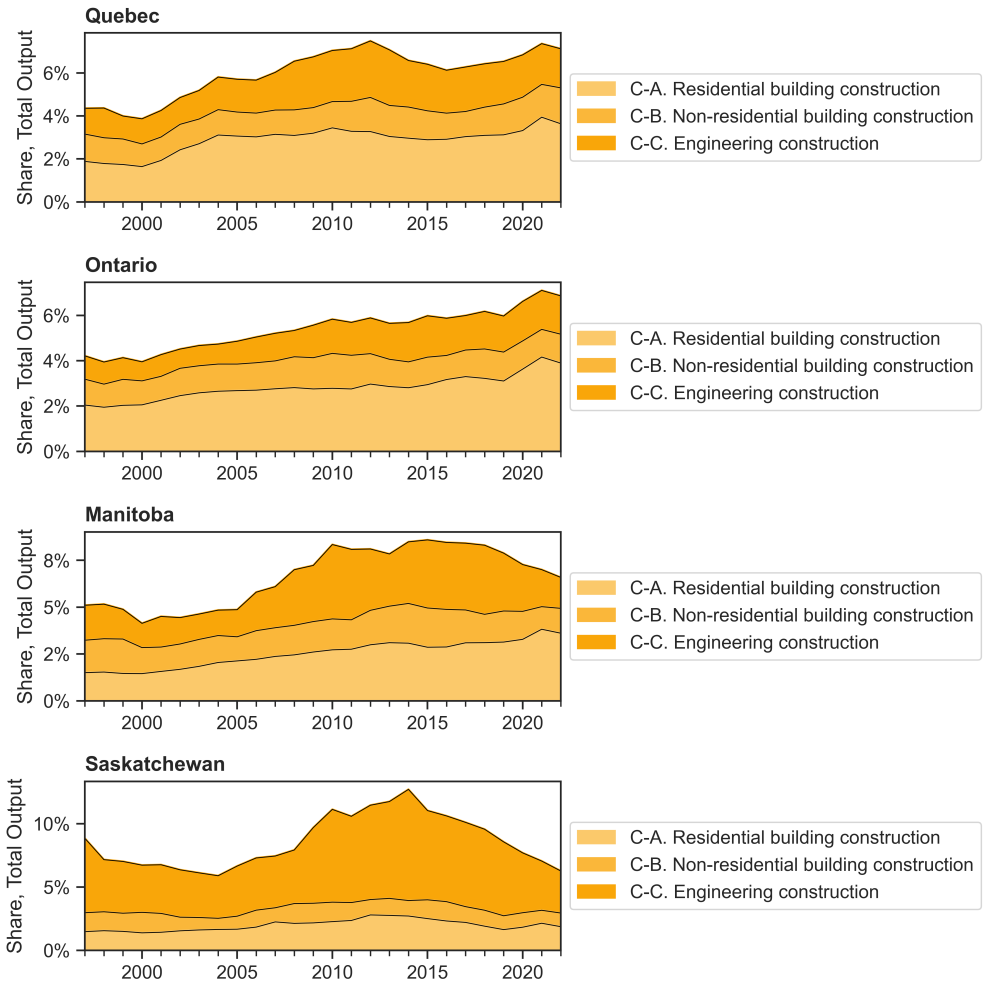


Figure 3: Output share of three largest subsectors of construction in Quebec, Ontario, Manitoba, and Saskatchewan. Residential building construction is very important to the output of Quebec and Ontario, while engineering construction has a significant role in the output of Saskatchewan.

Source: StatCan Table: 36-10-0488-01, "Output, by sector and industry, provincial and territorial (x 1,000,000)."

The share of the contribution of each construction group changes by province. The output shares of residential building construction in Quebec and Ontario are larger than in Manitoba and Saskatchewan. The significance of engineering construction in Saskatchewan – which would include construction involved in potash, mining, utilities,

and other major projects – is visible in Figure 3. In particular, the boom of construction output from 2005 to 2015 is mainly produced from engineering construction. Major projects that contributed to this boom could be:

- Mosaic K3 Potash Expansion (early development began in 2009)
- Seabee Gold Operation (commercial production began in 2014)
- Circle Drive South Project (extension in 2013)

Although the output share of engineering construction in Saskatchewan dropped after 2015, its share is still relatively high. Post-2015 engineering output is likely driven by projects like the BHP Jansen potash project, which is one of the largest potash mine projects in the world. The project is expected to generate approximately 8.5 million tonnes of potash every year.

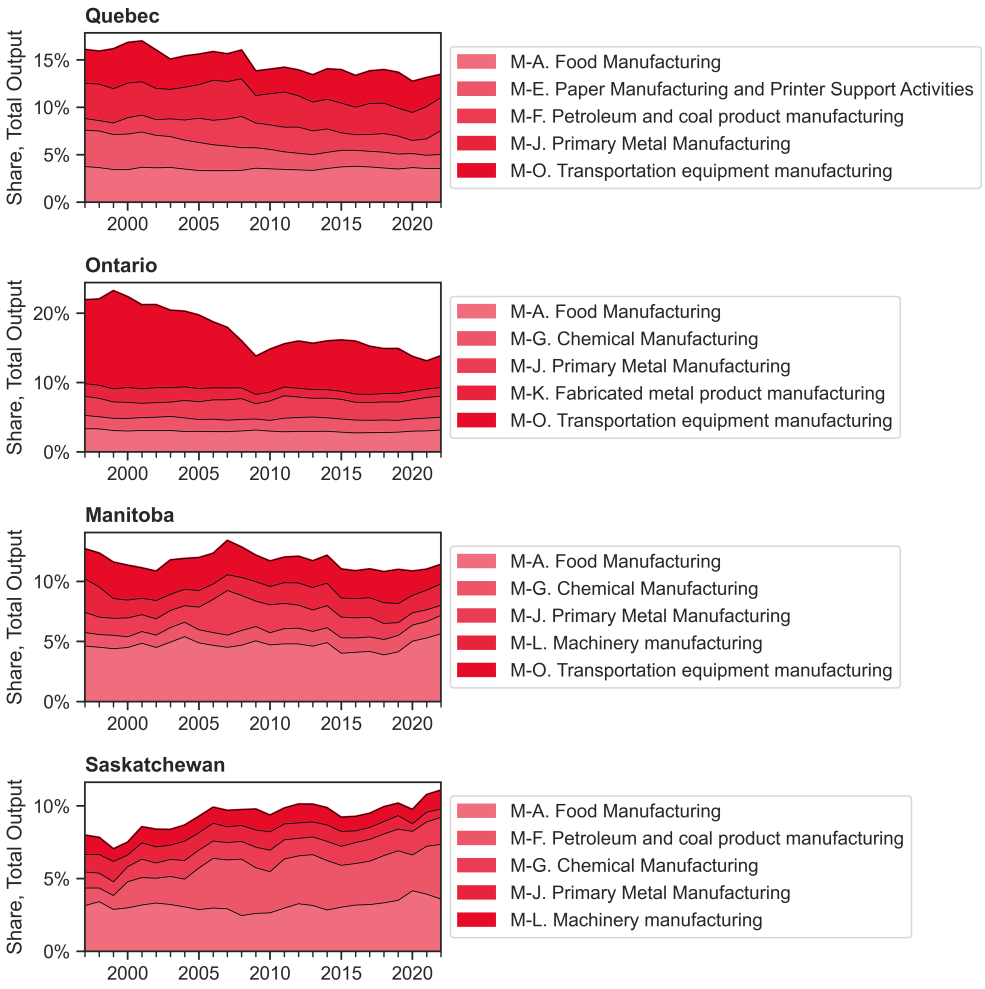


Figure 4: Output share of five largest subsectors of manufacturing in Quebec, Ontario, Manitoba, and Saskatchewan. Saskatchewan's five largest manufacturing subsectors are connected to demands for large utility projects and mining projects and refineries. Petroleum, coal product and chemical manufacturing has seen its share of output grow.

Source: StatCan Table: 36-10-0488-01, "Output, by sector and industry, provincial and territorial (x 1,000,000)."

Figure 4 shows the five subsectors with the biggest contributions to output share of manufacturing.[4] Unlike in the construction sector, strong manufacturing subsectors are not the same in all four provinces. Interviews for this report corroborate what Figure 4 shows as the top five manufacturing subsectors in Saskatchewan. Metal and machinery manufacturing are often sourced by large utility projects (e.g., SaskPower) and petroleum, coal product and chemical manufacturing would be needed for several mining projects and refineries (e.g., the CCRL Refinery Complex in Regina). The latter industry group – petroleum, coal product and chemical manufacturing – has seen its share of output grow from 1.2% in 1997 to 3.7% in 2022.

3. Indigenous economic impact in Saskatchewan's manufacturing and construction sectors

The economic impacts of Indigenous peoples in Saskatchewan's manufacturing and construction sectors are analyzed with estimates of different effects. Table 1 outlines the effects that are commonly found in I-O models of economic impact. Direct effects are produced from spending on a business or sector – e.g., a business buys new materials, leases technology, and hires labour to produce a good or service. Indirect and induced effects are modelled estimates of the cascading effects of initial spending. For example, an Indigenous-owned business like JNE Welding purchases goods and services from other Saskatchewan businesses to provide steel fabrication. The indirect effects of JNE Welding's purchases would include some of the subsequent spending of the businesses it purchases from, as they now have revenue to spend on their business activities. The induced effects of JNE Welding include the household spending of its employees, who purchase goods and services from received wages and salaries, as well as any people who change their household consumption because of JNE's indirect spending.

Table 1: Types of Effects

Type of Effect	Definition†
Direct	Initial spending made on a business or a sector .
Indirect	Business-to-business purchases that stem from the initial spending above.
Simple	Direct + Indirect
Induced	Household spending that can be attributed to the indirect business-to-business purchases
Total	Direct + Indirect + Induced

† Definitions summarized from Understanding IMPLAN: Direct, Indirect, and Induced Effects

[4]The methods to group manufacturing industries are detailed in Appendix A.

Table 2 defines the different indicators of economic impact. Spending can come from different sources, like consumer, business, or government spending, and not all spending takes the same path. It can become income for employees, profit for businesses, or tax revenue for governments.

Table 2: Types of Indicators

Type of Indicator	Definition†
Output	The measure of all sales of goods and services, both final and intermediate.
GDP	Total market value of all final goods and services. The value of intermediate goods or services, which are used in the production of a good or service, is not included in GDP.
Labour Income	Includes wages, supplementary labour income and the net income of unincorporated businesses.
Wages	Worker's wages, calculated either as wages or salaries paid to individuals.
Taxes	Taxes on production – property taxes, licenses, and permits – and taxes on products – GST, PST, etc.
Employment	Number of jobs, measured as full-time equivalent (FTE) person-years.

† Definitions of impacts summarized from A User Guide for CAHSEIM: The Culture, Arts, Heritage and Sport Economic Impact Model

3.1 Sources and methods of I-O modelling

I-O modeling is used to estimate the market effects of changes to employment, spending, industry growth, and other demand on output. For details on the sources and methods of the I-O modelling that was completed for this report, see Appendix B. As of March 2026, the most recent data available are for the year 2022.

3.2 Results of provincial I-O modelling

Table 3 summarizes the Indigenous economic impacts in Saskatchewan for the construction and manufacturing sectors. The table also includes the total impact of all sectors in the province. The rows list the types of economic effects, and the columns show the different indicators of economic impact.

The combined direct Indigenous economic output in the construction and manufacturing sectors in 2022 was estimated to be around $1.3 billion, or 14.9% of the direct Indigenous economic output. The combined total Indigenous economic output in the construction and manufacturing sectors was estimated to be around $2.6 billion, or 14.6% of the total Indigenous economic output in Saskatchewan.

Table 3: 2022 Indigenous Economic Impacts, Saskatchewan

Sector	Economic Effect	Economic Indicator					
		2022 CAN$, million					Number of FTE jobs
		Output	GDP	Labour Income	Wages	Taxes	Employment
Construction	Direct	$814	341	163	147	30	2,362
	Indirect	665	219	74	65	12	1,140
	Induced	349	180	57	50	36	977
	Total	1,828	740	294	262	78	4,479
Manufacturing	Direct	482	66	20	16	2	241
	Indirect	235	97	19	17	6	289
	Induced	55	28	9	8	6	145
	Total	772	191	48	41	14	675
All Sectors	Direct	8,708	4,584	2,324	1,984	268	29,266
	Indirect	4,651	1,893	763	667	119	11,165
	Induced	4,372	2,253	716	627	448	11,574
	Total	17,731	8,730	3,803	3,278	$835	52,005

Indicators from Table 3 can be transformed into impact per demand. Table 4 shows the Indigenous economic impact per million dollars of spending. For example, every million dollars spent on Indigenous economic activity in construction will produce, for the Saskatchewan economy, $2.25 million in total spending, $0.91 million in GDP, $0.32 million in wages, $0.10 million in taxes, and 5.5 FTE equivalent jobs.

Table 3 and Table 4 both demonstrate how the Indigenous economic impact in the manufacturing sector was smaller than it was in the construction sector. Section 4 will analyze how Indigenous economic output in the manufacturing and construction sectors are negatively affected by systemic barriers in employment and ownership. In addition, the Indigenous economic impact in Saskatchewan's manufacturing sector is shaped by the sector's reliance on imports.

For every $1M spent

- $2.25M total impact in construction
- $1.60M total impact in manufacturing
- 5.5 FTE jobs in construction
- 1.4 FTE jobs in manufacturing

Table 4: 2022 Indigenous Economic Impacts per $1 million of spending, Saskatchewan

Sector	Economic Effect	Economic Indicator					
		2022 CAN$, million					Number of FTE jobs
		Output	GDP	Labour Income	Wages	Taxes	Employment
Construction	Direct	$1.00	0.42	0.20	0.18	0.04	2.90
	Indirect	0.82	0.27	0.09	0.08	0.02	1.40
	Induced	0.43	0.22	0.07	0.06	0.04	1.20
	Total	2.25	0.91	0.36	0.32	0.10	5.50
Manufacturing	Direct	1.00	0.14	0.04	0.03	0.01	0.50
	Indirect	0.49	0.20	0.04	0.04	0.01	0.60
	Induced	0.11	0.06	0.02	0.02	0.01	0.30
	Total	1.60	0.40	0.10	0.09	0.03	1.40
All Sectors	Direct	1.00	0.53	0.27	0.23	0.03	3.36
	Indirect	0.53	0.22	0.09	0.08	0.01	1.28
	Induced	0.50	0.26	0.08	0.07	0.05	1.33
	Total	2.03	1.01	0.44	0.38	$0.09	5.97

Table 5 shows the regional purchase coefficients[5] for sectors in Saskatchewan. These coefficients estimate the share of inter-industry purchases that would come from regional sources. The closer a coefficient is to 100% the more goods and services of a sector come from sources within Saskatchewan – i.e., they are not imported from international sources or other provinces and territories of Canada. It is beyond the scope of the report to analyze why some sectors have higher regional purchase coefficients than others. Nevertheless, the manufacturing sector has the lowest regional purchase coefficient in Table 5, and by wide margin of difference.[6] For every dollar of manufacturing goods and services that are purchased for use in Saskatchewan's industries, only $0.21 is regionally-sourced.

[5] Regional purchase coefficients are calculated as:

$$p_i = \frac{x_i - e_i}{x_i - e_i + m_i}$$

where x_i is total output of sector i, e_i is the sum of international and inter-provincial exports of sector i, and m_i is the sum of international and inter-provincial imports of sector i.

[6] A low regional purchase coefficient for the manufacturing sector is not unique to Saskatchewan. For an Indigenous economic impact study for the City of Thunder Bay, the 2021 regional purchase coefficient for Ontario's manufacturing sector was 25%.

Table 5: Regional purchase coefficients, Saskatchewan, 2022

Sector	p_i
11 Agriculture, forestry, fishing and hunting	90%
21 Mining, quarrying, and oil and gas extraction	56.1%
22 Utilities	96.1%
23 Construction	99.7%
31-33 Manufacturing	21.1%
41 Wholesale trade	42.4%
44-45 Retail trade	96.7%
48-49 Transportation and warehousing	61%
51 Information and cultural industries	61%
52 Finance and insurance	62.9%
53 Real estate and rental and leasing	90.9%
54 Professional, scientific and technical services	48.4%
55 Management of companies and enterprises	76.8%
56 Administrative and support, waste management and remediation services	48.5%
61 Educational services	96.6%
62 Health care and social assistance	98%
71 Arts, entertainment and recreation	79.5%
72 Accommodation and food services	78.3%
81 Other services (except public administration)	93.6%
91 Public administration	99%

There are strong relationships between regional purchase coefficients and the multiplier effects of inter-industry spending. The construction sector in Saskatchewan, for example, supplies almost all its goods and services through regional sources.[7] Consequently, the multiplying effect of the construction sector on Saskatchewan's GDP is higher than many other sectors.

Conversely, a low regional purchase coefficient for the manufacturing sector produces a lower multiplying effect in GDP. Therefore, the low regional purchase coefficient of Saskatchewan's manufacturing sector is a signal of many lost opportunities for Indigenous peoples to supply manufacturing goods and services regionally. This would raise the regional purchase coefficient of manufacturing *and* increase the sector's multiplying effects on Saskatchewan's GDP.

[7] It is hard to imagine how a firm could "import" a construction job. Materials and labour can be imported for a project, but construction work is rooted geographically, and regional sites are not interchangeable with ones from elsewhere – e.g., laying the foundation of a new office building outside of Saskatchewan cannot be imported.

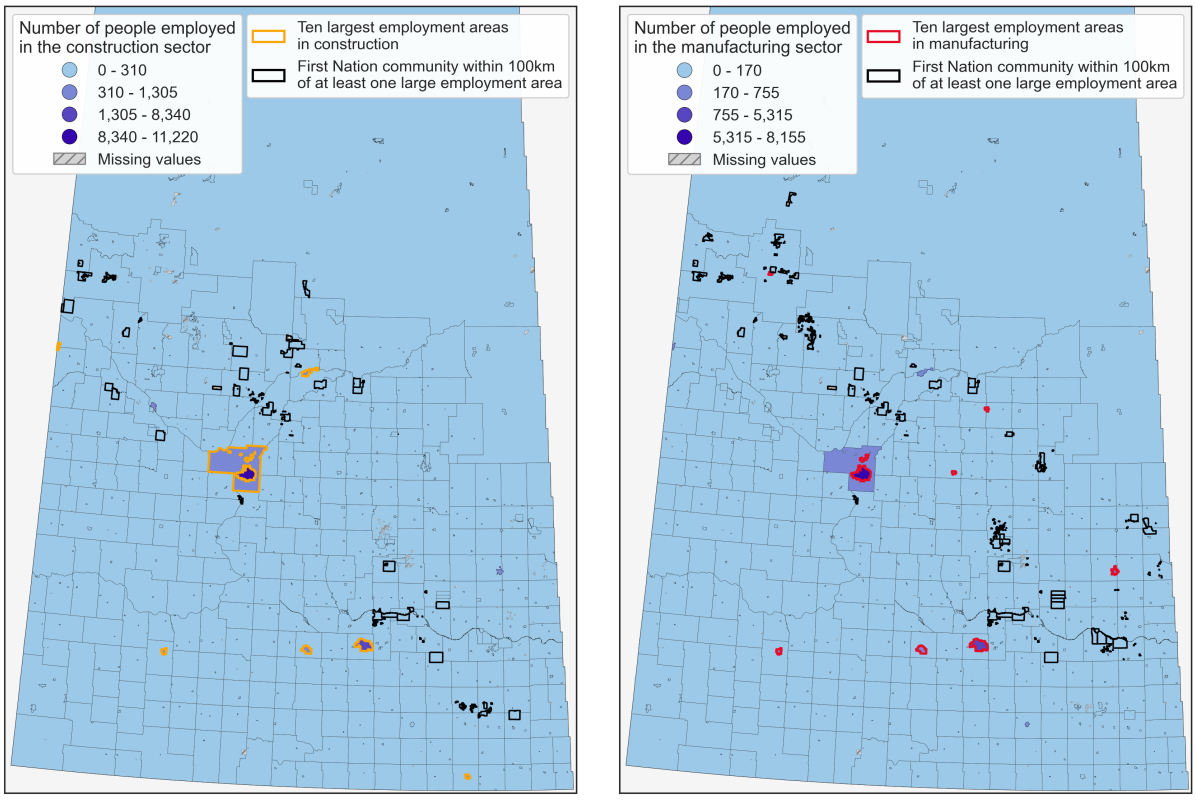
3.3 Results of urban I-O modelling

Most employments for construction and manufacturing are in Saskatchewan's urban areas. Figure 5 visualizes the number of employments in construction and manufacturing per census subdivision. Outlined in yellow are the ten largest employment areas for construction, which are nine cities and one rural municipality:

- Estevan
- Lloydminster (Part)
- Corman Park No. 344
- Swift Current
- Martensville
- Warman
- Prince Albert
- Moose Jaw
- Regina
- Saskatoon

The ten largest employment areas for manufacturing are ten cities outlined in red:

- Melfort
- Meadow Lake
- Humboldt
- Warman
- Swift Current
- Martensville
- Yorkton
- Moose Jaw
- Regina
- Saskatoon



(a) Geography of the largest employment areas in construction

(b) Geography of the largest employment areas in manufacturing

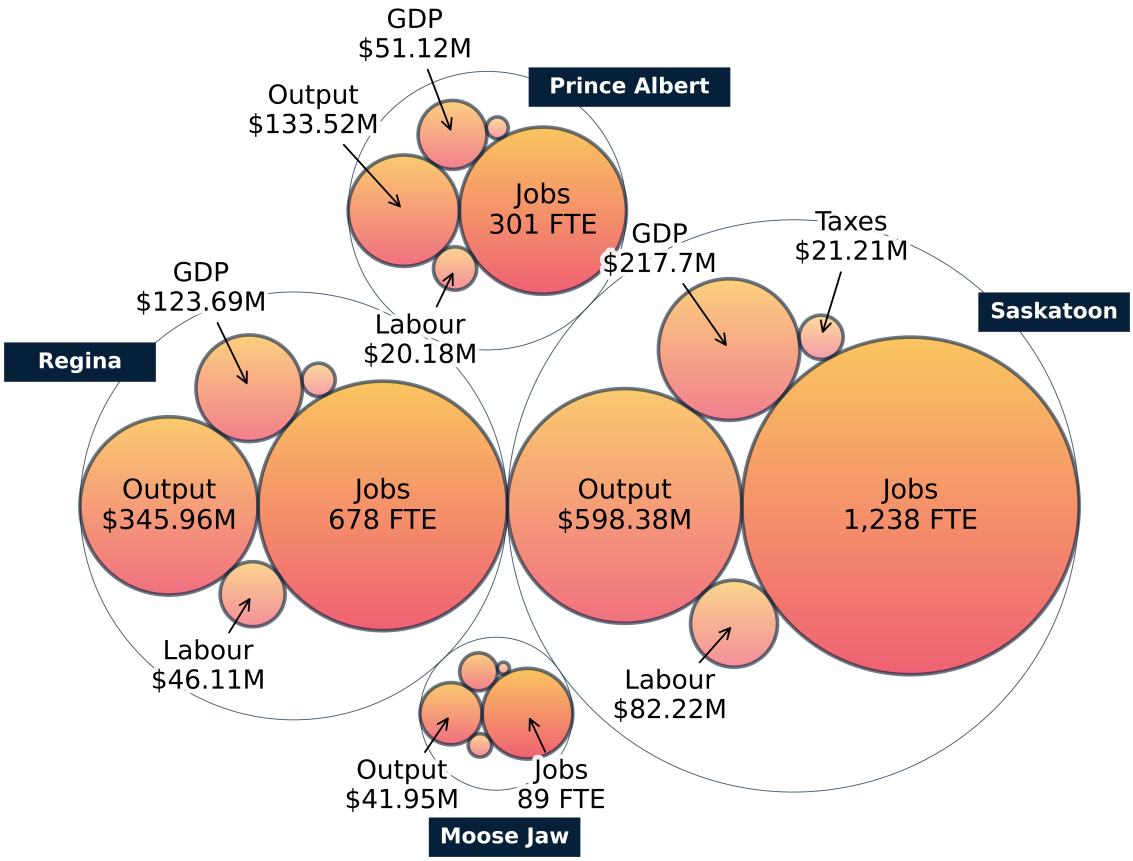
Figure 5: Top urban employment areas and surrounding First Nation communities. Urban construction and manufacturing activity is primarily located in Saskatoon, Regina, and Moose Jaw. 70 First Nations communities are within 100km of one of Saskatchewan's urban employment areas.

Highlighted in a thicker black border are First Nation communities that are within 100 kilometers of a top-ten employment area. Visualizing surrounding First Nations shows current and future opportunities for members of First Nations to find employment in one of Saskatchewan's larger markets. Large construction and manufacturing areas are less than 100km away from 70 First Nations.[8]

The proximity of First Nation communities to larger employment areas not only creates opportunities for their members to find employment; it also creates opportunities for:

- Indigenous-owned businesses to have greater access to goods and services for in-community construction and manufacturing projects;
- urban businesses and organizations to build partnerships and economic policies with First Nations communities;
- businesses and partners in urban areas of Saskatchewan to learn about the history, values, and experiences of neighbouring First Nations.

Combined Indigenous Impact in Manufacturing and Construction Sectors



[8]Reserves are a category in census subdivision geographic data (IRI). A First Nation community can be a collection of reserves. The count of 70 First Nation communities is produced from an Indigenous Services Canada dataset, that matches reserve areas to First Nation communities. The estimate is only counting First Nation communities within the geographic boundaries of Saskatchewan.

3.3.1 Construction

Table 6 tabulates the Indigenous economic impacts in construction for the four largest cities in Saskatchewan: Saskatoon, Regina, Prince Albert, and Moose Jaw. Economic statistics on Indigenous output and gross domestic income are only available at national, provincial, and territorial levels. Appendix B.2 provides details of how urban Indigenous impacts were estimated with regional modifiers.

Table 6: 2022 Indigenous Economic Impacts in Construction Sector, Saskatchewan cities

		Economic Indicator					
		2022 CAN$, million					Number of FTE jobs
City	Economic Effect	Output	GDP	Labour Income	Wages	Taxes	Employment
Saskatoon	Direct	$220.57	92.42	44.11	39.7	8.16	640
	Indirect	123.96	43.67	15	13.23	2.21	221
	Induced	63.08	35.51	11.69	10.15	7.72	221
	Total	407.61	171.60	70.80	63.08	18.09	1,082
Regina	Direct	118	49.44	23.6	21.24	4.37	342
	Indirect	59.35	21.95	7.67	6.73	1.18	106
	Induced	34.81	19.71	6.61	5.78	4.25	130
	Total	212.16	91.10	37.88	33.75	9.80	578
Prince Albert	Direct	64.01	26.82	12.8	11.52	2.37	186
	Indirect	16.64	7.3	2.5	2.24	0.38	38
	Induced	10.88	7.17	2.5	2.18	1.79	45
	Total	91.53	41.29	17.80	15.94	4.54	269
Moose Jaw	Direct	17.74	7.43	3.55	3.19	0.66	51
	Indirect	7.68	2.8	0.9	0.78	0.16	12
	Induced	4.19	2.45	0.82	0.71	0.57	16
	Total	29.61	12.68	5.27	4.68	$1.39	79

Significant shares of Indigenous economic impact are found in Saskatchewan's four largest cities. Of total Indigenous economic impacts in the construction sector (see Table 3), the combined impacts of the four cities are:

- 40.5% of total output
- 42.7% of total GDP
- 44.8% of total employment

Table 7 estimates Indigenous economic impact per million dollars of spending. The differences of economic impact between cities come from two variables: the size of sectors in urban regions and the urban share of the Indigenous involvement in these sectors. Table 8 demonstrates how Indigenous economic impact benefits from both increases in sector size and the number of Indigenous peoples employed in the sector. Prince Albert is a larger census agglomeration than Moose Jaw,[9] but its simple GDP multiplier is smaller than Moose Jaw, which has a larger total employment in construction.

Table 7: 2022 Indigenous Economic Impacts in Construction Sector per $1 million of spending, Saskatchewan cities

		Economic Indicator					
		2022 CAN$, million					Number of FTE jobs
City	Economic Effect	Output	GDP	Labour Income	Wages	Taxes	Employment
Saskatoon	Direct	$1.00	0.42	0.20	0.18	0.04	2.90
	Indirect	0.56	0.20	0.07	0.06	0.01	1.00
	Induced	0.29	0.16	0.05	0.05	0.04	1.00
	Total	1.85	0.78	0.32	0.29	0.09	4.90
Regina	Direct	1.00	0.42	0.20	0.18	0.04	2.90
	Indirect	0.50	0.19	0.07	0.06	0.01	0.90
	Induced	0.30	0.17	0.06	0.05	0.04	1.10
	Total	1.80	0.78	0.33	0.29	0.09	4.90
Prince Albert	Direct	1.00	0.42	0.20	0.18	0.04	2.91
	Indirect	0.26	0.11	0.04	0.03	0.01	0.59
	Induced	0.17	0.11	0.04	0.03	0.03	0.70
	Total	1.43	0.64	0.28	0.24	0.08	4.20
Moose Jaw	Direct	1.00	0.42	0.20	0.18	0.04	2.87
	Indirect	0.43	0.16	0.05	0.04	0.01	0.68
	Induced	0.24	0.14	0.05	0.04	0.03	0.90
	Total	1.67	0.72	0.30	0.26	$0.08	4.45

[9] StatCan Table 17-10-0148-01 estimates the 2025 population of Prince Albert (CA) to be 48,655 and Moose Jaw (CA) to be 37,434.

Table 8: 2022 Simple GDP multipliers and employment in construction sector, Saskatchewan cities

City	Simple† GDP multiplier	Sector employment, total	Simple GDP Impact, Indigenous peoples	Sector Employment, Indigenous peoples
Saskatoon	0.617	13,170	$136.09M	1,430
Regina	0.605	9,090	$71.39M	765
Prince Albert	0.533	1,225	$34.12M	415
Moose Jaw	0.577	1,240	$10.23M	115

† Simple = Direct + Indirect Effects

3.3.2 Manufacturing

Table 9, Table 10 use the methods above to estimate the urban Indigenous economic impacts in manufacturing.

Of total Indigenous economic impacts in the manufacturing sector, the combined impacts of the four cities are:

- 49% of total output
- 47% of total GDP
- 45% of total employment

These shares are all larger than their respective shares in the construction sector. This suggests that manufacturing in Saskatchewan is slightly more dependent on urban economic activity than construction.

Interviews for this report corroborate this point in two ways. First, several Indigenous-owned contractors with manufacturing services – e.g., JNE Welding, New Feathers Industrial, STC Industrial Contracting – are located in Saskatoon. Second, smaller or rural First Nations may not have in-community manufacturing facilities, as they lack spaces or buildings for equipment and materials storage.[10]

Indigenous public procurement

An interview participant noted that Indigenous economic activity in Saskatchewan will develop as, among other things, public Indigenous spend targets grow. The City of Saskatoon's 5% target can increase, as the City of Regina's 20% target creates greater incentives for Indigenous economic participation in urban projects.

[10] For many First Nations, low manufacturing capacity could be tied to reserve boundaries, which constrain community growth and land use, and infrastructure gaps.

Interestingly, it can be difficult to attract bids for public Indigenous procurement in Saskatchewan's cities. Many Indigenous businesses are working in Saskatchewan's mining sector, and compared to what can be done with city budgets, mining companies tend to offer stronger Indigenous procurement programs and can pay significant premiums to Indigenous suppliers.

Table 9: 2022 Indigenous Economic Impacts in Manufacturing Sector, Saskatchewan cities

City	Economic Effect	Economic Indicator					
		2022 CAN$, million					Number of FTE jobs
		Output	GDP	Labour Income	Wages	Taxes	Employment
Saskatoon	Direct	129.86	17.79	5.45	4.42	0.65	65
	Indirect	51.17	22.86	4.16	3.64	1.3	65
	Induced	9.74	5.45	1.82	1.56	1.17	26
	Total	190.77	46.1	11.43	9.62	3.12	156
Regina	Direct	92.35	12.65	3.88	3.14	0.46	46
	Indirect	34.34	15.88	2.96	2.59	0.92	46
	Induced	7.11	4.06	1.39	1.2	0.92	18
	Total	133.8	32.59	8.23	6.93	2.3	110
Prince Albert	Direct	31.74	4.35	1.33	1.08	0.16	16
	Indirect	8.89	4.6	0.73	0.63	0.25	10
	Induced	1.36	0.89	0.32	0.29	0.22	6
	Total	41.99	9.84	2.38	2	0.63	32
Moose Jaw	Direct	8.66	1.19	0.36	0.29	0.04	4
	Indirect	3.13	1.45	0.25	0.22	0.09	3
	Induced	0.55	0.32	0.1	0.1	0.07	3
	Total	12.34	2.96	0.71	0.61	0.2	10

The urban Indigenous economic impacts in manufacturing, per $1M of spending, are lower than the urban economic impacts in construction, per $1M of spending. If, for example, $1M of Indigenous construction activity in Saskatoon has a total impact of $0.78M, the same level of spending in Saskatoon's manufacturing sector only has a total impact of $0.35M, or 49% of the same impact in construction activity.

Table 11 shows how the differences between the economic output of cities are products of sector size and the number of Indigenous people employed in a city.

Table 10: 2022 Indigenous Economic Impacts in Manufacturing Sector per $1 million of spending, Saskatchewan cities

City	Economic Effect	Economic Indicator					
		2022 CAN$, million					Number of FTE jobs
		Output	GDP	Labour Income	Wages	Taxes	Employment
Saskatoon	Direct	1.00	0.14	0.04	0.03	0.01	0.50
	Indirect	0.39	0.18	0.03	0.03	0.01	0.50
	Induced	0.08	0.04	0.01	0.01	0.01	0.20
	Total	1.47	0.35	0.09	0.07	0.02	1.20
Regina	Direct	1.00	0.14	0.04	0.03	0.00	0.50
	Indirect	0.37	0.17	0.03	0.03	0.01	0.50
	Induced	0.08	0.04	0.02	0.01	0.01	0.19
	Total	1.45	0.35	0.09	0.08	0.02	1.20
Prince Albert	Direct	1.00	0.14	0.04	0.03	0.01	0.50
	Indirect	0.28	0.14	0.02	0.02	0.01	0.32
	Induced	0.04	0.03	0.01	0.01	0.01	0.19
	Total	1.32	0.31	0.07	0.06	0.02	1.01
Moose Jaw	Direct	1.00	0.14	0.04	0.03	0.00	0.46
	Indirect	0.36	0.17	0.03	0.03	0.01	0.35
	Induced	0.06	0.04	0.01	0.01	0.01	0.35
	Total	1.42	0.35	0.08	0.07	0.02	1.16

Table 11: 2022 Simple GDP multipliers and employment in manufacturing sector, Saskatchewan cities

City	Simple† GDP multiplier	Sector employment, total	Simple GDP Impact, Indigenous peoples	Sector Employment, Indigenous peoples
Saskatoon	0.313	9,460	$40.65M	450
Regina	0.309	6105	$28.53M	320
Prince Albert	0.281	325	$8.95M	110
Moose Jaw	0.304	760	$2.64M	30

† Simple = Direct + Indirect Effects

4. Barriers and opportunities to growing Indigenous employment in Saskatchewan's manufacturing and construction sectors

I-O analysis provides quantitative snapshots of the economic impacts of businesses in the private sector, consumers in households, and governments and institutions in the public sector. Because the regional and territorial networks of Indigenous economic spending in Canada are still impacted by laws, policies, and social attitudes that are colonial in origin or spirit, any quantitative snapshot of Indigenous economic impact is complicated. From one perspective, Indigenous economic impacts are still part of the long and on-going history of Canadian colonialism. This view can see how different socio-economic barriers affect contemporary economic statistics on output, GDP, employment, and ownership:

Failure to recognize Indigenous jurisdictions Colonialism in Canada replaced Indigenous institutions with a federal bureaucracy. The "failure to recognize Indigenous jurisdiction is that Indigenous peoples are frequently left out of the decision-making process or excluded from participating more generally" [3].

Infrastructure needed for economic development For example, the Assembly of First Nations (AFN) estimated that, as of 2023, $350 billion was needed to close infrastructure gaps in First Nations communities through construction, repair, or replacement [1]. Types of infrastructure gaps in First Nations can be foundational to economic activity: on-reserve housing, schools and teacherages, drinking water and wastewater treatment, connectivity, and road access.

Transportation for employment Many interviews for this report spoke of barriers to Indigenous community members having or finding transportation to and from a workplace.

Lower access to capital In a report to the First Nations Financial Management Board, Momentus observed that "Indigenous Governments, businesses, and entrepreneurs, both on and off reserve, do not have access to the same level of financial markets that support the mainstream economy" [8].

Exclusion from education and training Colonial education was imposed on Indigenous peoples and severed the continuity of community teachings and Indigenous ways of learning. Despite initiatives of reconciliation and the building of Indigenous Institutes across Canada, barriers to Indigenous education and training persist through the marginalization of Indigenous Knowledge in curriculums and to unequal access to strong education infrastructure in Indigenous communities [7].

From another view, the same economic snapshot of Indigenous economic impact is a starting point for change: what constrained Indigenous economic activity in the past need not constrain economic activity in the future. Nothing in the data has changed, but this forward-looking perspective is looking for opportunities to further economic reconciliation.

The ability to take multiple perspectives on Indigenous economic data applies to the analysis of Indigenous economic impact in Saskatchewan's manufacturing and construction sectors. This section analyses the effects of economic barriers on employment, which can be seen in three trends in hiring, ownership, and geography:

- The average non-Indigenous-owned private sector firm contributes much less to Indigenous employment in Saskatchewan's private sector than the average Indigenous-owned private sector firm.
- Indigenous-owned businesses are underrepresented in the manufacturing and construction sectors, relative to the Indigenous-owned shares in other sectors.
- Relative to the Indigenous population share of the province or a city in Saskatchewan, there can be large gaps in proportional shares of Indigenous employment.

4.1 Gaps in Indigenous employment in Saskatchewan

Many statistics from this report can demonstrate how the Indigenous economic impacts in the manufacturing and construction sectors in Saskatchewan are large. For example, Indigenous governments are estimated to have collectively spent in 2022 $474 million in the province's manufacturing sector.[11] However, some of the same economic impacts, regardless of their current size, can be much bigger, especially if governments, businesses, and consumers in Canada meaningfully commit to economic reconciliation.

Indigenous employment opportunities should be proportional to the population size of Indigenous peoples. The Indigenous share of the Saskatchewan population is around 17%, which means that Indigenous employment shares below 17% are indications of *underrepresentation*. Figure 6 plots the Indigenous share of (off-reserve) employment in the construction and manufacturing sectors in Saskatchewan, from 2007 to 2025. The Indigenous share of construction has an upward trend. In 2010, the Indigenous share of construction employment was around 10%, and it was close to 15% in 2025. With more severe ups and downs, the Indigenous share of manufacturing employment in Saskatchewan has trended sideways. In 2010, the Indigenous share of manufacturing employment was 4.8%; in 2025 it was 4.9%. Both panels demonstrate that, despite some progress, Indigenous people in Saskatchewan still experience employment gaps in opportunity and stability. The construction sector has not reached 17% and the manufacturing sector is far from this goal.

Proportional representation

Indigenous share of the Saskatchewan population is around 17%. Indigenous employment shares below 17% signal underrepresentation.

[11] This is estimated using the Saskatchewan's Provincial input-output tables, 2022. $474 million is the sum of inter-industry use of manufacturing industries by Indigenous government services [GS914000].

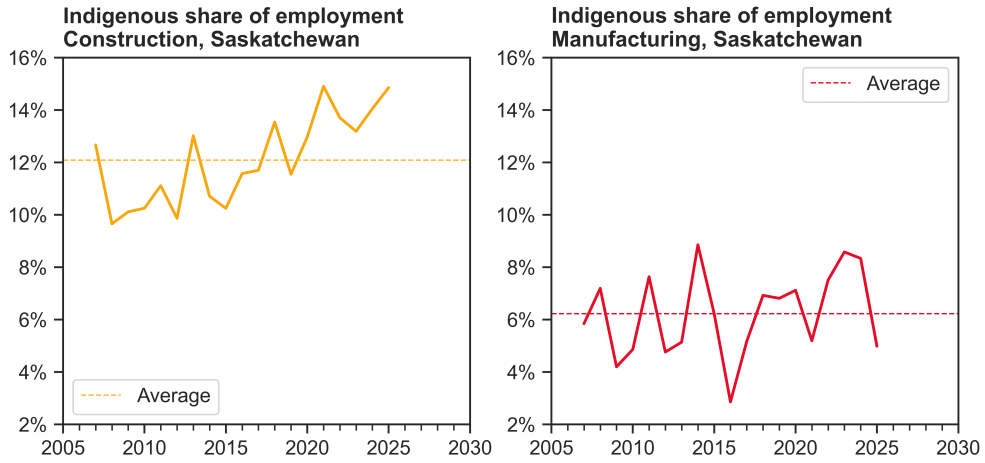


Figure 6: Indigenous shares of employments in construction and manufacturing. Indigenous employment shares are below 17%, which indicates underrepresentation.

Source: StatCan Table: 14-10-0469-02, "Employment by industry and Indigenous group living off reserve, annual."

The fluctuations in the employment shares of Figure 6 suggest that Indigenous peoples are exposed to employment volatility. Figure 7 plots the Indigenous share of part-time employment in the construction and manufacturing sectors. In both sectors, Indigenous peoples are generally *overrepresented* in part-time employment. The average shares of Indigenous part-time employment in both construction and manufacturing are above 17%. Interestingly, there have been declines in Indigenous part-time employment since 2020. The upward trend for the construction sector in Figure 6 suggests that the decline of part-time employments transformed into an increase in full-time employments. However, the sideways trend for the manufacturing sector in Figure 6 does not suggest the same outcome – declines in Indigenous part-time employment did not turn into increases of full-time employment.

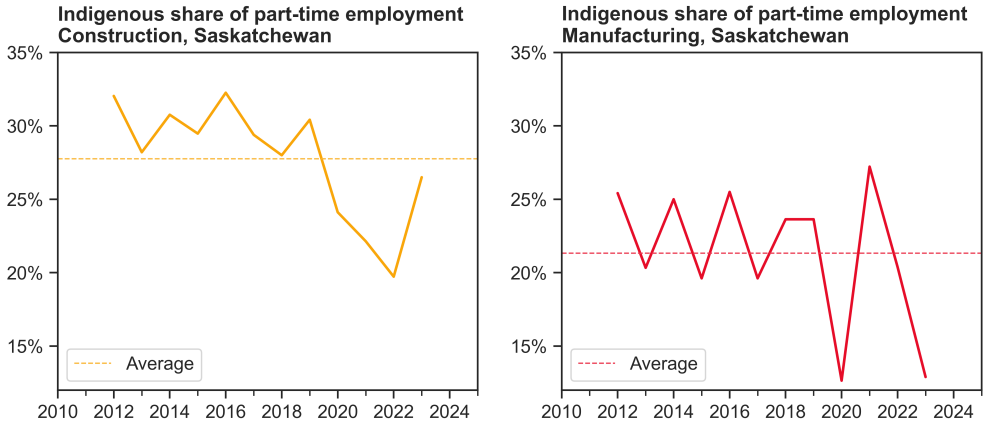


Figure 7: Indigenous shares of part-time employments in construction and manufacturing. The average shares of Indigenous part-time employment indicate that Indigenous peoples are overrepresented in part-time employment.

Source: StatCan Table: 14-10-0469-02, "Employment by industry and Indigenous group living off reserve, annual."

4.2 Gaps in the support of Indigenous employment

Many businesses in Saskatchewan's manufacturing and construction sectors employ Indigenous peoples. Some businesses are also setting targets for Indigenous employment with reconciliation action plans or with projects that prioritize Indigenous procurement. In the aggregate, collective support of Indigenous employment is a positive step toward economic reconciliation.

For example, the bottom panel in Figure 8 calculates the Indigenous unemployment gap, which is the point difference between the non-Indigenous rate and the Indigenous rate (both in the top panel). Between 2008 and 2026, the Indigenous unemployment gap has been as low as 4.4% and as high as 12.6%. The downward trend in the bottom series suggests that the Indigenous unemployment gap is closing. About a decade ago, the Indigenous unemployment rate in Saskatchewan was about 10% higher than the non-Indigenous rate. The Indigenous unemployment gap has been below 5% since 2025.

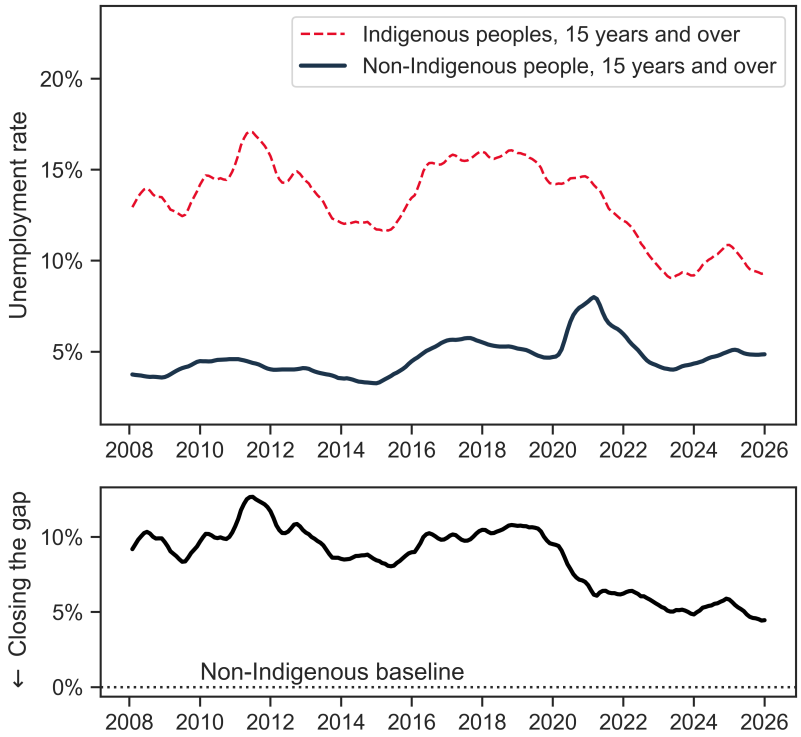


Figure 8: Unemployment in Saskatchewan, Indigenous peoples and non-Indigenous people. About a decade ago, the Indigenous unemployment rate in Saskatchewan was about 10% higher than the non-Indigenous rate. The Indigenous unemployment gap, which is the point difference between the non-Indigenous rate and the Indigenous rate, has been below 5% since 2025.

Note: The series are smoothed as 12-month moving averages.
Source: StatCan Table: 14-10-0401-01, "Labour force characteristics by detailed Indigenous group living off reserve, three-month moving averages, monthly, unadjusted for seasonality."

The Indigenous unemployment gap in Saskatchewan, and across Canada, *should be zero*, as that would indicate that Indigenous peoples no longer experience unemploy-

ment more severely than non-Indigenous people. In the push to close the Indigenous unemployment gap in Saskatchewan, it is worth deconstructing the support of Indigenous employment in the private sector. The average non-Indigenous-owned private sector firm contributes less to Indigenous employment in Saskatchewan's private sector than the average Indigenous-owned private sector firm.

Figure 9 shows that Indigenous private sector employment in Saskatchewan has a positive relationship with both non-Indigenous and Indigenous-owned businesses in the province. In the left panel, Indigenous private sector employment in Saskatchewan is compared to the number of non-Indigenous owned businesses in the province. In the right panel, the same measurement of Indigenous private sector employment is compared to the number of Indigenous-owned businesses in Saskatchewan.

Although Figure 9 does suggest that *any* additional private sector business will have a positive impact on Indigenous employment, there are still notable differences in the sizes of impacts. Every new non-Indigenous owned business produces 2 Indigenous employments in Saskatchewan, while every new Indigenous-owned business produces 19 Indigenous employments.[12] This difference is masked by the market share of non-Indigenous owned businesses. Outnumbering Indigenous-owned businesses in Saskatchewan almost 10-to-1 can make the collective employment contributions of non-Indigenous businesses look strong. But, on average, an Indigenous-owned business makes a much stronger contribution to Indigenous employment in Saskatchewan.

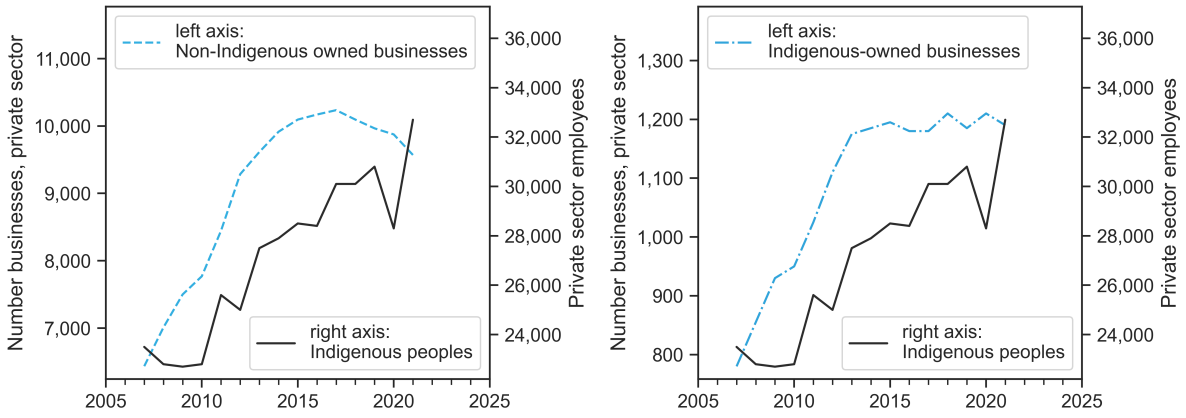


Figure 9: Business ownership and Indigenous employment, private sector, Saskatchewan. Indigenous employment does increase from the addition of any new firm. However, every new non-Indigenous owned business produces 2 Indigenous employments in Saskatchewan, while every new Indigenous-owned business produces 19 Indigenous employments.

Source: StatCan Table: 33-10-0631-01, "Private enterprises by sex and Indigenous identity of ownership, province or region and enterprise size" for business counts. StatCan Table: 14-10-0469-02, "Employment by industry and Indigenous group living off reserve, annual" for Indigenous private sector employment.

[12] These rates are calculated from separate linear regression models, where the impact of each type of business ownership is its coefficient. Because the Indigenous-owned and non-Indigenous owned businesses were modelled separately, the combined product of these coefficients overpredict the number of Indigenous people employed in the private sector in Saskatchewan. It was decided that multilinear regression modelling produced skewed results, likely from the relationship between the numbers of non-Indigenous and Indigenous businesses.

The estimates produced from Figure 9 are supported by a recent StatCan Economic and Social Report [4], which notes significant differences between Indigenous employment in non-Indigenous owned and Indigenous-owned businesses. On average:

- In the construction sector in Canada, the Indigenous employment share in a non-Indigenous owned business is 4.3%; in an Indigenous-owned business the Indigenous employment share is 24.8%.
- In the manufacturing sector in Canada, Indigenous employment share in a non-Indigenous owned business is 2.6%; in an Indigenous-owned business the Indigenous employment share is 16%.
- In Saskatchewan and across all sectors (excluding public administration), the Indigenous employment share in a non-Indigenous owned business is 10.6%; in an Indigenous-owned business the Indigenous employment share is 31.6%.

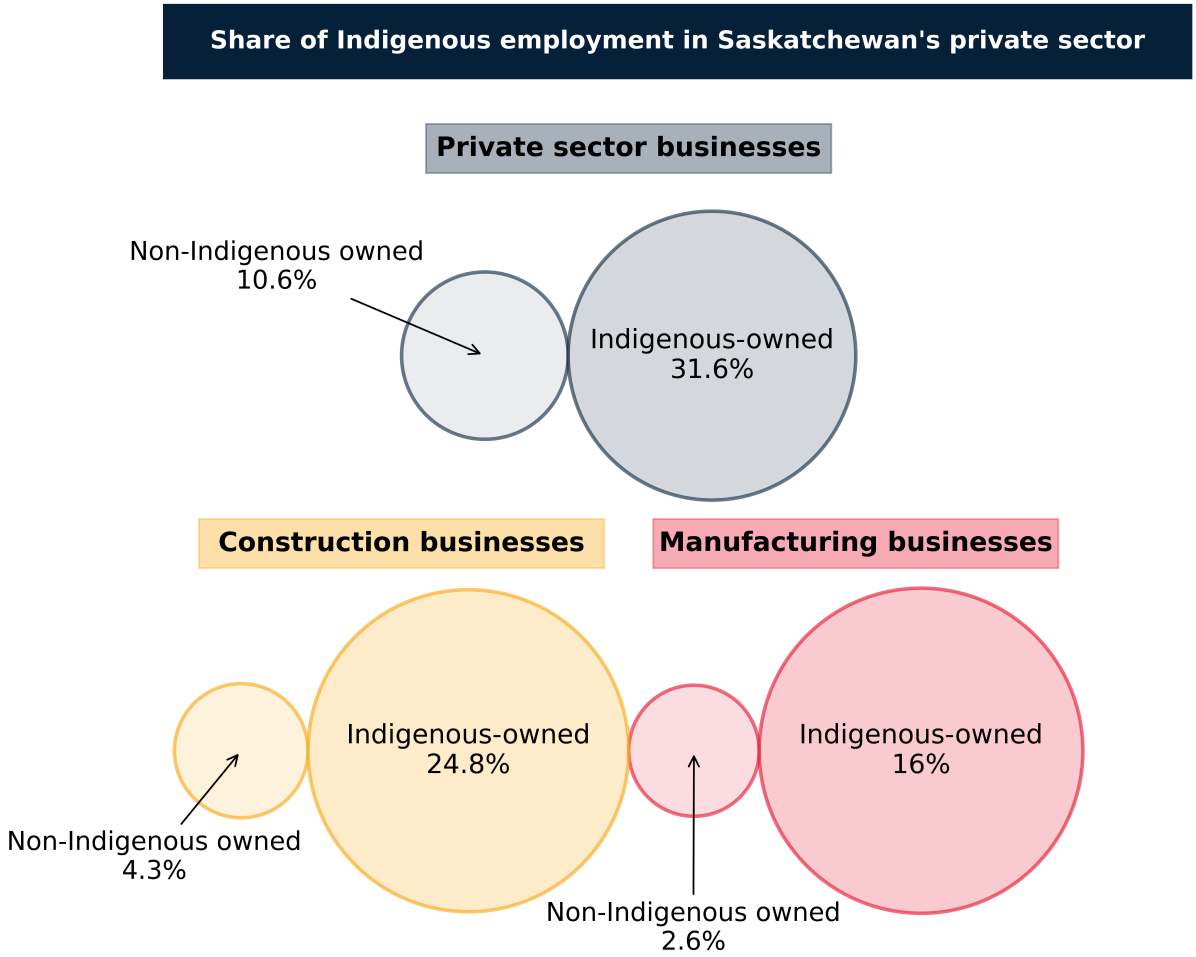
Interviews for this project and secondary research both emphasize how there are socio-economic factors that can impact the success of Indigenous employment [9]. An Indigenous job candidate can have less pre-employment training if their home community lacks infrastructure, technology, or other equipment for specialized tasks. Employment training and skills development can be less successful when delivered to Indigenous people in a top-down fashion, often through a "one-size-fits-all" model. A workplace can also feel alienating or be unsafe in cases when Indigenous peoples feel pressured to hide or repress their cultural views and historical experiences, as some of these views and experiences are very different from the views and experiences of non-Indigenous people. For example, an interview participant spoke of how intergenerational trauma is being carried by survivors of residential schools and their families. If a workplace is not properly trained on Indigenous history and the impacts of Canadian colonialism, the attitudes and behaviors of co-workers can exacerbate this trauma.

Ways to support Indigenous employment

- Recognize Indigenous community values
- Create work cultures that are culturally safe and trauma-informed
- Assist with transportation needs to and from work
- Provide on-site mentoring
- Design pathways for career advancement
- Avoid punitive "one-size-fits-all" models of management

Indigenous-owned businesses do not have a monopoly on being successful employers of Indigenous people. What Indigenous-owned businesses have is a higher likelihood of a shared lived experience. What non-Indigenous businesses can do is learn about these lived experiences, build relationships with Indigenous communities, and design ways to be better employers of Indigenous people. An interview for this report spoke of how a non-Indigenous construction firm in Saskatchewan has been very successful in hiring

and retaining Indigenous peoples. The firm consulted with Indigenous peoples to learn how Indigenous peoples could be better supported once they were hired. Supports included purchases of personal protective equipment (PPE) for employees and ride sharing. On-site mentoring can also be very effective if a manufacturing or construction job can count on-site learning towards an apprenticeship or other certification.



A non-Indigenous business could also have an implicit cultural hierarchy that puts Indigenous people in lower-rank positions more frequently. Figure 10 helps us see how Indigenous employment is not evenly distributed across occupations relevant to manufacturing and construction. For different occupations in the National Occupational Classification (NOC), shares of Indigenous occupational data for Saskatchewan are benchmarked against the Indigenous share of all employment in Saskatchewan, which is 10.9%. If the share of an occupation is below 10.9%, Indigenous employment is underrepresented and shown with a blue bar. Overrepresentation of Indigenous employment, whereby more than 10.9% of an occupation is employed with Indigenous peoples, is shown with a red bar.

Indigenous employees in Saskatchewan are overrepresented in general trades and several labourer occupations:

- (NOC 73) General trades

- (NOC 75) Helpers and labourers and other transport drivers, operators and labourers
- (NOC 95) Labourers in processing, manufacturing and utilities

This overrepresentation does not automatically suggest that there are barriers to construction and manufacturing employment. Interviews for this report spoke of how labourer occupations can be good opportunities for Indigenous community members to have income while they pursue higher education or gain on-site experience with equipment. However, overrepresentation in these occupations become issues of discrimination if Indigenous employees are not given fair opportunities in career advancement, including into occupations that have historically underrepresented Indigenous peoples. Except for supply-chain logistics (NOC 14), Indigenous peoples are underrepresented in every management and administerial occupation, as well in specialization roles.

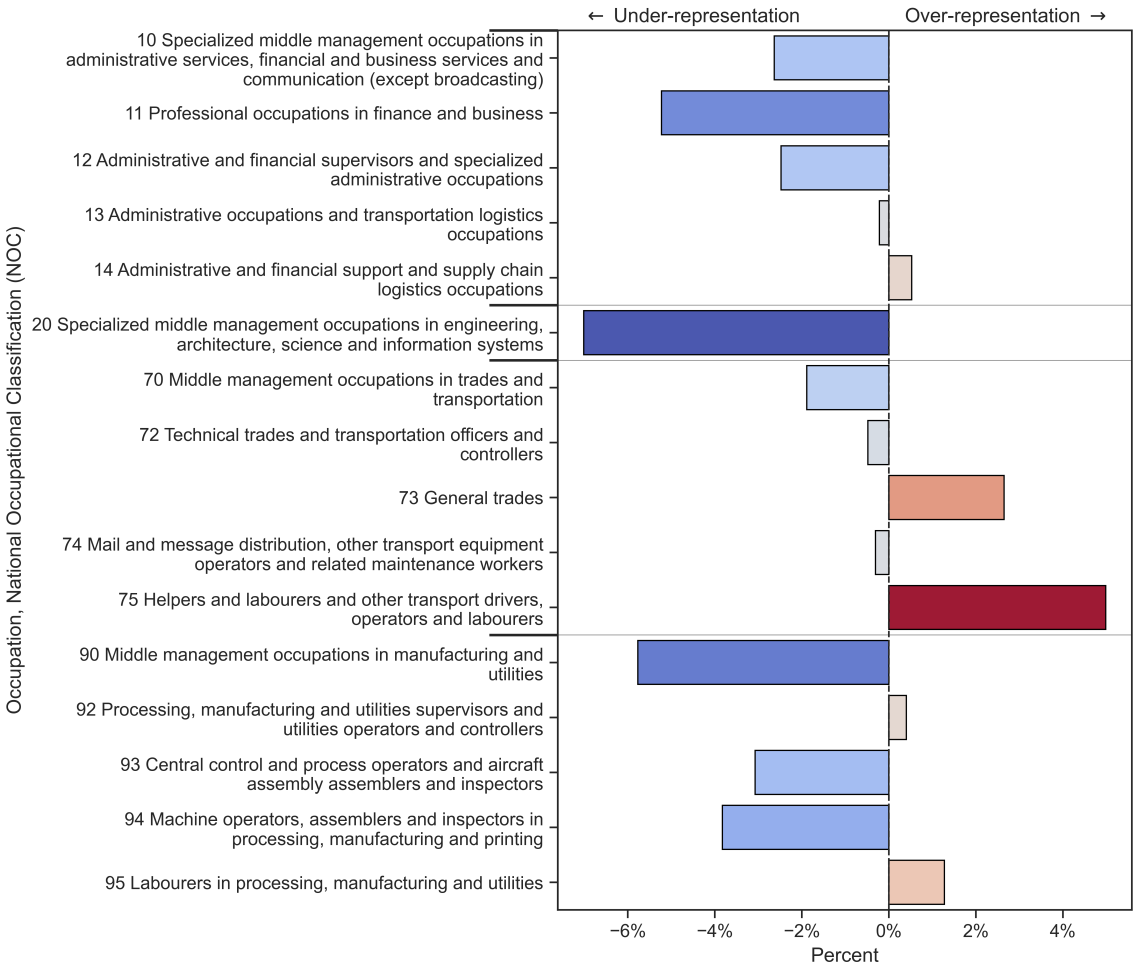


Figure 10: Indigenous representation in occupations, 2020, Saskatchewan. Indigenous peoples are underrepresented in almost every management and administerial occupation. Indigenous employees in Saskatchewan are overrepresented in general trades and several labourer occupations.

Source: StatCan Table: 98-10-0587-01, "Employment income statistics by occupation minor group, Indigenous identity, highest level of education, work activity during the reference year, age and gender: Canada, provinces and territories and census metropolitan areas with parts."

4.3 Indigenous-owned businesses in the manufacturing and construction sectors

The importance of Indigenous business ownership goes beyond the generation of income. As Kitsaki Management Limited Partnership demonstrates in their annual reporting on the economic development of the Lac La Ronge Indian Band, Indigenous ownership can be vital to supporting long-term community economic development. Ownership and ownership-stakes can also be vehicles for Indigenous peoples to exercise self-determination in their economic affairs.

The share of Indigenous ownership in Canada's private sector has grown in the last few years. Figure 11 combines multiple surveys from StatCan to produce a historical plot of the share of Indigenous business ownership in Saskatchewan. From 2005 to 2021, the share of Indigenous business ownership slowly grew from 2.3% of all private enterprises to 2.6%. After 2021, StatCan survey data indicates how the share of Indigenous business ownership jumped to new heights – including to an estimate of 7% in the fourth quarter of 2023.

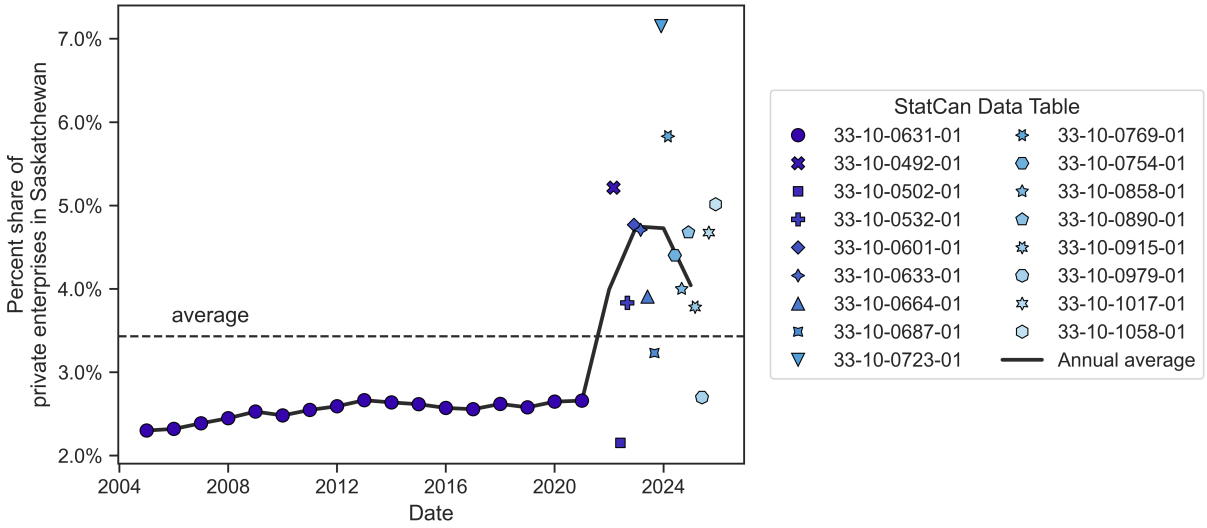


Figure 11: Indigenous-owned businesses, share of private enterprises, Saskatchewan. Indigenous business ownership experienced slow growth from 2005 to 2020, but then grew quickly from 2021 to 2024.

Several factors can explain the jump in Indigenous business ownership. First, Indigenous government spending has made a similar jump, and this jump can support Nation-owned businesses or acquire assets for community investment. Figure 12 measures Indigenous government expenditures, as a share of all government expenditures in Saskatchewan. Like the growth of Indigenous business ownership in the last few years, Indigenous government expenditures have increased in the last ten years.

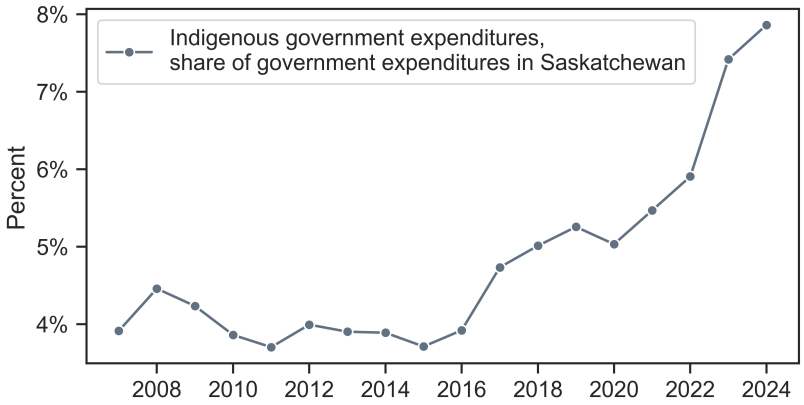


Figure 12: Indigenous government expenditures, share of all government expenditures, Saskatchewan. The significant increase in Indigenous government expenditures began around the same time as the fast growth of Indigenous business ownership.

Source: StatCan Table: 36-10-0450-01, "Revenue, expenditure and budgetary balance - General governments, provincial and territorial economic accounts (x 1,000,000)."

Second, Indigenous business growth can be rapid because Indigenous involvement is often a requirement or important advantage in public and private bids for contractors. However, there are controversies that circle around current Indigenous procurement policies in Canada, and this makes it difficult for the upward trend in Figure 11 to be a straightforward indicator of true Indigenous business growth in Saskatchewan. An Indigenous procurement policy can be an opportunity for pursuing economic reconciliation with Indigenous peoples, but such a policy necessitates checks and balances to ensure that Indigenous communities, organizations, or businesses are the true benefactors of procurement. For example, the AFN has advocated for greater scrutiny of the Indigenous Business Directory (IBD), which is the directory the Government of Canada uses for Indigenous procurement. Greater scrutiny is needed to ensure that Indigenous businesses are what they say – owned by people, organizations, or communities that can verify their Indigenous identities – and that joint-venture procurement does not count non-Indigenous spending toward Indigenous procurement goals.

Verifying Indigenous procurement

An interview participant for this report explained that the speed of growth in Indigenous procurement in Saskatchewan will, at a provincial level, increase the demand for stronger verifications of Indigenous procurement.

Another interview participant spoke of the need for sectors to ensure that Indigenous procurement goals are monitored across the life of a contract, especially if Indigenous businesses are partners or subcontractors on a bid.

Despite controversies in procurement that can undermine true and meaningful Indigenous involvement, shares of Indigenous business ownership can still grow higher. Figure 13 plots sector breakdowns for national data. Each sector has three markers: one for firms with annual revenues greater than $30,000, one for firms with annual revenues less than $30,000, and one for all firms. The x-axis measures the average share of Indigenous-owned businesses, as a percent of all businesses in the sector between 2019 and 2021. The dashed vertical line is the average share for all sectors: 1.8%. The shares of Indigenous ownership in construction and manufacturing sectors are only near or slightly above the average of 1.8%. Moreover, the estimates for the manufacturing sector suggests that, like Indigenous-owned businesses in agriculture, wholesale trade, retail trade, and real estate, there are higher tendencies for Indigenous-owned businesses in the manufacturing sector to have annual revenues below $30,000. The average share of Indigenous-owned manufacturing businesses with annual revenues above $30,000 is 1.6%, and the average share for manufacturing businesses with annual revenues below $30,000 is 2.2%.

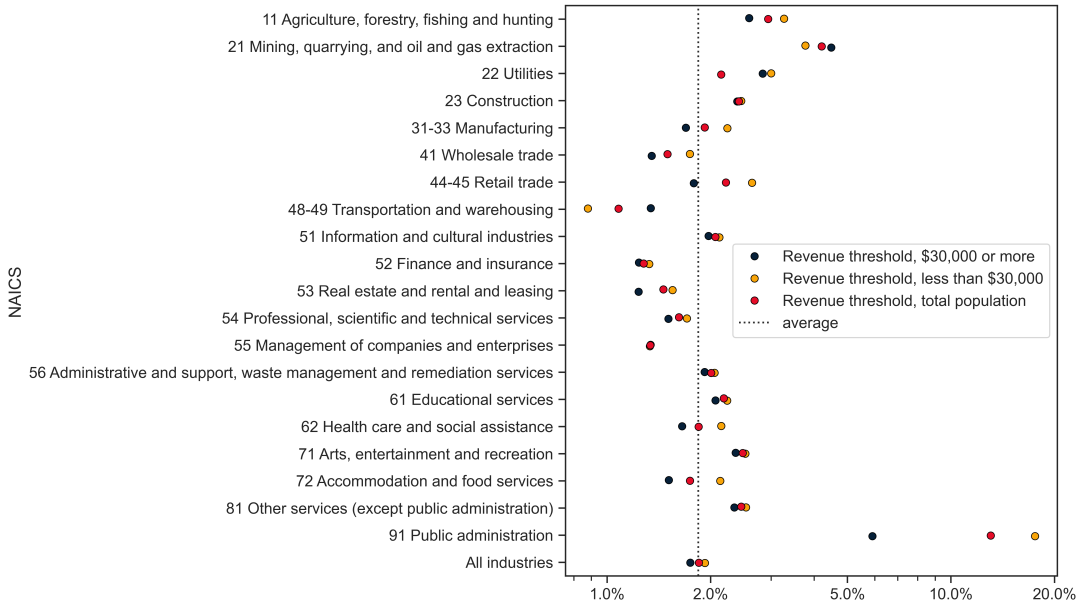


Figure 13: Percent share of Indigenous-owned businesses in Canada, by NAICS sector. Construction and manufacturing are slightly above or near the average share. The distribution of the data in the manufacturing sector indicates that the sector has a higher proportion of firms with annual revenues below $30,000.

Source: StatCan Table: 33-10-0856-01, "Number of enterprises in Canada, by industry and Indigenous group of owner."

A common barrier to Indigenous business growth is access to capital. Access to capital investment is of critical importance to any Indigenous government, community, business, and entrepreneur that is looking to leverage investment for an Indigenous-owned project or partnership. However an inequality of Indigenous access to capital can be understood in different ways:

- The *Indian Act* and government funding policies restrict First Nations from using certain on-reserve assets or revenue streams as collateral for financing [8].

- First Nation small and medium business owners can lack the information or paperwork to meet all requirements in applications for lending.
- Indigenous firms can be much less diversified than mainstream firms in the sources of market capital. Indigenous firms overwhelmingly rely on bank loans, while mainstream firms mix bank loans with bonds, debentures, commercial paper, and other instruments [2].
- Access to Indigenous-owned banking, bonds, or loans can also be limited. The capital and scope of an Indigenous financial institution can struggle to compete with mainstream banks, institutions, and other capital ventures. For example, the First Nations Finance Authority has issued nine debentures, but its current coverage is still limited to 140 First Nations communities. Investment funds might also be limited to certain market segments, such as small business and startups; this type of limitation can make it difficult for First Nations to access funds for larger projects in infrastructure and housing [8].

Barriers to accessing capital can undermine the longevity of Indigenous-owned businesses. A 2024 StatCan research paper found that Indigenous-owned businesses tend to have a higher debt-to-asset ratio than non-Indigenous owned businesses (0.62 v. 0.55) [6]. While the data from the paper does not tell us which debt structures are contributing to these debt-to-asset ratios, the average Indigenous-owned business is at greater risk of surviving if unfavourable debt structures are combined with average revenues that are, historically, lower than the average revenues of non-Indigenous owned businesses ($640,000 vs. $751,000).

Barriers to accessing capital can also prevent Indigenous peoples from pursuing entrepreneurship. Figure 14 indicates how Indigenous self-employment in Saskatchewan, as a share of all Indigenous employment in the province, has hovered around 8% from 2007 to 2025. As a type of employment for everyone in Saskatchewan, the rate of self-employment of the total population has declined since 2007. Nevertheless, Indigenous peoples are still below the provincial rate of self-employment. The financial risks of Indigenous self-employment might be higher and lack of access to capital might preclude Indigenous peoples in Saskatchewan from starting their own businesses.

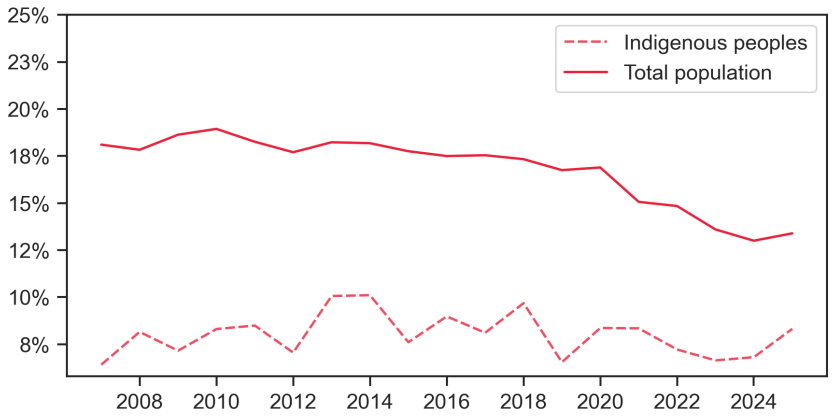


Figure 14: Rate of self-employment, Saskatchewan. Barriers to accessing capital are likely to prevent Indigenous peoples from pursuing entrepreneurship.

Source: StatCan Table: 14-10-0469-01, " Employment characteristics by Indigenous group living off reserve, annual."

4.4 Proportional employment shares in Saskatchewan and Saskatchewan's cities

Indigenous peoples are underrepresented in the number of people employed, in employments by sector, and by occupation. For additional consideration are the variances in proportional employment shares. For example, two hypothetical cities can have different Indigenous employment gaps:

- The Indigenous population share of City A is 1% and its Indigenous employment share of total employment is 0.7%.
- The Indigenous population share of City B is 10% and its Indigenous employment share of total employment is 8%.

There are Indigenous employment gaps in both cities, but the differences in percentage points makes the proportional employment gap in City B larger than the gap in City A (10%-8% = 2% v. 1%-0.7% = 0.3%).

Figure 15 and Figure 16 show how proportional employment gaps were calculated for Saskatchewan and nine cities in Saskatchewan. In each figure the left panel plots Indigenous employment share of total employment against the Indigenous population share. The dashed 45° line is a visual representation of proportional employment – e.g., a city that is 8% Indigenous has an 8% Indigenous employment share of total employment. Data points above the line signal overrepresentation and those below the line signal underrepresentation. The right panel calculates proportional employment gaps by subtracting the Indigenous population share from the Indigenous employment share. Negative percentages are indicators of proportional underrepresentation.

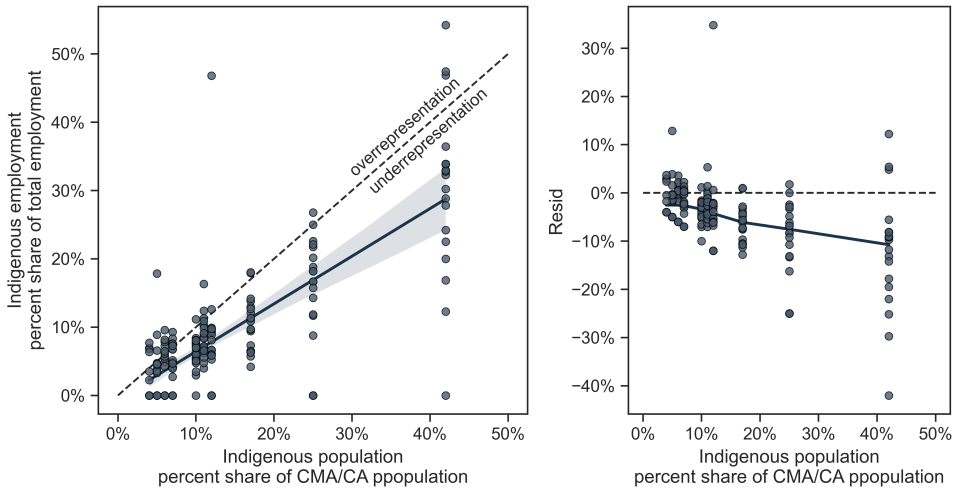


Figure 15: Proportional employment gaps of Indigenous peoples in all sectors, in Saskatchewan and nine cities in Saskatchewan. As the Indigenous share of a place increases, the gap in the proportional share of employment also increases.

Source: StatCan Table: 98-10-0588-01, "Employment income statistics by industry sectors, Indigenous identity, highest level of education, work activity during the reference year, age and gender: Canada, provinces and territories, census metropolitan areas and census agglomerations with parts" for Indigenous employment by sector. StatCan Table: 98-10-0265-01, "Indigenous identity by Registered or Treaty Indian status: Canada, provinces and territories, census metropolitan areas and census agglomerations with parts" for Indigenous population share by CMA/CA.

Figure 15 plots the data from the 20 major sectors and Figure 16 plots the data from construction (21) and manufacturing (31-33). In both figures we see the same trend. As the Indigenous share of a place increases, the gap in the proportional share of employment also increases. This means that Indigenous peoples tend to experience greater degrees of employment underrepresentation when Indigenous peoples count for a bigger share of the population.

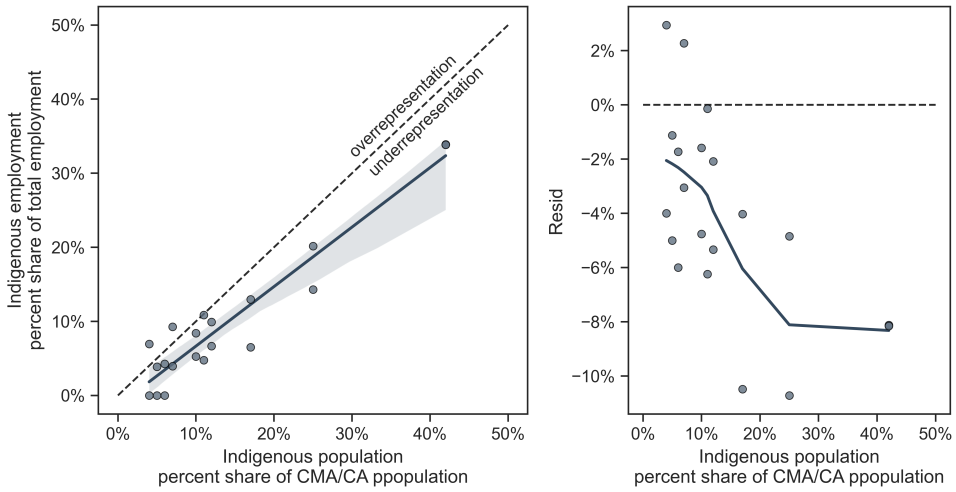


Figure 16: Proportional employment gaps of Indigenous peoples in manufacturing and construction, in Saskatchewan and nine cities in Saskatchewan. The same relationship between population and employment can be seen when we focus on just the manufacturing and construction sectors.

Source: See Figure 15

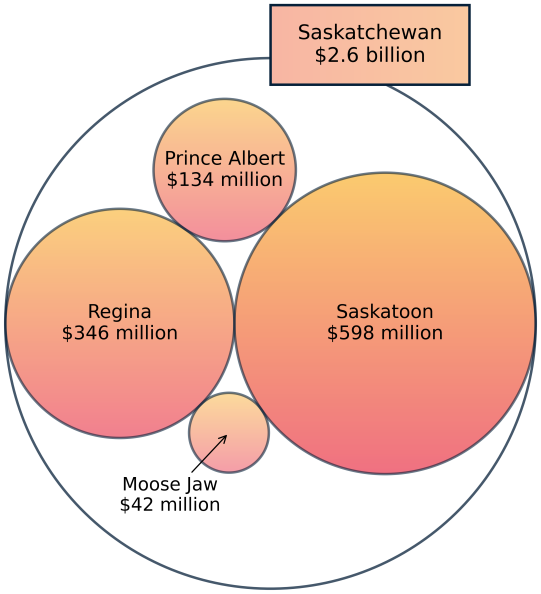
Table 12 shows the average proportional gaps for all sectors, as well as the average of the construction and manufacturing sectors. Where the Indigenous population share is higher — like Prince Albert — the degree of underrepresentation in the labour force is more severe.

Table 12: Average proportional gaps

Geography	Indigenous Population, share of total population	Indigenous employment gap, All Sectors	Indigenous employment gap, Construction and Manufacturing
Weyburn	4%	0%	-1%
Swift Current	5%	-1%	-3%
Estevan	6%	-1%	-4%
Moose Jaw	7%	-1%	0%
Regina	10%	-3%	-3%
Saskatoon	11%	-2%	-3%
Yorkton	12%	-3%	-4%
Saskatchewan	17%	-6%	-7%
North Battleford	25%	-7%	-8%
Prince Albert	42%	-9%	-8%

5. Conclusion

This report attempts to strike a balance in its analysis. The report presents data on current Indigenous economic impacts in the manufacturing and construction sectors in Saskatchewan. Within these impacts are different effects – direct, indirect, and induced – as well as more specific impacts to Saskatchewan's economy – GDP, labour income, wages, taxes, and FTE jobs.



The report also identifies some of the barriers that can depress Indigenous economic impact in Saskatchewan. Acknowledging these barriers should not diminish the significance of current Indigenous economic impacts. In fact, we should recognize how Indigenous peoples, businesses, and communities in Saskatchewan are generating $2.6 billion in the manufacturing and construction sectors *in spite* of these barriers.

5.1 Recommendations

Economic reconciliation in Saskatchewan's manufacturing and construction sectors will not come from just one action or tactic, but rather through collective efforts to remove systemic barriers to investment, procurement, employment, education, training, and promotion. Speaking with direct knowledge of Indigenous economic activity in Saskatchewan, interview participants shared several recommendations to increase Indigenous economic participation in the manufacturing and construction sectors:

Break large bids into several smaller ones Smaller or emerging Indigenous companies cannot compete in RFPs that are wide in scope. While these companies could bid for a large RFP as sub-consultants, this can cause them to experience economic losses.

Concentric employability Indigenous companies geographically near a project should be given added consideration. If there are no proximate Indigenous companies, the plan should be to widen the search by distance.

Flexibile credit arrangements Many construction agreements have requirements for sureties, bonding, or letters of credit. In cases when Indigenous businesses cannot be secured, alternative risk mitigations, such as performance hold backs, enables them to bid for larger jobs.

Indigenous industry liasons An Indigenous organization should be the external auditor of the Indigenous spending targets of government and industry. This oversight would ensure that Indigenous entrepreneurs, businesses, and communities are not excluded from processes that impact the opportunities for Indigenous economic development.

Measuring real impact The criteria of 51% Indigenous ownership is susceptible to being a "box-ticking" exercise that does not create real impacts in Indigenous communities. Indigenous economic development strategies should focus on growing employment, promoting community investment, and creating genuine equity for Indigenous partners.

Promote Indigenous career advancement Business operations in the manufacturing sector can be complex and require talent to manage operations, achieve certifications, and comply to process and safety standards. Typically, many operations and management roles go to non-Indigenous individuals, even in Indigenous-owned businesses. Pathways can be designed for Indigenous employees to grow into leadership positions.

Provincial procurement strategy The growth of Indigenous procurement opportunities creates greater demand for Saskatchewan to establish a formal, province-wide Indigenous procurement policy that everyone can follow.

Support Indigenous decision making Having non-Indigenous partners produce detailed reporting is essential to the decision making of Indigenous partners. For example, the Saskatchewan First Nation Natural Resource Centre of Excellence has required non-Indigenous companies to provide very detailed documentation to an Indigenous oversight body. High levels of reporting can be burdensome, but it helps prevent situations where Indigenous partnerships look good on paper but do not translate into real financial benefits for Indigenous communities.

Training with a purpose Workforce funding needs to go directly to the companies doing the hiring. This would allow for more ways for a job to be waiting for individuals who complete schooling, training or certification.

5.2 Forecasts

Estimating the future impacts of economic reconciliation in the manufacturing and construction is a difficult exercise and sensitive to changes in many socio-economic variables, including changes to international trade. Figure 17 and Figure 18 use growth rates in Saskatchewan's provincial and Indigenous economic accounts to raise three questions for future discussions in Indigenous economic participation:

1. What is the forecast of the total output of a sector?
2. What is the forecast of Indigenous economic output, assuming future growth rates are like growth rates in the past?
3. What is the forecast of Indigenous economic output, assuming economic reconciliation helps future growth rates be stronger than some of the past growth rates?

In both Figure 17 and Figure 18 there are two panels. The top panel of each figure shows 15-year forecasts for total and Indigenous output. The bottom panel of each figure shows the share of Indigenous output. There are two forecasts for Indigenous output. The low estimate samples from all growth rates of Indigenous output between 2013 and 2023. The high estimate samples from growth rates within the 25th-100th percentiles of Indigenous output growth rates between 2013 and 2023. Excluding the bottom quartile removes from the forecast the lowest growth rates, which we are assuming will be less likely to appear if Indigenous economic reconciliation is meaningful. For example, in the construction sector the lowest growth rate of Indigenous economic

output was -13.2%. The lowest growth rate in the high forecast is -7.1%.

Figure 17 and Figure 18 show there are at least two dimensions to measuring economic reconciliation in the manufacturing and construction sectors in Saskatchewan. Economic reconciliation can have impacts on future levels of economic output. For example, the high forecast of Indigenous economic output in the construction sector estimates output will be between $1.182 billion and $1.925 billion in 2038; the high forecast of Indigenous economic output in the manufacturing sector estimates output will be between $953 million and $1.404 billion in 2038.[13] Economic reconciliation can also have impacts on the Indigenous shares of economic output in Saskatchewan. The forecasts of economic share raise the important issue of how Indigenous economic participation grows at the pace of total economic growth in Saskatchewan. The Indigenous share of economic output can slowly decline if new economic opportunities are distributed unevenly, preventing Indigenous economic growth from holding the same or a better rate than non-Indigenous economic growth.

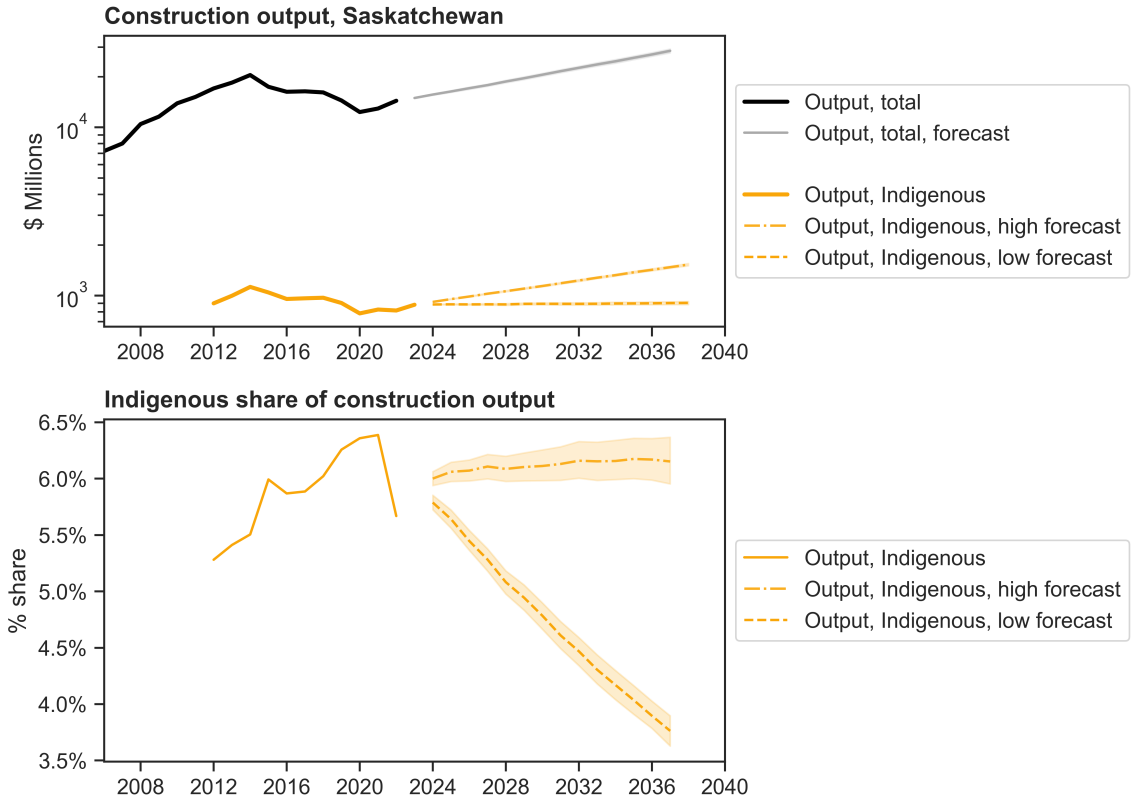


Figure 17: Forecasts of output in Saskatchewan's construction sector. The low forecast estimates a decline in the Indigenous share of output. The upward trend in the high forecast assumes economic reconciliation.

Source: StatCan Table: 36-10-0488-01, "Output, by sector and industry, provincial and territorial (x 1,000,000)" for provincial output by sector; StatCan Table: 36-10-0695-01, "Gross domestic income attributable to Indigenous people by industry" for Indigenous economic output by sector.

[13] Forecasted estimates of output were produced through bootstrapping methods that, for 1,000 iterations, sampled growth rates to forecast output from 2024 to 2038. The ranges for the estimated outputs of 2038 are one standard deviation above and below the sample mean.

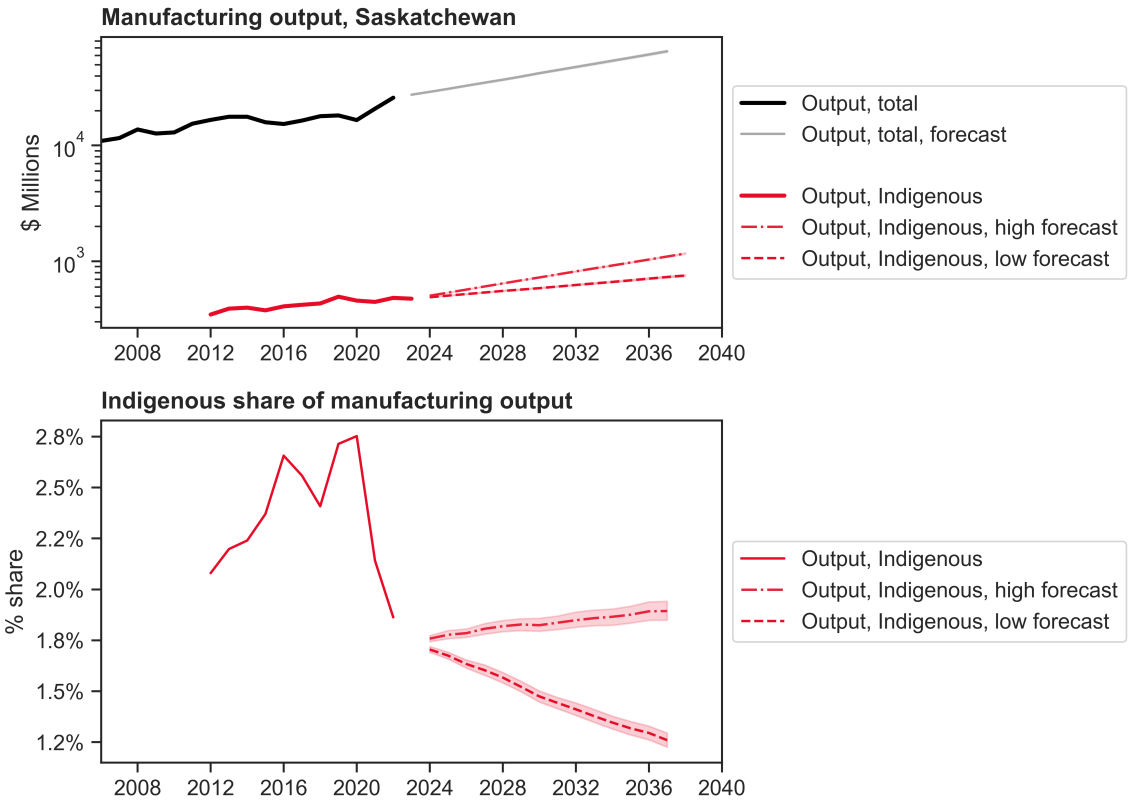


Figure 18: Forecasts of output in Saskatchewan's manufacturing sector. Past growth rates in output influence the sideways trends in the Indigenous forecast.

Source: See Figure 17.

5.3 Social impacts of economic reconciliation in the manufacturing and construction sectors

Section 4 of this report analysed the barriers and opportunities for growing Indigenous employment in the manufacturing and construction sectors. The significance of removing barriers to Indigenous employment growth goes far beyond economic statistics in a report. Indigenous employment growth can be a driver of broader socio-economic well being. More jobs and stronger careers for Indigenous peoples in manufacturing and construction can be important opportunities for Indigenous communities to build economic prosperity and to provide pathways for their youth. And greater Indigenous economic participation does not only help Indigenous peoples – it is a source of regional economic spending that boosts the total spending of economic sectors in Canada.

For example, Figure 19 demonstrates how Indigenous business ownership has a positive relationship to First Nations community development. The figure measures community development with the Community Well-Being (CWB) index, which "measures socio-economic well-being for individual communities across Canada." The index "has 4 components: education, labour force activity, income and housing."[14]

[14] Indigenous Services Canada has a set of webpages on the history and methods of the CWB Index

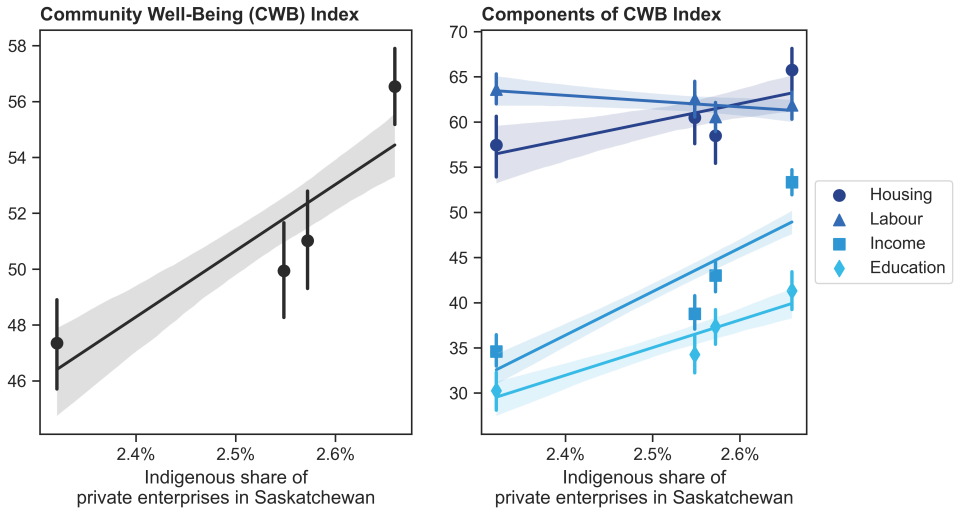


Figure 19: Indigenous business ownership and First Nations community well-being, Saskatchewan. In Saskatchewan there is a positive trend between the well-being of First Nations communities and the share of Indigenous businesses in the private sector.

Source: StatCan Table: 33-10-0631-01, "Private enterprises by sex and Indigenous identity of ownership, province or region and enterprise size" for business counts; Community Well-Being Index open data files for CWB Index, First Nations communities, Saskatchewan.

For 68 First Nation communities in Saskatchewan, the left panel of Figure 19 looks at the relationship Indigenous business ownership and the CWB indexes for 2006, 2011, 2016, and 2021. The relationship is positive, which suggests that increases in Indigenous business ownership contribute to First Nations community development. The right panel looks at the components of the CWB index. Three of four components have positive relationships with Indigenous business ownership. This suggests there are broader socio-economic impacts in housing, education, and income.[15]

When looking at manufacturing and construction, this report has been guided by a belief that public and private institutions in Canada need to have strong commitments to economic reconciliation. When economic reconciliation is connected to Indigenous rights of self-determination, it becomes clear how important it is to remove barriers to the equal participation of Indigenous peoples in the economy. Strengthening Indigenous employment opportunities, expanding access to capital, and supporting Indigenous ownership across Saskatchewan can sound like ambitious actions, but they are not optional when systemic barriers can survive in less ambitious commitments to Indigenous reconciliation. And when these ambitious actions appear across Saskatchewan – and there have been some already – they should be celebrated for recognizing that Indigenous reconciliation is not just about the past. It is about the rights of Indigenous peoples to build their economic future.

[LINK].

[15] Further research would be needed to understand why the labour component of the CWB does not have a positive relationship with Indigenous business ownership. One factor worth considering is business size, which is not accounted for in Figure 19.

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Appendices

A. Labelling subsectors and grouping industries

Table 13: Labelling manufacturing industries

Economic account code	Label
Animal food manufacturing [BS31110]	M-A. Food Manufacturing
Grain and oilseed milling [BS311200]	M-A. Food Manufacturing
Bakeries and tortilla manufacturing [BS311800]	M-A. Food Manufacturing
Other food manufacturing [BS311900]	M-A. Food Manufacturing
Sugar and confectionery product manufacturing [BS31130]	M-A. Food Manufacturing
Fruit and vegetable preserving and specialty food manufacturing [BS31140]	M-A. Food Manufacturing
Dairy product manufacturing [BS31150]	M-A. Food Manufacturing
Meat product manufacturing [BS31160]	M-A. Food Manufacturing
Seafood product preparation and packaging [BS31170]	M-A. Food Manufacturing
Soft drink and ice manufacturing [BS31211]	M-A. Food Manufacturing
Breweries [BS31212]	M-B. Beverage and Tobacco Product Manufacturing
Wineries and distilleries [BS3121A]	M-B. Beverage and Tobacco Product Manufacturing
Tobacco and cannabis product manufacturing [BS312A0]	M-B. Beverage and Tobacco Product Manufacturing
Textile and textile product mills [BS31A00]	M-C. Textile, textile products, clothing, and leather
Clothing and leather and allied product manufacturing [BS31B00]	M-C. Textile, textile products, clothing, and leather
Wood product manufacturing [BS32100]	M-D. Wood Product Manufacturing

Continued on next page

Table 13 – continued from previous page

Economic account code	Label
Pulp, paper and paperboard mills [BS32210]	M-E. Paper Manufacturing and Printer Support Activities
Converted paper product manufacturing [BS32220]	M-E. Paper Manufacturing and Printer Support Activities
Printing and related support activities [BS32300]	M-E. Paper Manufacturing and Printer Support Activities
Petroleum and coal product manufacturing [BS32400]	M-F. Petroleum and coal product manufacturing
Basic chemical manufacturing [BS32510]	M-G. Chemical Manufacturing
Resin, synthetic rubber, and artificial and synthetic fibres and filaments manufacturing [BS325200]	M-G. Chemical Manufacturing
Paint, coating and adhesive manufacturing [BS325500]	M-G. Chemical Manufacturing
Soap, cleaning compound and toilet preparation manufacturing [BS325600]	M-G. Chemical Manufacturing
Other chemical product manufacturing [BS325900]	M-G. Chemical Manufacturing
Pesticide, fertilizer and other agricultural chemical manufacturing [BS32530]	M-G. Chemical Manufacturing
Pharmaceutical and medicine manufacturing [BS32540]	M-G. Chemical Manufacturing
Plastic product manufacturing [BS32610]	M-H. Plastics and rubber products manufacturing
Rubber product manufacturing [BS32620]	M-H. Plastics and rubber products manufacturing
Non-metallic mineral product manufacturing (except cement and concrete products) [BS327A0]	M-I. Non-metallic mineral product manufacturing
Cement and concrete product manufacturing [BS32730]	M-I. Non-metallic mineral product manufacturing
Primary metal manufacturing [BS33100]	M-J. Primary Metal Manufacturing
Fabricated metal product manufacturing [BS33200]	M-K. Fabricated metal product manufacturing

Continued on next page

Table 13 – continued from previous page

Economic account code	Label
Machinery manufacturing [BS33300]	M-L. Machinery manufacturing
Computer and electronic product manufacturing [BS33400]	M-M. Computer and electronic product manufacturing
Electrical equipment, appliance and component manufacturing [BS33500]	M-N. Electrical equipment, appliance and component manufacturing
Motor vehicle manufacturing [BS33610]	M-O. Transportation equipment manufacturing
Motor vehicle body and trailer manufacturing [BS33620]	M-O. Transportation equipment manufacturing
Motor vehicle parts manufacturing [BS33630]	M-O. Transportation equipment manufacturing
Aerospace product and parts manufacturing [BS33640]	M-O. Transportation equipment manufacturing
Railroad rolling stock manufacturing [BS33650]	M-O. Transportation equipment manufacturing
Ship and boat building [BS33660]	M-O. Transportation equipment manufacturing
Other transportation equipment manufacturing [BS33690]	M-O. Transportation equipment manufacturing
Furniture and related product manufacturing [BS33700]	M-P. Furniture and related product manufacturing
Miscellaneous manufacturing [BS33900]	M-Q. Miscellaneous manufacturing

B. Sources and methods for I-O modelling

B.1 Supply and use and input-output tables

The Saskatchewan 2022 supply and use table was accessed through the Abacus Data Network in January 2026. The full citation is:

> Statistics Canada, 2025, "Supply and Use and Input-Output Tables, 2022", Abacus Data Network, V1

The "Basic Price" sheet of `IOT_provincial_SK_D_2022.xlsx` was converted to an unformatted CSV. The CSV was separated into files for each component of the I-O model – e.g., `build_D_final_demand.csv`.

B.2 Regional input-output modelling

This report uses two non-survey methods to estimate the urban Indigenous economic impacts in Saskatoon, Regina, Prince Albert, and Moose Jaw:

1. Location Quotients
2. Estimates of urban Indigenous economic output

B.2.1 Location quotients

For each industry, a location quotient (LQ) is used to produce estimates of a region's industrial specialization relative to a larger geographic unit. This report needed to estimate the regional industrial specialization of four cities in Saskatchewan, relative to Saskatchewan. The LQs were used to modify steps in the I-O model that are produced from the Saskatchewan Provincial input-output tables, 2022.

The 2021 Canadian Census was used to the build LQs. The relative impact of industries was calculated with employment by industry, as listed in the NAICS format. LQs are calculated by dividing the city distribution of labour by the benchmark. For example, if 0.9 percent of labour in Barrie, Ontario is involved in the utilities sector [22] and 0.7 percent of labour in Ontario is involved in this sector, the LQ for utilities in Barrie is 1.29 (0.9 ÷ 0.7).

Table B shows the LQs for Regina, Saskatoon, Prince Albert, and Moose Jaw. Any LQ higher than 1 signifies a larger share of employment, relative to the Saskatchewan distribution of employment across industries. Any industry with a LQ smaller than 1 is an indication that this industry is small, relative to the industry's share of labour in Saskatchewan's employment. For instance, the LQ of manufacturing [31-33] for Regina is 0.50, which suggests that the size of manufacturing in the city is likely below the average of what we would find in other areas of Saskatchewan. Conversely, the size of Saskatoon's construction sector [23] is 1.15 times larger than the Saskatchewan average.

The product of incorporating location quotients and regional purchase coefficients is a regional technology matrix (A^{rr}). For each row of A, which is the technology matrix built with Saskatchewan data, a rule is applied:

$$a_{ij}^{rr} = \left\{ \begin{array}{ll} (LQ_i^r)a_{ij}^n, & \text{if } LQ_i^r < 1 \\ a_{ij}^n, & \text{if } LQ_i^r \geq 1 \end{array} \right\}$$

A row in A will be multiplied by a LQ when its industry LQ is below 1. The LQ is not used for a regional industry is greater than 1. Consequently, we are producing a conservative estimate of Saskatchewan's regional impact. Larger estimates of economic impact could be produced if rows in the technology matrix were multiplied by LQs greater than 1, but this risks inflating the regional impact of industry specialization.

B.3 Estimating urban Indigenous output

StatCan provides statistics on the gross domestic income attributable to Indigenous people by industry.[16] However, data are only available at national, provincial, and territorial levels.

[16] Gross domestic income attributable to Indigenous people by industry

Table 14: Location Quotients (LQ) for Saskatchewan cities

	LQ			
	Saskatoon	Regina	Prince Albert	Moose Jaw
Agriculture, forestry, fishing and hunting [11]	1.43	1.00	2.21	2.64
Mining, quarrying, and oil and gas extraction [21]	4.80	1.80	3.80	5.80
Utilities [22]	1.00	2.29	1.00	1.29
Construction [23]	1.15	0.99	0.92	1.07
Manufacturing [31-33]	0.64	0.51	0.17	0.51
Wholesale trade [41]	1.18	1.09	0.70	0.76
Retail trade [44-45]	0.99	1.04	1.26	1.12
Transportation and warehousing [48-49]	0.90	0.80	0.55	1.16
Information and cultural industries [51]	0.70	1.09	0.39	0.48
Finance and insurance [52]	0.56	1.04	0.39	0.50
Real estate and rental and leasing [53]	0.76	0.76	0.52	0.67
Professional, scientific and technical services [54]	0.73	0.64	0.33	0.30
Management of companies and enterprises [55]	0.50	0.50	0.00	0.25
Administrative and support, waste management and remediation services [56]	0.75	0.80	0.64	0.77
Educational services [61]	1.33	0.97	1.21	1.08
Health care and social assistance [62]	1.28	1.22	1.61	1.33
Arts, entertainment and recreation [71]	1.06	1.06	1.06	1.28
Accommodation and food services [72]	1.23	1.11	1.32	1.51
Other services (except public administration) [81]	1.29	1.24	1.37	1.24
Public administration [91]	0.91	1.69	2.17	1.24

Urban shares of Saskatchewan's Indigenous employment were used to estimate Indigenous output for Regina, Saskatoon, Prince Albert, and Moose Jaw. Table 15 shows the values that are, for each city, multiplied by Saskatchewan's Indigenous output for 2022.

Table 15: Estimating Indigenous Output for Four Cities in Saskatchewan

	Output	Share of Indigenous Emp.			
	Saskatchewan	Saskatoon	Regina	Prince Albert	Moose Jaw
Agriculture, forestry, fishing and hunting [11]	751.62	7%	3%	4%	1%
Mining, quarrying, and oil and gas extraction [21]	425.6	19%	4%	10%	1%
Utilities [22]	61.02	20%	18%	11%	0%
Construction [23]	814.4	27%	14%	8%	2%
Manufacturing [31-33]	481.93	27%	19%	7%	2%
Wholesale trade [41]	166.81	37%	18%	6%	3%
Retail trade [44-45]	375.21	25%	14%	14%	2%
Transportation and warehousing [48-49]	343.55	24%	19%	7%	2%
Information and cultural industries [51]	71.49	29%	34%	8%	3%
Finance and insurance [52]	169.67	27%	30%	9%	3%
Real estate and rental and leasing [53]	687.51	27%	25%	10%	2%
Professional, scientific and technical services [54]	119.25	42%	18%	8%	0%
Management of companies and enterprises [55]	2.46	50%	0%	0%	0%
Administrative and support, waste management and remediation services [56]	154.41	20%	16%	7%	2%
Educational services [61]	578.85	21%	11%	9%	1%
Health care and social assistance [62]	744.34	21%	14%	14%	2%
Arts, entertainment and recreation [71]	146.15	28%	15%	10%	2%
Accommodation and food services [72]	266.58	30%	15%	13%	3%
Other services (except public administration) [81]	152.39	31%	18%	12%	1%
Public administration [91]	2195.04	16%	15%	13%	1%