

# NORTH REGION

## Economic Profile



This report contains demographic, job and business data within the geographic boundaries of the North economic region. The region includes:

- *Census Division 19*
- *Census Division 21*
- *Census Division 22*
- *Census Division 23*

The data in this report and the analysis provide basic information about the economy of the region but does not advocate for one course of action over another.

Data for this report comes from a variety of sources:

- Population – Manitoba Health’s annual reports
- Income and Education – 2016 Statistics Canada Census and 2006 Statistics Canada Census. The data for 2010 is not available.
- Jobs and Business – Emsi, which used the following sources: Canadian Business Patterns (CBP); survey of Employment; Payrolls and Hours (SEPH); Labour Force Survey (LFS) and CANSIM.

This report uses the most recent data available for each category. Some figures may include 2017 data, while others will only go to 2016 or 2015.



## TABLE OF CONTENTS

Executive Summary .....	3
1.0 Population.....	5
Figure 1: Population Growth 1991 - 2016.....	5
Figure 2: Population Growth in North Region by Age 2011 and 2016; Manitoba 2016 .	6
2.0 Education.....	7
Figure 3: Educational Attainment North Region and Manitoba 2016 .....	7
3.0 Income.....	8
Figure 4: Average Household Income North Region and Manitoba 2005 and 2015 .....	8
Figure 5: Household Income North Region 2005 and 2015 and Manitoba 2015.....	9
4.0 Jobs by Industry Sector .....	10
Figure 6: Percentage of Total Jobs by Industry Sector: North Region 2017 .....	11
5.0 Job Change by Industry Sector.....	12
Figure 7: Job Change by Industry Sector, 2011 to 2017.....	12
Figure 8: Real and Percentage Job Change by Industry Sector, 2011 and 2017 .....	13
6.0 Jobs by Industry Cluster .....	14
Figure 9: Percentage of Total Jobs by Industry Cluster North Region 2017 .....	15
7.0 Jobs Change by Industry Cluster.....	16
Figure 10: Job Change by Industry Cluster, 2011 to 2017.....	16
Figure 11: Real and Percentage Job Change by Industry Cluster, 2011 and 2017.....	17
8.0 Labour By Occupation .....	18
Figure 12: Labour by Occupation North Region and Manitoba 2017 .....	18
Figure 13: Top 12 Jobs by Occupations in 2011 and 2017.....	19
9.0 Business by Industry Sector, Cluster and Employment .....	20
Figure 14: North Region Number of Business by Industry, 2016.....	20
Figure 15: Number of Business by Cluster, 2017 .....	21
Figure 16: Business by Size of Employment, 2016 .....	21
Figure 17: Business with High Employment by Sector, 2016 .....	22
10.0 Determining Competitive Advantage.....	23
Figure 18: Industry Cluster by Relative Strength, Job Growth/ Decline 2017.....	24
11.0 Areas of Strength and Growth.....	25
Appendix: Manitoba Industry Clusters .....	29



## EXECUTIVE SUMMARY

The following is a summary of key points within each topic area covered in this profile. In this report “Jobs” and “Business” have been presented using two lens: the North American Industry Classification System (NAICS) which differentiates industries into primary, secondary and tertiary categories; and Cluster Theory. A business cluster is a geographic concentration of interconnected businesses, suppliers, and associated institutions in a particular field. This report used 18 Manitoba specific industry clusters, outlined in Appendix 1.

### Population

- From 1991 to 2016, the population of this region has increased by 15.1%
- This region has a higher proportion of residents in the younger age categories (0 – 29) than the province.

### Educational Attainment

- The North region has a higher proportion of residents with **No certificate, diploma or degree**; and **High school certificate or equivalent** than the provincial average.

### Income

- The average household income in the North Region was lower than the provincial average in 2005 and 2015.
- 27% of the households are in the highest income bracket.

### Jobs by Industry Sector

- The greatest percentage of jobs in the North region is within **Public administration** (16%).
- Between 2011 and 2017, the sector with the greatest job gains was **Construction**. The sector with the greatest job losses was **Mining and oil and gas extraction**.
- There was job loss in the Goods Producing industries (-188) and job growth in the Service industries (+167).

### Jobs by Industry Cluster

- The greatest percentage of jobs in the North region is within the **Local health services** cluster at 11%.
- Between 2011 and 2017, the cluster with the greatest job gains was **Transportation and logistics** (+397 jobs). The cluster with the greatest job loss was the **Mining** cluster (-314 jobs).



### Labour by Occupation

- The most common occupations in the North region are in the category of **Sales and service.** (21.9%)
- The most common occupation in the region is **Underground production and development miners** (1,239 jobs).

### Business by Industry

- In 2016, the sector with the greatest number of businesses was **Agriculture, forestry, fishing and hunting** with 352 businesses.

### Business by Industry Cluster

- In 2016, the cluster with the greatest number of businesses was **Local construction and development** with 519 businesses.

### Business by Employment

- Of the 2,846 businesses in the region, 1,465 are Indeterminate (self employed). 19 businesses employ more than 200 people.

### Determining Competitive Advantage

- Clusters that have experienced growth in this region are: **Tourism; Transportation and logistics; and Finance.**



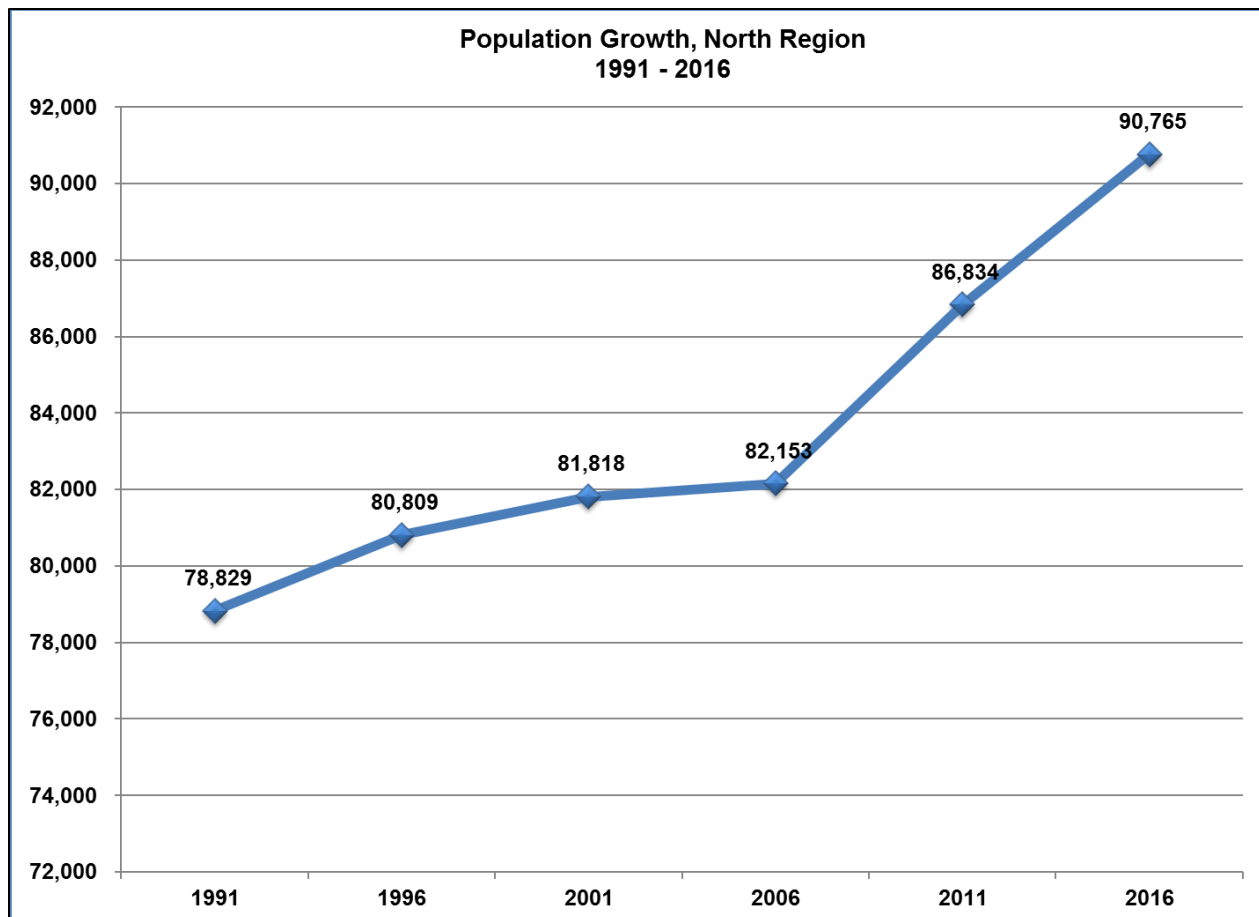
## 1.0 POPULATION

Population growth or decline over a period of time illustrates the historical trends of a region. It is often used to indicate the region's ability to grow over time.

Figure 1 shows that:

- According to the Manitoba Health Population Report (June 2016), there were 90,765 people living in this region in 2016.
  - The population of the region increased by 11,936 (+15.1%) from 1991 to 2016.
  - The population of the region increased by 3,931 (+4.8%) from 2011 to 2016.
- For reference, in Manitoba the overall population increase from 2011 to 2016 was 7.1%.

Figure 1: Population Growth 1991 - 2016

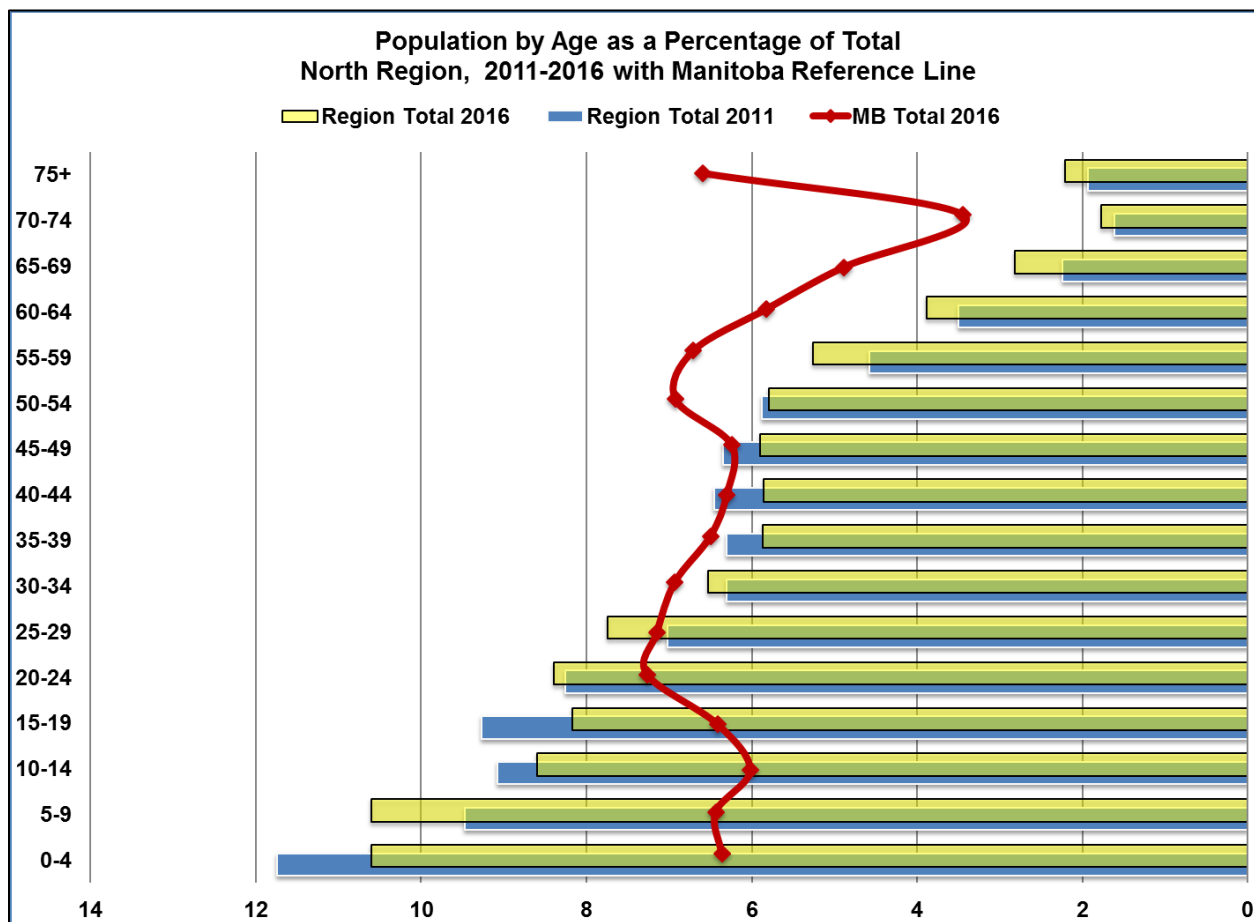


Data sources: Manitoba Health Population Reports: June 1 2016; June 1, 2011; June 1, 2006; June 1, 2001; June 1, 1996; and June 1, 1991.



Figure 2 shows that the proportion of population in this region has increased in the 5 to 9, 20 to 34, and 55 to 75+ age categories. The region has more people by proportion than the Manitoba average in the 0 to 29 age categories. The region has fewer people by proportion than the Manitoba average in the 30 to 75+ age categories.

Figure 2: Population Growth in North Region by Age 2011 and 2016; Manitoba 2016



Data sources: Manitoba Health Population Reports: June 1 2016; June 1, 2011



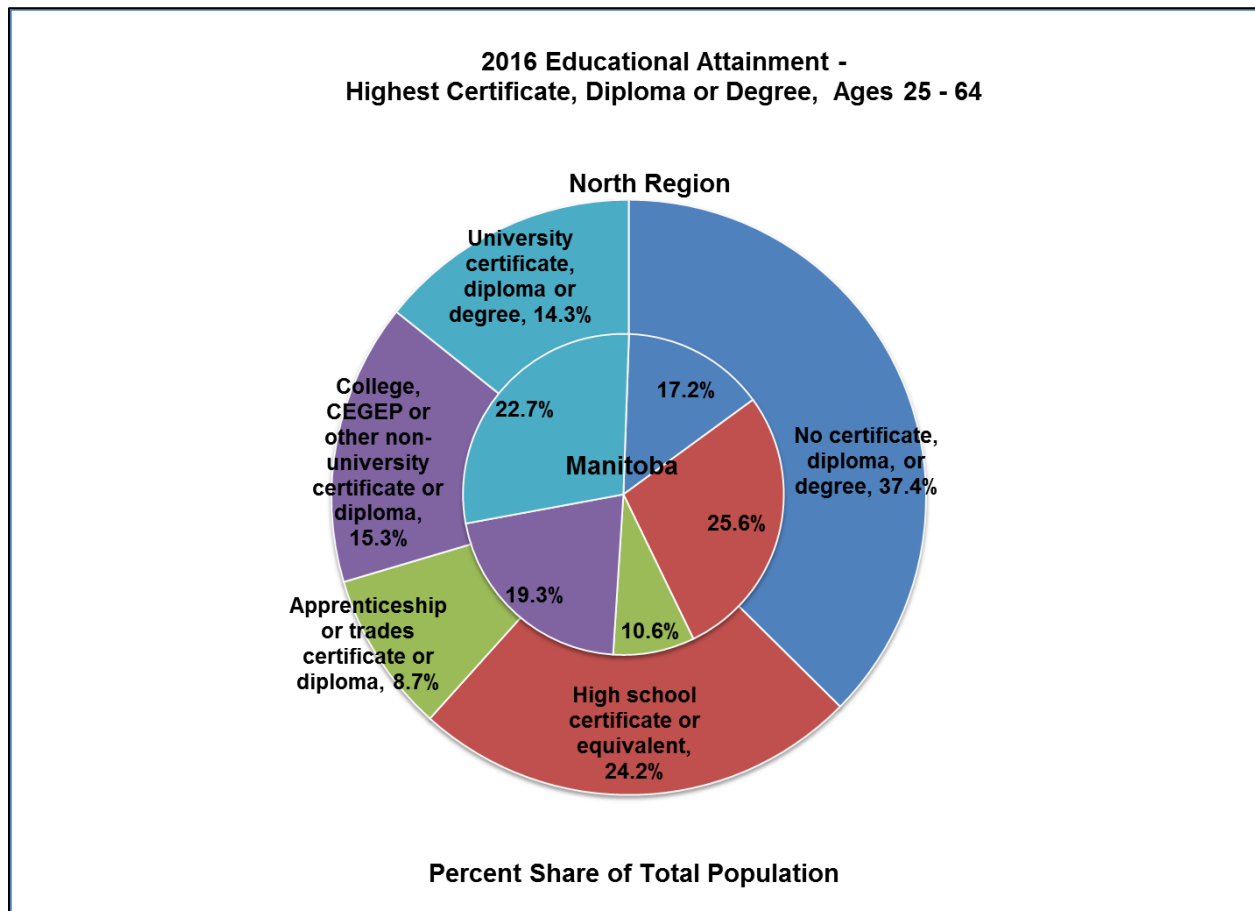
## 2.0 EDUCATION

The education level of a region is linked to the growth of the local economy. It also determines whether the labour force will be attractive to business and industry; and may predict innovation and entrepreneurial activities.

Figure 3 shows that this region has a higher proportion than Manitoba of people with: **No certificate, diploma or degree** (37.4%).

It has a lower proportion than Manitoba of people with: **University certificate, diploma or degree** (14.3%); **College, CEGEP or other non university certificate or diploma** (15.3%); **Apprenticeship or trades certificate or diploma** (8.7%); and **High school certificate or equivalent** (24.2%).

Figure 3: Educational Attainment North Region and Manitoba 2016



Source: Statistics Canada: 2016 Census

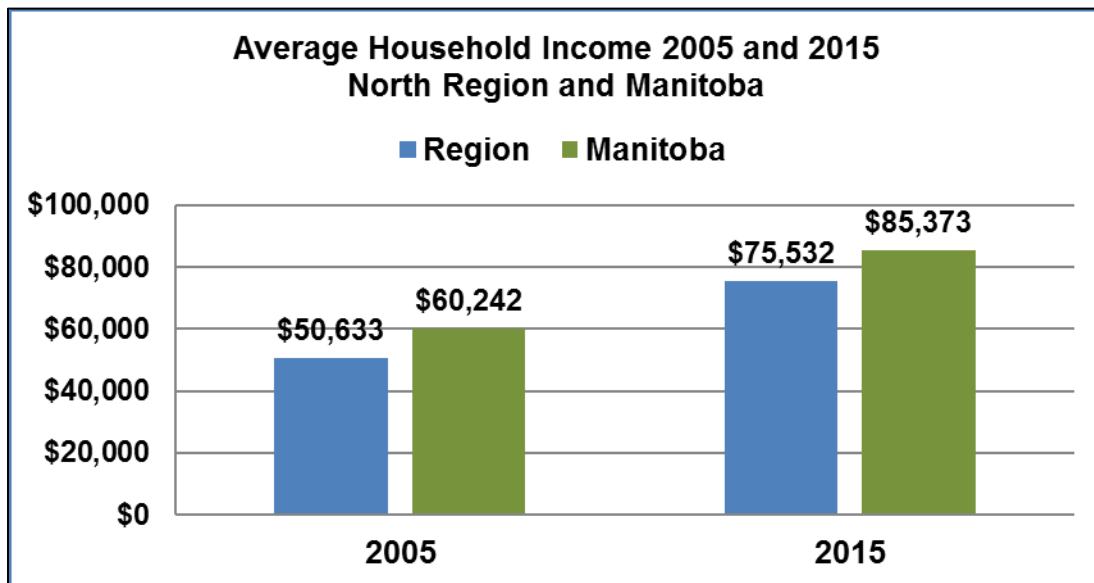


### 3.0 INCOME

Average income is the total incomes from all sources of all members of a household over 15 years of age. This can be used to assess the standard of living. Household income is often linked with educational attainment; as education attainment rises, household income also rises.

Figure 4 shows that average household income in the North region compared to Manitoba in 2005 and 2015.

Figure 4: Average Household Income North Region and Manitoba 2005 and 2015



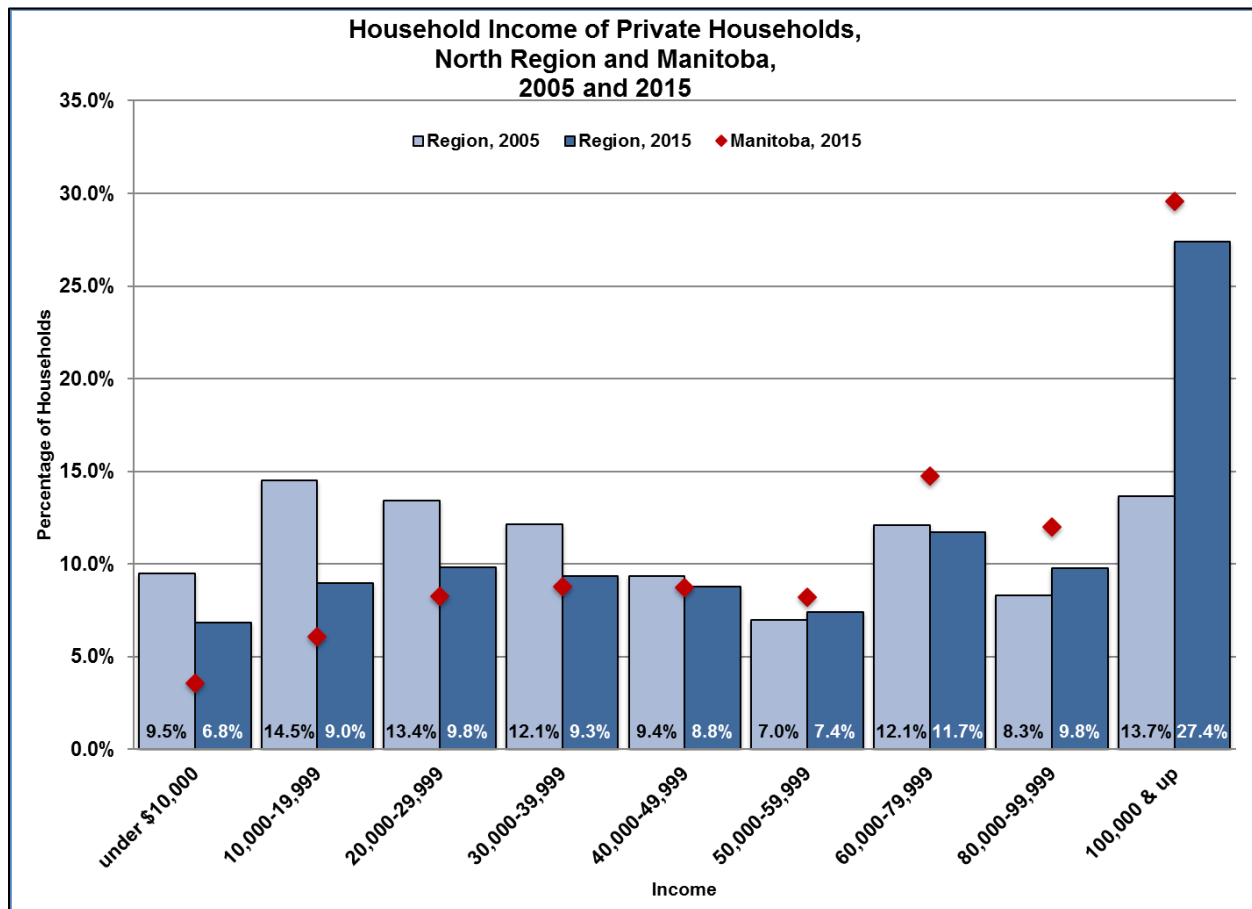
Data source: Statistics Canada: 2006 Census; National Household Survey 2015  
Note: The data for 2010 is not available.





Figure 5 shows that the percentage of households in the lower income brackets has decreased. The percentage of households in the highest two income brackets has increased. The percentage of households in the highest four income brackets is less than the provincial average.

Figure 5: Household Income North Region 2005 and 2015 and Manitoba 2015



Data source: Statistics Canada: 2006 Census; National Household Survey 2015

Note: The data for 2010 is not available.



## 4.0 JOBS BY INDUSTRY SECTOR

The strength and diversity of the labour force can be analyzed by dividing industries into three types:

- the **Primary** sector – industries that extract and produce raw materials; for example **Agriculture**.
- the **Secondary** sector – industries that change raw materials into goods; for example **Manufacturing**.
- the **Tertiary** sector – industries that provide goods and services to business and consumers; for example **Accounting, Retail**.

The **Primary** and **Secondary** sectors are referred to as the **Goods producing** sectors, and are considered the traditional growth drivers of the economy. The **Tertiary** sector is referred to as the **Service** sector, which includes industries within the knowledge economy that are now also important drivers of the economy. Industries and Jobs are classified by the North American Industry Classification System (NAICS). The more digits in the code, the more specific the industry description.

2 digit – 23 Construction

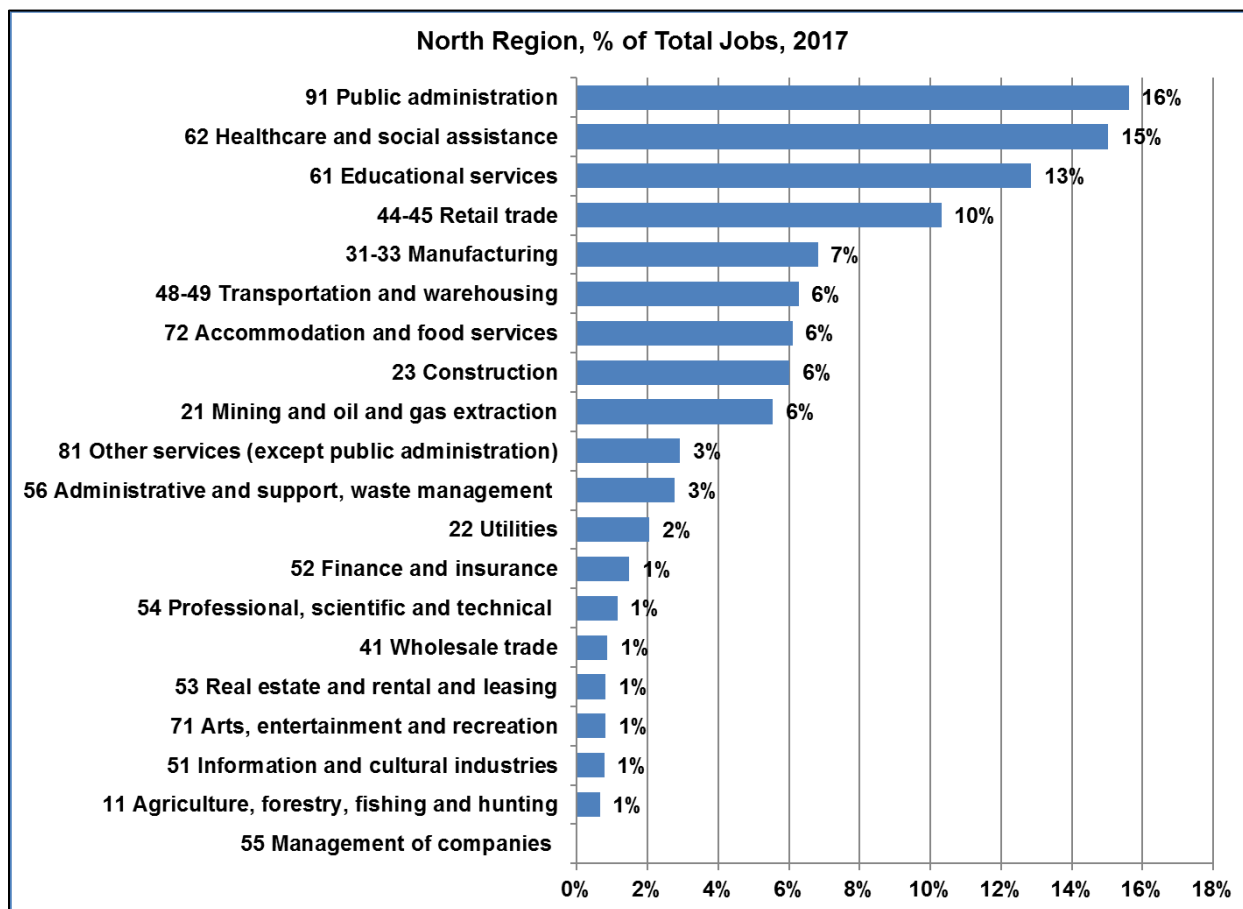
3 digit – 236 Construction of buildings

4 digit – 2361 Residential building construction

In 2017 there were 31,741 jobs in the North region. (Emsi 2017.3)



Figure 6: Percentage of Total Jobs by Industry Sector: North Region 2017



Data source: Emsi 2017.3

Figure 6 shows that:

- 7% of the jobs in the region are in the primary sectors of **Mining and oil and gas extraction**; and **Agriculture, forestry, fishing and hunting**.
- 15% of the jobs are in the secondary sectors of **Utilities**, **Construction** and **Manufacturing**.
- 79% of the jobs are in the tertiary sector.

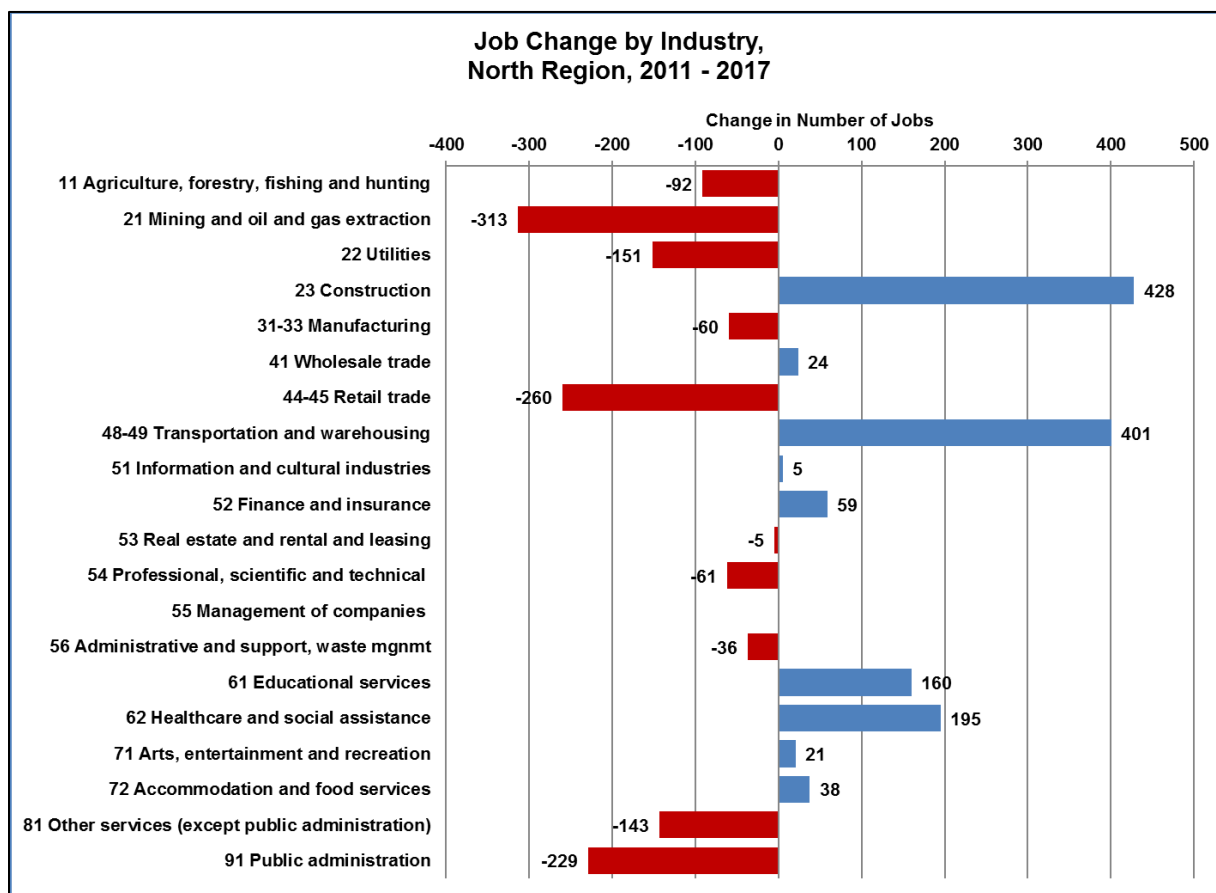


## 5.0 JOB CHANGE BY INDUSTRY SECTOR

Changes in the number of jobs illustrate how the economy of a region is evolving.

Figure 7 shows that the greatest job change was in the **Construction** sector with a gain of 428 jobs between 2011 and 2017. The sector with the greatest job loss was the **Mining and oil and gas extraction** sector with a loss of 313 jobs between 2011 and 2017.

Figure 7: Job Change by Industry Sector, 2011 to 2017



Data source: Emsi 2017.3



Figure 8 shows that:

- In 2017, there were 31,741 jobs in the region, a decrease of 49 jobs (-0.2%) between 2011 and 2017.
- In the goods producing sectors, there were 6,687 jobs in 2017, a decrease of 188 (-2.7%) from 2011. There was an decrease in jobs in the **Agriculture, forestry, fishing and hunting** sector of 92 jobs (-30.6%); a decrease of 313 jobs (-15.1%) in the **Mining and oil and gas extraction**; a decrease of 151 jobs (-18.9%) in the **Utilities** sector; an increase in the **Construction** sector of 428 jobs (+28.9%) and a decrease of 60 jobs (-2.7%) in the **Manufacturing** sector.
- In 2017, there were 24,670 jobs in the service sector, an increase of 167 jobs (+0.7%)

Figure 8: Real and Percentage Job Change by Industry Sector, 2011 and 2017

	North Region			
	Number of Jobs 2011	Number of Jobs 2017	Real Change 2011 - 2017	% Change 2011 - 2017
<b>ALL INDUSTRIES</b>	<b>31,790</b>	<b>31,741</b>	<b>-49</b>	<b>-0.2%</b>
<b>Goods Producing Industries</b>	<b>6,874</b>	<b>6,687</b>	<b>-188</b>	<b>-2.7%</b>
11 Agriculture, forestry, fishing and hunting	299	207	-92	-30.6%
21 Mining and oil and gas extraction	2073	1759	-313	-15.1%
22 Utilities	800	648	-151	-18.9%
23 Construction	1,480	1,908	428	28.9%
31-33 Manufacturing	2,223	2,163	-60	-2.7%
<b>Service Industries</b>	<b>24,503</b>	<b>24,670</b>	<b>167</b>	<b>0.7%</b>
41 Wholesale trade	252	275	24	9.4%
44-45 Retail trade	3,533	3,273	-260	-7.4%
48-49 Transportation and warehousing	1,590	1,991	401	25.2%
51 Information and cultural industries	240	245	5	2.1%
52 Finance and insurance	411	470	59	14.3%
53 Real estate and rental and leasing	262	257	-5	-1.8%
54 Professional, scientific and technical	424	363	-61	-14.4%
55 Management of companies	<10	<10		
56 Administrative and support, waste mgmnt	913	877	-36	-4.0%
61 Educational services	3,918	4,078	160	4.1%
62 Healthcare and social assistance	4,574	4,770	195	4.3%
71 Arts, entertainment and recreation	235	256	21	8.9%
72 Accommodation and food services	1,898	1,936	38	2.0%
81 Other services (except public administration)	1,069	925	-143	-13.4%
91 Public administration	5,183	4,954	-229	-4.4%
Unclassified	410	383	-27	-6.5%

Data source: Emsi 2017.3 Note: Figures may not add up due to rounding.



## 6.0 JOBS BY INDUSTRY CLUSTER

A business cluster is a geographic concentration of interconnected businesses, suppliers, and associated institutions in a particular field. They include suppliers and services of a particular industry with related labour force skills, related technologies or inputs. Many clusters also include governmental and educational institutions that provide specialized training, research and technical support. Clusters are credited with increasing the productivity of individual industries within a cluster as well as increasing national and even global competitiveness<sup>1</sup>.

In Manitoba, the Department of Growth, Enterprise and Trade identified 18 broad business clusters, adapted from cluster designations of Economic Development Winnipeg; Edward Feser (University of Illinois at Urbana-Champaign), Mercedes Delgado (Harvard Business School), Michael E. Porter (Harvard Business School) and Scott Stern (MIT Sloan).

The clusters include industries using a 4 digit NAICS code. The list of clusters and the industries included can be found in Appendix 1. For ease in reference, the clusters have been assigned numbers in alphabetical order.

- Advanced manufacturing (1)
- Agriculture inputs and services (2)
- Cultural (3)
- Education and knowledge creation (4)
- Financial services (5)
- Fishing and hunting (6)
- Food and agri product processing (7)
- Forestry (8)
- ICT (9)
- Life sciences (10)
- Local construction development (11)
- Local health services (12)
- Mining (13)
- Oil and gas production and transportation (14)
- Tourism (15)
- Transportation and logistics (16)
- Utilities and power (17)
- Wood and paper products (18)

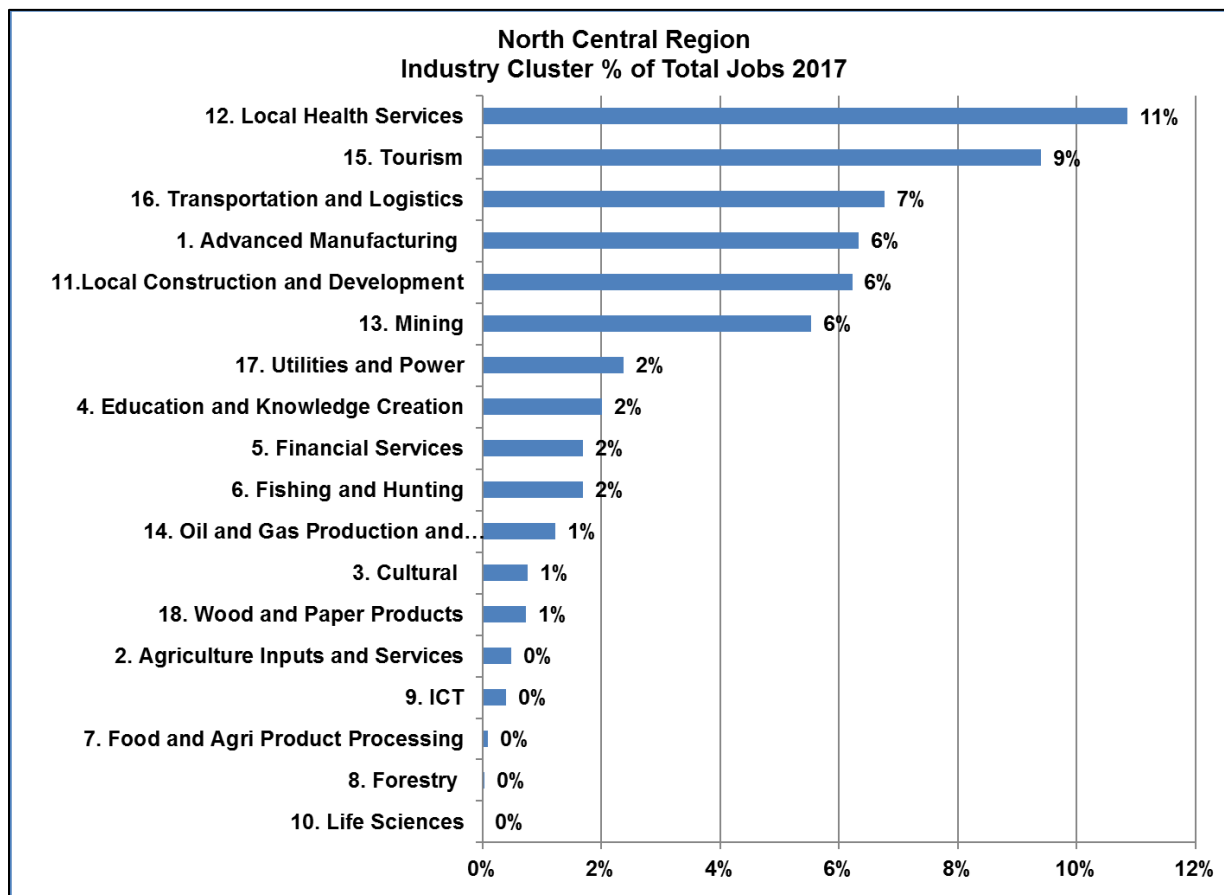
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<sup>1</sup> <https://hbr.org/1998/11/clusters-and-the-new-economics-of-competition>



Figure 9 shows that of the 18 clusters **Local health services** the greatest percentage of the total jobs in the region at 11%.

Figure 9: Percentage of Total Jobs by Industry Cluster North Region 2017



Data source: Emsi 2017.3

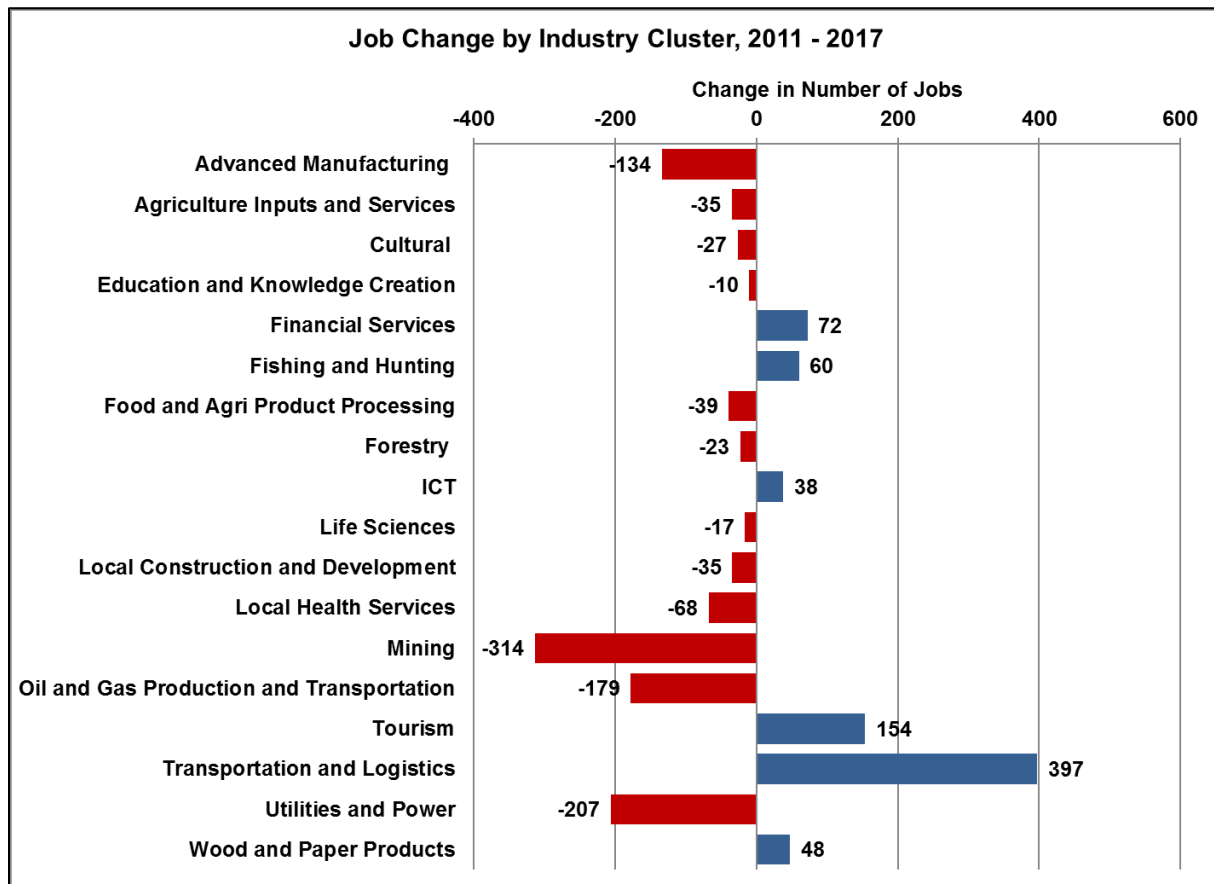


## 7.0 JOBS CHANGE BY INDUSTRY CLUSTER

Examining changes in the number of jobs in industry clusters can illustrate industry trends within an economy.

Figure 10 shows that the greatest job change was in the **Transportation and logistics** cluster with a gain of 397 jobs between 2011 and 2017. The cluster with the greatest job loss was the **Mining** cluster with a loss of 314 jobs between 2011 and 2017.

Figure 10: Job Change by Industry Cluster, 2011 to 2017



Emsi: 2017.3





Figure 11 illustrates both the real change and the percentage change within each cluster.

Figure 11: Real and Percentage Job Change by Industry Cluster, 2011 and 2017

North				
	Number of Jobs 2011	Number of Jobs 2017	Real Change 2011 - 2017	% Change 2011 - 2017
Advanced Manufacturing	2,143	2009	-134	-6.3%
Agriculture Inputs and Services	187	152	-35	-18.9%
Cultural	266	239	-27	-10.1%
Education and Knowledge Creation	649	639	-10	-1.6%
Financial Services	463	535	72	15.5%
Fishing and Hunting	111	171	60	54.0%
Food and Agri Product Processing	69	30	-39	-56.7%
Forestry	35	12	-23	-66.0%
ICT	90	127	38	42.2%
Life Sciences	17	0	-17	-100.0%
Local Construction and Development	2,009	1974	-35	-1.7%
Local Health Services	3,511	3443	-68	-1.9%
Mining	2,071	1757	-314	-15.2%
Oil and Gas Production and Transportation	566	388	-179	-31.6%
Tourism	2,830	2984	154	5.4%
Transportation and Logistics	1,751	2148	397	22.7%
Utilities and Power	961	754	-207	-21.5%
Wood and Paper Products	184	232	48	25.9%

Emsi: 2017.3

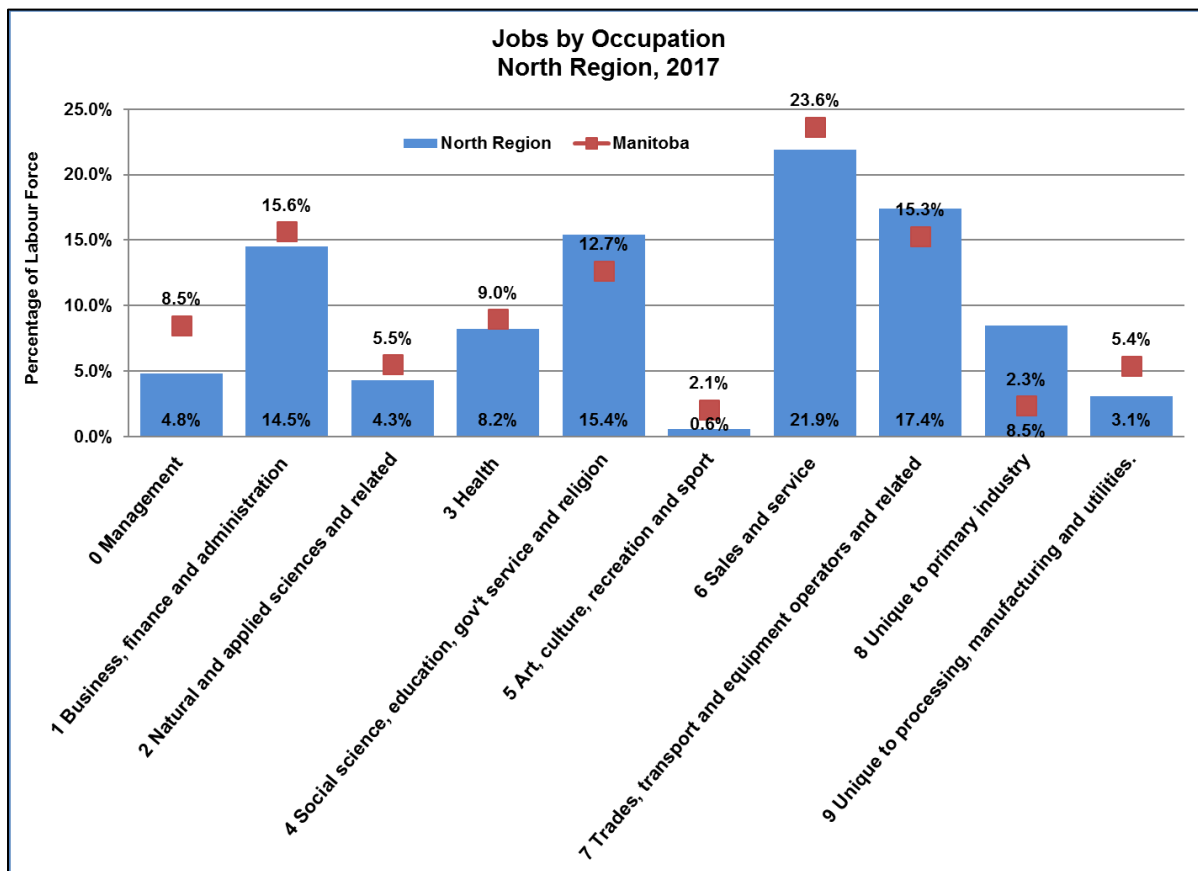
## 8.0 LABOUR BY OCCUPATION

Another way to identify characteristics of a region is to examine the makeup of occupations within the labour force. Occupations are categorized by the North American Occupations Classification system (NOCS)

Figure 12 shows that:

- The largest percentage of workers are in the field of **Sales and service occupations** (21.9%), followed by **Trades, transport and equipment operators and related occupations** (17.4%).
- In Manitoba, the largest percentage of workers are in the field of **Sales and service occupations** (23.6%), followed by **Business, finance and administration occupations** (15.6%).
- The region has a higher percentage than the average of Manitoba in the fields of **Occupations in social science, education, government service and religion; Trades, transport and equipment operators and related occupations; and Occupations unique to primary industry.**
- The data for this figure used 1 digit NOCS code.

Figure 12: Labour by Occupation North Region and Manitoba 2017



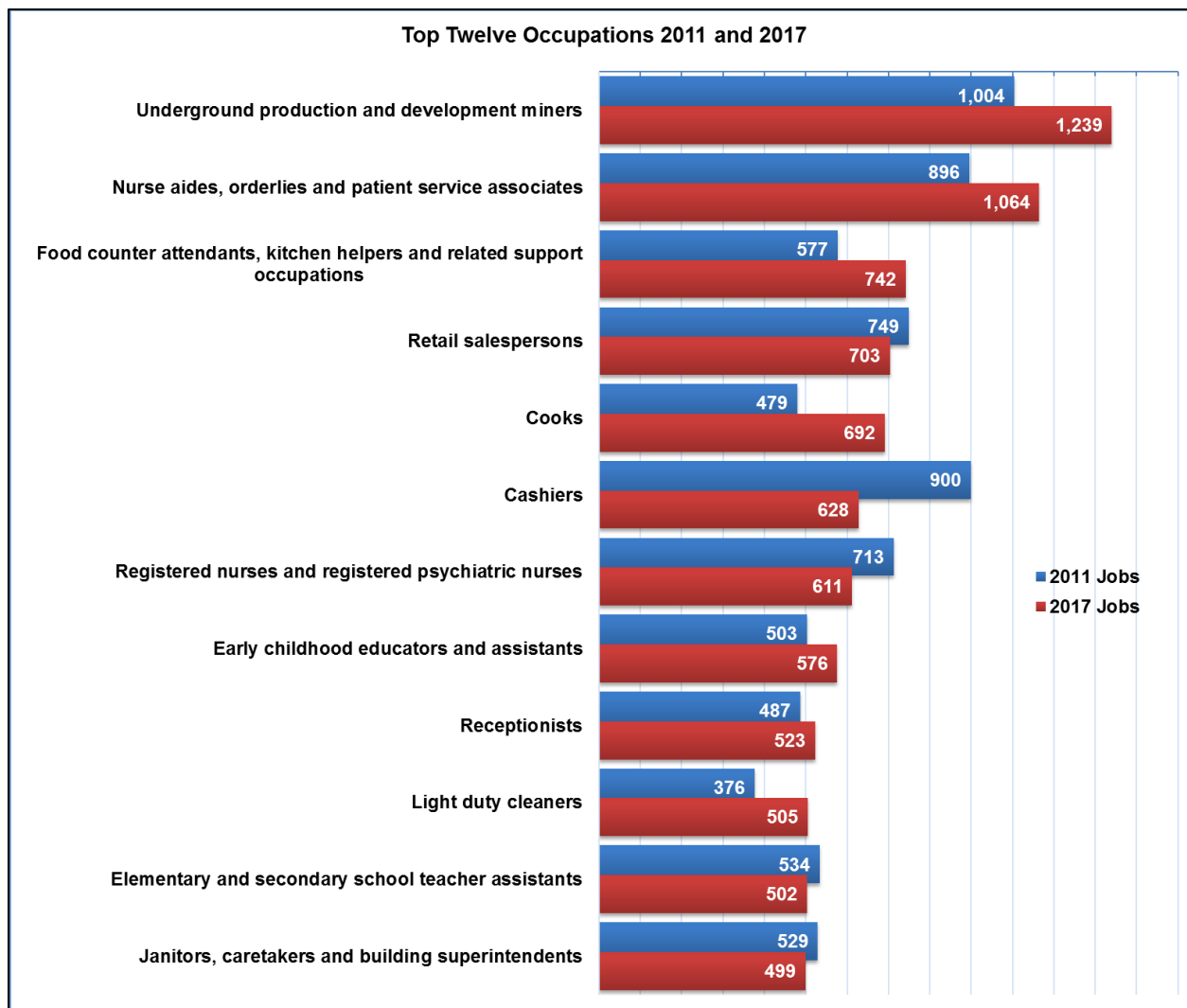
Data source: Emsi 2017.3



When looking at more specific occupations in the province, Figure 13 shows that:

- the most common occupation is **Underground production and development miners** with 1,239 people employed, followed by **Nurse aides, orderlies and patient service associates** with 1,064 people employed.
- The data for this figure used the 4 digit NOCS code.

Figure 13: Top 12 Jobs by Occupations in 2011 and 2017



Data source: Emsi 2017.3



## 9.0 BUSINESS BY INDUSTRY SECTOR, CLUSTER AND EMPLOYMENT

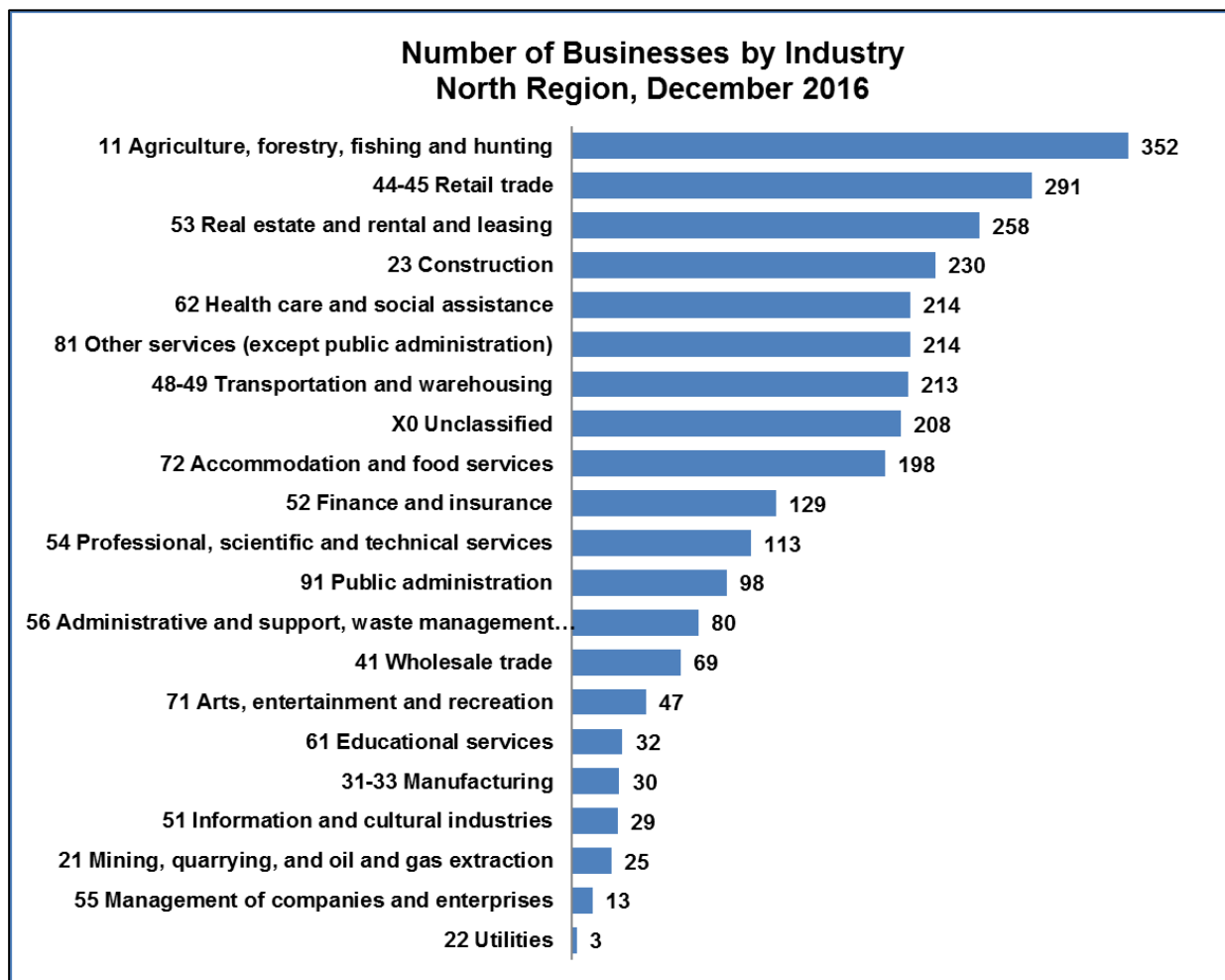
Another perspective in reviewing a regional economy is to determine the number of businesses in the region and the number of people they employ. It is important to note that some businesses are self-employed sole proprietors who do not have employees.

In 2016, there were 2,846 businesses in the region. (Emsi 2017.1)

Figure 14 shows that:

- Most businesses were in the primary sector of **Agriculture, forestry, fishing and hunting** with 352 businesses. In the secondary sector of **Construction** there were 230 businesses. There were 291 businesses in the tertiary sector of **Retail trade**.

Figure 14: North Region Number of Business by Industry, 2016



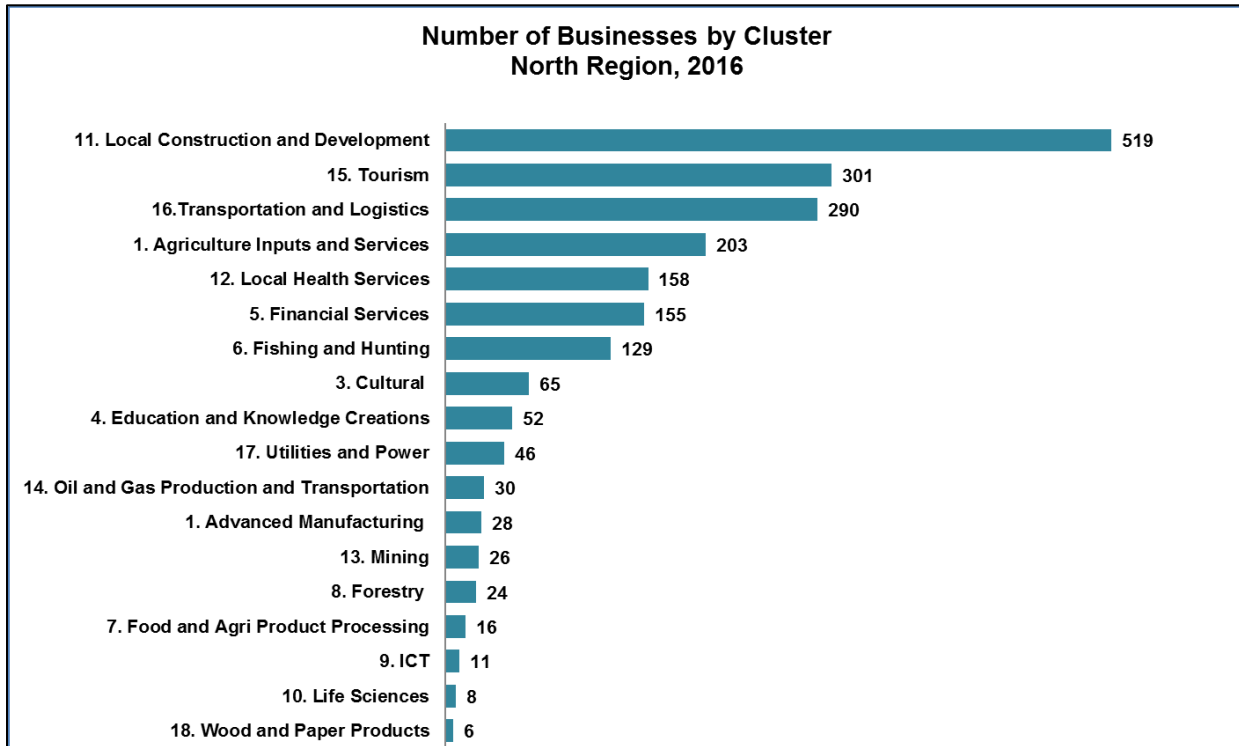
Data source: Emsi 2017.3 Note: this chart does not include all businesses.



Using the lens of clusters, Figure 15 shows that:

- Most businesses were in the **Local construction and development** cluster with 519 businesses followed by the **Tourism** cluster with 301 businesses.

Figure 15: Number of Business by Cluster, 2017



Data source: Emsi 2017.3 Note: this chart does not include all businesses.

Figure 16 shows that most businesses in the area are operated by self employed individuals. The next common are businesses that employ 1 to 4 individuals.

Figure 16: Business by Size of Employment, 2016

Number of employees	Number of businesses
Indeterminate (self-employed)	1465
1-4.	532
5-9.	286
10-19.	259
20-49	183
50-99	70
100-199	32
200-499	16
500+	3
<b>Total</b>	<b>2846</b>

Data source: Emsi 2017.3



To examine business employment more closely, Figure 17 illustrate the sectors with businesses that employ a large number of individuals. There are 19 businesses that employ between 200 and 500+ individuals.

Figure 17: Business with High Employment by Sector, 2016

NAICS Code	Description	200-499 Employees	500+ Employees
11	Agriculture, forestry, fishing and hunting	0	0
21	Mining, quarrying, and oil and gas extraction	2	0
22	Utilities	0	0
23	Construction	1	0
31-33	Manufacturing	1	2
41	Wholesale trade	0	0
44-45	Retail trade	1	0
48-49	Transportation and warehousing	1	0
51	Information and cultural industries	0	0
52	Finance and insurance	0	0
53	Real estate and rental and leasing	0	0
54	Professional, scientific and technical services	0	0
55	Management of companies and enterprises	0	0
56	Administrative and support, waste management and remediation	0	0
61	Educational services	5	1
62	Health care and social assistance	4	0
71	Arts, entertainment and recreation	0	0
72	Accommodation and food services	0	0
81	Other services (except public administration)	0	0
91	Public administration	1	0
X0	Unclassified	0	0
	<b>Total</b>	<b>16</b>	<b>3</b>

Data source: Emsi 2017.3



## 10.0 DETERMINING COMPETITIVE ADVANTAGE

Exploring the business makeup of the region within the industry clusters or sectors of the most competitive advantage may uncover business expansion opportunities and business investment opportunities.

An industry sector or cluster may be a competitive advantage for the region when it: 1) has high relative strength (more jobs per capita than the provincial or national average); 2) is a top employer of the region; 3) is experiencing labour growth; 4) is in a “Goods Producing” sector and/or 5) is growing due to a unique regional effect.

The relative strength of a cluster, sector or industry is calculated using a measurement called a Location Quotient (LQ). This measures the concentration of jobs within a particular sector within a region (North), relative to a larger region – in this case Manitoba. Location quotient values can reveal unique qualities about a region.

- **LQ less than 1 (below 0.8)** – indicates proportionally fewer people are employed in this cluster, which means there are fewer jobs per capita, compared to the rest of the country or province. A low LQ can also indicate that this sector is not producing enough goods or services to satisfy the local population – so people may be leaving the region to purchase these goods and services. It can also indicate business gaps.
- **LQ equal to 1 (0.8 – 1.2)** – indicates that the proportion of people employed in this cluster is the same as the national proportion and that the cluster is satisfying local demand for any goods and services produced in this sector.
- **LQ greater than 1 (higher than 1.2)** – indicates proportionally more people are employed in this cluster than in the province, which means labour is specialized or concentrated in these sectors within this region. Location Quotients greater than 1.2 indicate a unique regional labour strength and may also indicate a sector that is exporting its’ goods and services out of the region.

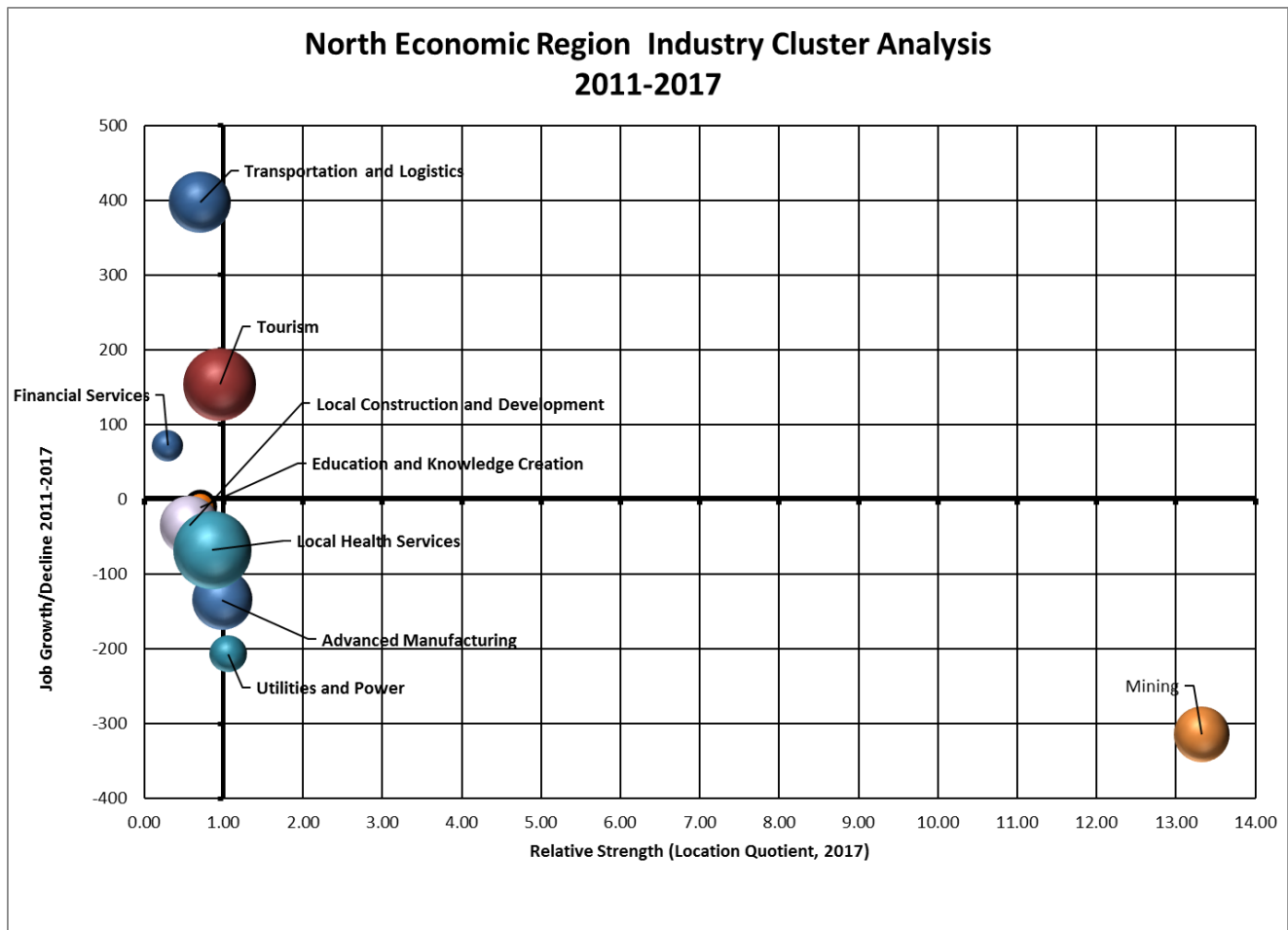
In Figure 18, the top ten clusters (by size of employment) are examined by comparing the growth or decline of jobs (vertical axis) from 2011 to 2017 and the relative strength of the industry in 2017 measured by the Location Quotient (horizontal axis).

The size of the bubble is relative to the number of jobs in that sector – the larger the bubble, the more jobs there are in that sector.





Figure 18: Industry Cluster by Relative Strength, Job Growth/ Decline 2017



Data source: Emsi 2017.3

Figure 18 shows:

#### Clusters experiencing Growth and High Relative Strength

- The industry clusters in the top right hand quadrant have experienced growth in the number of jobs in the region, and they also have high relative strength (concentrated labour) in relation to the rest of the province. There are no clusters in this quadrant: The sectors in the top right hand quadrant are often considered the “**stars**” of your economy.

#### Clusters experiencing Emerging Growth

- Clusters in the top left hand quadrant are experiencing an increase in the number of jobs, but the cluster do not have high relative strength (specialized labour). The clusters in this quadrant are: **Tourism; Transportation and logistics** and **Finance**.
- The sectors in the top left hand quadrant are considered to be **emerging** clusters.





### Clusters experiencing decline

- The clusters in the bottom right hand quadrant indicate a mature cluster. While still a major driver in the economy, the clusters are shedding jobs.

## 11.0 AREAS OF STRENGTH AND GROWTH

The following charts identify business strengths and businesses that have increased employment since 2011 within each cluster. Business strengths are industries (by 4 digit NAICS) that combine high employment and high relative strength. Businesses with potential opportunity are industries that have demonstrated increased employment since 2011 but do not yet have high relative strength. These businesses may provide targets for future growth.

The clusters included, in order of highest employment are:

- Local health services (12)
- Tourism (15)
- Transportation and logistics (16)
- Advanced manufacturing (1)
- Local construction and development (11)
- Mining (13)
- Utilities and power (17)
- Education and knowledge creation (4)

<b>12. Local Health Services</b>				
NAICS	Description	2017 Jobs	Total Business	Location Quotient
<b>Growing employment and high relative strength</b>				
6221	General medical & surgical hospitals	1,507	6	1.57
6214	Out-patient care centres	383	13	2.09
6231	Nursing care facilities	351	8	1.05
6216	Home health care services	214	1	2.04
6233	Community care facilities for elderly	196	3	1.07
6239	Other residential care facilities	181	10	2.22
6232	Residential handicap, mental health & substance abuse facilities	129	7	1.13
6219	Other ambulatory health care services	106	8	2.05
<b>Growing employment</b>				
6213	Office of other health practitioners	176	18	0.66
4461	Health & personal care stores	88	19	0.25
	<b>Cluster Total</b>	<b>3,443</b>	<b>158</b>	



<b>15. Tourism</b>				
NAICS	Description	2017 Jobs	Total Business	Location Quotient
<b>Growing employment and high relative strength</b>				
7211	Traveler Accommodation	592	61	1.95
4811	Scheduled air transportation	522	7	4.83
4812	Non-scheduled air transportation	157	18	6.82
7132	Gambling industries	108	3	1.58
7212	RV (recreational vehicle) parks and recreational camps	68	46	1.98
<b>Growing employment</b>				
7225	Full-service restaurants	1,186	78	0.70
7139	Other amusement and recreation industries	135	25	0.47
4532	Office Supplies, Stationery, and Gift Stores	45	13	0.81
	<b>Cluster Total</b>	<b>2,984</b>	<b>301</b>	

<b>16. Transportation and Logistics</b>				
NAICS	Description	2017 Jobs	Total Business	Location Quotient
<b>Growing employment and high relative strength</b>				
4811	Scheduled air transportation	522	7	4.83
4911	Postal service	333	5	2.63
4841	General freight trucking	313	37	0.99
4812	Non-scheduled air transportation	157	18	6.82
4881	Support activities for air transportation	105	7	2.02
4821	Rail Transportation	80	6	1.20
4853	Taxi and limousine service	74	63	1.06
4884	Support activities for road transportation	61	2	1.14
<b>Growing employment</b>				
4172	Construction, forestry, mining, and industrial machinery,	138	16	0.98
4851	Urban transit systems	89	1	0.81
4921	Couriers	54	6	0.59
4151	Motor vehicle wholesaler-distributors	19	0	0.47
4163	supplies wholesaler-distributors	14	2	0.12
	<b>Cluster Total</b>	<b>2,148</b>	<b>290</b>	

<b>1. Advanced Manufacturing</b>				
NAICS	Description	2017 Jobs	Total Business	Location Quotient
<b>Growing employment and high relative strength</b>				
3314	Nonferrous Metal (except Aluminum) Production and P	1668	1	80.14
3221	Pulp, Paper, and Paperboard Mills	193	1	4.84
<b>Growing employment</b>				
3211	Sawmills and Wood Preservation	38	2	0.63
	<b>Cluster Total</b>	<b>2,009</b>	<b>28</b>	



<b>11. Local Construction and Development</b>				
NAICS	Description	2017 Jobs	Total Business	Location Quotient
<b>Growing employment and high relative strength</b>				
2389	Other Specialty Trade Contractors	318	37	1.42
3273	Cement and Concrete Product Manufacturing	53	5	1.12
<b>Growing employment</b>				
2383	Building Finishing Contractors	155	24	0.50
4441	Building Material and Supplies Dealers	154	13	0.68
5411	Legal Services	118	18	0.53
2381	Foundation, Structure, and Building Exterior Contractors	47	17	0.16
	<b>Cluster Total</b>	<b>1,974</b>	<b>519</b>	

<b>13. Mining</b>				
NAICS	Description	2017 Jobs	Total Business	Location Quotient
<b>Growing employment and high relative strength</b>				
2122	Metal ore mining	1,343	5	26.50
2123	Non-metallic mineral mining and quarrying	74	1	1.78
2131	Support activities for mining,	339	18	2.50
	<b>Cluster Total</b>	<b>1,757</b>	<b>26</b>	

<b>17. Utilities and Power</b>				
NAICS	Description	2017 Jobs	Total Business	Location Quotient
<b>Growing employment and high relative strength</b>				
2211	Electric power generation, transmission and distribution	525	1	3.56
2213	Water, Sewage and Other Systems	123	1	6.40
<b>Growing employment</b>				
5413	Architectural, Engineering, and Related Services	49	10	0.12
5416	Management, Scientific, and Technical Consulting Services	41	22	0.16
	<b>Cluster Total</b>	<b>754</b>	<b>46</b>	

<b>4. Education and Knowledge Creation</b>				
NAICS	Description	2017 Jobs	Total Business	Location Quotient
<b>Growing employment and high relative strength</b>				
6113	Universities	424	2	0.84
8139	Business, professional, labour and other membership organizations	113	27	0.80
<b>Growing employment</b>				
6117	Educational support services	52	5	2.25
6116	Other schools and instruction	35	9	0.16
	<b>Cluster Total</b>	<b>639</b>	<b>52</b>	





## APPENDIX: MANITOBA INDUSTRY CLUSTERS

A business cluster is a geographic concentration of interconnected businesses, suppliers, and associated institutions in a particular field. They include suppliers and services of a particular industry with related labour force skills, related technologies or inputs. Many cluster also include governmental and educational institutions that provide specialized training, research and technical support. Clusters are credited with increasing the productivity of individual industries within a cluster as well as increasing national and even global competitiveness<sup>2</sup>.

In Manitoba, the Department of Growth, Enterprise and Trade identified 18 broad business clusters, adapted from cluster designations of Economic Development Winnipeg; Edward Feser (University of Illinois at Urbana-Champaign), Mercedes Delgado (Harvard Business School), Michael E. Porter (Harvard Business School) and Scott Stern (MIT Sloan).

### 1. Advanced Manufacturing

Source: Economic Development Winnipeg

#### NAICS Description

- 3132 Fabric Mills
- 3133 Textile and Fabric Finishing and Fabric Coating Mills
- 3141 Textile Furnishings Mills
- 3149 Other Textile Product Mills
- 3151 Clothing Knitting Mills
- 3152 Cut and Sew Apparel Manufacturing
- 3159 Apparel Accessories and Other Apparel Manufacturing
- 3161 Leather and Hide Tanning and Finishing
- 3162 Footwear Manufacturing
- 3169 Other Leather and Allied Product Manufacturing
- 3211 Sawmills and Wood Preservation
- 3212 Veneer, Plywood, and Engineered Wood Product Manufacturing
- 3219 Other Wood Product Manufacturing
- 3221 Pulp, Paper, and Paperboard Mills
- 3222 Converted Paper Product Manufacturing
- 3231 Printing and Related Support Activities

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<sup>2</sup> <https://hbr.org/1998/11/clusters-and-the-new-economics-of-competition>



- 3241 Petroleum and Coal Products Manufacturing
- 3251 Basic Chemical Manufacturing
- 3252 Resin, Synthetic Rubber, and Artificial Synthetic Fibers and Filaments Manufacturing
- 3253 Pesticide, Fertilizer, and Other Agricultural Chemical Manufacturing
- 3254 Pharmaceutical and Medicine Manufacturing
- 3256 Soap, Cleaning Compound, and Toilet Preparation Manufacturing
- 3259 Other Chemical Product and Preparation Manufacturing
- 3261 Plastics Product Manufacturing
- 3262 Rubber Product Manufacturing
- 3271 Clay Product and Refractory Manufacturing
- 3272 Glass and Glass Product Manufacturing
- 3273 Cement and Concrete Product Manufacturing
- 3274 Lime and Gypsum Product Manufacturing
- 3279 Other Nonmetallic Mineral Product Manufacturing
- 3311 Iron and Steel Mills and Ferroalloy Manufacturing
- 3312 Steel Product Manufacturing from Purchased Steel
- 3313 Alumina and Aluminum Production and Processing
- 3314 Nonferrous Metal (except Aluminum) Production and Processing
- 3315 Foundries
- 3321 Forging and Stamping
- 3322 Cutlery and Handtool Manufacturing
- 3323 Architectural and Structural Metals Manufacturing
- 3324 Boiler, Tank, and Shipping Container Manufacturing
- 3326 Spring and Wire Product Manufacturing
- 3327 Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing
- 3328 Coating, Engraving, Heat Treating, and Allied Activities
- 3329 Other Fabricated Metal Product Manufacturing
- 3331 Agriculture, Construction, and Mining Machinery Manufacturing
- 3332 Industrial Machinery Manufacturing
- 3333 Commercial and Service Industry Machinery Manufacturing
- 3334 Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing



- 3335 Metalworking Machinery Manufacturing
- 3336 Engine, Turbine, and Power Transmission Equipment Manufacturing
- 3339 Other General Purpose Machinery Manufacturing
- 3341 Computer and Peripheral Equipment Manufacturing
- 3342 Communications Equipment Manufacturing
- 3343 Audio and Video Equipment Manufacturing
- 3344 Semiconductor and Other Electronic Component Manufacturing
- 3345 Navigational, Measuring, Electro medical, and Control Instruments Manufacturing
- 3346 Manufacturing and Reproducing Magnetic and Optical Media
- 3351 Electric Lighting Equipment Manufacturing
- 3352 Household Appliance Manufacturing
- 3353 Electrical Equipment Manufacturing
- 3359 Other Electrical Equipment and Component Manufacturing
- 3361 Motor Vehicle Manufacturing
- 3362 Motor Vehicle Body and Trailer Manufacturing
- 3363 Motor Vehicle Parts Manufacturing
- 3364 Aerospace Product and Parts Manufacturing
- 3365 Railroad Rolling Stock Manufacturing
- 3366 Ship and Boat Building
- 3369 Other Transportation Equipment Manufacturing
- 3371 Household and Institutional Furniture and Kitchen Cabinet Manufacturing
- 3372 Office Furniture (including Fixtures) Manufacturing
- 3379 Other Furniture Related Product Manufacturing
- 3391 Medical Equipment and Supplies Manufacturing
- 3399 Other Miscellaneous Manufacturing

## 2. Agriculture Inputs and Services

Source: EDW and Delgado, Porter and Stern

### NAICS Description

- 1110 Farms
- 1150 Support activities for farms
- 1151 Support Activities for Crop Production
- 1152 Support Activities for Animal Production





- 3253 Pesticide, fertilizer and other agricultural chemical manufacturing
- 3331 Agricultural, construction and mining machinery manufacturing
- 4111 Farm product wholesaler-distributors
- 4171 Farm, lawn and garden machinery and equipment wholesaler-distributors
- 4183 Agricultural supplies wholesaler-distributors

### 3. Cultural

Source: Economic Development Winnipeg

#### NAICS Description

- 5111 Newspaper, Periodical, Book, and Directory Publishers
- 5121 Motion picture and video industries
- 5122 Sound recording industries
- 5151 Radio and Television Broadcasting
- 5152 Pay and Specialty Television
- 5161 Internet publishing and broadcasting
- 5414 Specialized design services
- 5415 Computer systems design and related services
- 5418 Advertising and related services
- 5419 Other Professional, Scientific, and Technical Services (ex. Veterinarians)
- 7111 Performing arts companies
- 7112 Spectator sports
- 7113 Promoters (presenters) of performing arts, sports and similar events
- 7114 Agents and managers for artists, athletes, entertainers and other public figures
- 7115 Independent artists, writers and performers
- 7121 Heritage institutions

### 4. Education and Knowledge Creation

Source: Delgado, Porter and Stern (Harvard Business School)

#### NAICS Description

- 5417 Scientific research and development services
- 6112 Community colleges and C.E.G.E.P.s
- 6113 Universities





- 6114 Business schools and computer and management training
- 6115 Technical and trade schools
- 6116 Other schools and instruction
- 6117 Educational support services
- 8139 Business, professional, labour and other membership organizations

## 5. Financial Services

Source: Economic Development Winnipeg

### NAICS Description

- 5211 Monetary authorities - central bank
- 5221 Depository credit intermediation
- 5222 Non-depository credit intermediation
- 5223 Activities related to credit intermediation
- 5231 Securities and commodity contracts intermediation and brokerage
- 5232 Securities and commodity exchanges
- 5239 Other financial investment activities
- 5241 Insurance carriers
- 5242 Agencies, brokerages and other insurance related activities
- 5261 Pension funds
- 5269 Other funds and financial vehicles
- 5321 Automotive equipment rental and leasing
- 5322 Consumer goods rental
- 5323 General rental centres
- 5324 Commercial and industrial machinery and equipment rental and leasing

## 6. Fishing and Hunting

Source: Economic Development Winnipeg and Delgado, Porter and Stern

### NAICS Description

- 1141 Fishing
- 1142 Hunting and trapping
- 3117 Seafood product preparation and packaging



## 7. Food and Agri Product Processing

Source: Economic Development Winnipeg and Delgado, Porter and Stern

### NAICS Description

- 3111 Animal food manufacturing
- 3112 Grain and oilseed milling
- 3113 Sugar and confectionery product manufacturing
- 3114 Fruit and vegetable preserving and specialty food manufacturing
- 3115 Dairy product manufacturing
- 3116 Meat product manufacturing
- 3118 Bakeries and tortilla manufacturing
- 3119 Other food manufacturing
- 3121 Beverage manufacturing
- 3122 Tobacco manufacturing
- 3272 Glass and glass product manufacturing
- 4131 Food wholesaler-distributors
- 4132 Beverage wholesaler-distributors
- 4133 Cigarette and tobacco product wholesaler-distributors

## 8. Forestry

Source: Delgado, Porter and Stern

### NAICS Description

- 1131 Timber tract operations
- 1132 Forest nurseries and gathering of forest products
- 1133 Logging
- 1153 Support activities for forestry

## 9. ICT

Source: Economic Development Winnipeg

### NAICS Description

- 3341 Computer and peripheral equipment manufacturing
- 3342 Communications equipment manufacturing
- 3343 Audio and video equipment manufacturing
- 3344 Semiconductor and other electronic component manufacturing



- 3345 Navigational, measuring, medical and control instruments manufacturing
- 3346 Manufacturing and reproducing magnetic and optical media
- 4173 Computer and communications equipment and supplies wholesaler-distributors
- 5112 Software publishers
- 5171 Wired Telecommunications Carriers
- 5172 Wireless Telecommunications Carriers (except Satellite)
- 5174 Satellite Telecommunications
- 5179 Other Telecommunications
- 5182 Data Processing, Hosting, and Related Services
- 5415 Computer systems design and related services
- 8112 Electronic and precision equipment repair and maintenance

## 10. Life Sciences

Source: Economic Development Winnipeg

### NAICS Description

- 3111 Animal food manufacturing
- 3241 Petroleum and coal products manufacturing
- 3251 Basic chemical manufacturing
- 3252 Resin, synthetic rubber, and artificial and synthetic fibres and filaments manufacturing
- 3253 Pesticide, fertilizer and other agricultural chemical manufacturing
- 3254 Pharmaceutical and medicine manufacturing
- 3255 Paint, coating and adhesive manufacturing
- 3256 Soap, cleaning compound and toilet preparation manufacturing
- 3259 Other chemical product manufacturing
- 3345 Navigational, measuring, medical and control instruments manufacturing
- 3391 Medical equipment and supplies manufacturing
- 4145 Pharmaceuticals, toiletries, cosmetics and sundries wholesaler-distributors
- 5417 Scientific research and development services
- 6215 Medical and diagnostic laboratories



## 11. Local Construction and Development

Source: Delgado, Porter and Stern (Harvard Business School)

### NAICS Description

- 2361 Residential Building Construction
- 2362 Nonresidential Building Construction
- 2371 Utility System Construction
- 2372 Land Subdivision
- 2373 Highway, Street, and Bridge Construction
- 2381 Foundation, Structure, and Building Exterior Contractors
- 2382 Building Equipment Contractors
- 2383 Building Finishing Contractors
- 2389 Other Specialty Trade Contractors
- 3273 Cement and Concrete Product Manufacturing
- 3323 Architectural and Structural Metals Manufacturing
- 3372 Office Furniture (including Fixtures) Manufacturing
- 4161 Hardware, and Plumbing and Heating Equipment and Supplies Merchant Wholesalers
- 4163 Lumber and Other Construction Materials Merchant Wholesalers
- 4441 Building Material and Supplies Dealers
- 5311 Lessors of Real Estate
- 5312 Offices of Real Estate Agents and Brokers
- 5313 Activities Related to Real Estate
- 5411 Legal Services
- 5413 Architectural, Engineering, and Related Services
- 5629 Remediation and Other Waste Management Services

## 12. Local Health Services

Source: Delgado, Porter and Stern (Harvard Business School)

### NAICS Description

- 3391 Medical equipment & supplies manufacturing
- 4461 Health & personal care stores
- 5322 Consumer goods rental
- 6211 Offices of physicians



- 6212 Offices of dentists
- 6213 Office of other health practitioners
- 6214 Out-patient care centres
- 6215 Medical & diagnostic laboratories
- 6216 Home health care services
- 6219 Other ambulatory health care services
- 6221 General medical & surgical hospitals
- 6222 Psychiatric & substance abuse hospitals
- 6223 Specialty (except psychiatric & substance abuse) hospitals
- 6231 Nursing care facilities
- 6232 Residential handicap, mental health & substance abuse facilities
- 6233 Community care facilities for elderly
- 6239 Other residential care facilities
- 8122 Funeral services

### 13. Mining

Source: Economic Development Winnipeg and Delgado, Porter and Stern:

#### NAICS Description

- 2122 Metal ore mining
- 2123 Non-metallic mineral mining and quarrying
- 2131 Support activities for mining,
- 4181 Recyclable material merchant wholesalers

### 14. Oil and Gas Production and Transportation

Source: Economic Development Winnipeg and Delgado, Porter and Stern

#### NAICS Description

- 2111 Oil and gas extraction
- 2131 Support activities for mining, and oil and gas extraction
- 3241 Petroleum and coal product manufacturing
- 3331 Agricultural, construction and mining machinery manufacturing
- 4861 Pipeline transportation of crude oil
- 4862 Pipeline transportation of natural gas
- 4869 Other pipeline transportation
- 5413 Architectural, engineering and related services



## 15. Tourism

Source: Economic Development Winnipeg

### NAICS Description

- 4532 Office Supplies, Stationery, and Gift Stores
- 4811 Scheduled air transportation
- 4812 Non-scheduled air transportation
- 4821 Rail Transportation
- 4832 Inland Water Transportation
- 4871 Scenic and sightseeing transportation, land
- 4872 Scenic and sightseeing transportation, water
- 5615 Travel arrangement and reservation services
- 7111 Performing arts companies
- 7112 Spectator sports
- 7113 Promoters (presenters) of performing arts, sports and similar events
- 7114 Agents and managers for artists, athletes, entertainers and other public figures
- 7115 Independent artists, writers and performers
- 7121 Heritage institutions
- 7131 Amusement parks and arcades
- 7132 Gambling industries
- 7139 Other amusement and recreation industries
- 7211 Traveler Accommodation
- 7212 RV (recreational vehicle) parks and recreational camps
- 7213 Rooming and boarding houses
- 7223 Special food services
- 7224 Drinking places (alcoholic beverages)
- 7225 Full-service restaurants



## 16. Transportation and Logistics

Source: Economic Development Winnipeg

### NAICS Description

- 4111 Farm product wholesaler-distributors
- 4121 Petroleum product wholesaler-distributors
- 4131 Food wholesaler-distributors
- 4132 Beverage wholesaler-distributors
- 4133 Cigarette and tobacco product wholesaler-distributors
- 4141 Textile, clothing and footwear wholesaler-distributors
- 4142 Home entertainment equipment and household appliance wholesaler-distributors
- 4143 Home furnishings wholesaler-distributors
- 4144 Personal goods wholesaler-distributors
- 4145 Pharmaceuticals, toiletries, cosmetics and sundries wholesaler-distributors
- 4151 Motor vehicle wholesaler-distributors
- 4152 New motor vehicle parts and accessories wholesaler-distributors
- 4153 Used motor vehicle parts and accessories wholesaler-distributors
- 4161 Electrical, plumbing, heating and air-conditioning equipment and supplies wholesaler-distributors
- 4162 Metal service centres
- 4163 Lumber, millwork, hardware and other building supplies wholesaler-distributors
- 4171 Farm, lawn and garden machinery and equipment wholesaler-distributors
- 4172 Construction, forestry, mining, and industrial machinery, equipment and supplies wholesaler-distributors
- 4173 Computer and communications equipment and supplies wholesaler-distributors
- 4179 Other machinery, equipment and supplies wholesaler-distributors
- 4181 Recyclable material merchant wholesalers
- 4182 Paper, paper product and disposable plastic product wholesaler-distributors
- 4183 Agricultural supplies wholesaler-distributors
- 4184 Chemical (except agricultural) and allied product wholesaler-distributors
- 4189 Other miscellaneous wholesaler-distributors
- 4191 Wholesale agents and brokers
- 4811 Scheduled air transportation
- 4812 Non-scheduled air transportation





- 4821 Rail Transportation
- 4832 Inland Water Transportation
- 4841 General freight trucking
- 4842 Specialized freight trucking
- 4851 Urban transit systems
- 4852 Interurban and rural bus transportation
- 4853 Taxi and limousine service
- 4854 School and employee bus transportation
- 4855 Charter bus industry
- 4859 Other transit and ground passenger transportation
- 4862 Pipeline transportation of natural gas
- 4869 Other pipeline transportation
- 4871 Scenic and sightseeing transportation, land
- 4872 Scenic and sightseeing transportation, water
- 4881 Support activities for air transportation
- 4882 Support activities for rail transportation
- 4883 Support activities for water transportation
- 4884 Support activities for road transportation
- 4885 Freight transportation arrangement
- 4889 Other support activities for transportation
- 4911 Postal service
- 4921 Couriers
- 4922 Local messengers and local delivery
- 4931 Warehousing and storage
- 5615 Travel arrangement and reservation services

## 17. Utilities and Power

Source: Economic Development Winnipeg and Delgado, Porter and Stern

### NAICS Description

- 2211 Electric power generation, transmission and distribution
- 2213 Water, Sewage and Other Systems
- 4181 Recyclable material merchant wholesalers
- 5413 Architectural, Engineering, and Related Services





- 5416 Management, Scientific, and Technical Consulting Services
- 5621 Waste Collection
- 5622 Waste Treatment and Disposal
- 5629 Remediation and Other Waste Management Services

## 18. Wood and Paper Products

Source: Economic Development Winnipeg and Delgado, Porter and Stern

### NAICS Description

- 3211 Sawmills and wood preservation
- 3212 Veneer, plywood and engineered wood product manufacturing
- 3219 Other wood product manufacturing
- 3221 Pulp, paper and paperboard mills
- 3222 Converted paper product manufacturing