

September 1, 2022

## Executive Director's Message

SIMSA's member survey is complete! Below we will highlight a few items and the full survey - which also includes comparative and contextual data – is [HERE](#).

SIMSA conducted the survey to effectively tell our story to Federal and Provincial governments and to have them follow our requests, since they need to be told how many voters and dollars we represent. We had not completed a thorough survey of this since 2019 and our membership has grown by 50% since then.

The information in this report was compiled from 3 different surveys (current and previous two) – representing 135 companies. All response data was self-reported, with additional data pulled from public information (i.e. financial statements) or populated from the SIMSA member database (membership fee structure). Summary results were validated against public data and PWC report from September 2019 “The economic impact of local resource suppliers in Saskatchewan” - Table 8.

The current survey data is from July 2022 and therefore does not include new editions such as Cenovus Energy. SIMSA currently has 315 members, at the time of the survey's completion we were at 309.

SIMSA's 309 members (as of July 2022) represented 32,100 employees in Saskatchewan generating \$13.7-billion in annual sales attributable to activities within Saskatchewan.



SIMSA's members' sales attributable to Saskatchewan activities, has correlated with the number of employees within Saskatchewan.

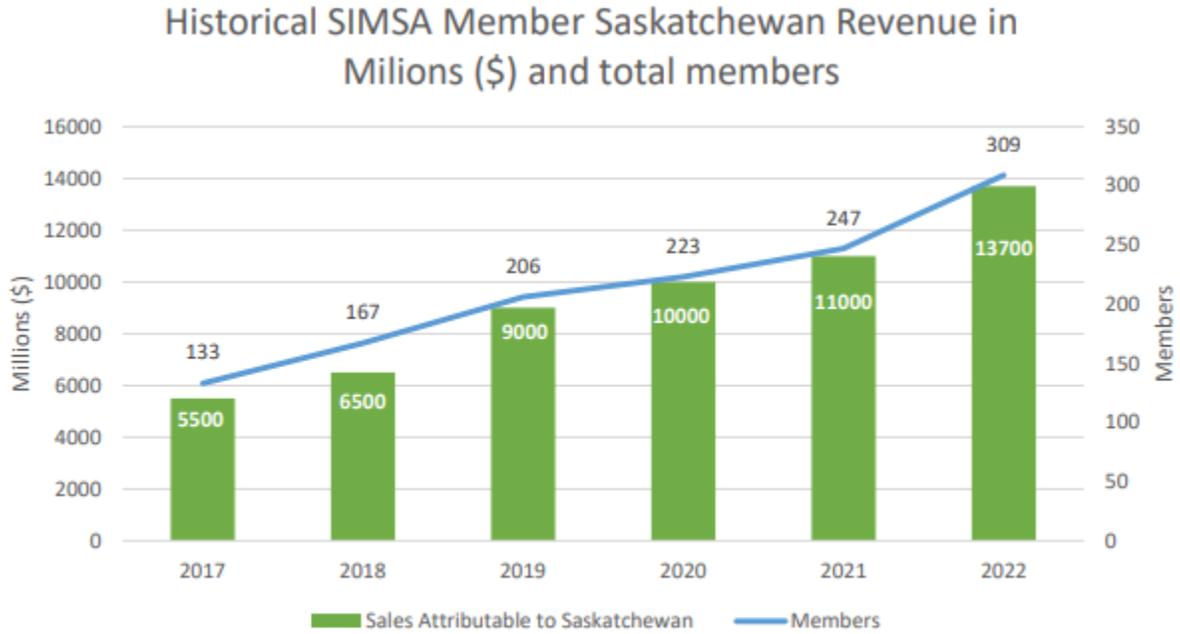


Figure 16 - Historical Member Sales in Millions (\$) with a line graph of total members

Our members work in the following sectors.

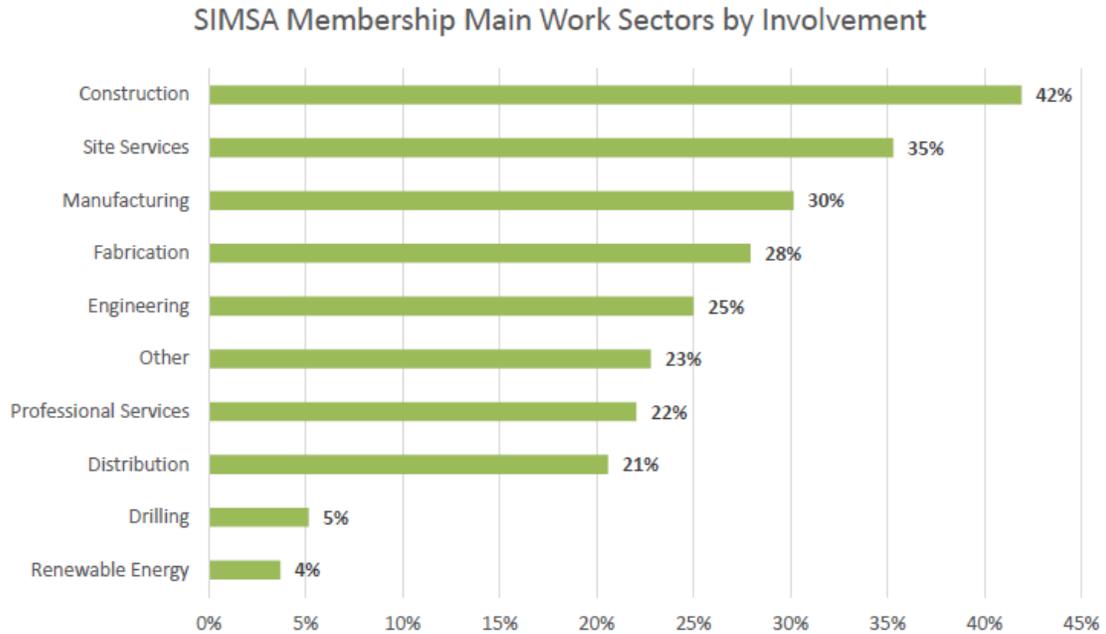


Figure 2 - Membership Breakdown of Main Work Sectors. By involvement not % of work, i.e. 42% of membership is involved in construction, 35% site services, etc.

The resource sectors we work within have both remained steady over the years.

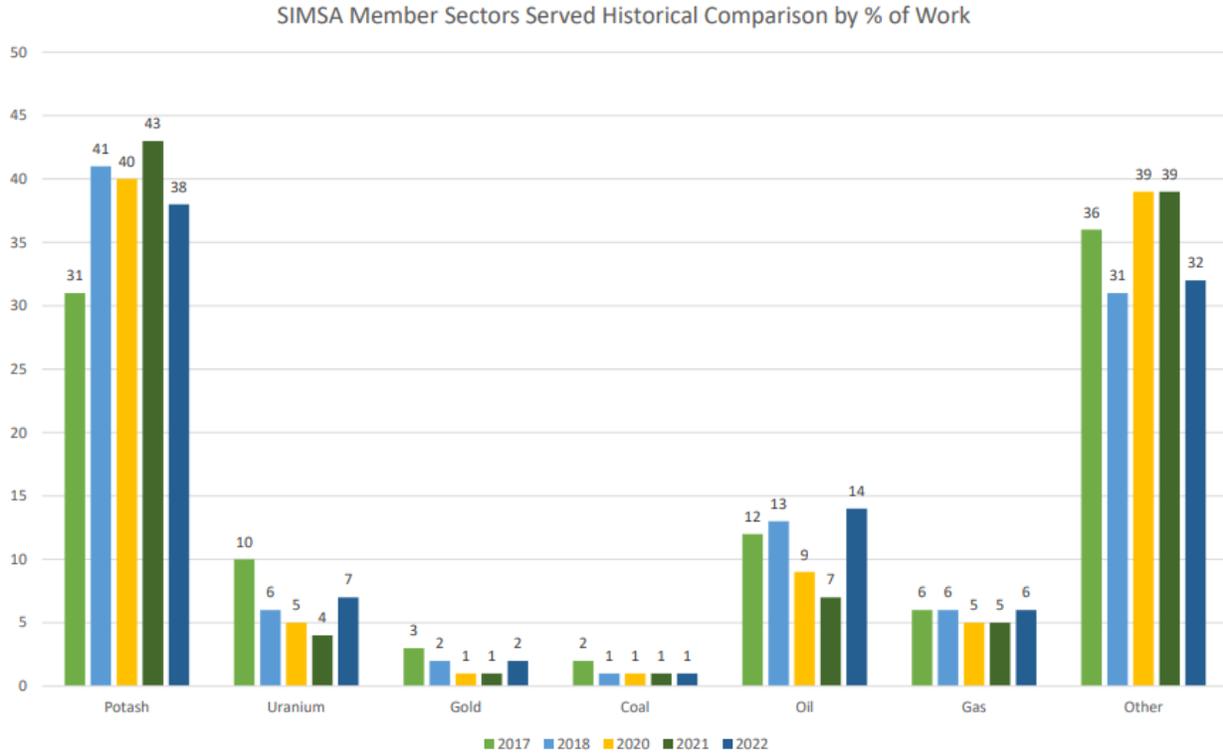


Figure 4 - Sectors served comparison chart - % of work. Renewables were not included in the above chart because it is not measured in previous years, therefore it is grouped into "other".

SIMSA members are seeing fewer swings in fulltime employee counts – from average to peak – but a growing percentage of parttime employees.

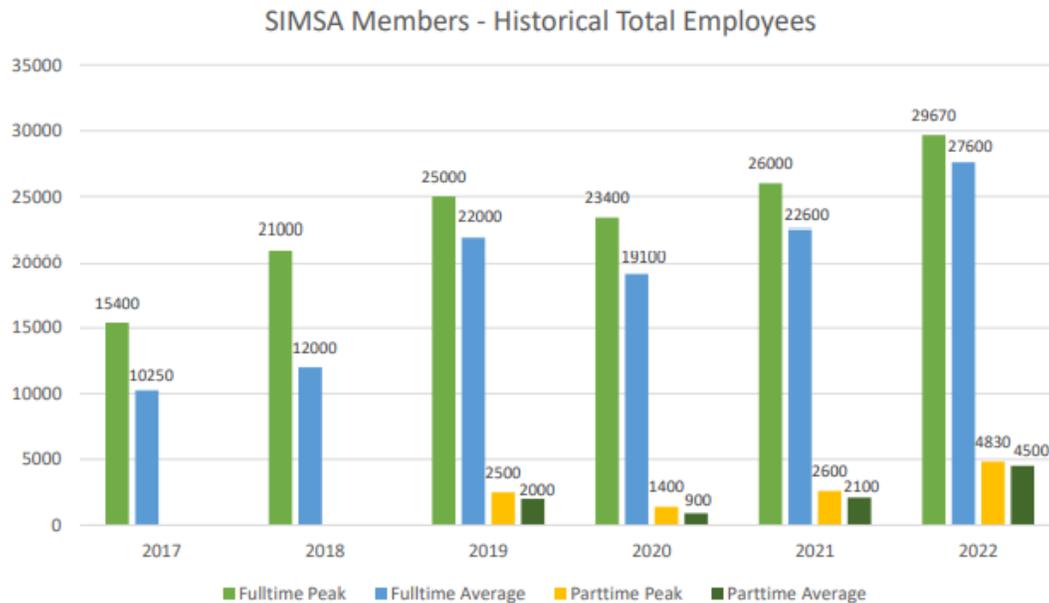


Figure 8 - Graph of total SK employees across membership.

SIMSA members are somewhat steady numbers of male and female employees, but the Indigenous portion within this is growing.

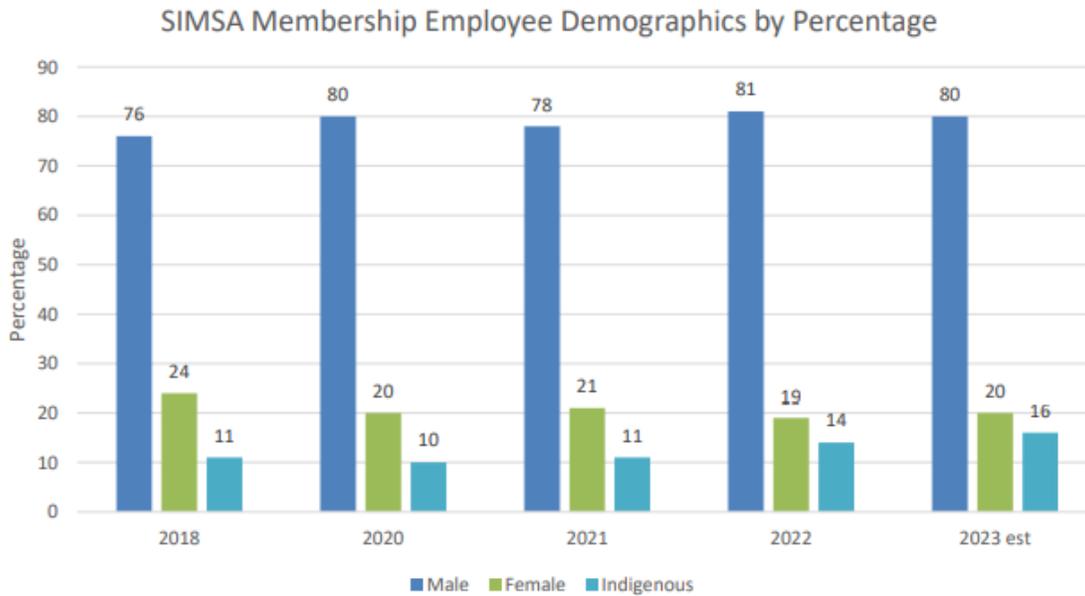


Figure 10 - Employee demographics by percentage.

SIMSA’s member database has had significant use by purchasing persons from various mining and energy producers, as well as industrial companies.

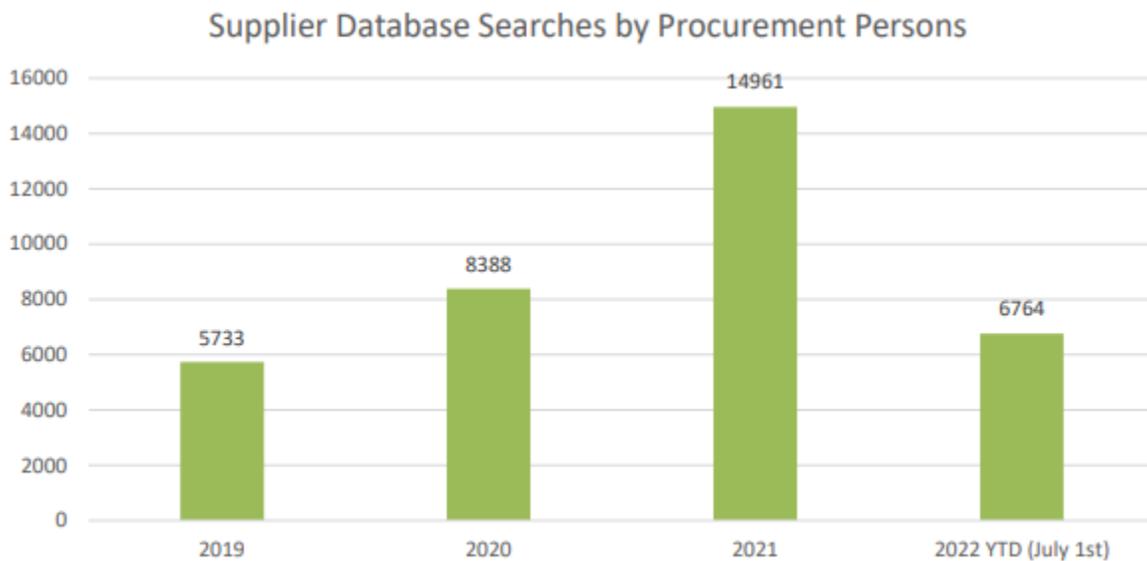


Figure 11 - Supplier database searches - data pulled on July 1st

SIMSA's database use and various events have resulted in significant business for our members.

### Potential value of business leads that has been generated due to SIMSA's events, database, and advocacy.



SIMSA is grateful to the members who completed the survey and helped to understand their data.

SIMSA will be resuming in-person events – such as our amazing roundtable events with mining companies – this fall.

We have updated the “Saskatchewan Opportunities” list on our website [HERE](#). This list portrays \$29.4-billion in projects for your review.

We will be adding an updated August 2022 Carbon Calculator to our website in the coming weeks. It is important to keep the August 2021 version as well. This updated version will allow you create a current carbon number and then compare it to the August 2021 version's results. The changes will be in the carbon within the Saskatchewan electrical power grid, as well as any changes within your company-specific data.

# Members' News

[Air Excellence HVAC Services to offer backflow testing](#)

[Haztech proud to now offer Mental Health First Aid training programs](#)

[JNE Welding – The #CombinedStrength Podcast New](#)

[Merit Working to End the Stigma Around Mental Health](#)

[Nobel HSSE Management Ltd. is now offering Advanced First Aid for Firefighters and Mine Rescue teams](#)

[Pro Canada West Energy Awarded the “Safe Employer of the Year” Award from WorkSafe Saskatchewan](#)

[Team Power Solutions Welcomes Students from the Saskatchewan Indian Institute of Technologies](#)

[Team Power Solutions Offers Virtual Interactive Electrical Safety Training Courses](#)

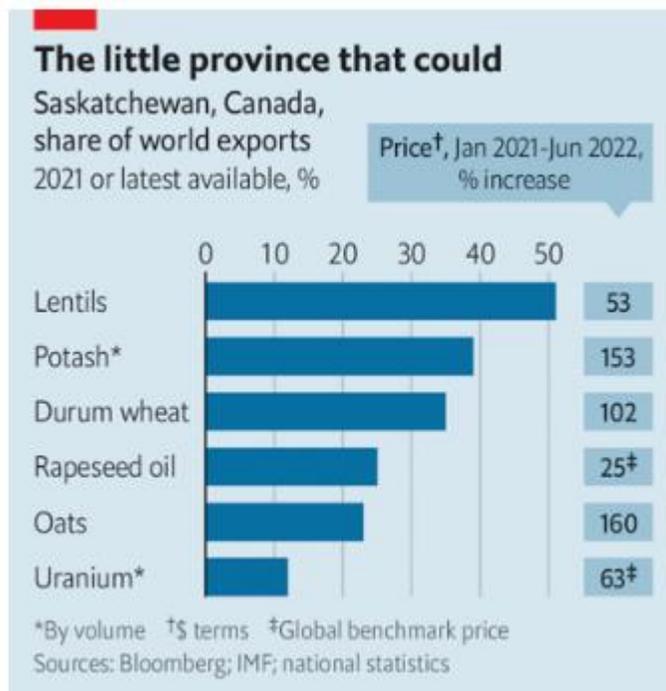
# Sector News

There was [a great story in the Economist](#) that also had some issues this past month. It was entitled, “A remote Canadian province luxuriates in the global supply crunch: Saskatchewan is enjoying wild growth in the wake of war in Europe.”

No, Saskatchewan is not “remote.” But, the story did do a great job of highlighting our current situation (after stepping in a few other pot holes). It reads:

In Saskatchewan, where a tenth of the population has Ukrainian roots, events in eastern Europe are again shifting local fortunes. Russia’s invasion of Ukraine has not quite prompted a stampede towards the prairie—the refugees arriving in Canada mostly prefer the comfort and energy of cities in the east. But it has caused the price of many of the commodities which drive Saskatchewan’s see-sawing economy to rocket like never before.

Just about everything the province produces in abundance has seen its price shoot up as a result of the war. This includes the wheat and oats first grown by early settlers, Ukrainian or otherwise, as well as newer crops like rapeseed, pulses (lentils, chickpeas and the like) and mustard (see chart below). It is a bonanza that will reach far and wide. Saskatchewan is set to grow by 6% this year, more than any other Canadian province.



Most important of all is what lies beneath the earth: oil, gas, uranium and above all potash, a jagged, crystalline mix of soluble salts of potassium that is a crucial ingredient in fertilisers. It is sometimes called “pink gold” for the hue it takes before it is refined into a white powder. Saskatchewan produces a third of the world’s output, and exports almost all of it.

Russia and Belarus, the world’s two other potash powers, together produce about what Saskatchewan does on its own. But the world has lost access to much of their output, owing to sanctions and shipping blockades. Ken Seitz, the boss of Nutrien, a Canadian potash miner, recently told Reuters that the stranded supplies could amount to 8m tonnes this year, a fifth of global potash exports.

That means the biggest importers, such as Brazil, India and Indonesia, as well as Europe, will find it harder to procure the fertiliser they need to plant crops and keep citizens fed. Saskatchewan is one of the few places in the world that can boost production at short notice, says Bronwyn Eyre,

until recently the province's minister of energy and resources. Ambassadors and other officials have been calling with urgent demands. For them, "it's a national security concern."

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The potash industry is at the centre of this new mood. The tallest steel-and-glass office building in Saskatoon, the largest city, is the Nutrien tower. Mosaic's building in the provincial capital, Regina, is almost as prominent. The firms' names adorn stadiums and events. To anyone who takes the Yellowhead Highway across the province, half a dozen mines and their huge pink-white tailing piles can be seen across the pancake-flat landscape.

Firms are scrambling to take advantage of what one boss describes as "outrageous" prices, which have tripled in a year. But new mines take time. Potash deposits are a kilometre or so beneath the earth, under a thick layer of pressurised water. To sink a shaft down the water must be frozen from above, a procedure that can take two years or more. BHP, the world's biggest mining firm, is rushing to finish its first potash mine, in Saskatchewan, a year before it was due to open in 2027.

Efforts are under way to ramp up production at existing mines, too. Nutrien plans to extract an extra 1m tonnes of potash in 2022, equal to 7% of its output. Mosaic has reactivated a mine it had mothballed in 2019. But transport problems hamper such plans. What Canada needs, says Ms Eyre, is more pipelines to move oil and gas about, which would free rail capacity to move more potash and crops to ports to be shipped abroad. The left-leaning prime minister, Justin Trudeau, disagrees.

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# Upcoming Events

Register for Upcoming Events [HERE](#)

- **Lunch & Learn: NRC IRAP – September 8, 2022**  
An overview on NRC IRAP and how they can help small and medium-sized businesses grow through innovation.
- **Gov't of SK “Strategic Business Overview and Procurement Forum” – September 20, 2022**
- **Lunch & Learn: Saskatchewan Polytechnic's - Major New Campus Project – September 23, 2022**
- **Saskatchewan Suppliers Energy Forum – September 28, 2022**  
The 8<sup>th</sup> Annual Saskatchewan Suppliers Energy Forum will be held at the Delta Hotel in Regina, SK. Cenovus, Crescent Point Energy, Federated Co-op, TC Energy and others are already confirmed as attendees, more are expected. SMRs, hydrogen, lithium, and biomass will also be included in the event.
- **Future Mines Event – November 23, 2023**  
The Future Mines networking and information session will be in-person on Wednesday, November 23<sup>rd</sup> at the Saskatoon Inn. Confirmed presenters include NexGen, Foran and Gensource.
- **Saskatchewan Mining Supply Chain Forum – April 18 & 19, 2023**  
Save the date!
- **SIMSA's 2023 AGM – May 16, 2023**  
Save the date!

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