



SIMSA

Saskatchewan Industrial & Mining
Suppliers Association Inc

SIMSA Member Survey Results

September 1st, 2022



Data from July, 2022

Preamble

The information in this report has been compiled from 3 different surveys – 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 survey data herein is from July 2022, and therefore does not include new editions such as Cenovus Energy.

Membership Breakdown

The following section breaks down the historical membership totals, the main work sectors, and main resource sectors.

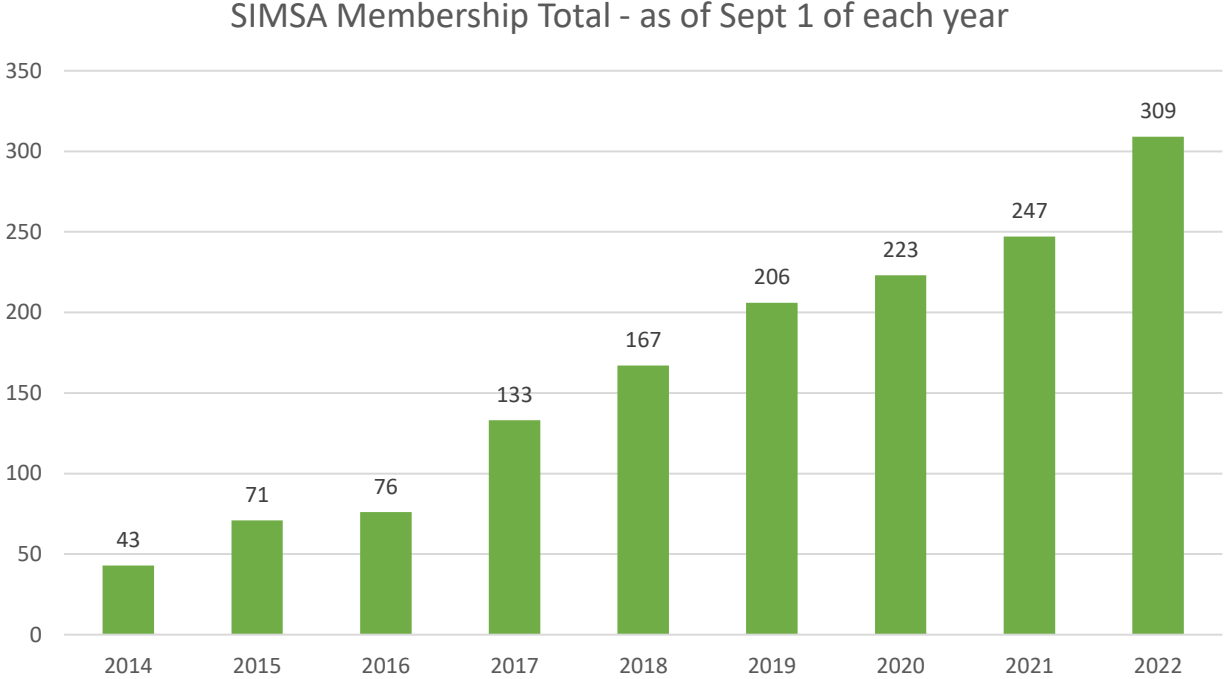


Figure 1 - Membership Total - as of September 1st of each year since 2014.

SIMSA Membership Main Work Sectors by Involvement

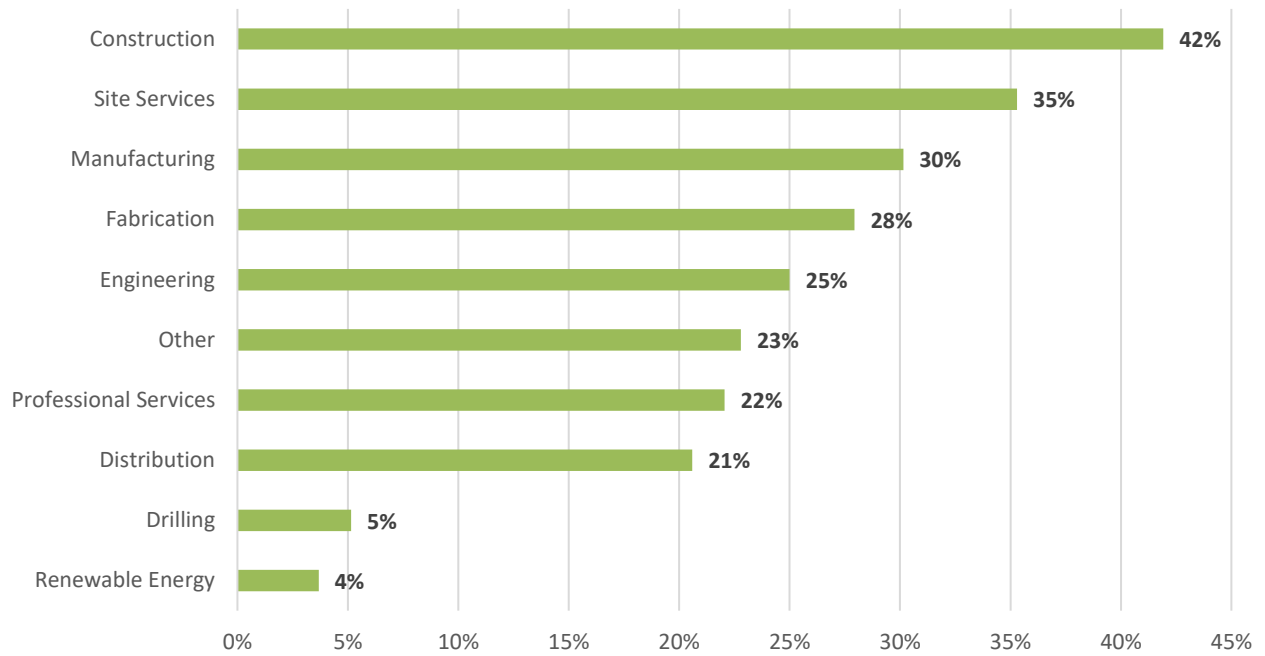


Figure 2 - Membership Breakdown of Main Work Sectors. By involvement not % of work, i.e. 42% of membership is involved in construction, 35% site services, etc.

Memberships' Main Resource Sectors - % of Work

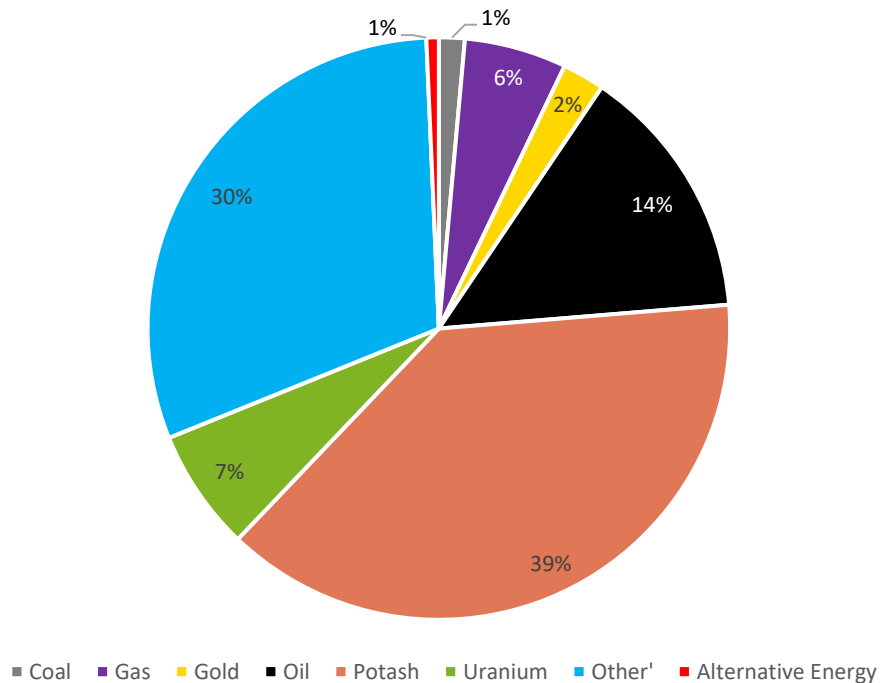


Figure 3 - Memberships' Main Resource Sectors - % of Work. Graph is an average obtained from responses to advocacy survey.

SIMSA Member Sectors Served Historical Comparison by % of Work

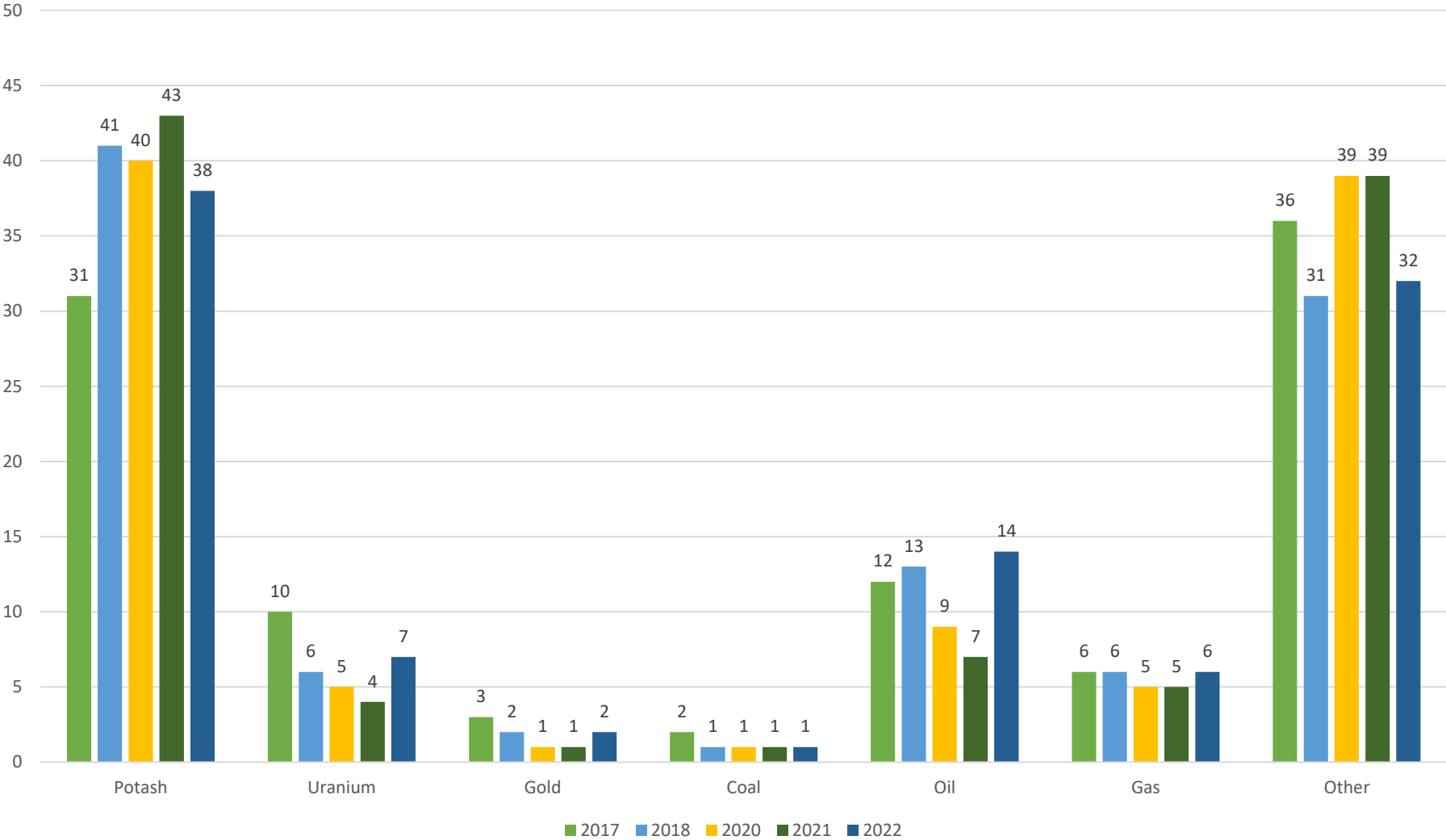


Figure 4 - Sectors served comparison chart - % of work. Renewables were not included in the above chart because it is not measured in previous years, therefore it is grouped into "other".

Labour

The following section breaks down the historical membership labour totals, with breakdowns of demographics and full/part time. Also included in the section is comparative data from other sources.



Figure 5 - Average number of employees full and part time.

Saskatchewan Employment by Sector - 2021 (hundred thousands) Total 570.6

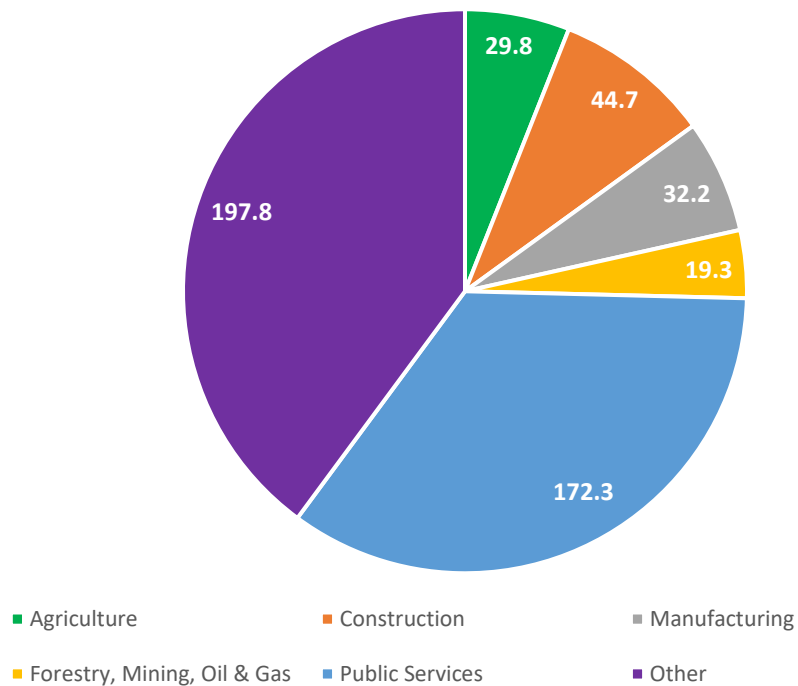


Figure 6 – Source – <https://dashboard.saskatchewan.ca/business-economy> - Saskatchewan Employment by Sector in Millions

SMA - Reported Direct Labour - 2021
Total 7,641

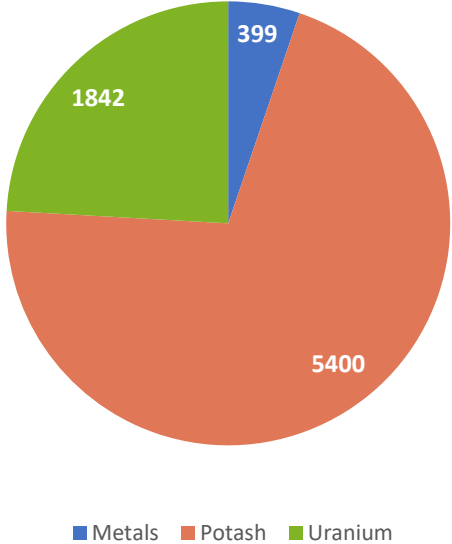


Figure 7 - Source Saskatchewan Association from 2021 – A snapshot of Saskatchewan’s metallic minerals, potash and Uranium industries in 2021

SIMSA Membership Labour Attributable to Saskatchewan by
Category

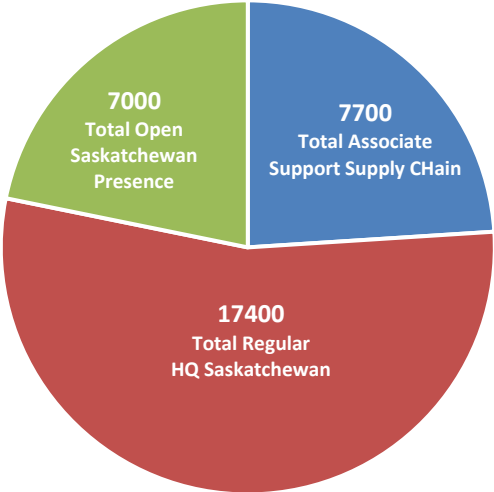


Figure 8 - Membership Labour Attributable to Saskatchewan. Attributable to SK includes SK sales and sales outside of SK if the company has a local HQ. Above includes average full & part time employees (not peak). Associate member supports the supply chain, Regular member has their HQ in SK, Open member has a presence in SK.

SIMSA Membership Labour by Sector

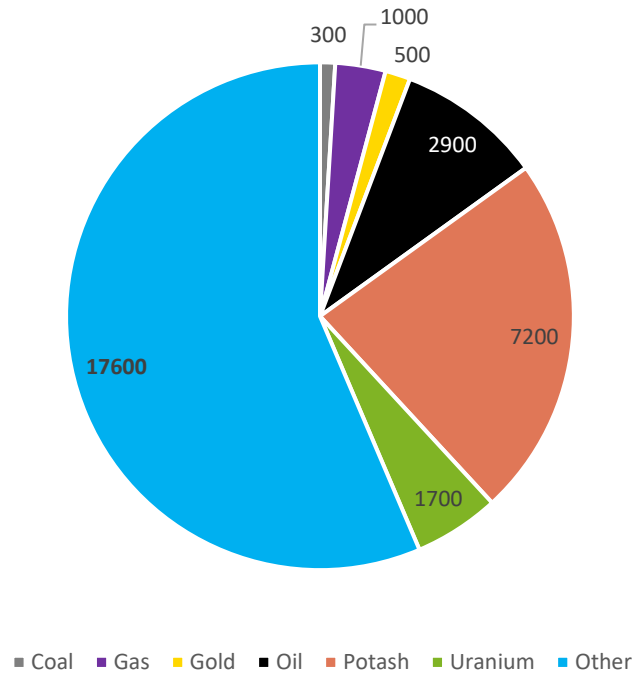


Figure 9 - SIMSA Membership Labour by Sector

SIMSA Members - Historical Total Employees

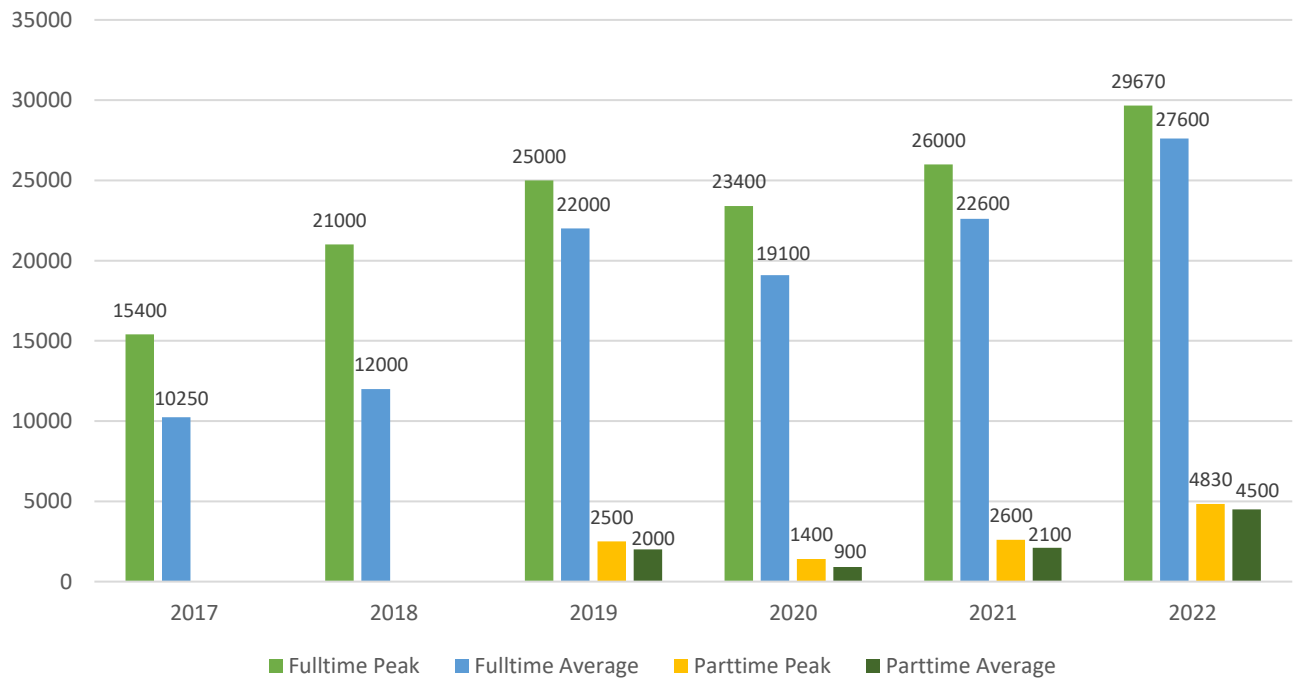


Figure 10 - Graph of total SK employees across membership.

SIMSA Membership Labour Breakdown

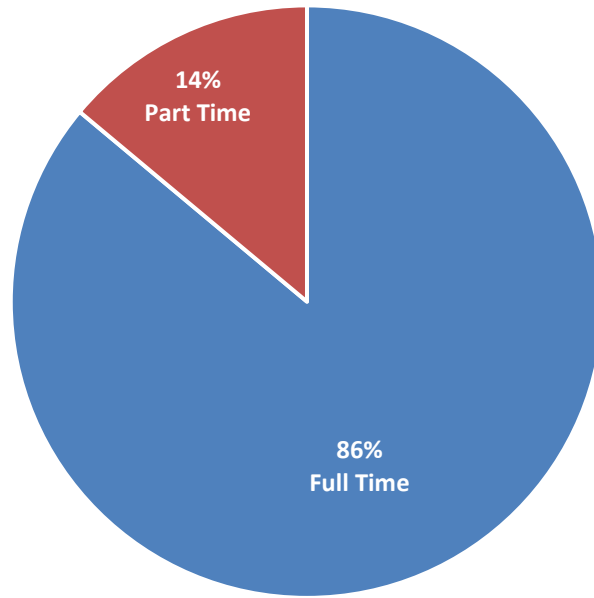


Figure 11 - Full-time and part time breakdown

SIMSA Membership Employee Demographics by Percentage

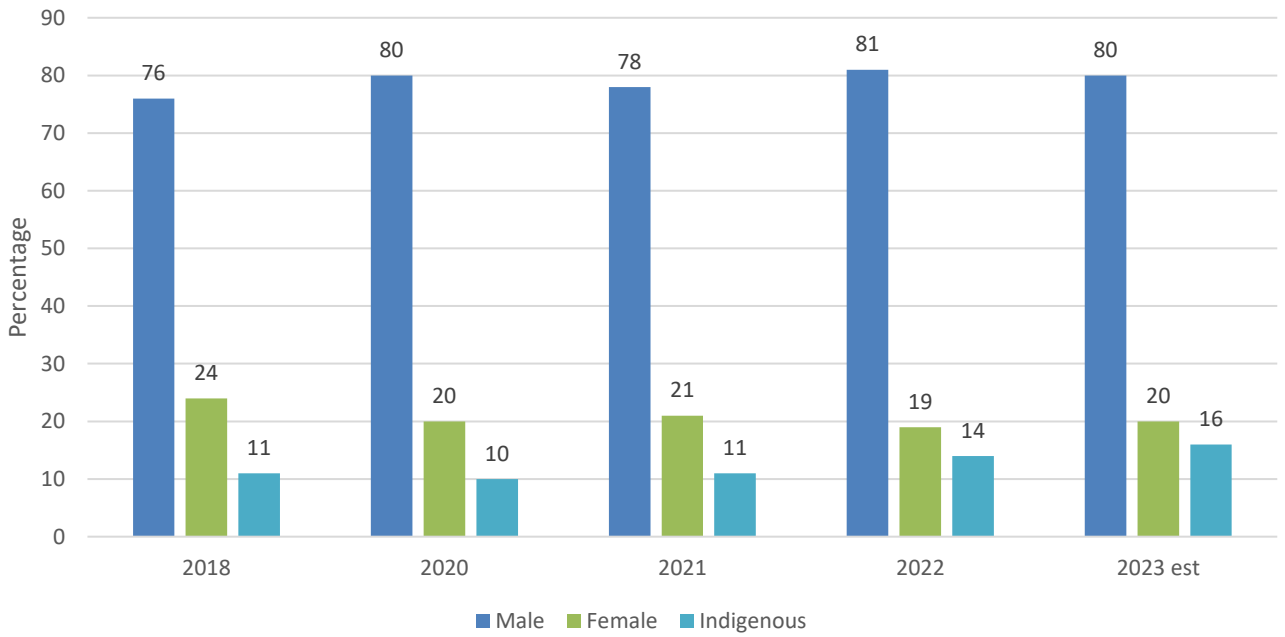


Figure 12 - Employee demographics by percentage.

SIMSA Membership Benefits

The following section breaks down the benefits of membership with self-reported values of business leads through SIMSA events, database, and advocacy.

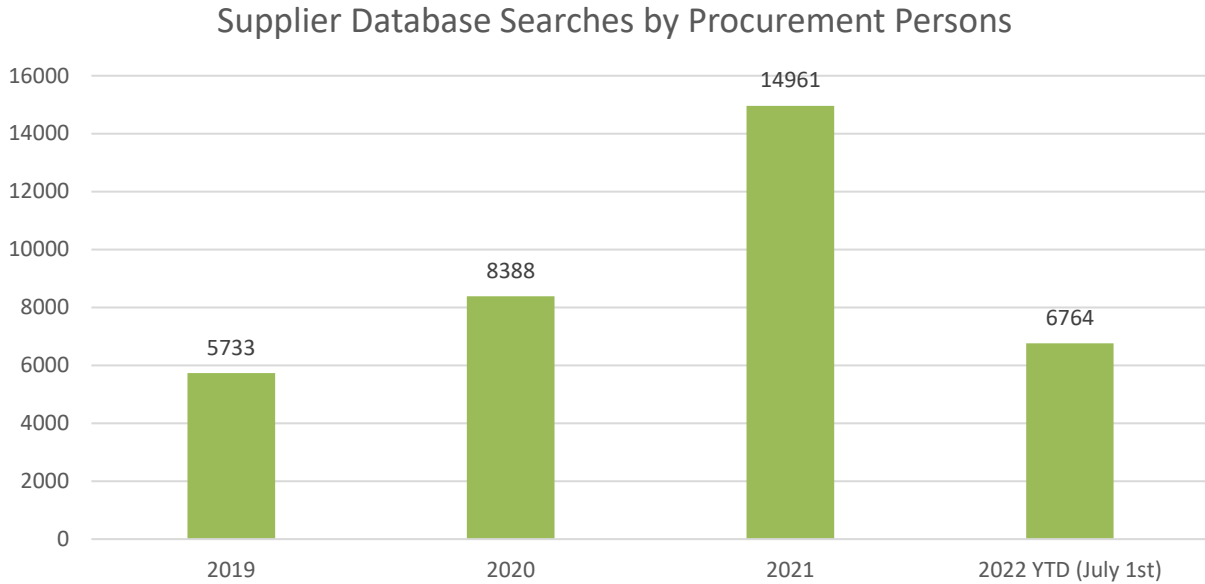


Figure 13 - Supplier database searches - data pulled on July 1st

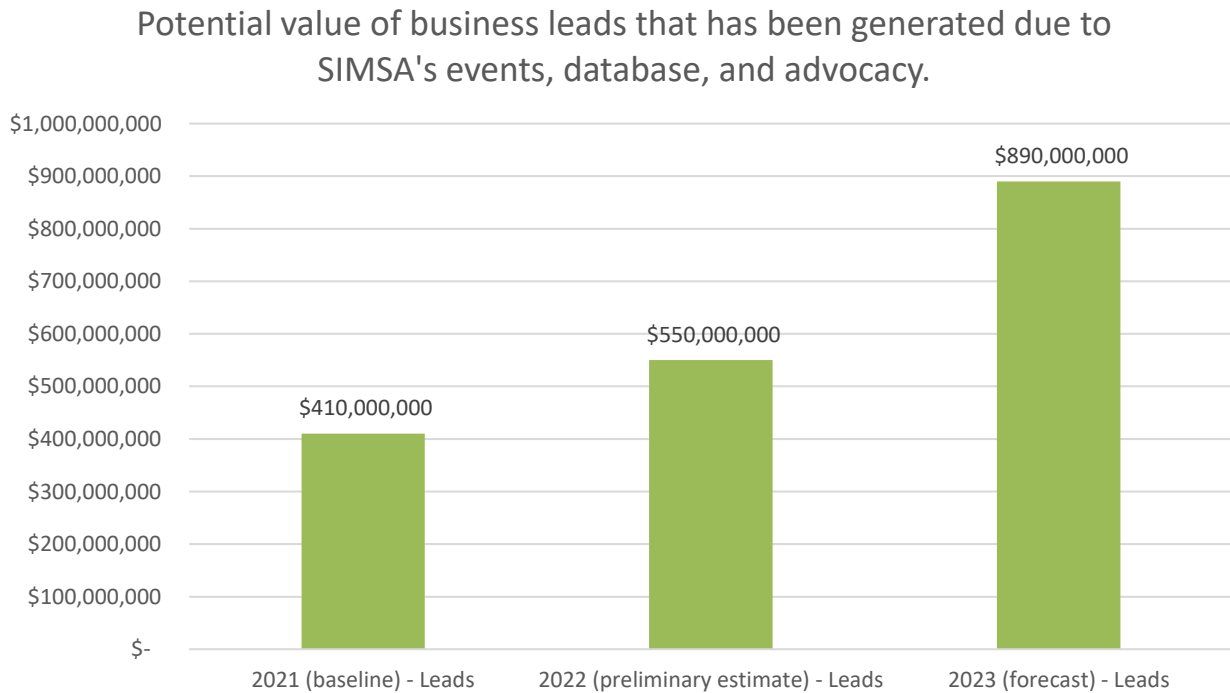


Figure 14 - Potential value of business leads that has been generated due to SIMSA's events, database, and advocacy.

Value of business generated or greatly-assisted by SIMSA's events, database, and advocacy.

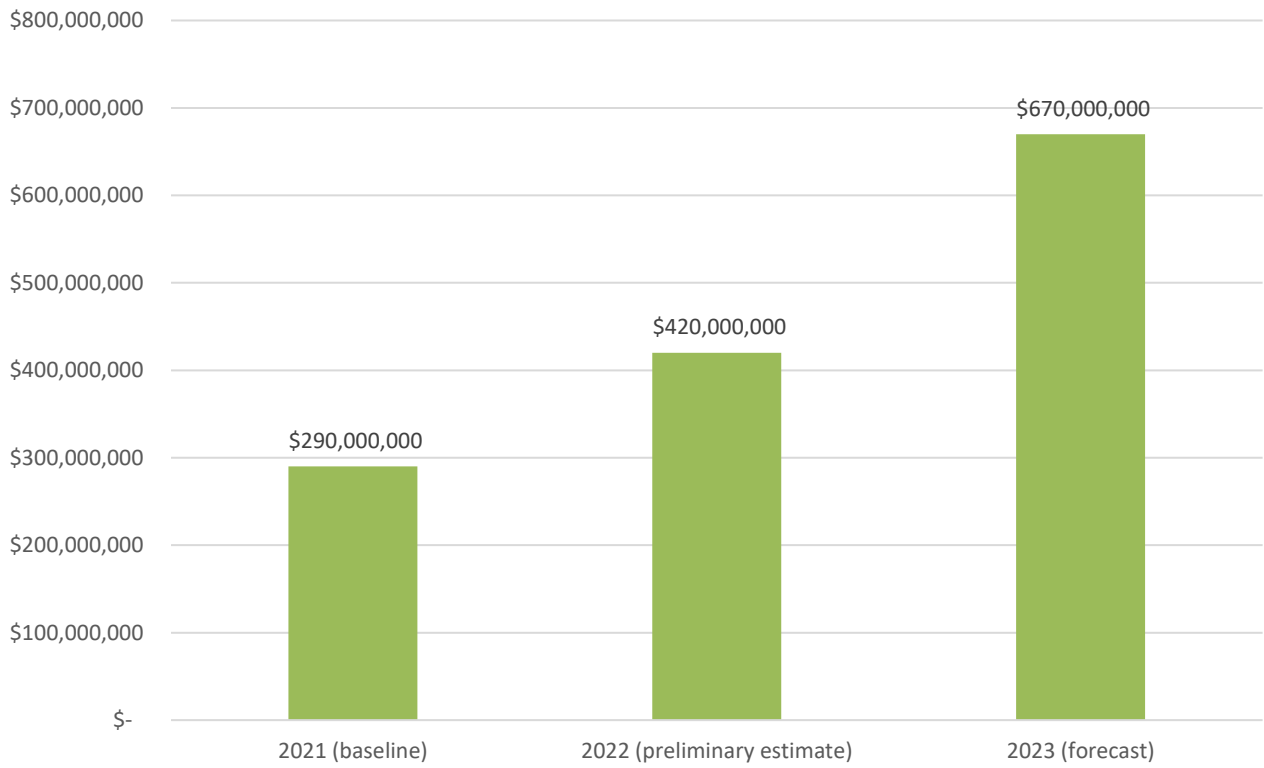


Figure 15 - Expected value of business generated that has been generated due to SIMSA's events, database, and advocacy

Revenue

The following section breaks down the historical membership totals, the main work sectors, and main resource sectors. The survey data is from July, and therefore does not include new editions such as Cenovus Energy. Also included in the section is comparative data from other sources.



Figure 16 - SIMSA Membership Total Revenue

Saskatchewan GDP by Sector - 2021 (million \$) Total \$77,308

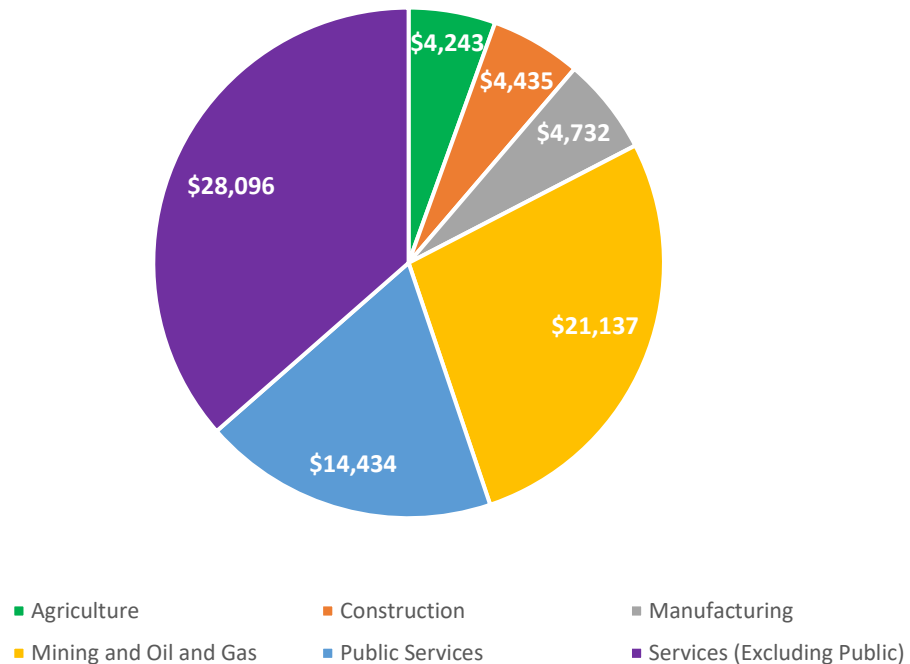


Figure 17 - Source – <https://dashboard.saskatchewan.ca/business-economy> - Saskatchewan GDP by Sector in Millions

SMA - Reported Local Procurement - 2021 (million \$)
Total \$2,127

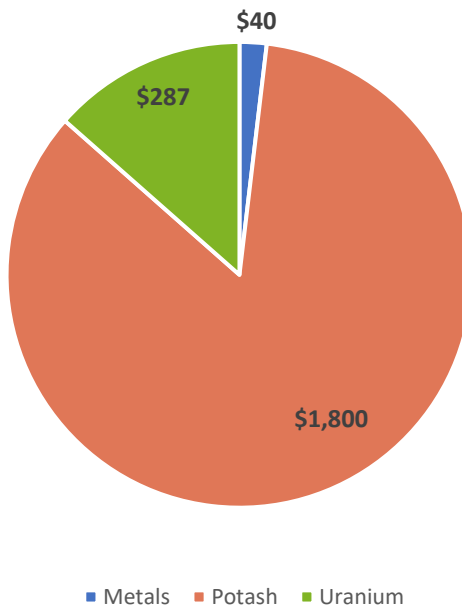


Figure 18 - Source Saskatchewan Association from 2021 – A snapshot of Saskatchewan’s metallic minerals, potash and Uranium industries in 2021

SIMSA Membership Revenue Attributable to Saskatchewan in millions (\$) by Membership Category

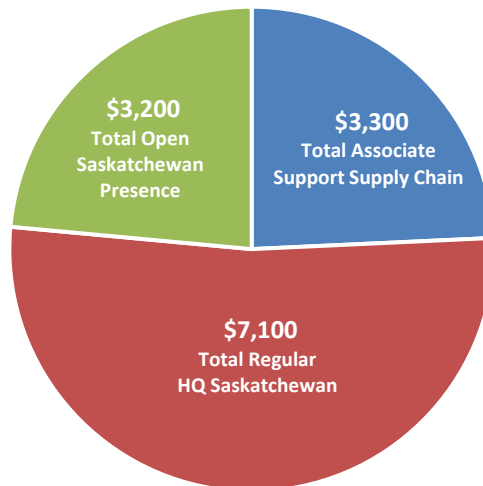


Figure 19 - Membership Revenue Attributable to Saskatchewan in millions (\$). Associate member supports the supply chain, Regular member has their HQ in SK, Open member has a presence in SK.

Historical SIMSA Member Saskatchewan Revenue in Millions (\$) and total members

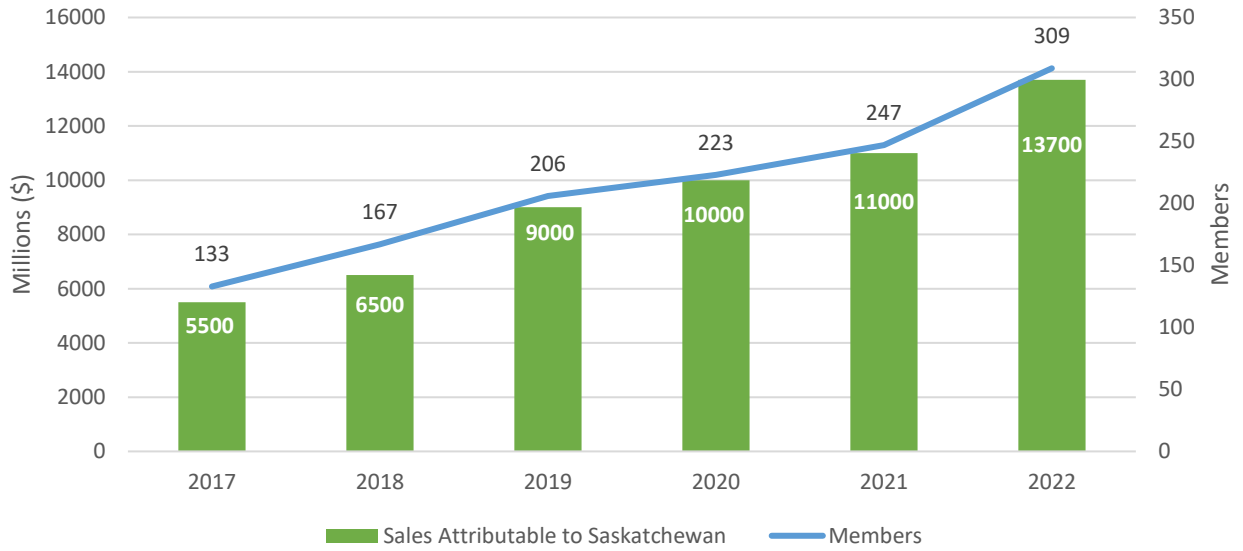


Figure 20 - Historical Member Sales in Millions (\$) with a line graph of total members