

# CALGARY: MANUFACTURED FORCE

## MANUFACTURING SECTOR PROFILE





Calgary Economic Development has compiled this profile to give interested businesses and individuals a comprehensive overview of Calgary's Manufacturing sector. Also highlighted is the recent performance, future opportunities and institutional support that contributes to the thriving development of the Manufacturing sector.

Over the last 10 years Calgary's growing Manufacturing sector has become a major contributor to the strong economic growth in Calgary and in Alberta, which are considered among the fastest growing economies in North America. Calgary's exceptional business climate offers manufacturers well developed infrastructure, access to capital, head office concentration of buyers, a large skilled labour pool and an entrepreneurial community.

Calgary's highly trained, well educated, and motivated labour force provides the sector with the human capital to thrive and innovate.

With over three million potential customers for consumer product manufacturers in Alberta, Manufacturing is a growing force in Calgary. Calgary's Manufacturing sector will continue to expand and attract interest, employees and businesses in the years to come.

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CED recognizes Alberta Economic Development as a partner in the development of the Calgary Region Manufacturing sector, particularly in the distribution of this profile.

# CALGARY ECONOMIC DEVELOPMENT

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Calgary Economic Development (CED) is Calgary's lead economic development agency, committed to marketing the Calgary Region's competitive advantages, pro-business climate and superior lifestyle across Canada and around the world.

Our organization works closely with business, partner agencies, educational institutions, the community and all levels of government. We focus on leveraging Calgary's abundant energy and innovative spirit to sustain economic growth.

Calgary is Western Canada's business centre and has more head offices per capita than any other Canadian city. Its key economic drivers are Transportation and Logistics, Information and Communication Technology, Energy, Manufacturing, Financial and Business Services, Film and Creative Industries. CED concentrates its activities on developing these sectors; an experienced economic development professional is dedicated to each sector. Using a hands-on approach, we are furthering the success and growth of existing businesses, helping small and medium businesses grow their markets globally and promoting the Calgary Region as the ideal location for business investment.

Our operating principles allow us to get the job done - by working with business and partners proactively, collaboratively and responsively.

Proud of its past and focused on tomorrow, Calgary is Canada's leading business opportunity centre. To make Calgary a part of your tomorrow, let us point you in the right direction.

[www.calgaryeconomicdevelopment.com](http://www.calgaryeconomicdevelopment.com)

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## MANUFACTURING – A FLOURISHING SECTOR



Manufacturing in Calgary is a dynamic sector comprising a variety of consumer and industrial products. The sector is reaping the benefits of the continuing strong economic growth in Calgary and in Alberta, considered among the fastest growing economies in North America.

The well-established oil and gas industry has attracted people and capital from around the world, creating business opportunities and fuelling innovation in every economic sector. In particular, several of Calgary's Manufacturing sub-sectors have found strong markets within the resource sector.

The city's exceptional business climate offers manufacturers well developed infrastructure, good access to capital, head office concentration of buyers, a large skilled labour pool and an entrepreneurial community.

Compared to other major North American cities, Calgary's manufacturing companies have lower costs in key areas, like research and development (R&D), industrial land, housing prices and taxes. Calgary's highly trained, well educated, and motivated labour force provides the sector with the human capital to thrive and innovate.

True to the entrepreneurial spirit of the city, Calgary manufacturers have made substantial investments in the most current technology and are more modern and efficient than many of their competitors.

## Industry Outlook

The economy in Calgary and Alberta continues to expand and attract interest, employees and businesses.

Over three million potential customers for consumer product manufacturers live in Alberta. This is good news for manufacturers because the trend of high transportation and energy costs is driving a shift in focus for local companies who want to buy manufactured goods from domestic markets to avoid paying these costs. That said, exporting opportunities exist for several Manufacturing sub-sectors, including Primary Metals, Computer and Electronic Products and Furniture and Related Products.

As well, several sub-sectors of Calgary's Manufacturing industry are in the process of becoming established and have room to develop, offering opportunities for new business startups and business investment.

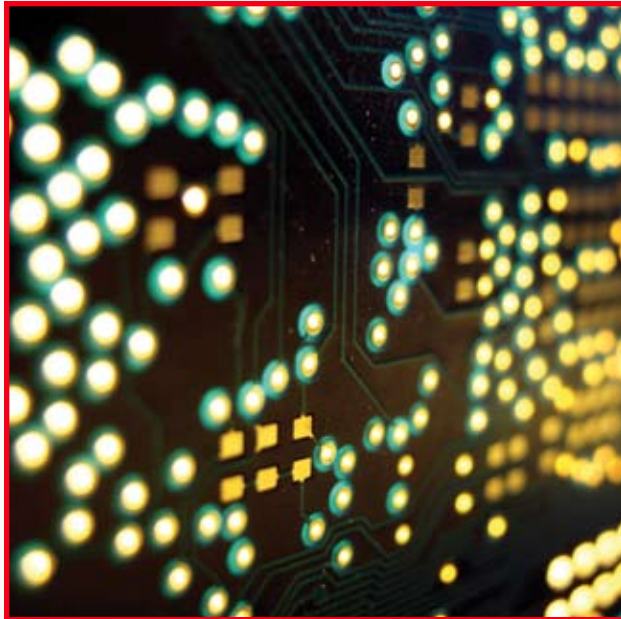
## Manufacturing Sector Definition

Calgary's diverse Manufacturing sector is represented by:

- Food Manufacturing
- Wood Products Manufacturing
- Printing and Related Support Activities
- Chemical Manufacturing
- Primary Metal Manufacturing
- Fabricated Metal Products Manufacturing
- Machinery Manufacturing
- Computer and Electronic Products Manufacturing
- Furniture and Related Products Manufacturing
- Miscellaneous Manufacturing



## CALGARY'S MANUFACTURING INDUSTRY GROWTH



The Manufacturing sector in Calgary has grown over the last 10 years. This reflects the economic and population growth in the region; the Calgary-Edmonton corridor is one of the fastest growing economic regions in Canada and North America. This provides markets, infrastructure and employees to allow manufacturing companies to prosper.

An increased focus on research and technology, coupled with a business-oriented provincial government, provides the Manufacturing sector with a strong foundation on which to continue to innovate to remain competitive in the global market. The following are highlights of the Manufacturing industry in Calgary.

### Calgary Employment, Canada (LQCAN) and Alberta (LQALB) Location Quotients: 1996 and 2005

Sub-Sector	1996 Employment	LQCAN 1996	LQALB 1996	2005 Employment	LQCAN 2005	LQALB 2005	Jobs Created
Manufacturing Total	41,200	0.6	1.1	46,600	0.5	1.0	5,400
Food	7,500	0.9	1.3	7,200	0.7	1.0	- 300
Wood Products	2,700	0.6	0.7	2,200	0.3	0.5	- 500
Printing and Support	2,400	0.7	1.8	2,500	0.6	1.3	100
Chemicals	2,300	0.7	0.8	2,800	0.6	0.9	500
Primary Metals	2,600	0.6	1.5	2,100	0.6	1.9	- 500
Fabricated Metal Products	3,400	0.8	0.9	4,100	0.5	0.6	700
Machinery	1,900	0.6	0.9	5,000	0.9	0.9	3,100
Computer and Electronic Products	3,600	1.1	2.4	3,400	0.8	1.8	- 200
Furniture and Related Products	3,600	1.3	1.7	4,400	1.0	1.8	800
Miscellaneous	2,000	0.7	1.3	3,700	1.0	1.7	1,700
Total Accounted for in these sub-sectors	32,000	-	-	37,400	-	-	5,400
Proportion of Total	77.7 %	-	-	80.3%	-	-	100%

Over the past decade Calgary's Manufacturing sector has been a strong contributor to Alberta's job market. The sector created 5,400 new jobs, representing almost 23% of all new Manufacturing jobs created in Alberta. Manufacturing employs 46,600 Calgarians, representing 7.2% of Calgary's total employment.

The top four employment creating sub-sectors were:

- Machinery Manufacturing – 3,100 new jobs
- Miscellaneous Manufacturing – 1,700 new jobs
- Furniture and Related Products – 800 new jobs
- Fabricated Metal Products – 700 new jobs

Several of Calgary's Manufacturing sub-sectors have markets beyond Calgary, enjoying healthy levels of exports. The following Calgary manufacturing sub-sectors export goods and services to other parts of Alberta and have location quotients greater than 1\*:

- Primary Metal Manufacturing – 1.9
- Computer & Electronic Products Manufacturing – 1.8
- Furniture and Related Products Manufacturing – 1.8
- Miscellaneous Manufacturing – 1.7
- Printing and Support Activities – 1.3

\*Location quotients greater than 1 indicate concentrations of activity that support export opportunities.



## Employment Growth

Over the past 10 years, the average annual growth rate of Manufacturing employment in Calgary was 2.9%, surpassing both Alberta (2.2%) and Canada (1.5%).

Average Annual Employment Growth: 1996-2005 (%)			
Sub-Sector	Canada	Alberta	Calgary
Manufacturing Total	1.5 %	2.2 %	2.9 %
Food	2.1 %	2.3 %	3.8 %
Wood Products	2.6 %	2.1 %	5.1 %
Printing and Support	1.6 %	2.6 %	0.3 %
Chemicals	1.6 %	6.7 %	6.4 %
Primary Metals	- 1.8 %	- 4.5 %	4.0 %
Fabricated Metal Products	3.6 %	5.6 %	7.7 %
Machinery	3.7 %	11.3 %	13.4 %
Computer and Electronic Products	2.6 %	8.7 %	10.7 %
Furniture and Related Products	4.7 %	3.0 %	6.4 %
Miscellaneous	2.5 %	2.3 %	11.8 %

## Average (1996 – 2005) and Current Unemployment Rate (%)

At the end of 2005 the unemployment rate in Calgary's Manufacturing sector was 2.5%, considerably less than the Canadian average (5.6%) and on par with Alberta.

Sub-Sector	Canada		Alberta		Calgary	
	Avg.	2005	Avg.	2005	Avg.	2005
Manufacturing	5.8 %	5.6 %	4.3 %	2.5 %	4.4 %	2.5 %
Food	8.6 %	8.3 %	4.4 %	3.4 %	3.6 %	5.3 %
Wood Products	7.1 %	6.1 %	4.6 %	5.0 %	7.4 %	12.0 %
Printing and Support	5.0 %	4.8 %	3.8 %	1.8 %	3.4 %	3.8 %
Chemicals	3.9 %	4.8 %	3.1 %	1.1 %	2.7 %	0.0 %
Primary Metals	3.4 %	3.4 %	4.0 %	0.0 %	5.2 %	0.0 %
Fabricated Metal Products	5.6 %	4.2 %	4.8 %	2.8 %	3.9 %	0.0 %
Machinery	4.6 %	4.4 %	4.0 %	1.3 %	3.8 %	2.0 %
Computer and Electronic Products	5.0 %	5.0 %	4.7 %	3.8 %	4.4 %	5.6 %
Furniture and Related Products	6.0 %	6.2 %	4.3 %	0.0 %	5.4 %	2.2 %
Miscellaneous	7.0 %	6.6 %	4.0 %	1.7 %	3.5 %	0.0 %

### Sub-Sector Contributions to Calgary's Manufacturing Employment (%)

Calgary's manufacturing employment is greatest in the Food Processing, Machinery and Furniture sub-sectors, which are also the strongest and increasingly important to the Manufacturing sector.

Sub-Sector	1996	2005	Change
Food	18.2 %	15.5 %	- 2.7 %
Wood Products	6.6 %	4.7 %	- 1.9 %
Printing and Support	5.8 %	5.4 %	- 0.4 %
Chemicals	5.6 %	6.0 %	0.4 %
Primary Metals	6.3 %	4.5 %	- 1.8 %
Fabricated Metal Products	8.3 %	8.8 %	0.5 %
Machinery	4.6 %	10.7 %	6.1 %
Computer and Electronic Products	8.7 %	7.3 %	- 1.4 %
Furniture and Related Products	8.7 %	9.4 %	0.7 %
Miscellaneous	4.9 %	7.9 %	3.0 %

Manufacturing employment in Calgary accounts for 7.2% of total employment compared to Alberta (7.3%) and Canada (13.7%).



## Calgary Region Business Establishments By Number of Employees: 2005

Number of Employees Industry / Sub-sector	Total Firms	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500+
<b>All Manufacturing</b>	<b>1931</b>	<b>732</b>	<b>325</b>	<b>302</b>	<b>279</b>	<b>152</b>	<b>89</b>	<b>42</b>	<b>10</b>
Food	150	55	22	27	19	9	13	4	1
Beverage and Tobacco	16	4	1	1	3	2	3	1	1
Textile Mills	16	6	2	6	1	1	0	0	0
Textile Product Mills	37	19	4	7	6	1	0	0	0
Clothing	48	30	10	2	5	0	1	0	0
Leather and Allied Products	5	3	0	1	1	0	0	0	0
Wood Products	94	28	11	21	13	12	3	6	0
Paper	19	5	1	2	6	1	3	1	0
Printing and Support	199	114	34	16	21	8	5	1	0
Petroleum and Coal Products	18	6	3	2	1	2	1	2	1
Chemicals	83	27	16	14	15	4	5	2	0
Plastic and Rubber Products	67	19	8	13	13	9	4	1	0
Non-Metallic Mineral	89	22	13	16	17	16	3	1	1
Primary Metals	22	6	3	2	2	3	4	1	1
Fabricated Metal Products	295	85	61	50	58	24	13	4	0
Machinery	216	64	39	38	31	20	16	7	1
Computer and Electronic Products	92	28	14	16	17	9	2	4	2
Electric Equipment, Appliance and Components	45	16	6	7	5	8	1	2	0
Transportation Equipment	55	25	6	9	8	3	3	1	0
Furniture and Related Products	114	34	22	19	17	14	4	2	2
Miscellaneous	251	136	49	33	20	6	5	2	0





### Change in the Number of Business Establishments in Calgary: 2001-2005

Over the past five years, Calgary's Manufacturing sector has experienced some consolidation. This trend has increased the average size of companies in the sector, providing the competitive advantage of size and resilience in the unpredictable global market.

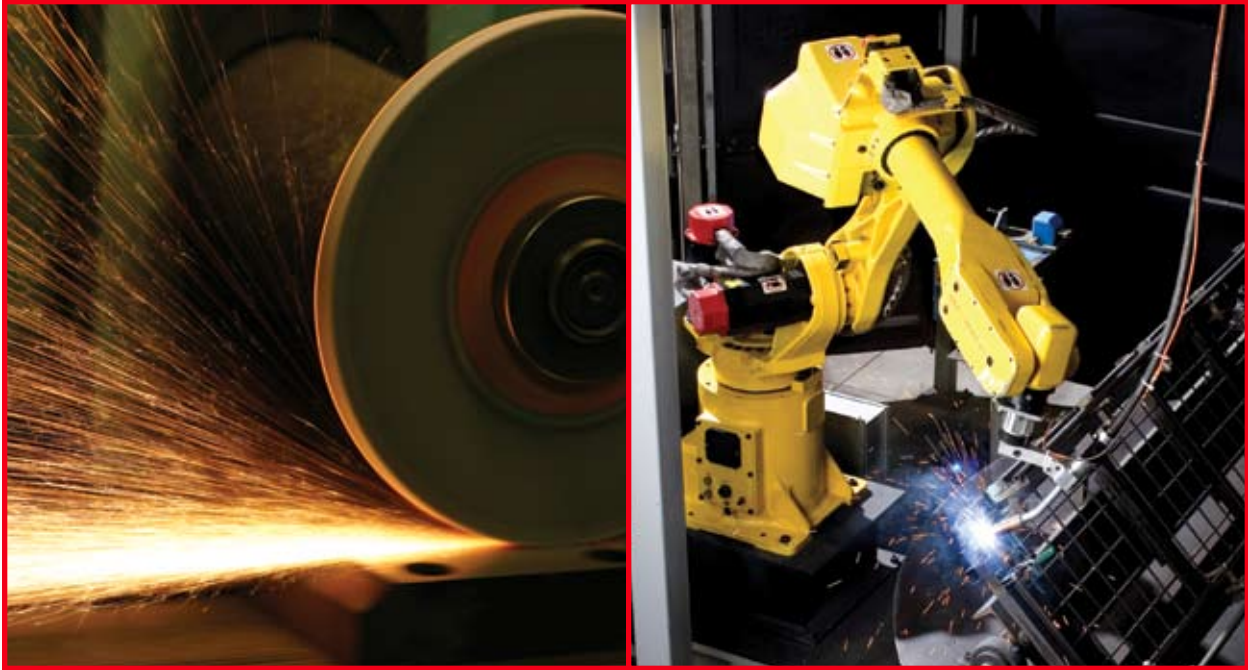
Industry / Sub-sector	# Change	% Change
Manufacturing	-235	-10.8 %
Food	-39	-20.6 %
Wood Products	7	8.0 %
Printing and Support	-5	-2.5 %
Chemicals	-9	-9.8 %
Primary Metals	-5	-18.5 %
Fabricated Metal Products	-15	-4.8 %
Machinery	-15	-6.5 %
Computer and Electronic Products	-43	-31.9 %
Furniture and Related Products	-21	-15.6 %
Miscellaneous	-13	-4.9 %

Calgary's Manufacturing sector has experienced some consolidation over the past five years, reflected in the reduced number of business establishments (-10.8% or -235 establishments).

Compared to 2001, Calgary now has fewer companies with less than 50 employees (-56), and an increase in the number of companies with greater than 50 employees (+8).

# INDUSTRY BREAKDOWN BY SECTOR

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## INDUSTRY BREAKDOWN BY SECTOR

The Manufacturing sector is diverse and supplies a large and varied number of industries and consumer groups with products. The following is an overview of the key sub-sectors of the Manufacturing industry.

### Food Manufacturing

Food Manufacturing is the largest of the Manufacturing sub-sectors in Calgary. Several successful businesses have been built by Calgarians, adding value to the abundant supply of top quality products raised by Alberta's strong agricultural base.

For example, Sunterra is a family-run business that combines a farming tradition with food processing and retail outlets. The popular Sunterra Market sells fresh produce and pork and beef products, raised and processed in-house to ensure quality control. The business also exports some of its products.

Others, like Cargill Foods with operations in 61 countries, are international conglomerates, which have chosen the Calgary area because of its prime location and favourable business environment.

## Food Manufacturing Employment Statistics

Employment 1996	7,500
Employment 2005	7,200
Jobs Created, 1996-2005	-300
Average Annual rate of Employment Growth, 1996-2005	3.8 %
Sub-Sector proportion of Calgary Manufacturing Employment, 2005	15.5 %
Sub-Sector Unemployment Rate, 2005	5.3 %
Location Quotient – Canada, 2005	0.7
Location Quotient – Alberta, 2005	1.0
Number of Business Establishments, 2005	150
Change in Number of Business Establishments, 2004 - 2005	-39

With 7,200 employees, representing 15.5% of all Manufacturing employees, Food Manufacturing is the largest sub-sector of the 21 Manufacturing sub-sectors.

Over the last decade Calgary's Food Manufacturing sub-sector experienced an average annual growth in employment of 3.8%, surpassing Alberta (2.3%) and Canada (2.1%).

Unemployment in the Food Manufacturing sector is 5.3% compared to Alberta (3.4%) and Canada (8.3%).

Food Manufacturing		Growth Rates (%)			10 yr. Average Proportion of Sub-Sector (%)
		Labour Force		Employment	
Jurisdiction	1996 - 2005	10 yr. Average	1996 - 2005	10 yr. Average	Employment
Canada	17.0	2.0	18.8	2.1	11.1
Alberta	15.0	2.2	19.0	2.3	14.7
Calgary	-8.4	4.6	-4.0	3.8	13.8

## Food Manufacturing Companies in Calgary and Area

- ADM Milling Co
- Alberta Processing Co
- Byblos Bakery Ltd
- Canada Malting Co Ltd
- Cargill
- Centennial Foods
- El Molino Foods Of Canada Ltd
- Lucerne Foods Ltd
- Old Dutch Foods Ltd
- Spolumbo's
- Sunterra
- X L Meats



## Wood Products Manufacturing

Calgary's growing housing and commercial building market provides many opportunities for Wood Products Manufacturing companies.

Recognizing the opportunity, Spindles, Stairs and Railings began operations in 1999. In 2005 this custom builder of staircases was chosen as one of Canada's 100 fastest growing companies.

Calgary companies are also active in the export market. Nascor Ltd is a Calgary-based company that exports energy-efficient pre-engineered structural components for home building across North America, Europe and South America.

## Wood Products Manufacturing Employment Statistics

Employment 1996	2,700
Employment 2005	2,200
Jobs Created, 1996-2005	500
Average Annual rate of Employment Growth, 1996-2005	5.1 %
Sub-Sector proportion of Calgary Manufacturing Employment, 2005	4.7 %
Sub-Sector Unemployment Rate, 2005	12.0 %
Location Quotient – Canada, 2005	0.3
Location Quotient – Alberta, 2005	0.5
Number of Business Establishments, 2005	94
Change in Number of Business Establishments, 2004 - 2005	7

With 2,200 employees and 4.7% of Manufacturing employment in 2005, Wood Products Manufacturing is a small sub-sector of Calgary's Manufacturing sector. Seven new business establishments, all in the 50-499 employee range, have started operations over the past year.

Over the past decade Calgary's Wood Products Manufacturing sub-sector experienced average annual employment growth of 5.1%, more than doubling that of Alberta (2.1%) and surpassing Canada (2.6%).

Wood Products Manufacturing	Growth Rates (%)				10 yr. Average Proportion of Sub-Sector (%)	
	Labour Force		Employment			Employment
	Jurisdiction	1996 -2005	10 yr. Average	1996 -2005		10 yr. Average
Canada	21.2	2.4	24.0	2.6	7.4	
Alberta	7.1	1.9	5.5	2.1	9.8	
Calgary	-10.7	4.3	-18.6	5.1	5.8	

## Wood Products Manufacturing Companies in Calgary and Area

- All Span Building Ltd
- Artek Inc
- Continental Door & Bldg Supls
- Heritage Woodwork Co
- Ifco Systems
- Iko Industries Ltd
- Jager Building Systems
- Nascor Ltd
- Nose Creek Forest Products Inc
- Spindles, Stairs & Railings Ltd
- Rona Timbertech Truss
- Steels Industrial Products
- Vipco Industries Inc

## Printing and Related Support Activities



Industries in the Printing and Related Support Activities sub-sector print products like newspapers, books, labels and business cards, among others. Support activities include data imaging, platemaking services, and bookbinding.

Calgary's Printing and Related Support Activities sector has a diverse range of companies that service the area's strong demand for printing, particularly from the corporate sector. Calgary has Canada's second highest concentration of corporate head offices, following Toronto.

Among the well-established companies in Calgary is West Canadian Graphics. It has a rich history and innovative approach to printing and is one of Alberta's largest and most advanced digital imaging centre. The company opened its doors in Calgary in 1952 and in 2004 expanded into Edmonton. West Canadian employs 200 people.



Bolder Graphics is another homegrown company that provides packing and display products for its clients. Bolder has grown with the market by acquiring several companies over its 40-year history in Calgary.

### Printing and Related Support Activities Employment Statistics

Employment 1996	2,400
Employment 2005	2,500
Jobs Created, 1996-2005	100
Average Annual rate of Employment Growth, 1996-2005	0.3 %
Sub-Sector proportion of Calgary Manufacturing Employment, 2005	5.4 %
Sub-Sector Unemployment Rate, 2005	3.8 %
Location Quotient – Canada, 2005	0.6
Location Quotient – Alberta, 2005	1.3
Number of Business Establishments, 2005	199
Change in Number of Business Establishments, 2004 - 2005	-5

Over the past decade Printing and Support Activities has increased its level of employment (+100 jobs) and generally maintained the number of business establishments (-5).

With a location quotient of 1.3, Calgary's Printing industry is a net exporter of its output to other parts of Alberta.

Printing and Support Activities	Growth Rates (%)				10 yr. Average Proportion of Sub-Sector (%)	
	Labour Force		Employment			Employment
	Jurisdiction	1996 -2005	10 yr. Average	1996 -2005		
Canada	9.0	1.6	9.8	1.6	4.6	
Alberta	34.1	1.9	38.5	2.6	4.8	
Calgary	4.0	-0.6	4.2	0.3	6.4	

## Printing and Related Support Activities Companies in Calgary and Area

- Bolder Graphics
- Carbon Copy Imaging
- Data Business Forms
- Datamark Systems-Sheraton
- McAra Printing Ltd
- Phoenix Press Inc
- Quebecor Printpak
- Sundog Printing Ltd
- Topline Printing Inc
- Trans Continental Printing Inc
- West Canadian Graphics

## Chemical Manufacturing



Calgary's Chemical Manufacturing sector has grown with Alberta's oil industry. Adding value to the province's commodities, Chemical Manufacturing companies in Calgary contribute to the ongoing sustainability of the city's economy.

Based in Calgary, Dow Chemical Canada Inc is a subsidiary of The Dow Chemical Company, a global publicly traded company that provides innovative chemical and plastic products and services to consumer markets.

E.L.P. Products Division is small, employing 15 people but it has a reach that circles the globe. The company manufactures and exports custom-moulded solid cast polyurethane products and cleaning systems for the pulp and paper industry around the world.

## Chemical Manufacturing Employment Statistics

Employment 1996	2,300
Employment 2005	2,800
Jobs Created, 1996-2005	500
Average Annual Rate of Employment Growth, 1996-2005	6.4 %
Sub-Sector Proportion of Calgary Manufacturing Employment, 2005	6.0 %
Sub-Sector Unemployment Rate, 2005	0.0 %
Location Quotient – Canada, 2005	0.6
Location Quotient – Alberta, 2005	0.9
Number of Business Establishments, 2005	83
Change in Number of Business Establishments, 2004 - 2005	-9

Chemical Manufacturing represents 6.0% of Calgary's Manufacturing sector and is the fifth largest contributor to growth.

Over the past decade Calgary's Chemical Manufacturing sub-sector:

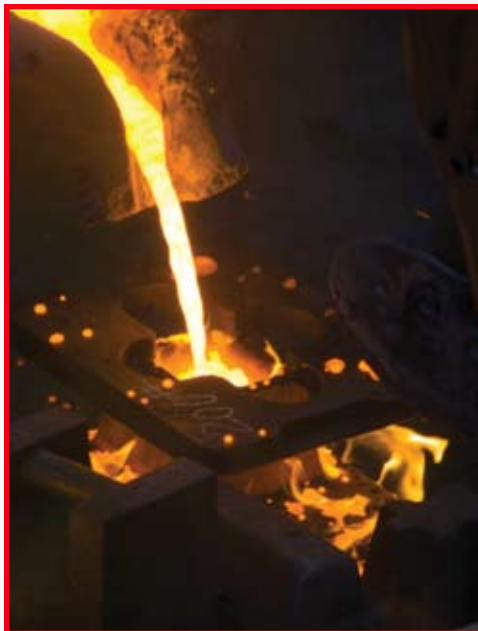
- experienced average annual employment growth 6.4%, compared to Alberta (6.7%) and far surpassing the Canadian average (1.6%); and
- contributed 500 new jobs.

Chemical Manufacturing	Growth Rates (%)				10 yr. Average Proportion of Sub-Sector (%)	
	Labour Force		Employment			Employment
	Jurisdiction	1996 -2005	10 yr. Average	1996 -2005		10 yr. Average
Canada	22.0	1.6	22.0	1.6	5.2	
Alberta	2.35	5.8	4.9	6.7	6.9	
Calgary	16.7	10.1	21.7	6.4	4.6	

## Chemical Manufacturing Companies in Calgary

- Agrium Inc
- Air Liquide Canada
- Baker Petrolite Corp
- Baymag
- Dow Chemicals Canada Ltd
- ELP Products Ltd
- France Compressor Products
- Glaxo Wellcome Inc
- Mocoat Services Ltd
- Nova Chemicals Corp
- Praxair
- Westland Limited

## Primary Metal Manufacturing



Primary Metal Manufacturing in Calgary benefits from the active energy industry and the growth the province is experiencing, which requires additional and upgraded infrastructure. The sub-sector includes iron and steel mills, steel pipe and tube mills, iron foundries and primary manufacturers of non-ferrous metals.

Prudential Steel has served the Western Canadian oil patch for 40 years. The company employs over 500 people, has three pipe-making facilities and has its head office in Calgary.

Employing 80 people, Canfer Rolling Mills Ltd is a full-service manufacturer of pre-engineered steel buildings, steel buildings components and modular steel buildings for the industrial, commercial, agricultural and residential markets. The company has served Canadian industry for over 20 years.

## Primary Metal Manufacturing Employment Statistics

Employment 1996	2,600
Employment 2005	2,100
Jobs Created, 1996-2005	-500
Average Annual Rate of Employment Growth, 1996-2005	4.0 %
Sub-Sector Proportion of Calgary Manufacturing Employment, 2005	4.5 %
Sub-Sector Unemployment Rate, 2005	0.0 %
Location Quotient – Canada, 2005	0.6
Location Quotient – Alberta, 2005	1.9
Number of Business Establishments, 2005	22
Change in Number of Business Establishments, 2004 - 2005	-5

Primary Metal Manufacturing represents 4.5% of all Manufacturing employment or 2,100 jobs.

Over the past decade the average annual employment growth of Calgary's Primary Metal Manufacturing sub-sector was 4.0%, far outpacing Alberta (-4.5%) and Canada (1.8%), which both shrank.

A location quotient of 1.9 illustrates that this sub-sector is a strong net exporter of products to other locations in Alberta.

Primary Metal Manufacturing	Growth Rates (%)				10 yr. Average Proportion of Sub-Sector (%)
	Labour Force		Employment		
	Jurisdiction	1996 -2005	10 yr. Average	1996 -2005	10 yr. Average
Canada	-21.1	-1.8	-20.0	-1.8	4.7
Alberta	-44.6	-5.4	-39.2	-4.5	3.6
Calgary	-27.6	3.0	-19.2	4.0	4.2

## Primary Metal Manufacturing Companies in Calgary and Area

- Canfer Rolling Mills Ltd
- Chittom Equipment Ltd
- Elite Technical Inc
- JP Metal Manufacturing Inc
- M A Steel Foundry Ltd
- Nardei Fabricators Ltd
- National-Oilwell Canada Ltd
- Poor Boy Stove Pipe
- Prudential Steel Ltd
- Sovereign Castings Ltd
- Sureway Metal Systems Ltd

## Fabricated Metal Products Manufacturing



Fabricated Metal Products Manufacturing serves the new construction industry and the major renovations industry. With residential and commercial construction in Calgary at historical highs, the industry is well positioned for continued growth.

Indutech Canada Ltd has found its niche serving the bulk handling market with its abrasion resistant steel piping products and supplying the oil and gas market with its induction and cold bending service. The company has been established for over 15 years.

Several companies in the sub-sector have seized opportunities in the export market. Century Valve & Machine Ltd's needle, gauge and manifold valves are known worldwide for exceptional quality performance and reliability. With 80 employees, the company services Canada and exports to the United States, the Middle East, China, Europe, Russia, and the North Sea.



## Fabricated Metal Products Manufacturing Employment Statistics

Employment 1996	3,400
Employment 2005	4,100
Jobs Created, 1996-2005	700
Average Annual Rate of Employment Growth, 1996-2005	7.7 %
Sub-Sector Proportion of Calgary Manufacturing Employment, 2005	8.8 %
Sub-Sector Unemployment Rate, 2005	0.0 %
Location Quotient – Canada, 2005	0.5
Location Quotient – Alberta, 2005	0.6
Number of Business Establishments, 2005	295
Change in Number of Business Establishments, 2004 - 2005	-15

The Fabricated Metal Products sub-sector is the fourth largest contributor to Manufacturing employment in Calgary (4,100 jobs), representing 8.8% of all Manufacturing employment.

Over the past decade Calgary's Fabricated Metal Products sub-sector:

- experienced average annual employment growth of 7.7% surpassing Alberta (5.6) and more than doubling the Canadian average (3.6%); and
- was the fourth largest creator of new jobs (700) in the Manufacturing sector.

The sub-sector has a 0% unemployment rate in Calgary compared to Alberta (2.8%) and Canada (4.2%).

Fabricated Metal Products	Growth Rates (%)				10 yr. Average Proportion of Sub-Sector (%)
	Labour Force		Employment		Employment
	1996 -2005	10 yr. Average	1996 -2005	10 yr. Average	
Canada	46.9	3.4	51.9	3.6	7.5
Alberta	51.7	5.4	58.2	5.6	11.0
Calgary	13.9	7.9	20.6	7.7	8.6

## **Fabricated Metal Products Manufacturing Companies in Calgary and Area**

- International Utility Structures Inc
- Advance Engineered Products
- Brews Controls Corp
- Capitan Overlay Technologies
- Century Valve & Machine Ltd
- Indutech Canada Ltd
- Wheatley Canada Ltd
- Plains Fabrication and Supply
- ATCO Structures
- Standen's Limited



## **Machinery Manufacturing**

Machinery Manufacturing includes companies that manufacture industrial and commercial machinery. The continuing strong oil and gas industry and the spin-off activity it creates will sustain demand for machinery and promote growth in the sub-sector, already the fastest growing sub-sector in Manufacturing employment in Calgary.

Calgary-based Enerflex Systems Ltd is a publicly traded global leader in the custom design, manufacturing, servicing and leasing of compression systems for the production and processing of natural gas. The company employs 2,200 people and exports its products around the globe.

Working in the housing market, Conematic is a privately owned company whose heating systems are utilized extensively in Western Canada. Conematic is an industry leader in packaged heating technology particularly suitable for residential, multi-family, small commercial and 'packaged' housing.

## Machinery Manufacturing Employment Statistics

Employment 1996	1,900
Employment 2005	5,000
Jobs Created, 1996-2005	3,100
Average Annual Rate of Employment Growth, 1996-2005	13.4 %
Sub-Sector Proportion of Calgary Manufacturing Employment, 2005	10.7 %
Sub-Sector Unemployment Rate, 2005	2.0 %
Location Quotient – Canada, 2005	0.9
Location Quotient – Alberta, 2005	0.9
Number of Business Establishments, 2005	216
Change in Number of Business Establishments, 2004 - 2005	-15

Machinery Manufacturing is the second largest contributor to Calgary's Manufacturing employment (10.7%).

Over the past decade Calgary's Machinery Manufacturing sub-sector:

- was the fastest growing Manufacturing sub-sector, experiencing an average annual employment growth of 13.4%, surpassing Alberta (11.3%) and tripling Canada's average (3.7%); and
- created the largest number of jobs (3,100), representing almost 35% of new jobs created in the sub-sector in Alberta.

Machinery Manufacturing	Growth Rates (%)				10 yr. Average Proportion of Sub-Sector (%)
	Labour Force		Employment		
	Jurisdiction	1996 -2005	10 yr. Average	1996 -2005	10 yr. Average
Canada	33.4	3.6	36.4	3.7	5.5
Alberta	145.9	11.1	150.8	11.3	8.2
Calgary	155.0	12.0	163.2	13.4	8.5

## **Machinery Manufacturing Companies in Calgary and Area**

- Chinook Industrial Ltd
- Clemro Western Ltd
- Conematic
- Enerflex Systems
- Energy Industries Inc
- Enersul Inc
- Prestige Railings & Stairs Ltd
- Raffin Electric Co Ltd
- Rostel Industries Ltd
- Ruffneck Heaters
- System Aire Inc
- Tesco Manufacturing Div
- Toromont Process Systems
- Transcanada Turbines Ltd
- Vipond Fire Protection Inc

## **Computer and Electronic Products Manufacturing**

This sub-sector, the third fastest growing in the Calgary Manufacturing sector, is comprised of companies that manufacture computers, computer-peripheral equipment, communications equipment and similar electronic products, and components for those products.

Headquartered in Calgary, CSI Wireless is one of North America's fastest-growing technology companies. The company is a leading international designer, manufacturer and marketer of global positioning systems (GPS), wireless and products and a combination of the two. Founded in 1990, CSI is publicly traded, has three major facilities in the United States and customers in almost 50 countries worldwide.

Established in 1948, General Dynamics Canada is Canada's premiere defence company with offices in Ottawa, Halifax and Calgary. It provides land, airborne and maritime systems, software and hardware to the armed forces in over 20 countries - from NATO to the Pacific Rim.

## Computer and Electronic Products Manufacturing Employment Statistics

Employment 1996	3,600
Employment 2005	3,400
Jobs Created, 1996-2005	-200
Average Annual Rate of Employment Growth, 1996-2005	10.7 %
Sub-Sector Proportion of Calgary Manufacturing Employment, 2005	7.3 %
Sub-Sector Unemployment Rate, 2005	5.6 %
Location Quotient – Canada, 2005	0.8
Location Quotient – Alberta, 2005	1.8
Number of Business Establishments, 2005	92
Change in Number of Business Establishments, 2004 - 2005	-43

Computer and Electronic Products Manufacturing is Calgary's third fastest growing sub-sector, creating 67% of all jobs in this sub-sector in Alberta.

In the past decade Calgary's Computer and Electronic Products Manufacturing sub-sector experienced annual average employment growth of 10.7% surpassing Alberta (8.7%) and far outpacing Canada (2.6%).

The unemployment rate in this segment in Calgary is 5.6% compared to Alberta (3.8%) and Canada (5%).

With a location quotient of 1.8, Calgary is a net exporter of these products to other areas of the province.

Computer and Electronic Manufacturing	Growth Rates (%)				10 yr. Average Proportion of Sub-Sector (%)
	Labour Force		Employment		Employment
	Jurisdiction	1996 -2005	10 yr. Average	1996 -2005	10 yr. Average
Canada	14.2	2.4	14.4	2.6	5.4
Alberta	20.5	8.3	18.6	8.7	5.3
Calgary	-2.7	9.3	-5.6	10.7	10.1

## Computer and Electronic Products Manufacturing Companies in Calgary and Area

- Ametek Western Research
- Barton Instruments
- Beta Monitors & Controls Ltd
- Cam Tech Industries Inc
- Dynamic Source Manufacturing Inc
- Enerflex Syntech
- Fischer Rosemount Ltd
- General Dynamics Canada Ltd
- General Electric, Energy Services
- Guardian Telecom Inc
- Harris Canada Inc
- Kadon Electro Mechanical Svc
- NovaTel
- Nuflo Measurement Systems
- Peacock Inc
- Sabre Instruments Svc Ltd
- Spartan Controls Ltd
- VooDoo Computers
- Global Thermoelectric

## Furniture and Related Products Manufacturing



Companies in the Furniture and Related Product Manufacturing sub-sector created the largest number of new jobs in the sector over the past decade, as the Calgary Region continues to experience an influx of new residents and businesses. Companies in the sub-sector make furniture and related articles, such as mattresses, window blinds, cabinets, modular offices and fixtures.

Gunnar Manufacturing Inc was established in 1979. It has become one of the dominant manufacturers of office furnishings in Calgary and Western Canada, occupying over 130,000 square feet of production space and utilizing some of the best equipment and technology available in the industry.

Simo Corporation is a family-owned manufacturer of office and institutional furniture. Established in 1971, Simo manufactures high-quality seating and casegoods from two modern facilities in Calgary. It employs over 100 people and exports its products to the United States.

### Furniture and Related Products Manufacturing Employment Statistics

Employment 1996	3,600
Employment 2005	4,400
Jobs Created, 1996-2005	800
Average Annual Rate of Employment Growth, 1996-2005	6.4 %
Sub-Sector Proportion of Calgary Manufacturing Employment, 2005	9.4 %
Sub-Sector Unemployment Rate, 2005	2.2 %
Location Quotient – Canada, 2005	1.0
Location Quotient – Alberta, 2005	1.8
Number of Business Establishments, 2005	114
Change in Number of Business Establishments, 2004 - 2005	-21

Furniture and Related Products is the third largest sub-sector of Calgary's Manufacturing industry, with 4,400 jobs, representing 9.4% of all employees in the industry.

Over the past decade Calgary's Furniture and Related Products sub-sector:

- was among five Manufacturing sub-sectors that experienced the fastest employment growth, averaging 6.4% annually, growing faster than Alberta (3.0%) and Canada (4.7%); and
- created the third highest number of new jobs (800).

It is one of five Manufacturing sub-sectors that are net exporters. With a location quotient of 1.8, Calgary is a net exporter of these products to other areas of the province.



Furniture and Related Products	Growth Rates (%)				10 yr. Average Proportion of Sub-Sector (%)	
	Labour Force		Employment			Employment
	Jurisdiction	1996 -2005	10 yr. Average	1996 -2005		
Canada	40.4	4.6	43.9	4.7	4.8	
Alberta	1.5	1.8	6.5	3.0	6.2	
Calgary	18.4	6.0	22.2	6.4	10.4	

## Furniture and Related Products Manufacturing Companies in Calgary and Area

- Birchwood Furniture Ltd
- DIRT
- Dynamic Furniture Corp.
- Dynasty Furniture Mfg Ltd
- Evans Consoles
- Gunnar Office Furnishings
- Legacy Kitchen Design Group
- Magnum Designs
- Marble Factory
- Posture-Beauty Sleep Products
- RBK Millwork Ltd
- Simmons Canada Inc
- Simo Corporation
- SMED/Haworth
- Wild Rose Furniture
- Zodiac Cabinets Inc

## Miscellaneous Manufacturing



This sub-sector comprises companies that manufacture a diverse range of products, such as medical equipment and supplies, jewellery, sporting goods, toys and office supplies. It is the second fastest growing Manufacturing sub-sector in Calgary.

Topmade Plastics and Neon Signs Ltd was founded in 1979 in a 1,700 square-foot shop in Calgary. It is now one of Western Canada's busiest sign manufacturing facilities, with over 30,000 square feet of manufacturing space, offering a broad range of sign manufacturing and plastic fabrication services.

Intergold Limited is a publicly traded company that supplies the recognition industry with unique customized jewelry and merchandise for corporate, schools and sports markets.

## Miscellaneous Manufacturing Employment Statistics

Employment 1996	2,000
Employment 2005	3,700
Jobs Created, 1996-2005	1,700
Average Annual Rate of Employment Growth, 1996-2005	11.8 %
Sub-Sector Proportion of Calgary Manufacturing Employment, 2005	7.9 %
Sub-Sector Unemployment Rate, 2005	0.0 %
Location Quotient – Canada, 2005	1.0
Location Quotient – Alberta, 2005	1.7
Number of Business Establishments, 2005	251
Change in Number of Business Establishments, 2004 - 2005	-13

Miscellaneous Manufacturing includes 251 companies in Calgary, most employing fewer than 50 people; 13 companies have between 50 and 499 employees.

It is the fifth largest and the second fastest growing among Calgary's Manufacturing sub-sectors, representing 7.9% of Manufacturing employment.

Over the past decade Calgary's Miscellaneous Manufacturing sub-sector:

- experienced average annual employment growth of (11.8%), outpacing Alberta (2.3%) and Canada (3.5%); and
- created 1,700 new positions.

With a location quotient of 1.7, this sub-sector exports products to other parts of the province.

Miscellaneous Manufacturing	Growth Rates (%)				10 yr. Average Proportion of Sub-Sector (%)
	Labour Force		Employment		
	Jurisdiction	1996 -2005	10 yr. Average	1996 -2005	10 yr. Average
Canada	8.2	2.5	10.9	2.5	4.2
Alberta	22.4	2.0	28.3	2.3	4.6
Calgary	76.2	9.7	85.0	11.8	6.1



## Miscellaneous Manufacturing Companies in Calgary and Area

- Adaptive Engineering Ltd
- Aurum Ceramic Dental Labs Ltd
- Canada Fossils
- Complete Dental Lab Services Inc
- Electromec
- Guest-Tek
- Home Care Medical Supply Centre
- Intergold Limited
- Kantech Dental Lab
- Norwesco Industries Ltd
- Prowest Dental Lab Ltd
- Raytheon Canada Ltd
- Sign Solutions Ltd
- Strongco Inc
- Topmade Plastics and Neon Signs Ltd
- Westbridge Pet Containers

# MANUFACTURING SECTOR OPPORTUNITIES

## The Market

Alberta has the fastest growing economy in Canada and arguably, in North America; a variety of industries are growing rapidly. Calgary manufacturers have opportunities to exploit this growth by supplying needed products quickly and cost effectively, as the speed of delivery and quality of products is critical when undertaking industrial purchases.

The global investment community understands the favourable economic forecasts for Alberta and is looking for areas in which to invest, providing opportunities for Calgary manufacturers with expansion plans.

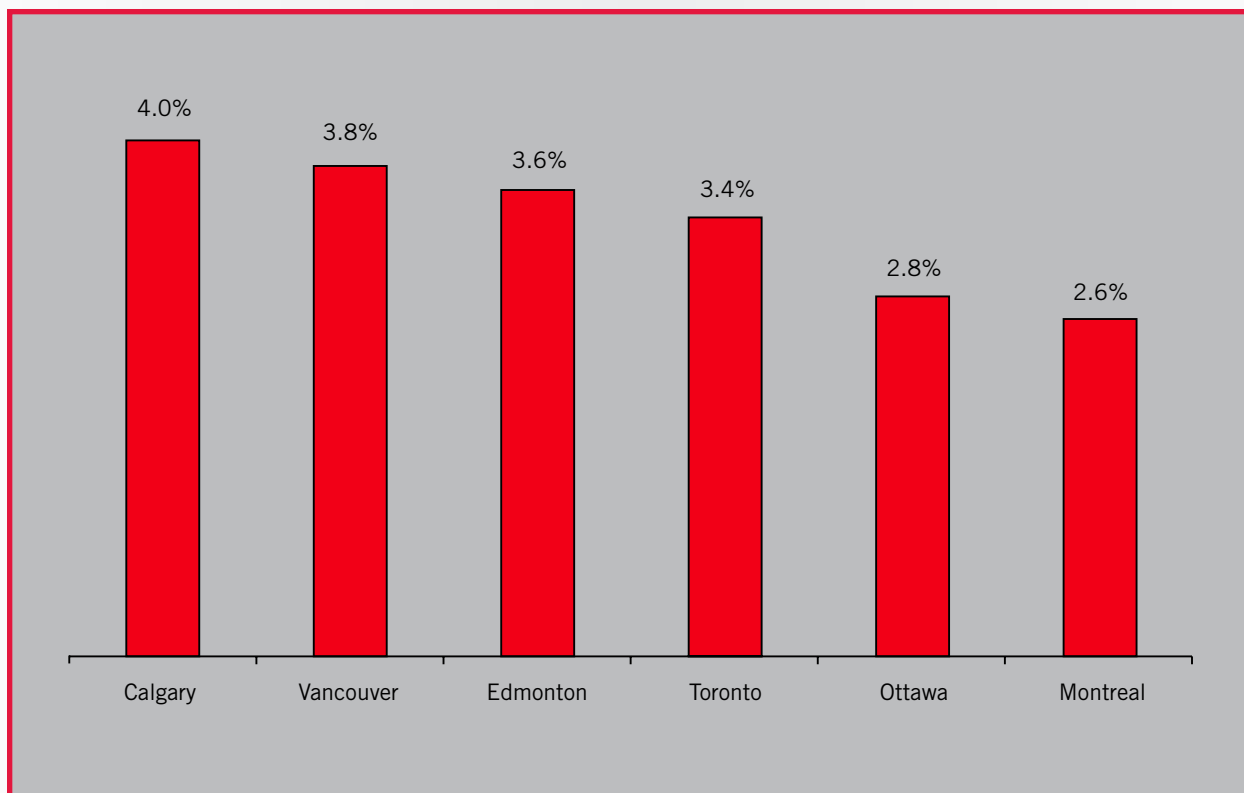
REAL GROSS DOMESTIC PRODUCT, CALGARY ECONOMIC REGION			
INDUSTRY	1995	2005	Growth
	1997 Dollars	1997 Dollars	(1995-2005)
	(000,000s)	(000,000s)	
AGRICULTURE	230	256	11.4%
MINING	8,663	6,936	-19.9%
CONSTRUCTION	2,000	4,092	104.5%
UTILITIES	751	805	7.1%
MANUFACTURING	3,034	5,166	70.3%
WHOLESALE TRADE	1,274	2,771	117.5%
RETAIL TRADE	1,354	2,721	101.0%
TRANSPORTATION AND WAREHOUSING	2,602	5,523	112.2%
FINANCE, INSURANCE AND REAL ESTATE	5,895	10,320	75.1%
PROFESSIONAL, SCIENTIFIC AND TECHNICAL	1,332	3,134	135.4%
BUSINESS SERVICES	539	850	57.5%
INFORMATION, CULTURE AND RECREATION	779	1,665	113.8%
EDUCATIONAL SERVICES	1,170	1,810	54.7%
HEALTH CARE AND SOCIAL ASSISTANCE	1,449	2,119	46.2%
ACCOMMODATION AND FOOD SERVICES	641	902	40.8%
OTHER SERVICES	560	901	60.9%
PUBLIC ADMINISTRATION	1,140	1,478	29.6%
<b>ALL INDUSTRIES</b>	<b>33,414</b>	<b>51,447</b>	<b>54.0%</b>

## Stellar Economic Performance

Calgary is Canada's fastest growing region, with an estimated 4.0% growth in real GDP in 2006. It also has had the highest growth in employment of any major Canadian city: 34.4% from 1996 to 2005.

Also, Calgary has had the highest total population growth in Canada over the past ten years (1996-2005) at a rate of 25.8%. Calgary was a migrant workforce magnet between 1996-2005, with interprovincial migration of 9,000 migrants annually. Due to this strong growth, the Calgary Region's population has topped one million.

## Real GDP Growth, 2006



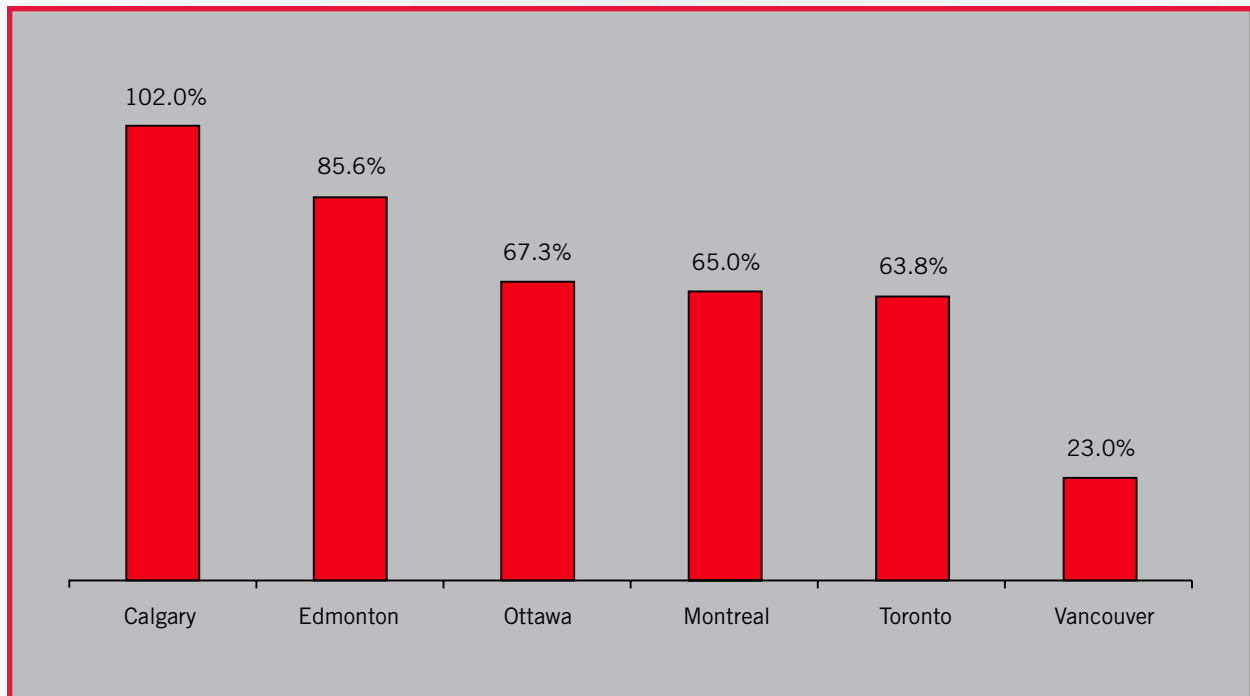
## Competitive Advantage

Calgary manufacturers are entrepreneurial. They are early adopters of new technology and have modern facilities, providing them with competitive efficiencies in a business climate of labour force challenges and sometimes-unfavourable international trading regulations.

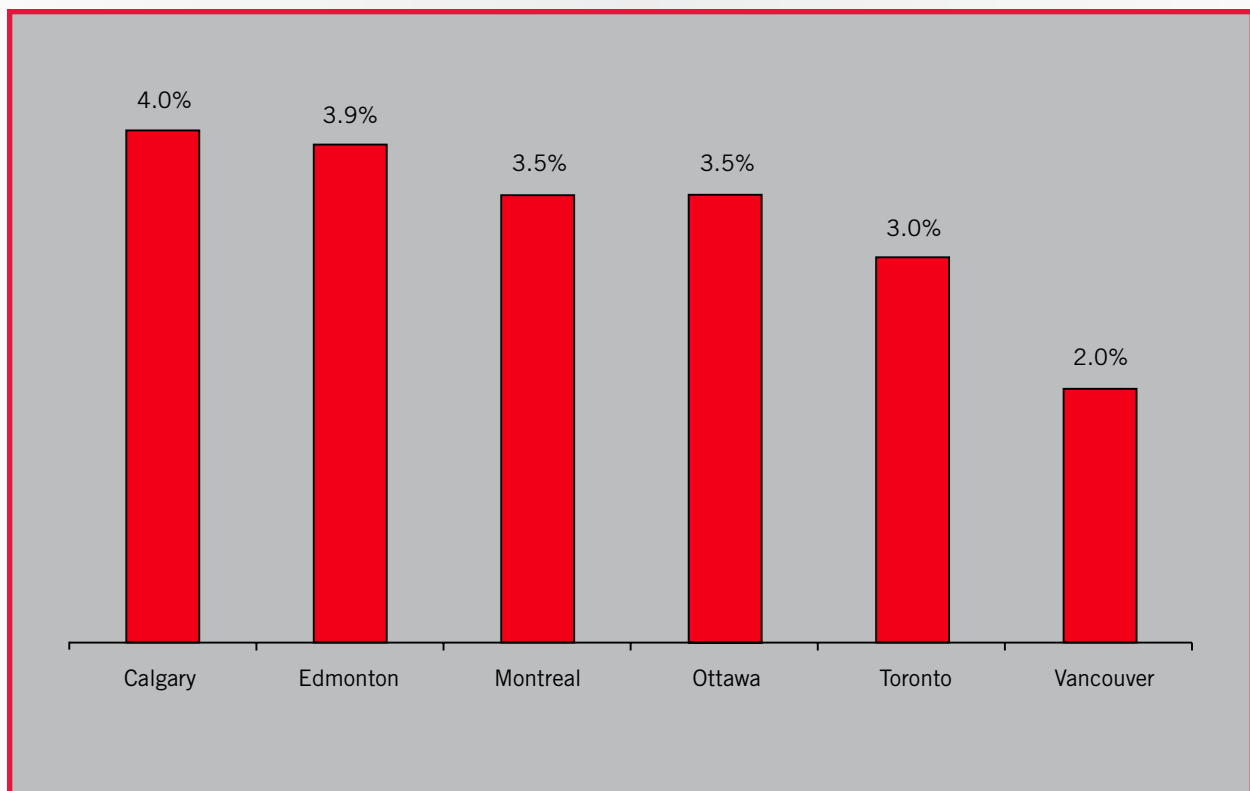
## Consumer Products

Manufacturers of consumer products have a market of almost 3.3 million people in Alberta. The Calgary Region is experiencing strong economic growth and consumers have a greater disposable income than those in many other urban centres in Canada.

### Total Retail Sales Growth, 1996-2005



### Average Annual Personal Income per Capita Growth, 1996-2005





## Transportation Costs

Increasing transportation and energy costs are creating opportunities for manufacturers to supply local markets, as buyers increasingly look for cost efficiencies. Calgary manufacturers can use the dynamic Calgary marketplace – consumer, business and industrial – to their business advantage by selling to local companies.

## Export Trade

Calgary Manufacturing companies are exporters of goods and services to other parts of Alberta in the following sub-sectors (with location quotients greater than 1):

- Primary Metal Manufacturing – 1.9
- Computer and Electronic Products Manufacturing – 1.8
- Furniture and Related Products Manufacturing – 1.8
- Miscellaneous Manufacturing – 1.7
- Printing and Support Activities – 1.3

Opportunities exist to strengthen these industries and broaden their export markets to other areas of Canada and internationally.

## Fastest Growing Sub-Sectors (by employment)

In the past decade Calgary's Manufacturing sector has created 5,400 new jobs. The top four employment-creating sub-sectors are:

- Machinery Manufacturing – 3,100 new jobs,
- Miscellaneous Manufacturing – 1,700 new jobs,
- Furniture and Related Products – 800 new jobs
- Fabricated Metal Products – 700 new jobs

These sub-sectors are also the largest and fastest growing sub-sectors in Calgary's Manufacturing sector and offer business and market development potential.

## **Under-Developed Industries**

New business opportunities and investment potential exist in several of Calgary's less developed sub-sectors, including:

- Beverage and Tobacco Product Manufacturing
- Textile Mills
- Textile Product Mills
- Clothing Manufacturing
- Leather and Allied Product Manufacturing
- Paper Manufacturing
- Petroleum and Coal Products Manufacturing
- Plastics and Rubber Products Manufacturing
- Non-Metallic Mineral Products Manufacturing
- Electric Equipment, Appliance and Component Manufacturing
- Transportation Equipment Manufacturing

## CALGARY ADVANTAGES



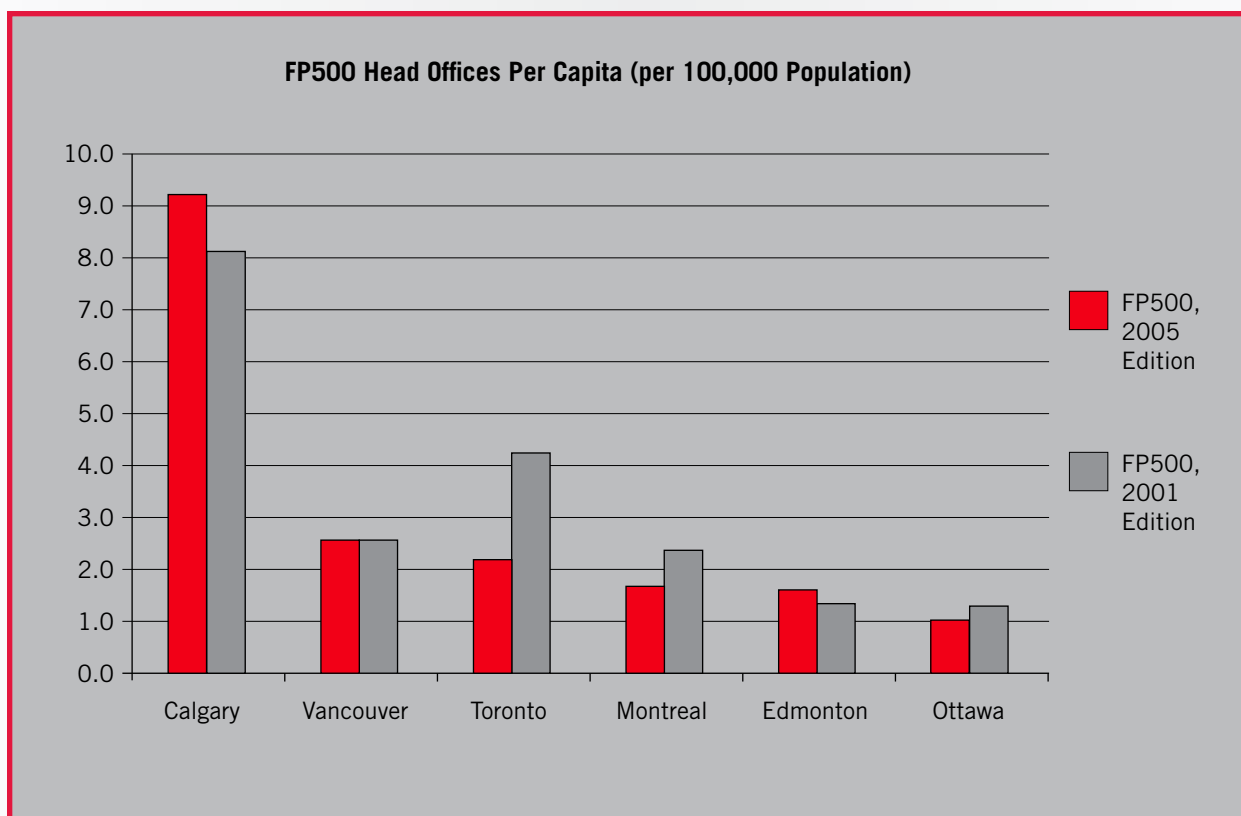
### An Exceptional Business Climate

Manufacturers operating in Calgary enjoy support for their enterprises. The large established and growing oil and gas sector has similar infrastructure and capital requirements, paving the way for companies in the Manufacturing sector.

The entrepreneurial business climate in Calgary creates an environment where small, innovative and independent companies can flourish. Investors recognize this fact and entrepreneurs in the city have easier access to a strong capital base compared to other regions in Canada.

The city is young and dynamic; entrepreneurs succeed based on the quality of their ideas and business acumen. Companies collaborate and co-operate with each other to resolve issues and find business solutions.

Calgary has the second highest concentration of head offices in Canada. Key decisions, especially purchasing decisions, are often made locally and leaders of the companies are generally accessible.



FP Businesses Per 100,000	
Calgary	9.3
Vancouver	2.6
Toronto	2.2
Montreal	1.7
Edmonton	1.7
Ottawa	1.0

Calgary and Alberta offer a business-friendly environment that minimizes regulatory barriers. The government in Alberta views its role as creating an environment where industry can create jobs. As well, because Calgary is a young city, the market is still being developed, and there is limited competition and ample opportunity in the Manufacturing sector.

## Business Cost Advantages

Compared with other major cities in North America, research and development costs, industrial land costs, housing prices and taxes are lower in Calgary and Alberta has no provincial sales tax. Ongoing economic growth in Calgary and Alberta continues to provide significant opportunities for Calgary-based manufacturers. Wages within the Manufacturing sector are competitive with other industries in Calgary.

## Business Cost Index

Calgary, AB	94.7
Toronto, ON	96.5
Oklahoma	97.8
Salt Lake City	99.6
Colorado	100.8
Dallas	101.2
Houston	102.9
<i>Source: KPMG CEO's Guide to International Business Costs, February 2006</i>	

Calgary has a very low, cost-effective business cost index, especially in comparison to other North American energy centres. For a more detailed cost comparison see page 99.

## Labour Costs Index

Calgary	100
Vancouver	104
Toronto	105
Colorado Springs	114
Minneapolis	117
Chicago	121
Seattle	122
<i>Source: KPMG CEO's Guide to International Business Costs, February 2006</i>	

## Alberta Labour Costs At a Glance

<b>Mandatory</b>	
<i>Employer paid benefits</i>	
Canadian Pension Plan	4.95% <sup>1</sup>
Worker's Compensation	\$1.57 per \$100 of insurable earnings (i.e., 1.57%) is the average for 2006. The rate for the insurance industry is \$0.29
Employment insurance	2.62% (2006) <sup>2</sup>
Paid vacation	4.0% (6% after four years) <sup>3</sup>
Holidays	Alberta employees are entitled to nine paid general holidays
<b>Voluntary</b>	
<i>Health care premiums</i>	
Single	\$44/month <sup>4</sup>
Family	\$88/month <sup>5</sup>
<b>Other</b>	
Minimum wage	\$7.00 <sup>6</sup>
<p><i>Notes:</i></p> <p>1. Determined by federal law. Maximum contribution is \$1,910.70 (2006). Calculation is based on maximum pensionable earnings of \$42,100 minus a basic deduction of \$3,500 times 4.95%.</p> <p>2. Maximum contribution of \$1,021.70 is achieved at an annual salary of \$39,000.</p> <p>3. If employees are paid a monthly salary, they receive their regular rate of pay for the time of their vacation. All other employees receive vacation pay as a percentage of wages for the year for which vacation was given. All construction employees receive 6% (no qualifying period necessary).</p> <p>4. Assumes that adjusted taxable income exceeds \$20,970; otherwise a lower rate applies.</p> <p>5. Assumes that adjusted taxable income exceeds \$39,250; otherwise a lower rate applies.</p> <p>6. As of September 1, 2005.</p> <p>Source: Alberta Economic Development, 2006</p>	

## Favourable Tax Regime

Calgary benefits from a low tax regime: the province of Alberta has no municipal or provincial sales tax and has one of the lowest provincial corporate tax rates in Canada (10%). Furthermore, the Canadian corporate tax rate is declining to 21% (as outlined in the 2004 federal budget), lower than most U.S. jurisdictions, and there is no provincial general capital tax. Calgary businesses also benefit from the fact that Alberta has no inventory tax, no machinery and equipment tax and no payroll tax.

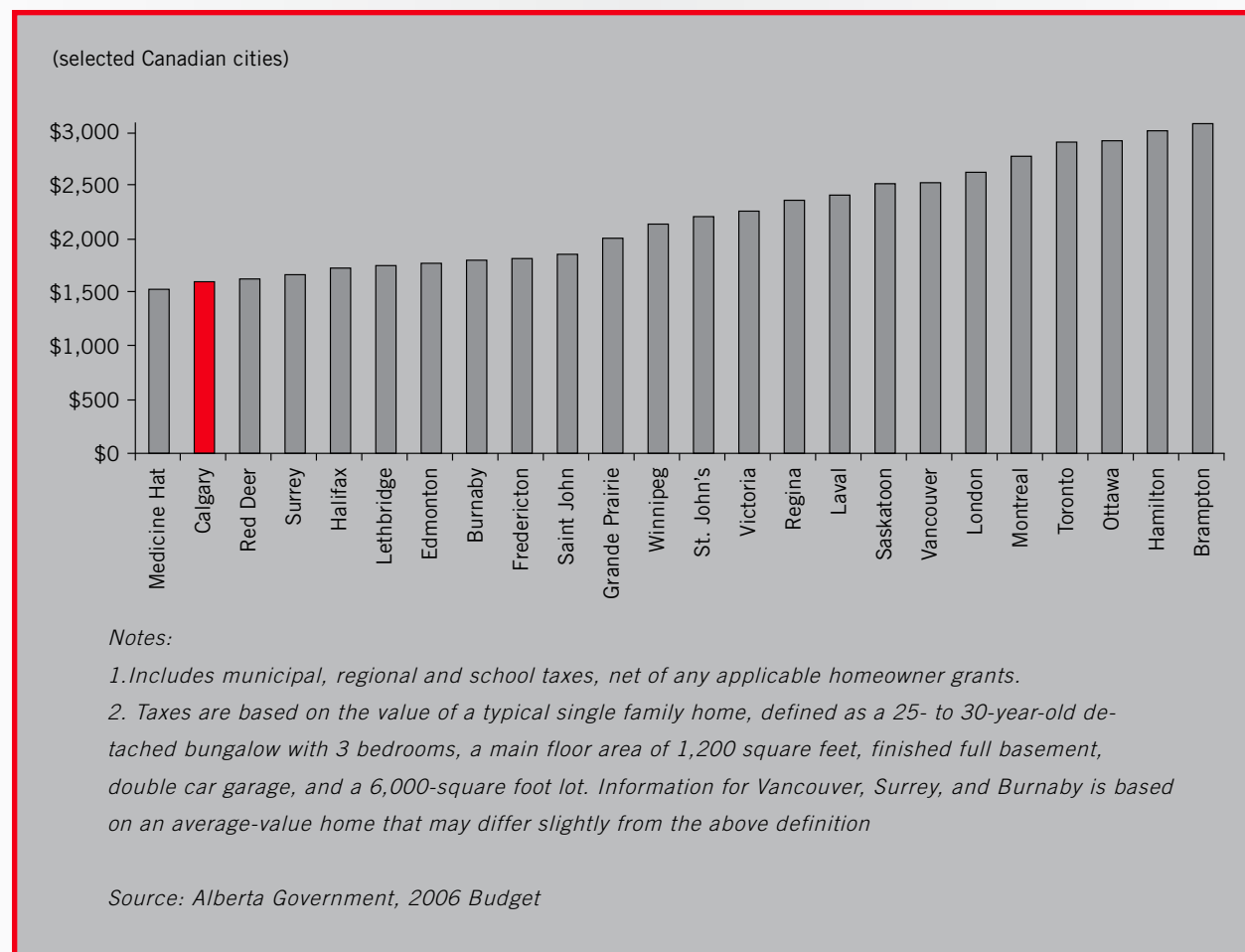
Alberta is the only Canadian province to have a flat income tax rate (10%). All other Canadian provinces work on a sliding income scale. In addition, the provincial government is debt-free and Calgary's low tax regime is expected to continue throughout the foreseeable future. Alberta's beneficial tax regime creates an environment in which businesses can operate more profitably, and individuals can retain more of their personal incomes.

## Corporate Tax

In 2006, the provincial government dropped the general corporate income tax rate to 10% from 11.5%, to ensure Alberta's global competitiveness. The small business rate is 3%.

Since 2001, the provincial government has cut the small business rate in half and doubled the small business income threshold to \$400,000. The general corporate tax rate decreased by 25%. The government has pledged to further reduce the general rate to 8%.

## Net Property Tax for a Single-Family Home, 2004





## Provincial Income Tax Rates, 2005

(%)	AB	BC	SK	MB	ON	QC	NB	NS	PE	NL	Canada
General	10.0	12.0	17.0	14.5	14.0	9.9	13.0	16.0	16.0	14.0	22.12
MFG. & processing	10.0	12.0	10-17	15.0	12.0	9.9	13.0	16.0	16.0	5.0	22.12
Small business	3.0	4.5	5.0	4.5	5.5	8.5	2.0	5.0	6.5	6.5	13.12
<i>Source: Alberta Economic Development</i>											

## State Effective Corporate Income Tax Rates

(%)	Oregon	California	N Dakota	Montana	Idaho	Colorado	Utah	N Mexico	Louisiana	Federal
General	6.6	8.84	7.0	6.75	7.6	4.63	5.0	7.6	8.0	35.00
MFG. & processing	6.6	8.84	7.0	6.75	7.6	4.63	5.0	7.6	8.0	33.95
Small business	6.6	8.84	6.83	6.75	7.6	4.63	5.0	4.8	6.85	32.00
<i>Source: Alberta Economic Development</i>										
<i>Rates effective January 2005.</i>										

## Top Marginal Personal Income Tax Rates, 2006

(%)	AB	BC	SK	MB	ON	QC	NB	NS	PE	NL
Federal	29.00	29.00	29.00	29.00	29.00	29.00	29.00	29.00	29.00	29.00
Provincial	10.00	14.70	15.00	17.40	17.41	24.00	17.84	19.25	18.37	19.64
Federal abatement <sup>1</sup>	—	—	—	—	—	(4.79)	—	—	—	—
Total	39.00	43.70	44.00	46.40	46.41	48.21	46.84	48.25	47.37	48.64
<i>Rates for other provinces known as of February 23, 2006.</i>										
<sup>1</sup> Quebec residents receive an abatement of 16.5% of basic federal tax in lieu of federal cash transfers to Quebec for several social programs. This reduces the top federal rate of 2.9% by 16.5% or 4.79% of taxable income.										
<i>Source: Alberta Government, 2006 Budget</i>										

## Major Provincial Tax Rates, 2005

		AB	BC	SK	MB	ON	QC	NB	NS	PE	NL
<b>Personal income tax</b>											
Statutory rate range											
– lowest rate	(%)	10.00	6.05	11.00	10.90	6.05	16.00	9.68	8.79	9.80	10.57
– highest rate	(%)	10.00	14.70	15.00	17.40	11.16	24.00	17.84	17.50	16.70	18.02
Surtax	(%)	–	–	–	–	20.0/36.0	–	–	10.00	10.00	9.00
<b>Credit Amounts</b>											
– Personal amount (\$)		14,899	8,858	8,589	7,734	8,377	6,520	8,061	7,231	7,412	7,410
– Spousal amount (\$)		14,899	7,585	8,589	6482	7,113	6520	6,845	6,140	6,294	6,055
<b>Corporate income tax</b>											
General rate	(%)	10.0	12.0	17.0	14.5	14.0	9.9	13.0	16.0	16.0	14.0
M&P rate	(%)	10.0	12.0	10-17	14.5	12.0	9.9	13.0	16.0	16.0	5.0
Small business											
– rate	(%)	3.0	4.5	5.0	4.5	5.5	8.5	2.0	5.0	6.5	5.0
– threshold	(\$000)	400	400	300	400	400	400	450	350	300	300
<b>Capital tax</b>											
General (max. %)		–	–	0.60	0.50	0.30	0.525	0.25	0.275	–	–
Financial institutions (max %)		–	3.00	3.25	3.00	0.90	1.30	3.00	4.00	5.00	4.00
<b>Retail sales tax</b>	(%)	–	7.00	7.00	7.00	8.00	7.5 <sup>d</sup>	8.00	8.00	10.0 <sup>d</sup>	8.00
<b>Gasoline tax</b>	(¢/litre)	9.00	14.5 <sup>e</sup>	15.00	11.50	14.7	15.2 <sup>ef</sup>	14.5 <sup>f</sup>	15.5 <sup>f</sup>	20.7	16.5 <sup>f</sup>
<b>Tobacco tax</b>	(\$/carton)	32.00	35.80	35.00 <sup>f</sup>	35.00 <sup>f</sup>	24.70	20.60	23.50 <sup>f</sup>	31.04 <sup>f</sup>	34.90	34.00 <sup>f</sup>
<b>Payroll tax</b>	(max. %)	–	–	–	2.15	1.95	4.26 <sup>g</sup>	–	–	–	2.00

*Rates for other provinces known as of February 23, 2006*

*a Quebec residents receive an abatement of 16.5% of basic federal tax in lieu of federal cash transfers to Quebec for several social programs.*

*b The general corporate tax rate is reduced by up to 7 points based on the share of a corporation's national manufacturing and processing income allocated to Saskatchewan*

*c The Quebec financial institutions capital tax includes the base rate of 1.05% and a compensatory tax of 0.25%*

*d These provinces apply their retail sales tax on the retail price of the good inclusive of the GST*

*e An additional 6 cent/litre is imposed in the greater Vancouver area, 2.5 cent/litre in Victoria and 1.5 cent/litre in Montreal.*

*f These provinces apply their retail sales taxes on the retail price of the good inclusive of the particular excise tax.*

*g This rate is based on an 11.5 cent/litre base rate and 10.7% of the average wholesale price and is recalculated on a monthly basis.*

*h Quebec levies an additional 2% compensatory tax on the wages paid by financial that is not included in this rate.*

*Source: Alberta Government, 2005 Budget*

# FUEL TAXES



Alberta has the lowest fuel tax rate of the major Canadian provinces, 3.4 cents per litre less than the national average.

## Fuel Tax Comparison

Fuel Tax Rates (cents per litre)					
	Alberta	Manitoba	British Columbia	Ontario	Saskatchewan
Gasoline (regular)	9	11.5	14.5	14.7	15
Diesel	9	11.5	15	14.3	15
Source: Gas Tax Honesty Campaign – Canadian Taxpayers Federation, M.J. Ervin and Associates, May 2005					

## Infrastructure

Calgary has highly integrated air, rail, road and transit infrastructures to meet the needs of the Region's business and commuter needs.

The Calgary International Airport's passenger facilities are considered to be the best in the world. In 2004, J.D. Power and Associates ranked Calgary's airport number one in passenger satisfaction for airports with less than 10 million passengers per year in its Global Airport Satisfaction Index Study.

Spacious, modern and friendly, Calgary's airport has non-stop flights to 49 cities around the world and is Canada's fourth busiest airport. It serves more than 9.1 million passengers a year (5.8 million domestic passengers, 1.6 million trans-border passengers and 600,000 international passengers).

Operated and maintained by the Calgary Airport Authority, the Springbank Airport is a Canada Customs-designated airport of entry located 10 kilometres west of Calgary just off the TransCanada Highway in the Municipal District of Rocky View No. 44. It occupies about 420 hectares (1,040 acres) and is the gateway to the Canadian Rockies and conveniently close to the towns of Cochrane and Bragg Creek.

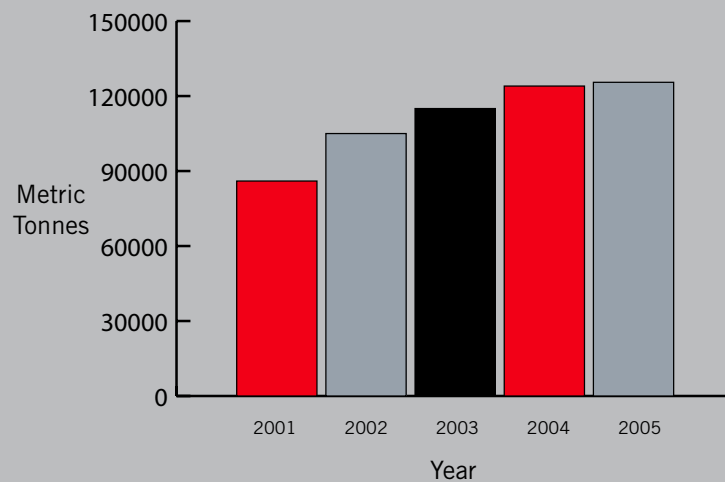
Calgary also provides ready access to Asia, Europe, and the United States; many American cities are less than a four-hour flight from Calgary.

### Driving and Flight Times

	Driving	Flight
<b>Canada</b>		
Edmonton	3 h	45 m
Montreal	38 h	4 h
Ottawa	36 h	3 h 50 m
Regina	8 h	1 h 11m
Thunder Bay	21 h	2 h 50 m
Toronto	35 h	4 h 10 m
Vancouver	11 h	1 h 15 m
Winnipeg	14 h	2 h 10 m
<b>United States</b>		
Chicago	26 h	3 h 30 m
Dallas	32 h	3 h 40 m
Denver	14.5 h	2 h 23 m
Los Angeles	27 h	3 h
New York City	40 h	5 h 53 m
Salt Lake City	15 h	1 h 46 m
San Francisco	22 h	2 h 44 m
Seattle	12 h	1 h 10 m
Source: Statistics Canada, U.S. Census Bureau, The Calgary Advantage, Proximity One, GGA Management Consultants		

In addition to a modern terminal, the Calgary International Airport has award-winning, first-class cargo facilities and services for any needs, including a premier livestock handling facility, on-airport refrigeration facilities and 24/7 operations with no curfew. Five Trade Parks on airport land promote and support economic development and enhance businesses' abilities to reach over 50 million people within one day's travel by truck. Calgary is the only Canadian city with 24/7 air cargo service to Asia and Europe. While air cargo facilities have expanded considerably to meet demand, the airport continues to have the land, resources and commitment to add facilities as business grows.

## Annual Air Cargo



*Source: Calgary Airport Authority*

## An Educated, Skilled and Motivated Labour Force



Knowledge-based businesses, including manufacturing companies, benefit from the high calibre of human resources available in Calgary: engineers, commerce graduates, product development staff, technologists, financiers and skilled trades.

Manufacturers have access to graduates from numerous first-rate post secondary educational institutions including the University of Calgary, SAIT Polytechnic, the University of Alberta, Northern Alberta Institute of Technology and the University of Lethbridge.

Several reputable educational institutions in Calgary work with industry leaders to produce graduates that have the skills and knowledge required by industry. For example, SAIT Polytechnic's Industry Advisory Committee includes key business leaders who help determine content for courses. SAIT Polytechnic's apprenticeship program encourages strong trades development and produces skilled trades people. The city also has a large pool of sub-contractors and workers in the support services.

The lower rate of unionization in Calgary, compared to other regions in Canada, and a relatively young workforce result in higher productivity and flexibility. Calgary's youthful workforce also translates into lower health-related costs such as disability claims, absence due to illness and Worker Compensation premiums.

## Unionization Rates



Alberta's overall unionization is estimated at 23.6%, which is the lowest in Canada. However, it is the public sector (public administration, education and health) that makes up the bulk of this rate. The unionization rate in the private sector is 12.2%. Between 2000 and 2004, Alberta's person-days lost due to labour disputes was the second lowest in Canada. In 2004, the estimated number of person-days lost to labour disputes in Alberta averaged 2.6 days per 10,000 paid workers, compared to 74.7 days per 10,000 paid workers nationally.

## Provincial, National Unionization Rates

Region	Total %
Canada	31.8
Quebec	40.0
Newfoundland	38.9
Manitoba	37.5
Saskatchewan	35.3
British Columbia	33.6
Prince Edward Island	32.3
Nova Scotia	28.7
New Brunswick	28.5
Ontario	27.8
<b>Alberta</b>	<b>23.7</b>
<i>Source: Statistics Canada, Labour Force Historical Review, 2004</i>	



## HUMAN CAPITAL

### University of Calgary



The University of Calgary (U of C) is a comprehensive research university that provides a dynamic setting for scholars in 16 faculties, 53 departments and more than 30 research institutes and centres. The University has more than 4,700 faculty and staff and nearly 29,000 full-time equivalent students, including 900 international students from 87 countries. The U of C granted a total of 6,455 degrees in 2004.

The U of C provides direct manufacturing training and education through the Schulich School of Engineering. Students can earn a PhD or an M.Eng. in Mechanical & Manufacturing Engineering, as well as a B.Sc. in Manufacturing Engineering.

In 2003 the U of C's manufacturing engineering program was named one of the best programs of its kind in the world. The International Society of Manufacturing Engineers awarded the U of C's program the prestigious Leadership and Excellence in the Application and Development of Integrated Manufacturing (LEAD) award, making the U of C the first Canadian recipient of this award. In 2004 the U of C granted nine graduate and 26 undergraduate degrees to students of these programs.

For further information please contact:

#### University of Calgary

2500 University Drive NW  
Calgary, Alberta, T2N 1N4  
Phone: (403) 220-5110  
[www.ucalgary.ca](http://www.ucalgary.ca)

### Southern Alberta Institute of Technology (SAIT) Polytechnic

SAIT Polytechnic is known worldwide for its quality technical education and hands-on training. SAIT Polytechnic also has over 2,300 continuing education courses and more than 70 applied degree, diploma and certificate programs. SAIT Polytechnic provides education and first class training for more than 65,000 learners beginning and enhancing their careers each year.



SAIT Polytechnic provides five career streams within the Manufacturing and Automation area:

- Automated Systems Engineering Technology
- Computer Integrated Design
- Machinist Technician
- Mechanical Engineering
- Welding Engineering

SAIT Polytechnic graduated 109 students in 2003 and 136 students in 2004 from the Manufacturing and Automation programs. In 2003, 71% of the graduates found employment in Calgary in their field of study and another 19% were working elsewhere in Alberta. For the 2004 graduates, 67% found work in their field with Calgary employers, and another 17% were working within Alberta.

For further information please contact:

**SAIT Polytechnic**

1301 16th Ave NW

Calgary, Alberta, T2M 0L4

Phone: (403) 284-SAIT (7248)

Toll free: 1-877-284-SAIT (7248)

[www.sait.ab.ca](http://www.sait.ab.ca)

## **Bow Valley College**

Bow Valley College serves more than 11,000 learners (about 4,100 full-load equivalents) each year in Calgary, at campuses throughout southern Alberta and, through contract arrangements, across Canada and in a number of other countries.

The college offers year-round programs leading to career certificates and diplomas, adult upgrading and English as a Second Language (ESL) courses. In addition, career planning and assessment services are provided to 20,000 Albertans per year, along with other specialized services for businesses and organizations.

For further information please contact:

## **Bow Valley College**

332 – 6 Avenue SE  
Calgary, Alberta T2G 4S6  
Phone: (403) 410-1400  
[www.bowvalley.ab.ca](http://www.bowvalley.ab.ca)

## **DeVry Institute of Technology**

DeVry Institute of Technology (DeVry) offers bachelor's degree and diploma programs that combine today's business skills with current technical applications. DeVry is part of the DeVry University system, which also offers undergraduate and graduate programs online.

For further information please contact:

## **DeVry Calgary**

2700 3rd Avenue SE  
Calgary, Alberta, T2A 7W4  
Phone: (403) 235-3450  
Toll free: (800) 363-5558  
[www.devry.ca](http://www.devry.ca)

# SUPPORTING ORGANIZATIONS

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## INDUSTRY ASSOCIATIONS



### Canadian Manufacturers & Exporters

Canadian Manufacturers & Exporters (CME) represents the interests of Canadian business, keeping members on the competitive edge of world-class manufacturing and trade. CME is a national association with strong divisions in every province.

The mission of CME is to continuously improve the competitiveness of Canadian industry and to expand export business.

CME members include Canada's leading businesses engaged in manufacturing and the export of goods and services. Members represent 75% of the country's manufacturing output and 90% of exports. While membership includes Canada's largest players, 80% of members are considered small and mid-sized companies.

For further information please contact:

### Canadian Manufacturers & Exporters

1931, 10060 Jasper Avenue

Edmonton, Alberta T5J 3R8

Phone: (780) 426-6622

Fax: (780) 426-1509

[www.cme-mec.ca](http://www.cme-mec.ca)

## RESEARCH AND DEVELOPMENT (R&D) ASSISTANCE

A number of federal and provincial R&D-focused grants and awards provide Calgary-based companies funding for applied or basic research.

The following programs are available to eligible Calgary companies or research personnel to offset costs that otherwise would be incurred in conducting research and development activities.

**SCIENTIFIC RESEARCH AND EXPERIMENTAL DEVELOPMENT (SR&ED)****Tax Incentive Program**

Offered by the Government of Canada and administered by the Canada Revenue Agency, the SR&ED program is the largest single source of federal government support for industrial research and development. The tax-incentive program is designed to encourage Canadian businesses to conduct research and development in Canada that will lead to new, improved, or technologically advanced products or processes.

Generally, Canadian-controlled private corporations can earn an investment tax credit (ITC) of 35% up to the first \$2 million of qualified expenditures for SR&ED conducted in Canada; and 20% on any excess amount. Other Canadian corporations, proprietorships, partnerships and trusts can earn an ITC of 20% of qualified expenditures for SR&ED conducted in Canada.

To qualify for the SR&ED program, the R&D must advance the understanding of scientific relations or technologies, address scientific or technological uncertainty and incorporate a systematic investigation by qualified personnel. Examples of work that qualifies for SR&ED tax credits includes:

- experimental development to achieve technological advancement to create new materials, devices, products, or improve existing ones;
- applied research to advance scientific knowledge with a specific practical application in view;
- basic research to advance scientific knowledge without a specific practical application in view; and
- support work in engineering, design, operations research, mathematical analysis, computer programming, data collection, test or psychological research, but only if the work is commensurate with, and directly supports, the eligible experimental development or applied or basic research.

For complete application information, including full eligibility criteria and additional information, please contact:

**The Calgary SR&ED Division**

130, 220 – 4 Avenue SW

Calgary, AB T2G 0L1

Tel: (403) 691-5890

Fax: (403) 691-6625

[www.cra-arc.gc.ca/sred](http://www.cra-arc.gc.ca/sred)



## **NATIONAL RESEARCH COUNCIL INDUSTRIAL RESEARCH ASSISTANCE PROGRAM (NRC-IRAP)**

IRAP is delivered by the NRC and provides a range of technical and business advisory services, including potential financial support, to growth-oriented Canadian small and medium sized enterprises (under 500 employees).

NRC-IRAP provides non-repayable contributions to Canadian small and medium sized enterprises interested in growing by using technology to commercialize services, products and processes in Canadian and international markets. NRC-IRAP also provides mentoring support and invests, on a cost-shared basis, in research and pre-competitive development technical projects, upon assessment of a project and firm by a team of Industrial Technology Advisors. Depending on the specifics of the proposed project, NRC-IRAP is able to invest up to 50% of eligible projects costs to a maximum of \$500,000.

NRC-IRAP also delivers two youth initiatives on behalf the Government of Canada's Youth Employment Strategy that provide financial support to hire post-secondary graduates. These programs are the Internship Program with Innovative Small and Medium Enterprises and The Collaborative Research Internships Program. Both programs are expected to last from between six and 12 months. The maximum financial support provided by NRC-IRAP in each of these programs is \$12,000 to help cover part of the graduate's salary. Overhead, benefits and project costs are the company's responsibility.

For complete application information, including full eligibility criteria and additional information, please contact:

### **National Research Council Industrial Research Assistance Program**

250 Karl Clark Road

Edmonton, AB, T6N 1E4

Tel: (780) 495-6509

Fax: (780) 495-6510

<http://irap-pari.nrc-cnrc.gc.ca/>

## **NATIONAL SCIENCES AND ENGINEERING RESEARCH COUNCIL AWARDS**

The Natural Sciences and Engineering Research Council of Canada (NSERC) supports the development of highly qualified Canadians in the natural sciences and engineering through a number of scholarship and fellowship programs. Companies may propose a research project and nominate recent doctoral graduates to undertake research for which NSERC will provide financial assistance in support of researcher salaries. To facilitate the prompt placement of qualified research candidates, NSERC maintains an inventory of pre-approved candidates.

NSERC offers financial support to the following programs:

- Industrial R&D Fellowships (IRDF) – \$30,000 per year for two years plus a minimum company contribution of \$10,000 per year.
- Industrial Postgraduate Scholarships (IPS) – \$15,000 per year for two years plus a minimum company contribution of \$6,000 per year.
- Industrial Undergraduate Student Research Awards (USRA) – \$4,500 plus an additional contribution by the company of at least 25% of the value of the award.

For complete application information, including full eligibility criteria and additional information, please contact:

**NSERC**

350 Albert Street  
Ottawa, ON K1A 1H5  
Tel: (613) 995-4273  
[www.nserc.gc.ca](http://www.nserc.gc.ca)

**ALBERTA INGENUITY FUND**

The primary objective of the Alberta Ingenuity Fund is to increase the research expertise in Alberta companies. The Alberta Ingenuity Industrial Associate award, granted to up to 40 new recipients each year, consists of an annual stipend of \$48,000 and a research allowance of \$7,000 per year for up to two years for a total of \$110,000.

Eligible candidates are Master's or PhD program graduates, within five years of their application date, or expected to complete their degree requirements within three months of submitting the application.

Eligible companies are for-profit, provincially or federally incorporated and operating in Alberta; or if not incorporated, they must be wholly Alberta owned. The company must be engaged, to some extent, in R&D activities based on technology derived from science and engineering disciplines.

For complete application information, including full eligibility criteria and additional information, please contact:



**Alberta Ingenuity Fund**

2410 Manulife Plaza,  
10180 - 101 Street  
Edmonton, AB T5J 3S4  
Tel: (780) 423-5735  
Fax: (780) 420-0018  
[www.albertaingenuity.ca](http://www.albertaingenuity.ca)

**BUSINESS AND INFORMATION SERVICES****ALBERTA APPRENTICESHIP & INDUSTRY TRAINING BOARD**

The Apprenticeship and Industry Training Board's main function is to advise the Alberta Minister of Learning on labour market issues that relate to training and certification of people in designated trades and occupations.

Alberta's Apprenticeship and Industry Training System is an industry-driven partnership with government that ensures a highly skilled, internationally competitive workforce in 55 designated trades and occupations.

For further information please contact:

**The Alberta Apprenticeship and Industry Training Board**

300, 10325 Bonaventure Drive SE  
Calgary, Alberta T2J 7E4  
Tel: (403) 297-6457  
Fax: (403) 297-3799  
[www.tradesecrets.org](http://www.tradesecrets.org)

**ALBERTA ECONOMIC DEVELOPMENT (AED)**

AED is one of 23 government ministries within the Alberta Government structure. AED works in partnership with business, industry associations, other provincial ministries and other governments to:

- provide quality information and competitive intelligence
- diversify industry products and services
- expand export and trade
- attract investment
- promote tourism

For further information please contact:

**Alberta Economic Development**

300, 639 – 5 Avenue SW  
Calgary, Alberta, T2P 0M9  
Phone: (403) 297-6284  
[www.alberta-canada.com](http://www.alberta-canada.com)

**ALBERTA INNOVATION & SCIENCE**

Alberta Innovation and Science is responsible for high-tech research and development policy advice, as well as developing business opportunities in information and communications technology research. The Ministry works to grow, attract, and retain firms specializing in industries such as electronics, microelectronics, telecommunications and information networks, computer technology, multimedia, advanced materials and manufacturing.

The Ministry works closely with Alberta's research community and coordinates grant funding for various industry programs.

For further information please contact:

**Alberta Innovation and Science**

9th Floor, 10365 - 97 Street  
Edmonton, Alberta T5J 3W7  
Phone: (780) 427-0285  
Fax: (780) 415-9824  
[www.innovation.gov.ab.ca](http://www.innovation.gov.ab.ca)

**ALBERTA RESEARCH COUNCIL (ARC)**

ARC develops and commercializes technology to give customers a competitive advantage. A Canadian leader in innovation, ARC provides solutions globally to the energy, life sciences, agriculture, environment, forestry and Manufacturing sectors.

ARC is known for scientific excellence business knowledge, superb facilities and global contacts. It provides access to leading expertise and unique facilities and provides intellectual capital to help grow businesses.

ARC is a wholly owned subsidiary of the Alberta Science and Research Authority (ASRA).

For further information please contact:

**Alberta Research Council**

3608 - 33 Street NW  
Calgary, Alberta T2L 2A6  
Tel (403) 210-5222

Fax (403) 210-5380  
[www.arc.ab.ca](http://www.arc.ab.ca)

**CALGARY BUSINESS INFORMATION CENTRE (CBIC)**

CBIC is a first-stop resource, established to provide individuals with free or affordable access to useful and authoritative information for launching a business in the Calgary Region.

CBIC offers:

- one-on-one business guidance
- professional consulting services
- entrepreneurial roundtables
- workshops and seminars
- a reference library
- an Info-Centre
- an online bookstore

CBIC is a not-for-profit organization funded by all three levels of government and is a member of the Canada Business Service Network. Together, CBIC and the Business Link- Business Service Centre promote the development and success of small business in Alberta.

For further information please contact:

**Calgary Business Information Centre**

250, 639 - 5 Avenue SW

Calgary, AB, T2P 0M9

Phone: (403) 221-7800

Fax: (403) 221-7817

[www.calgary-smallbusiness.com](http://www.calgary-smallbusiness.com)

**NATIONAL RESEARCH COUNCIL (NRC)**

NRC is the Government of Canada's premier organization for research and development comprising over 20 institutes and national programs, spanning a wide variety of disciplines and offering a broad array of services. It has been active since 1916.

NRC helps small and medium-sized Canadian firms build their capability in technology and innovation. Industrial Technology Advisors work on-site to assess a company's needs and design solutions tailored to the business.

Twenty-five Industrial Technology Advisors work in Alberta and the Northwest Territories. They manage assigned areas and serve as sector specialists to resource-based industries, manufacturing and the service industries. Expertise spans a range of key technologies such as electronics, biotechnology, materials, telecommunications, and information technology.

For further information please contact:

**National Research Council**

250 Karl Clark Road

Edmonton, Alberta T6N 1E4

Telephone: (780) 495-6509

Facsimile: (780) 495-6510

[http://irap-pari.nrc-cnrc.gc.ca/main\\_e.html](http://irap-pari.nrc-cnrc.gc.ca/main_e.html)

## **TSX VENTURE EXCHANGE**

The TSX Venture Exchange is Canada's public venture capital marketplace. It provides emerging companies with access to capital while offering investors a well-regulated market for making venture investments. TSX Venture Exchange-listed companies are active primarily in the mining, oil and gas, manufacturing, technology and financial services sectors.

TSX Venture Exchange gives the Canadian economy the capital-raising infrastructure for the small and medium size businesses that are driving economic growth in Canada.

With offices in Vancouver, Calgary, Winnipeg, Toronto and Montreal, TSX Venture Exchange provides corporate finance and business development expertise in key markets across the country.

For further information please contact:

### **Calgary Office**

10 Flr, 300 - 5 Avenue SW  
Calgary, Alberta, T2P 3C4  
Phone: (403) 218-2800  
Toll free: (877) 884-2369  
Fax: (403) 237-0450  
[www.tsx.com](http://www.tsx.com)

## TELECOMMUNICATIONS, BUSINESS, AND INFORMATION SERVICES

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Calgary's excellent telecommunications capabilities for global communications allow Manufacturing companies to manage their international operations effectively. The city is one of the most wired in North America and has a high rate of Internet use: 67 per cent of Calgarians are connected to the World Wide Web.

### **Calgary Technologies Inc.**

Established in 1981, Calgary Technologies Inc (CTI), is a joint partnership between The City of Calgary, the Calgary Chamber of Commerce and the University of Calgary to work with technology and life sciences companies and entrepreneurs to develop and expand their operations in the city. CTI's business is the economic development of Calgary's advanced technology sector.

CTI provides an array of unique programs and services for technology, commercialization and incubation, including networking opportunities, as a means of helping grow the technology sector. The organization is a single point of contact for investors in the technology sector of Calgary.

[www.calgarytechnologies.com](http://www.calgarytechnologies.com)

### **Calgary Regional Partnership**

A number of diverse municipalities and jurisdictions, each with a unique identity, have joined the Calgary Regional Partnership to work cooperatively on issues related to delivering municipal services to residents and businesses, enhancing prosperity and protecting the natural environments upon which their citizens depend.

[www.calgaryregion.ca](http://www.calgaryregion.ca)

# EXCEPTIONAL QUALITY OF LIFE



## Health

Calgarians value the quality of their public health-care system and are committed to continuously improving its services and program. For example, a new Alberta Children's Hospital has been opened on the University of Calgary's West Campus by the Calgary Health Region. This world-class pediatric health-care facility features state-of-the-art technology, family-centred care and research and education – to the benefit of all Calgarians.

The vast majority of the Calgary area's health services are delivered by 2,000 physicians (family practitioners and specialists) and the Calgary Health Region. Funded by the Province of Alberta, the Calgary Health Region employs 22,000 people and each year delivers more than \$1.5 billion of health-care services at more than 100 locations, including four hospitals in Calgary (the Foothills Medical Centre, Rockyview General Hospital, Peter Lougheed Centre and Alberta Children's Hospital) and more than a dozen hospitals and health-care centres in the surrounding communities of Canmore, Banff, Claresholm, Didsbury, High River, Black Diamond, Strathmore and Vulcan. In all, the Region serves more than 1.1 million people in southern Alberta, southeastern British Columbia and southwestern Saskatchewan.

An integral part of Calgary's health-care system is the University of Calgary, where the faculties of Medicine, Nursing, and Kinesiology educate new generations of health-care practitioners and conduct world-renowned research.



Calgary was ranked as the Healthiest City in the World in which to live in a survey by Mercer Human Resource Consulting in 2004; the survey examined 144 major cities and determined Calgary is one of the safest cities in Canada to live in.

## Education

In addition to the post-secondary institutions highlighted previously, Calgary's education system includes; the Calgary Board of Education, which has 215 public schools with more than 9,000 teaching staff and nearly 100,000 students. Also, the city has 96 Catholic schools with more than 4,000 staff and nearly 44,000 students. A comprehensive curriculum of academic arts and sciences programs is offered by Calgary's primary and secondary schools, with a commitment to excellence and child-centred development. Calgary is also served by a growing number of private, charter and alternative schools.

Alberta and Calgary students ranked at the top in reading, mathematics and science in an international study undertaken by the Organization for Economic Cooperation & Development in 2003.

## Lifestyle



A modern metropolis with a Western heritage. An exceptionally productive workforce that loves to play in the Rocky Mountains. A four-season city with abundant sunshine and warm Chinook winds.

If ever a city offered the best of all worlds, surely it is Calgary.

By international standards, Calgary is young (founded just 130 years ago). But it is confident and successful. For most of the past century the city has hosted “The Greatest Outdoor Show on Earth,” the annual Calgary Stampede and Exhibition. In 1988, the city welcomed the world to the “best-ever” Olympic Winter Games, demonstrating not only its friendly spirit, but its “can-do” attitude. These events reflect Calgarians’ love of the Old West and winter sports, particularly skiing and ice hockey.

Indeed, Calgarians were dubbed the greatest sports fans in the world in 2004 when the underdog Calgary Flames made it to the NHL’s Stanley Cup Finals.

Calgarians love to work and play. They are Canada’s most productive workers – and arguably they have Canada’s greatest backyard: the majestic Rocky Mountains which include Banff National Park and Kananaskis Country.

Within city limits are the Bow River, one of the finest trout rivers in the world, more than two dozen golf courses and three dozen parks connected by 580 kilometres of cycling and pedestrian pathways and 260 kilometres of on-street bike routes. Calgary’s natural environment is one of the city’s greatest assets. Citizens and government alike are deeply committed to protecting and preserving the river valleys and environmentally sensitive areas as well as the integrity of its communities.

First-class facilities such as the Pengrowth Olympic Saddledome, Spruce Meadows and Canada Olympic Park provide additional recreational opportunities and act as training and performance venues for some of the world’s best athletes. As well, recreational facilities abound, such as community ice hockey arenas, swimming pools, soccer pitches and more.

Calgary’s moderate climate accommodates year-round outdoor activities. The city receives 2,395 hours of sunshine a year. The average daily high in summer (June, July and August) is 22.3 °C; the average daily high in winter (December, January and February) is -2.3 °C, although daytimes temperatures of 10 °C are common during Chinooks, periodic warm western winds.

Arts and culture thrive in the city. The EPCOR CENTRE for the Performing Arts is home to several professional theatre companies and the Calgary Philharmonic Orchestra, and hosts hundreds of touring performers every year. Arts and artifacts take centre stage at the city’s two museums: the Glenbow Museum and the Nickle Arts Museum. With programs in drawing, painting, sculpture, photography, glass, ceramics and other arts, the Alberta College of Art and Design helps educate and expand Calgary’s artistic community.

For more than half a century, Calgary has been Canada’s energy capital, and the city is home to more than 87% of Canada’s oil and natural gas producers. To compete in the world arena, Calgary boasts international leaders in energy discovery, recovery, technology, and associated services and support.

# APPENDIX A

## SELECTED EXAMPLES OF MANUFACTURING COMPANIES, BY SUB-SECTOR

MANUFACTURING SECTOR
SAMPLE LIST OF COMPANIES BY SUB-SECTOR (ALPHABETICAL)
<b>Food Manufacturing</b>
ADM Milling Co
Alberta Processing Co
Byblos Bakery Ltd
Canada Malting Co Ltd
Cargill
Centennial Foods
El Molino Foods Of Canada Ltd
Lucerne Foods Ltd
Old Dutch Foods Ltd
Spolumbo's
Sunterra
X L Meats
<b>Beverage and Tobacco Product Manufacturing</b>
Alberta Distillers Ltd
Andres Wines Ltd
Arctic Glacier Premium Ice
Atlas Wine Merchants
Big Rock Brewery Ltd
<b>Textile Mills</b>
Alsew Canada Inc
Chemtron Manufacturing Ltd
Gordon Sheppard Agencies Ltd
Pac Cana Enterprises Ltd
Texsyl Manufacturing
Ultimate Drapery Creations

<b>MANUFACTURING SECTOR</b>
<b>SAMPLE LIST OF COMPANIES BY SUB-SECTOR (ALPHABETICAL)</b>
<b>Textile Product Mills</b>
Calgary Tent & Awning Ltd
Can-Stitch Ltd
Flag Craft
Flagworks
Great Plains Cresting
Kordick Enterprises
Precision Colour Imaging Ltd
Precision-Lite Dock
Sprung's Western Tent & Awning
Texsyl Manufacturing Ltd
Warner Shelter Systems Ltd
Western Ribbons Ltd
<b>Clothing Manufacturing</b>
Everharvest Enterprises Ltd
First Impressions Sportswear
Guardina Protective Clothing
Jam-Cal Sportswear Mfg Ltd
Kids Only Clothing Club Inc
Kings Fashions
Larson Group
MPT-Shirts Inc
New Hatchwear
New Tech Garments Na Ltd
<b>Leather and Allied Product Manufacturing</b>
Graf Canada
Alberta Boot Mfg. Co. Inc
Wood's Leather Goods

**MANUFACTURING SECTOR****SAMPLE LIST OF COMPANIES BY SUB-SECTOR (ALPHABETICAL)****Wood Product Manufacturing**

All Span Building Ltd

Artek Inc

Continental Door &amp; Bldg Supls

Heritage Woodwork Co

Ifco Systems

Iko Industries Ltd

Jager Building Systems

Nascor Ltd

Nose Creek Forest Products Inc

Spindles, Stairs &amp; Railings Ltd

Rona Timbertech Truss

Steels Industrial Products

Vipco Industries Inc

**Paper Manufacturing**

Chester Plastics Ltd

Hood Packaging

Natayo Manufacturing Inc

Norampac Inc

Olaf Packaging Ltd

Premier Packaging Inc

Shippers Supply Inc

Smurfit-Mbi Canada

Triple Three Trading Ltd

**Printing and Related Support Activities**

Bolder Graphics

Carbon Copy Imaging

Data Business Forms

Datamark Systems-Sheraton Div

McAra Printing Ltd

Phoenix Press Inc

Quebecor Printpak

<b>MANUFACTURING SECTOR</b>
<b>SAMPLE LIST OF COMPANIES BY SUB-SECTOR (ALPHABETICAL)</b>
Sundog Printing Ltd
Topline Printing Inc
Trans Continental Printing Inc
West Canadian Graphics
<b>Petroleum and Coal Products Manufacturing</b>
Boss Lubricants
E S Ind Ltd
Guardex Lubes Inc
Ken-Nan Automotive Equipment
Kvaerner Process Systems
Marathon Ashland Petroleum
Maryn Lubricants Inc
Phoenix Metals Ltd
<b>Chemical Manufacturing</b>
Agrium Inc
Air Liquide Canada
Baker Petrolite Corp
Baymag
Dow Chemicals Canada Ltd
Elp Products Ltd
France Compressor Products
Glaxo Wellcome Inc
Mocoat Services Ltd
Nova Chemicals Corp
Praxair
Westland Limited
<b>Plastics and Rubber Products Manufacturing</b>
ATK Blow Moulding Inc
Atlas Plastics Inc
Black Forest Wood Co
Chinook Plastics Ltd
Duraprene Industries Ltd

**MANUFACTURING SECTOR****SAMPLE LIST OF COMPANIES BY SUB-SECTOR (ALPHABETICAL)**

Dynamic Molded Products Ltd

Goodall

Ipex Inc

L &amp; L Tool &amp; Injection Ltd

Nilex Inc

North American Profiles Group

Perfect Fit Mfg Ltd

PLASTI-FAB

Topmade Plastics &amp; Neon Signs

Westbridge PET Containers

Western Polymers Ltd

**Non-Metallic Mineral Product Manufacturing**

Active Marble &amp; Tile

AFGD

Ceramic Protection Corporation

Continental Lime Ltd

Goldray Inc

Lafarge Canada Inc

Lafarge Construction Materials

Platinum Grover Int Inc

PPG Canada Inc

Sum Canada Enterprises Ltd

Thermal Systems KWC Ltd

Venus Bath Products Inc

Westcon Precast

**Primary Metal Manufacturing**

Canfer Rolling Mills Ltd

Chittom Equipment Ltd

Elite Technical Inc

JP Metal Manufacturing Inc

M A Steel Foundry Ltd

Nardei Fabricators Ltd



<b>MANUFACTURING SECTOR</b>
<b>SAMPLE LIST OF COMPANIES BY SUB-SECTOR (ALPHABETICAL)</b>
National-Oilwell Canada Ltd
Poor Boy Stove Pipe
Prudential Steel Ltd
Sovereign Castings Ltd
Sureway Metal Systems Ltd
<b>Fabricated Metal Product Manufacturing</b>
<b>Forging and Stamping - 3321</b>
Alta Valve Ltd
Inventronics Limited
<b>Cutlery and Hand Tool Manufacturing</b>
First Quality Industries Ltd
Randmar Inc
Thunderbolt Industries Ltd
Western Saws (Alberta) Ltd
<b>Architectural and Structural Metals Manufacturing</b>
Appel Extrusions
Geco Steel Corp Ltd
Gienow
Plains Fabrication & Supply
Scott Springfield Mfg
Supreme Windows (Calgary) Inc
TIW Western
Varsteel Limited
<b>Boiler, Tank and Shipping Container Manufacturing</b>
Alberta Drum Inc
All Trailer Canada Inc
Bonnybrook Steel Ltd
Calgary Plastic Container
Exchangers Industries
Hefcorp
Horton CBI Ltd
Petro-Tech Heaters Ltd
Westech Industrial Ltd

**MANUFACTURING SECTOR****SAMPLE LIST OF COMPANIES BY SUB-SECTOR (ALPHABETICAL)****Spring and Wire Product Manufacturing**

Barrier Fencing Ltd

Boundary Equipment Ltd

Continental Wire Cloth

Jne Retail Equipment Inc

Loyalty Metal Factory Ltd

Round-Up Bascart Services Alberta

Standen's Limited

Wire Rope Industries Ltd

**Machine Shops, Turned Product, and Screw, Nut and Bolt Manufacturing**

Aero-Tech Specialty Welding

Alberta Aircraft Overhaul

G N Corporations Inc

Hunting Oilfield Services Canada

Kudu

Mco Industries Inc

Mid Western Machine Works Inc

Natayo Manufacturing

National-Oilwell Canada Ltd

Optima Manufacturing Inc

Rostel Industries Ltd

**Coating, Engraving, Heat Treating and Allied Activities**

Alberta Plating Ltd

Alberta Powder Coating

Bellare Industrial Coatings

Calgary Powder Coatings Inc

Endurance Technologies Inc

Foothills Decorating Ltd

Indalex Alumin Solutions

JIT Powder Coaters

<b>MANUFACTURING SECTOR</b>
<b>SAMPLE LIST OF COMPANIES BY SUB-SECTOR (ALPHABETICAL)</b>
Polymer Science Corp
Protective Surface Engineering
Shea Foams Ltd
<b>Other Fabricated Metal Product Manufacturing</b>
International Utility Structures Inc
Advance Engineered Products
Brews Controls Corp
Capitan Overlay Technologies
Century Valve & Machine Ltd
Indutech Canada Ltd
Wheatley Canada Ltd
<b>Machinery Manufacturing</b>
Chinook Industrial Ltd
Clemro Western Ltd
Conematic
Enerflex Systems
Energy Industries Inc
Enersul Inc
Prestige Railings & Stairs Ltd
Raffin Electric Co Ltd
Rostel Industries Ltd
Ruffneck Heaters
System Aire Inc
Tesco Manufacturing Div
Toromont Process Systems
Transcanada Turbines Ltd
Vipond Fire Protection Inc
<b>Computer and Electronic Product Manufacturing</b>
Ametek Western Research
Barton Instruments
Beta Monitors & Controls Ltd
Cam Tech Industries Inc

**MANUFACTURING SECTOR****SAMPLE LIST OF COMPANIES BY SUB-SECTOR (ALPHABETICAL)**

Dynamic Source Manufacturing Inc

Enerflex Syntech

Fischer Rosemount Ltd

General Dynamics Canada Ltd

General Electric, Energy Services

Guardian Telecom Inc

Harris Canada Inc

Kadon Electro Mechanical Svc

NovaTel

Nuflo Measurement Systems

Peacock Inc

Sabre Instruments Svc Ltd

Spartan Controls Ltd

VooDoo Computers

**Electronic Equipment, Appliance and Component Manufacturing**

Advantage Products Inc

Alberta Computer Cable Inc

Anixter Canada Inc

BW Technologies

CSI Wireless Inc

Electrotek Limited

Elite Technical Inc

Hampton Power Systems Ltd

Imaging Dynamics Company Ltd

Moeller Electric

Pelorus Navigation Systems Inc

Sercel Canada Ltd

Smart Technologies

Wermac Electric Ltd

MANUFACTURING SECTOR	
SAMPLE LIST OF COMPANIES BY SUB-SECTOR (ALPHABETICAL)	
<b>Transportation Equipment Manufacturing</b>	
	Atco Structures Inc
	Bell Sports Canada Inc
	C & V Portable Accommodations
	E & M Upholstering Ltd
	Focus Auto Design Inc
	Global Railways Industries
	Nortruck Manufacturing & Distr
	Raytheon Canada Limited
	Traction
	Wabash National Trailer Centre
<b>Furniture and Related Product Manufacturing</b>	
	Birchwood Furniture Ltd
	DIRTT
	Dynamic Furniture Corp.
	Dynasty Furniture Mfg Ltd
	Evans Consoles
	Gunnar Office Furnishings
	Legacy Kitchen Design Group
	Magnum Designs
	Marble Factory
	Posture-Beauty Sleep Products
	RBK Millwork Ltd
	Simmons Canada Inc
	Simo Corporation
	SMED/Haworth
	Wild Rose Furniture
	Zodiac Cabinets Inc

**MANUFACTURING SECTOR****SAMPLE LIST OF COMPANIES BY SUB-SECTOR (ALPHABETICAL)****Miscellaneous Manufacturing**

Adaptive Engineering Ltd

Aurum Ceramic Dental Labs Ltd

Canada Fossils

Complete Dental Lab Services Inc

Electromec

Guest-Tek

Home Care Medical Supply Centre

Intergold Limited

Kantech Dental Lab

Norwesco Industries Ltd

Prowest Dental Lab Ltd

Raytheon Canada Ltd

Sign Solutions Ltd

Strongco Inc

Topmade Plastics and Neon Signs Ltd

*Source: Calgary Economic Development & InfoCanada*

# APPENDIX B

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## MANUFACTURING WAGES AND SALARIES

The following is a breakdown by sub-sector, where information is available, on the wages and salaries of the Manufacturing sector. Please note the following explanations of the data presented.

### Hourly Wage Detail

Includes full-time and part-time employees.

\*All wages are hourly except where otherwise indicated. Wages and salaries do not include overtime hours, tips, benefits, profit shares, bonuses (unrelated to production) and other forms of compensation.

These wage results include employees in companies of 10 or more employees, from the public and private sector and include full and part-time employees. Average wages were weighted by the number of employees.

### Overall Results

\*Rounded to the nearest dollar.

### Skills Shortage Information

In 2005 employers were asked if they experienced hiring difficulties or had vacancies that had been unfilled for four months or longer. Note: the information is a snapshot in time and represents the opinions of the organizations that responded to the 2005 survey.

The Vacancy Rate is calculated using the following formula: Number of vacancies reported divided by the sum of the overall number of employees in the occupation plus the number of vacancies reported. For example, if 10 vacancies were reported on a total of 90 employees in an occupation, the vacancy rate would be 10%.

### Industry Information

View wage information broken down by industry in Alberta, at: [www.alis.gov.ab.ca/wageinfo](http://www.alis.gov.ab.ca/wageinfo)



## Supervisors, Mineral and Metal Processing

Occupation Title (NOC):		Supervisors, Mineral and Metal Processing			
Region:		Calgary			
NOC Code:		9211			
HOURLY WAGE DETAIL: (For full-time and part-time employees)					
Wages*	Minimum	Maximum	Average	Median	Sampling Error
Starting	N/A	N/A	N/A	N/A	C
After 3 years	\$14.60	\$24.00	\$17.40	\$15.50	C
Top	N/A	N/A	N/A	N/A	C
*All wages are hourly except where otherwise indicated. Wages and salaries do not include overtime hours, tips, benefits, profit shares, bonuses (unrelated to production) and other forms of compensation. For more information, please review the Survey Methodology Report .					
OVERALL RESULTS TABLE:					
Average Hours Worked (per week) 44.3					
Overall Average Wage (per hour), Calgary				\$16.02	
Overall Average Salary (annual)*, Calgary				\$36,982	
*Rounded to the nearest dollar					
SKILLS SHORTAGE INFORMATION:					
Estimated Hiring Difficulties			(percent of responding organizations)		
YES			0%		
NO			50%		
N/A			50%		
Estimated Vacancy Rate					
2005			0%		
INDUSTRY INFORMATION:					
Industry			Average Salary		
Manufacturing			\$35,345		
OVERALL ACROSS ALL INDUSTRIES			\$35,480		

## Supervisors, Plastic and Rubber Products Manufacturing

Occupation Title (NOC):		Supervisors, Plastic and Rubber Products Manufacturing			
Region:		Calgary			
NOC Code:		9214			
HOURLY WAGE DETAIL: (For full-time and part-time employees)					
Wages*	Minimum	Maximum	Average	Median	Sampling Error
Starting	N/A	N/A	N/A	N/A	C
After 3 years	N/A	N/A	N/A	N/A	C
Top	\$17.31	\$20.00	\$18.33	\$18.00	C
*All wages are hourly except where otherwise indicated. Wages and salaries do not include overtime hours, tips, benefits, profit shares, bonuses (unrelated to production) and other forms of compensation. For more information, please review the Survey Methodology Report .					
OVERALL RESULTS TABLE:					
Average Hours Worked (per week)				41.1	
Overall Average Wage (per hour), Calgary				\$18.52	
Overall Average Salary (annual)*, Calgary				\$39,493	
*Rounded to the nearest dollar					
SKILLS SHORTAGE INFORMATION:					
Estimated Hiring Difficulties		(percent of responding organizations)			
YES	25%				
NO	50%				
N/A	25%				
Estimated Vacancy Rate					
2005				N/A	
INDUSTRY INFORMATION:					
Industry			Average Salary		
Manufacturing			\$43,575		
OVERALL ACROSS ALL INDUSTRIES			\$39,109		

## Supervisors, Electronics Manufacturing (Alberta information only)

Occupation Title (NOC):		Supervisors, Electronics Manufacturing			
Region:		Alberta			
NOC Code:		9222			
HOURLY WAGE DETAIL: (For full-time and part-time employees)					
Wages*	Minimum	Maximum	Average	Median	Sampling Error
Starting	N/A	N/A	N/A	N/A	C
After 3 years	N/A	N/A	N/A	N/A	C
Top	N/A	N/A	N/A	N/A	C
*All wages are hourly except where otherwise indicated. Wages and salaries do not include overtime hours, tips, benefits, profit shares, bonuses (unrelated to production) and other forms of compensation. For more information, please review the Survey Methodology Report .					
OVERALL RESULTS TABLE:					
Average Hours Worked (per week)				38.2	
Overall Average Wage (per hour), Alberta				\$22.15	
Overall Average Salary (annual)*, Alberta				\$43,600	
*Rounded to the nearest dollar					
SKILLS SHORTAGE INFORMATION:					
Estimated Hiring Difficulties			(percent of responding organizations)		
YES			0%		
NO			25%		
N/A			75%		
Estimated Vacancy Rate					
2005			0%		
INDUSTRY INFORMATION:					
Industry			Average Salary		
Manufacturing			\$41,997		
OVERALL ACROSS ALL INDUSTRIES			\$43,600		

## Supervisors, Furniture and Fixtures Manufacturing

Occupation Title (NOC):		Supervisors, Furniture and Fixtures Manufacturing			
Region:		Calgary			
NOC Code:		9224			
HOURLY WAGE DETAIL: (For full-time and part-time employees)					
Wages*	Minimum	Maximum	Average	Median	Sampling Error
Starting	N/A	N/A	N/A	N/A	C
After 3 years	N/A	N/A	N/A	N/A	C
Top	\$17.50	\$25.00	\$23.02	\$23.92	C
*All wages are hourly except where otherwise indicated. Wages and salaries do not include overtime hours, tips, benefits, profit shares, bonuses (unrelated to production) and other forms of compensation. For more information, please review the Survey Methodology Report .					
OVERALL RESULTS TABLE:					
Average Hours Worked (per week)				40.0	
Overall Average Wage (per hour), Calgary				\$21.27	
Overall Average Salary (annual)*, Calgary				\$44,248	
*Rounded to the nearest dollar					
SKILLS SHORTAGE INFORMATION:					
Estimated Hiring Difficulties			(percent of responding organizations)		
YES			0%		
NO			25%		
N/A			75%		
Estimated Vacancy Rate					
2005				0%	
INDUSTRY INFORMATION:					
Industry			Average Salary		
Manufacturing			\$47,725		
OVERALL ACROSS ALL INDUSTRIES			\$46,185		

## Supervisors, Other Mechanical and Metal Products Manufacturing

Occupation Title (NOC):		Supervisors, Other Mechanical and Metal Products Manufacturing			
Region:		Calgary			
NOC Code:		9226			
HOURLY WAGE DETAIL: (For full-time and part-time employees)					
Wages*	Minimum	Maximum	Average	Median	Sampling Error
Starting	N/A	N/A	N/A	N/A	C
After 3 years	N/A	N/A	N/A	N/A	C
Top	N/A	N/A	N/A	N/A	C
*All wages are hourly except where otherwise indicated. Wages and salaries do not include overtime hours, tips, benefits, profit shares, bonuses (unrelated to production) and other forms of compensation. For more information, please review the Survey Methodology Report .					
OVERALL RESULTS TABLE:					
Average Hours Worked (per week)				40.1	
Overall Average Wage (per hour), Calgary				\$25.81	
Overall Average Salary (annual)*, Calgary				\$53,809	
*Rounded to the nearest dollar					
SKILLS SHORTAGE INFORMATION:					
Estimated Hiring Difficulties			(percent of responding organizations)		
YES			0%		
NO			43%		
N/A			57%		
Estimated Vacancy Rate					
2005			0%		
INDUSTRY INFORMATION:					
Industry			Average Salary		
Manufacturing			\$52,947		
OVERALL ACROSS ALL INDUSTRIES			\$51,959		

## Machine Operators, Mineral and Metal Processing

Occupation Title (NOC):		Machine Operators, Mineral and Metal Processing			
Region:		Calgary			
NOC Code:		9411			
HOURLY WAGE DETAIL: (For full-time and part-time employees)					
Wages*	Minimum	Maximum	Average	Median	Sampling Error
Starting	N/A	N/A	N/A	N/A	C
After 3 years	N/A	N/A	N/A	N/A	C
Top	N/A	N/A	N/A	N/A	C
*All wages are hourly except where otherwise indicated. Wages and salaries do not include overtime hours, tips, benefits, profit shares, bonuses (unrelated to production) and other forms of compensation. For more information, please review the Survey Methodology Report .					
OVERALL RESULTS TABLE:					
Average Hours Worked (per week)				39.6	
Overall Average Wage (per hour), Calgary				\$16.85	
Overall Average Salary (annual)*, Calgary				\$34,602	
*Rounded to the nearest dollar					
SKILLS SHORTAGE INFORMATION:					
Estimated Hiring Difficulties			(percent of responding organizations)		
YES			N/A		
NO			N/A		
N/A			N/A		
Estimated Vacancy Rate					
2005				N/A	
INDUSTRY INFORMATION:					
Industry			Average Salary		
Manufacturing				\$33,189	
OVERALL ACROSS ALL INDUSTRIES				\$32,552	

## Foundry Workers (Alberta information only)

Occupation Title (NOC):			Foundry Workers		
Region:			Alberta		
NOC Code:			9412		
HOURLY WAGE DETAIL: (For full-time and part-time employees)					
Wages*	Minimum	Maximum	Average	Median	Sampling Error
Starting	N/A	N/A	N/A	N/A	C
After 3 years	\$15.00	\$16.00	\$15.73	\$16.00	C
Top	N/A	N/A	N/A	N/A	C
*All wages are hourly except where otherwise indicated. Wages and salaries do not include overtime hours, tips, benefits, profit shares, bonuses (unrelated to production) and other forms of compensation. For more information, please review the Survey Methodology Report .					
OVERALL RESULTS TABLE:					
Average Hours Worked (per week)				43.1	
Overall Average Wage (per hour), Alberta				\$16.87	
Overall Average Salary (annual)*, Alberta				\$37,621	
*Rounded to the nearest dollar					
SKILLS SHORTAGE INFORMATION:					
Estimated Hiring Difficulties			(percent of responding organizations)		
YES			50%		
NO			50%		
N/A			0%		
Estimated Vacancy Rate					
2005			5%		
INDUSTRY INFORMATION:					
Industry			Average Salary		
Manufacturing			\$37,621		
OVERALL ACROSS ALL INDUSTRIES			\$37,621		

## Plastics Processing Machine Operators

Occupation Title (NOC):		Plastics Processing Machine Operators			
Region:		Calgary			
NOC Code:		9422			
HOURLY WAGE DETAIL: (For full-time and part-time employees)					
Wages*	Minimum	Maximum	Average	Median	Sampling Error
Starting	\$8.00	\$13.46	\$8.69	\$8.50	C
After 3 years	N/A	N/A	N/A	N/A	C
Top	N/A	N/A	N/A	N/A	C
*All wages are hourly except where otherwise indicated. Wages and salaries do not include overtime hours, tips, benefits, profit shares, bonuses (unrelated to production) and other forms of compensation. For more information, please review the Survey Methodology Report .					
OVERALL RESULTS TABLE:					
Average Hours Worked (per week)				40.0	
Overall Average Wage (per hour), Calgary				\$9.09	
Overall Average Salary (annual)*, Calgary				\$18,909	
*Rounded to the nearest dollar					
SKILLS SHORTAGE INFORMATION:					
Estimated Hiring Difficulties			(percent of responding organizations)		
YES			13%		
NO			13%		
N/A			75%		
Estimated Vacancy Rate					
2005				0%	
INDUSTRY INFORMATION:					
Industry			Average Salary		
Manufacturing			\$30,581		
OVERALL ACROSS ALL INDUSTRIES			\$28,353		



## Electronics Assemblers, Fabricators, Inspectors and Testers

Occupation Title (NOC):		Electronics Assemblers, Fabricators, Inspectors and Testers			
Region:		Calgary			
NOC Code:		9483			
HOURLY WAGE DETAIL: (For full-time and part-time employees)					
Wages*	Minimum	Maximum	Average	Median	Sampling Error
Starting	\$10.00	\$12.29	\$10.86	\$10.00	B
After 3 years	\$11.00	\$15.38	\$11.50	\$11.00	B
Top	\$12.02	\$29.15	\$14.80	\$12.17	B
*All wages are hourly except where otherwise indicated. Wages and salaries do not include overtime hours, tips, benefits, profit shares, bonuses (unrelated to production) and other forms of compensation. For more information, please review the Survey Methodology Report .					
OVERALL RESULTS TABLE:					
Average Hours Worked (per week)				39.9	
Overall Average Wage (per hour), Calgary				\$11.76	
Overall Average Salary (annual)*, Calgary				\$24,403	
*Rounded to the nearest dollar					
SKILLS SHORTAGE INFORMATION:					
Estimated Hiring Difficulties			(percent of responding organizations)		
YES			13%		
NO			75%		
N/A			13%		
Estimated Vacancy Rate					
2005				0%	
INDUSTRY INFORMATION:					
Industry			Average Salary		
Manufacturing			\$26,208		
OVERALL ACROSS ALL INDUSTRIES			\$26,208		

## Mechanical Assemblers and Inspectors

Occupation Title (NOC):		Mechanical Assemblers and Inspectors			
Region:		Calgary			
NOC Code:		9486			
HOURLY WAGE DETAIL:					
(For full-time and part-time employees)					
Wages*	Minimum	Maximum	Average	Median	Sampling Error
Starting	\$14.00	\$18.03	\$15.88	\$14.50	C
After 3 years	\$16.00	\$21.63	\$19.52	\$20.00	C
Top	\$19.00	\$27.00	\$25.37	\$26.44	C
*All wages are hourly except where otherwise indicated. Wages and salaries do not include overtime hours, tips, benefits, profit shares, bonuses (unrelated to production) and other forms of compensation. For more information, please review the Survey Methodology Report .					
OVERALL RESULTS TABLE:					
Average Hours Worked (per week)				40.0	
Overall Average Wage (per hour), Calgary				\$20.33	
Overall Average Salary (annual)*, Calgary				\$42,286	
*Rounded to the nearest dollar					
SKILLS SHORTAGE INFORMATION:					
Estimated Hiring Difficulties			(percent of responding organizations)		
YES			50%		
NO			50%		
N/A			0%		
Estimated Vacancy Rate					
2005				0%	
INDUSTRY INFORMATION:					
Industry			Average Salary		
Retail Trade			\$45,383		
Other Services (Repair, Personal, Related)			\$33,440		
Manufacturing			\$27,745		
OVERALL ACROSS ALL INDUSTRIES			\$31,080		

## Furniture and Fixture Assemblers and Inspectors

Occupation Title (NOC):		Furniture and Fixture Assemblers and Inspectors			
Region:		Calgary			
NOC Code:		9492			
HOURLY WAGE DETAIL: (For full-time and part-time employees)					
Wages*	Minimum	Maximum	Average	Median	Sampling Error
Starting	\$8.00	\$19.60	\$14.65	\$18.19	C
After 3 years	\$12.00	\$16.00	\$13.43	\$13.25	C
Top	N/A	N/A	N/A	N/A	C
*All wages are hourly except where otherwise indicated. Wages and salaries do not include overtime hours, tips, benefits, profit shares, bonuses (unrelated to production) and other forms of compensation. For more information, please review the Survey Methodology Report .					
OVERALL RESULTS TABLE:					
Average Hours Worked (per week)				40.1	
Overall Average Wage (per hour), Calgary				\$14.52	
Overall Average Salary (annual)*, Calgary				\$30,295	
*Rounded to the nearest dollar					
SKILLS SHORTAGE INFORMATION:					
Estimated Hiring Difficulties			(percent of responding organizations)		
YES			11%		
NO			44%		
N/A			44%		
Estimated Vacancy Rate					
2005			0%		
INDUSTRY INFORMATION:					
Industry			Average Salary		
Manufacturing			\$26,566		
OVERALL ACROSS ALL INDUSTRIES			\$26,597		

## Furniture Finishers and Refinishers (Alberta information only)

Occupation Title (NOC):			Furniture Finishers and Refinishers		
Region:			Alberta		
NOC Code:			9494		
HOURLY WAGE DETAIL: (For full-time and part-time employees)					
Wages*	Minimum	Maximum	Average	Median	Sampling Error
Starting	N/A	N/A	N/A	N/A	C
After 3 years	N/A	N/A	N/A	N/A	C
Top	N/A	N/A	N/A	N/A	C
*All wages are hourly except where otherwise indicated. Wages and salaries do not include overtime hours, tips, benefits, profit shares, bonuses (unrelated to production) and other forms of compensation. For more information, please review the Survey Methodology Report .					
OVERALL RESULTS TABLE:					
Average Hours Worked (per week)				40.6	
Overall Average Wage (per hour), Alberta				\$15.95	
Overall Average Salary (annual)*, Alberta				\$33,580	
*Rounded to the nearest dollar					
SKILLS SHORTAGE INFORMATION:					
Estimated Hiring Difficulties			(percent of responding organizations)		
YES			40%		
NO			60%		
N/A			0%		
Estimated Vacancy Rate					
2005			9%		
INDUSTRY INFORMATION:					
Industry			Average Salary		
Manufacturing			\$32,287		
OVERALL ACROSS ALL INDUSTRIES			\$33,580		

## Painters and Coaters - Industrial

Occupation Title (NOC):		Painters and Coaters - Industrial			
Region:		Calgary			
NOC Code:		9496			
HOURLY WAGE DETAIL: (For full-time and part-time employees)					
Wages*	Minimum	Maximum	Average	Median	Sampling Error
Starting	\$10.40	\$18.00	\$14.48	\$15.06	C
After 3 years	\$13.00	\$21.85	\$17.25	\$17.63	C
Top	\$18.00	\$28.41	\$21.39	\$19.96	C
*All wages are hourly except where otherwise indicated. Wages and salaries do not include overtime hours, tips, benefits, profit shares, bonuses (unrelated to production) and other forms of compensation. For more information, please review the Survey Methodology Report .					
OVERALL RESULTS TABLE:					
Average Hours Worked (per week)				41.0	
Overall Average Wage (per hour), Calgary				\$18.16	
Overall Average Salary (annual)*, Calgary				\$38,941	
*Rounded to the nearest dollar					
SKILLS SHORTAGE INFORMATION:					
Estimated Hiring Difficulties			(percent of responding organizations)		
YES			21%		
NO			57%		
N/A			21%		
Estimated Vacancy Rate					
2005			5%		
INDUSTRY INFORMATION:					
Industry			Average Salary		
Construction			\$44,556		
Other Services (Repair, Personal, Related)			\$44,155		
Manufacturing			\$42,780		
OVERALL ACROSS ALL INDUSTRIES			\$43,044		

## Machining Tool Operators

Occupation Title (NOC):			Machining Tool Operators		
Region:			Calgary		
NOC Code:			9511		
HOURLY WAGE DETAIL: (For full-time and part-time employees)					
Wages*	Minimum	Maximum	Average	Median	Sampling Error
Starting	\$11.54	\$16.00	\$12.53	\$12.00	A
After 3 years	\$13.00	\$24.00	\$16.41	\$15.84	A
Top	\$14.42	\$25.00	\$17.76	\$16.50	A
*All wages are hourly except where otherwise indicated. Wages and salaries do not include overtime hours, tips, benefits, profit shares, bonuses (unrelated to production) and other forms of compensation. For more information, please review the Survey Methodology Report .					
OVERALL RESULTS TABLE:					
Average Hours Worked (per week)				40.4	
Overall Average Wage (per hour), Calgary				\$14.47	
Overall Average Salary (annual)*, Calgary				\$30,407	
*Rounded to the nearest dollar					
SKILLS SHORTAGE INFORMATION:					
Estimated Hiring Difficulties			(percent of responding organizations)		
YES			20%		
NO			50%		
N/A			30%		
Estimated Vacancy Rate					
2005				0%	
INDUSTRY INFORMATION:					
Industry			Average Salary		
Manufacturing			\$36,494		
OVERALL ACROSS ALL INDUSTRIES			\$36,997		

## Woodworking Machine Operators

Occupation Title (NOC):		Woodworking Machine Operators			
Region:		Calgary			
NOC Code:		9513			
HOURLY WAGE DETAIL: (For full-time and part-time employees)					
Wages*	Minimum	Maximum	Average	Median	Sampling Error
Starting	\$9.00	\$22.00	\$13.92	\$14.00	A
After 3 years	\$12.00	\$24.00	\$17.91	\$21.00	A
Top	\$14.00	\$25.50	\$21.75	\$25.00	A
*All wages are hourly except where otherwise indicated. Wages and salaries do not include overtime hours, tips, benefits, profit shares, bonuses (unrelated to production) and other forms of compensation. For more information, please review the Survey Methodology Report .					
OVERALL RESULTS TABLE:					
Average Hours Worked (per week)				55.1	
Overall Average Wage (per hour), Calgary				\$17.26	
Overall Average Salary (annual)*, Calgary				\$52,247	
*Rounded to the nearest dollar					
SKILLS SHORTAGE INFORMATION:					
Estimated Hiring Difficulties			(percent of responding organizations)		
YES			43%		
NO			43%		
N/A			14%		
Estimated Vacancy Rate					
2005				0%	
INDUSTRY INFORMATION:					
Industry			Average Salary		
Manufacturing			\$39,570		
OVERALL ACROSS ALL INDUSTRIES			\$45,367		

## Metalworking Machine Operators

Occupation Title (NOC):		Metalworking Machine Operators			
Region:		Calgary			
NOC Code:		9514			
HOURLY WAGE DETAIL:					
(For full-time and part-time employees)					
Wages*	Minimum	Maximum	Average	Median	Sampling Error
Starting	\$10.00	\$23.16	\$19.01	\$18.90	A
After 3 years	\$14.00	\$25.97	\$23.32	\$24.00	A
Top	\$14.50	\$26.00	\$24.89	\$26.00	A
*All wages are hourly except where otherwise indicated. Wages and salaries do not include overtime hours, tips, benefits, profit shares, bonuses (unrelated to production) and other forms of compensation. For more information, please review the Survey Methodology Report .					
OVERALL RESULTS TABLE:					
Average Hours Worked (per week)				40.2	
Overall Average Wage (per hour), Calgary				\$22.78	
Overall Average Salary (annual)*, Calgary				\$47,469	
*Rounded to the nearest dollar					
SKILLS SHORTAGE INFORMATION:					
Estimated Hiring Difficulties			(percent of responding organizations)		
YES			17%		
NO			58%		
N/A			25%		
Estimated Vacancy Rate					
2005			1%		
INDUSTRY INFORMATION:					
Industry			Average Salary		
Public Administration			\$50,318		
Manufacturing			\$43,685		
OVERALL ACROSS ALL INDUSTRIES			\$44,665		



## Labourers in Metal Fabrication

Occupation Title (NOC):		Labourers in Metal Fabrication			
Region:		Calgary			
NOC Code:		9612			
HOURLY WAGE DETAIL: (For full-time and part-time employees)					
Wages*	Minimum	Maximum	Average	Median	Sampling Error
Starting	\$7.00	\$15.76	\$11.27	\$11.50	B
After 3 years	\$10.00	\$24.00	\$14.82	\$15.00	B
Top	\$12.00	\$23.00	\$17.44	\$17.00	B
*All wages are hourly except where otherwise indicated. Wages and salaries do not include overtime hours, tips, benefits, profit shares, bonuses (unrelated to production) and other forms of compensation. For more information, please review the Survey Methodology Report .					
OVERALL RESULTS TABLE:					
Average Hours Worked (per week)				41.7	
Overall Average Wage (per hour), Calgary				\$14.47	
Overall Average Salary (annual)*, Calgary				\$31,491	
*Rounded to the nearest dollar					
SKILLS SHORTAGE INFORMATION:					
Estimated Hiring Difficulties			(percent of responding organizations)		
YES			15%		
NO			81%		
N/A			4%		
Estimated Vacancy Rate					
2005			2%		
INDUSTRY INFORMATION:					
Industry			Average Salary		
Construction			\$32,917		
Manufacturing			\$30,910		
Mining and Oil & Gas Extraction			\$28,983		
OVERALL ACROSS ALL INDUSTRIES			\$31,105		

## Labourers in Rubber and Plastic Products Manufacturing (Alberta information only)

Occupation Title (NOC):		Labourers in Rubber and Plastic Products Manufacturing			
Region:		Alberta			
NOC Code:		9615			
HOURLY WAGE DETAIL: (For full-time and part-time employees)					
Wages*	Minimum	Maximum	Average	Median	Sampling Error
Starting	\$8.50	\$27.30	\$13.11	\$12.63	B
After 3 years	\$12.00	\$18.50	\$15.74	\$15.50	B
Top	\$16.00	\$25.00	\$19.08	\$18.61	B
*All wages are hourly except where otherwise indicated. Wages and salaries do not include overtime hours, tips, benefits, profit shares, bonuses (unrelated to production) and other forms of compensation. For more information, please review the Survey Methodology Report .					
OVERALL RESULTS TABLE:					
Average Hours Worked (per week)				40.0	
Overall Average Wage (per hour), Alberta				\$15.67	
Overall Average Salary (annual)*, Alberta				\$32,632	
*Rounded to the nearest dollar					
SKILLS SHORTAGE INFORMATION:					
Estimated Hiring Difficulties			(percent of responding organizations)		
YES			31%		
NO			54%		
N/A			15%		
Estimated Vacancy Rate					
2005				2%	
INDUSTRY INFORMATION:					
Industry			Average Salary		
Manufacturing			\$32,632		
OVERALL ACROSS ALL INDUSTRIES			\$32,632		

## Notes

In some instances, anomalies have occurred as a result of weighting the data, the occurrence of outliers, or the margin of error associated with the survey results. For example, the average top pay may be less than the average pay after three years experience. In most cases, the inconsistency is fairly small and within the margin of error for the survey. For some occupations, outliers have been suppressed and the averages have been recalculated. For some wage levels for other occupations the information has been entirely suppressed. N/A is listed in instances of insufficient response.

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Source:

[www.alis.gov.ab.ca/wageinfo](http://www.alis.gov.ab.ca/wageinfo)

## KPMG Competitive Alternatives Section

The KPMG Competitive Alternatives Report profiles various business operations in countries and cities around the world. The result of this independent study, published in 2006, is a comprehensive analysis of 27 cost components most likely to vary by location and be of the most relevance to companies comparing business costs in Canada, the United States and offshore.

Cost components in the analysis include labour, utilities, investment in land and buildings, and relevant taxes at all levels (e.g. national, municipal, property). The analysis also includes any site location incentives that have clearly defined eligibility requirements such as tax abatements, investment tax credits, sales tax exemptions and other development and job tax credits where applicable.

The basis for comparison among the various locations is the after-tax cost of business start-up and operation over a 10-year time frame. A detailed description of the methodology and the detailed reports are available on the internet at:

[www.competitivealternatives.com](http://www.competitivealternatives.com)

Effective tax rates are not shown where results are not meaningful due to marginal profitability.

Effective tax rates may be negative due to refundable tax credits exceeding taxes paid.

## Competitive Alternatives.com Cost Model Detailed Comparison Report

Operation: Average of 12 operations (US \$'000)

City	Calgary	Edmonton	Montreal	Ottawa	Toronto	Vancouver	Chicago	Colorado	Minneapolis	Seattle
Province/State	AB	AB	QC	ON	BC	IL	CO	MN	MN	WA
Country	CA	CA	CA	CA	CA	CA	USA	USA	USA	USA
Exchange rate per USD\$	C\$1.174	C\$1.174	C\$1.174	C\$1.174	C\$1.174	C\$1.174	\$1.000	\$1.000	\$1.000	\$1.000
<b>Initial Investment</b>										
Land	978	758	785	706	1,998	2,129	874	694	685	1,225
Buildings	1,985	2,146	2,077	2,437	1,754	2,373	2,096	1,863	2,513	2,844
	2,963	2,905	2,862	3,143	3,752	4,501	2,971	2,558	3,198	4,069
Rank, total investment	4	3	2	6	8	10	5	1	7	9
Cash	238	238	238	238	238	238	238	238	238	238
Inventory	1,125	1,125	1,125	1,125	1,125	1,125	1,125	1,125	1,125	1,125
Fixed assets	4,710	4,710	4,710	4,710	4,710	4,710	4,710	4,710	4,710	4,710
	\$9,037	\$8,979	\$8,936	\$9,217	\$9,825	\$10,575	\$9,044	\$8,631	\$9,272	\$10,142
<b>Initial Financing</b>										
Debt	4,485	4,456	4,428	4,583	4,918	5,328	4,496	4,261	4,614	5,096
Equity	4,552	4,523	4,508	4,634	4,907	5,247	4,549	4,371	4,658	5,047
	\$9,037	\$8,979	\$8,936	\$9,217	\$9,825	\$10,575	\$9,044	\$8,631	\$9,272	\$10,142
<b>10-Year Average Profit &amp; Loss</b>										
Sales	15,915	15,819	15,929	15,935	16,076	15,986	16,200	16,172	16,221	16,225
<b>Location-sensitive costs</b>										
Salary and wages	4,820	4,603	4,806	4,821	5,046	5,068	5,392	4,914	5,320	5,609
Statutory plans	290	283	501	356	365	282	526	455	515	576
Other benefits	983	939	964	972	1,017	999	1,233	1,550	1,555	1,225
Total labour	6,092	5,825	6,272	6,149	6,427	6,349	7,151	9,918	7,390	7,409
Rank, total labour	2	1	4	3	6	5	8	7	9	10
Facility lease	268	246	252	252	335	268	295	328	289	263
Rank, facility lease	5	1	2	2	10	5	8	9	7	4
Road freight	458	495	251	251	223	566	281	597	681	795
Air freight	23	24	21	20	18	21	20	22	20	21
Sea freight	92	93	70	93	74	78	97	97	99	68
Total transportation	574	612	342	363	314	664	397	715	799	884
Rank, transportation	5	6	2	3	1	7	4	8	9	10
Electricity	188	159	167	212	234	118	259	224	173	155
Gas	92	88	114	96	96	93	102	88	96	103
Telecommunications	61	61	58	60	58	58	53	56	55	52
<b>Total utilities</b>	<b>340</b>	<b>308</b>	<b>338</b>	<b>369</b>	<b>388</b>	<b>269</b>	<b>414</b>	<b>368</b>	<b>323</b>	<b>310</b>

City	Calgary	Edmonton	Montreal	Ottawa	Toronto	Vancouver	Chicago	Colorado	Minneapolis	Seattle
Rank, electricity	6	3	4	7	9	1	10	8	5	2
Rank, gas	3	1	10	6	6	4	8	2	5	9
Rank, telecommunications	9	9	5	8	5	7	2	4	3	1
<b>Total operating costs</b>	<b>7,275</b>	<b>6,991</b>	<b>7,203</b>	<b>7,133</b>	<b>7,464</b>	<b>7,552</b>	<b>8,257</b>	<b>8,330</b>	<b>8,801</b>	<b>8,866</b>
Rank, operating costs	4	1	3	2	5	6	7	8	9	10
Interest	47	34	35	52	80	112	95	89	162	198
Depreciation	723	734	729	753	708	749	730	715	758	780
<b>Total interest, depreciation</b>	<b>770</b>	<b>767</b>	<b>764</b>	<b>805</b>	<b>788</b>	<b>861</b>	<b>826</b>	<b>804</b>	<b>920</b>	<b>978</b>
Income tax, national	408	456	429	406	367	325	392	371	227	191
Income tax, regional	265	288	207	265	243	175	73	57	13	-
Income tax, local	-	-	-	-	-	-	-	-	-	-
Capital tax, national	-	-	-	-	-	-	-	-	-	-
Capital tax, regional	-	-	34	5	5	-	5	-	3	-
Sales tax	-	-	-	104	104	119	111	84	148	196
Property tax	61	62	123	158	119	126	76	107	125	91
Gross receipts tax	-	-	-	-	-	-	-	-	-	50
Business tax	49	41	-	-	-	-	-	-	-	-
Grants, subsidies	-	-	-	-	-	-	-	-	-	-
Total taxes (net of grants)	783	846	792	941	842	743	663	621	479	455
<b>Total location-sensitive costs</b>	<b>8,828</b>	<b>8,604</b>	<b>8,759</b>	<b>8,878</b>	<b>9,094</b>	<b>9,155</b>	<b>9,745</b>	<b>9,755</b>	<b>10,200</b>	<b>10,299</b>
<b>Location-insensitive costs</b>										
Materials	4,081	4,081	4,081	4,081	4,081	4,081	4,081	4,081	4,081	4,081
Other operating expenses	1,475	1,475	1,475	1,475	1,475	1,475	1,475	1,475	1,475	1,475
Total location-insensitive costs	5,557	5,557	5,557	5,557	5,557	5,557	5,557	5,557	5,557	5,557
Total costs	14,385	14,161	14,316	14,435	14,651	14,711	15,302	15,312	15,757	15,855
Net Profit after tax	\$1,530	\$1,658	\$1,613	\$1,500	\$1,425	\$1,274	\$898	\$860	\$465	\$370
% of sales	9.6%	10.5%	10.1%	9.4%	8.9%	8.0%	5.5%	5.3%	2.9%	2.3%
<b>Overall rank</b>	<b>3</b>	<b>1</b>	<b>2</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>
<b>Overall index</b>	<b>94.7</b>	<b>93.3</b>	<b>94.3</b>	<b>95.1</b>	<b>96.5</b>	<b>96.9</b>	<b>100.8</b>	<b>100.8</b>	<b>103.8</b>	<b>104.4</b>
<b>Summary Measures</b>										
Net profit before income tax	2,203	2,401	2,249	2,171	2,035	1,774	1,363	1,287	704	561
Effective income tax rate	30.5%	31.0%	28.3%	30.9%	30.0%	28.2%	34.1%	33.2%	34.0%	34.1%
<b>Rank</b>	<b>4</b>	<b>6</b>	<b>2</b>	<b>5</b>	<b>3</b>	<b>1</b>	<b>10</b>	<b>7</b>	<b>8</b>	<b>9</b>
Property-based taxes per sq. ft	\$1.95	\$1.76	\$1.67	\$2.15	\$1.64	\$1.71	\$1.07	\$1.76	\$1.70	\$1.46
<b>Rank</b>	<b>9</b>	<b>8</b>	<b>4</b>	<b>10</b>	<b>3</b>	<b>6</b>	<b>1</b>	<b>7</b>	<b>5</b>	<b>2</b>





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