

MANUFACTURING SECTOR PROFILE

November 2024





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A. Introduction

Rocky View County surrounds the City of Calgary in a horseshoe-shape to the west, north and east. It is part of the Calgary Economic Region¹, which is Alberta's second-largest manufacturing region by employment. The County is approximately a three and a half hours' drive north of the United States border with the state of Montana and one day drive from the Port of Vancouver.





Manufacturing is a key target sector for Rocky View County. The County is committed to fostering a business-friendly environment that supports the growth of this industry. With strategic investments in infrastructure and streamlined processes for new developments, Rocky View County actively welcomes manufacturers looking to establish or expand their operations.

¹ An economic region is a grouping of census divisions as defined by Statistics Canada in their Standard Geographical Classification. The Calgary Economic Region contains the communities of: Calgary; Airdrie; Rocky View County; Cochrane; Okotoks; Chestermere; Foothills County; Canmore; Strathmore; High River; Banff; Wheatland County; Drumheller; Crossfield; Stoney 142, 143, 144; Siksika 146; Tsuu T'ina Nation 145; Bighorn No. 8; Irricana; Improvement District No. 9; Banff; Beiseker; Eden Valley 216; Rockyford; Standard; Longview; Hussar; Kananaskis; Ghost Lake; Waiparous; Turner Valley; Black Diamond.



Rocky View County has:

- Shovel-ready properties ideal for large and medium-size manufacturing businesses with yard requirements.
- Excellent access to efficient, cost-competitive movement of goods and services: two Class 1 railroads, Canada's fourth busiest international airport, plus major north-south and east-west highway corridors. Furthermore, Calgary's Stoney Trail Ring Road allows for easy movement of larger equipment around the perimeter of the city, as opposed to through it.
- Lower land costs and a favourable mill rate.²
- No business tax.
- Access to a large and growing workforce.
- Over 75 manufacturing operations (2023)³.

Manufacturing in the Calgary Economic Region employs 46,100 workers (2023). Key sub-sectors by employment in the Calgary Economic Region include:⁴

- Food and beverage manufacturing (24.7%)
- Fabricated metal product manufacturing (11.7%)
- Machinery manufacturing (10.6%)
- Wood, pulp and paper manufacturing (6.5%)

Rocky View County is home to an especially strong cluster of fabricated metal product manufacturers and machinery manufacturers.

B. Alberta's Manufacturing Scene

Manufacturing is a major driver of Alberta's economy. The industry creates well-paying jobs, with salaries that are 9% higher than the industrial average.⁵

Manufacturing in Alberta:

- Generated \$25.8 billion in real GDP (2023); 7.7% of total provincial GDP⁶
- Sold \$42.6 billion worth of goods abroad (2023); close to one-quarter of the province's merchandise exports⁷
- Employed 144,700 Albertans; 5.9% of total employment⁸
- Produces \$83.80 worth of goods per hour (2022); this compares to the national average of \$56.80⁹ (output per worker)
- Generated \$101.0 of GDP per hour worked compared to the national average of \$67.2 (2023)¹⁰

² <u>https://highplainsindustrialpark.com/about/</u>

³ Statistics Canada. Table 33-10-0719-01 Canadian Business Counts, with employees, census metropolitan areas and census subdivisions, June 2023. See Appendix A for description.

⁴ Canadian Manufacturing and Exporters. "Manufacturing Alberta's Future." April 2024. Page 12 and Table 3 Page 14.

⁵ Ibid. Page 1.

⁶ Statistics Canada. Table 36-10-0402-02. Gross domestic product (GDP) at basic prices, by industry, provinces and territories, growth rates (x 1,000,000)

⁷ Canadian Manufacturing and Exporters. "Manufacturing Alberta's Future." April 2024. Page 5.

⁸ Ibid. Page 5.

⁹ Ibid. Page 9.

¹⁰ Statistics Canada Table 36-10-0480-01 and ATB Economics

Alberta's industrial manufacturing sector delivers high-value products and services across Canada and around the world. Alberta's top 3 export markets for manufacturing products in 2022 were:¹¹

- United States (\$28.5 billion)
- China (\$2.8 billion)
- South Korea (\$1.7 billion)

In 2022, Alberta and Ontario had the second largest flow of interprovincial trade at \$15.5 billion, after Ontario and Quebec (\$58.3 billion in two-way manufacturing trade between the two provinces). Alberta and Ontario's manufacturing trade was driven by sales of food, chemicals, and petroleum and coal products. The third largest flow of two-way trade for manufactured goods was between Alberta and British Columbia at \$14.5 billion, largely in food products.¹²

Table 1: Destination of Manufacturing Sales (2022) Out of Alberta

Destination of Sales from Alberta	Million of Dollars
British Columbia	\$9,994
Alberta	\$63,762
Saskatchewan	\$3,882
Manitoba	\$3,054
Ontario	\$5,991
Quebec	\$3,069
New Brunswick	\$255
Nova Scotia	\$204
Prince Edward Island	\$40
Newfoundland and Labrador	\$71

Source: Statistics Canada. "Internal Trade in Canada: Value of interprovincial trade in manufactured goods, 2022." The Daily. July 9, 2024. Table 36-10-0698-01.

Manufacturing in Alberta is strongly interwoven with the province's natural resources. Given the province's rich deposits of oil and gas, top manufacturing activities encompass petroleum refining and chemical manufacturing (see figure 2). Agriculture and forestry contribute to the sector via raw materials for food and beverage manufacturing, and wood and paper products.

¹¹ Export Alberta. Export Tool. <u>https://export.alberta.ca/export-tool/#&aebpcChartType=list&product=&industry=31-</u>

<u>33&market=ALL®ion=&year=2022&traderegion=&usState=¤cy=CAD&importExport=albertaexport&dataType=value&vue=0&aebpcH</u> <u>SLevel=4&aebtcChartType=line&aebmcChartType=graph</u>

¹² Statistics Canada. "Internal Trade in Canada: Value of interprovincial trade in manufactured goods, 2022." The Daily. July 9, 2024.





Figure 2: Real Manufacturing GDP by Subsector in 2022 - Alberta

Sources: CME, Statistics Canada

The main contributors to employment include food manufacturing (15.8%), fabricated metal manufacturing (13.6%), machinery (9.8%), wood product manufacturing (9.8%), and chemical manufacturing (8.7%).¹³

Alberta is one of Canada's three major metal and machinery manufacturing centres. Alberta's strengths lie in mining, oil and gas field machinery manufacturing, and construction machinery manufacturing. The majority of these outputs stay within the province.

Alberta's manufacturing sector stands out due to several key strengths:

Skilled Workforce: Alberta's Fabrication and Machining sector boasts a diverse range of worldclass design, engineering, machining, and welding expertise.

Harsh Weather Advantage: Manufacturers in Alberta benefit from the ability to develop and test equipment in extreme weather conditions, ensuring their products are highly durable and functional in both cold and hot climates.

Efficient Oversize and Heavy Equipment Transport: The province has numerous heavy haul corridors specifically designed for moving oversized and heavy equipment. Alberta also features a well-organized and streamlined permitting process for transporting oversized loads, supported by specialized transportation companies with expertise in heavy equipment logistics.

¹³ Alberta Sector Profile: Manufacturing. <u>https://www.jobbank.gc.ca/trend-analysis/job-market-reports/alberta/sectoral-profile-manufacturing</u> Analysis of Manufacturing: Page 6

C. Current State of Rocky View County's Product Categories

Products produced in Rocky View County range from traffic signs to aluminum building products and from meat processing to oilfield equipment and machinery. While the County is home to a diverse range of manufacturers, the subsectors that are most prominent include: fabricated metal products, machinery, food and beverage products, and wood products.

C.1 Fabricated Metal Product Manufacturing (NAICS¹⁴ 332)

Fabricated metal product manufacturing is the sixth largest manufacturing subsector in the province. In the Calgary Economic Region, it is the second largest manufacturing subsector by employment (11.7%) after food and beverage processing.

The products made by the fabricated metal product and machinery industries feed into other downstream industries such as oil and gas extraction, agriculture, construction, and other manufacturing. Consequently, domestic markets are a dominant focus for the sector.

Fabricated metal product manufacturing includes:

- Forging and stamping (NAICS 3321)
- Cutlery and hand tool manufacturing (NAICS 3322)
- Architectural and structural metals manufacturing (NAICS 3323)
- Boiler, tank and shipping container manufacturing (NAICS 3324)
- Hardware manufacturing (NAICS 3325)
- Spring and wire product manufacturing (NAICS 3326)
- Machine shops, turned product, and screw, nut and bolt manufacturing (NAICS 3327)
- Coating, engraving, cold and heat treating and allied activities (NAICS 3328)
- Other fabricated metal product manufacturing (NAICS 3329)

The construction industry is one of the largest buyers of fabricated metal products. The province's steady construction activity and stronger manufacturing output support the production of fabricated metal goods.

The primary and fabricated metals categories in Alberta rely heavily on demand from the oil and gas sector. Levels of investment and oil prices have a trickledown effect on Alberta's fabrication sectors.

The sector is dominated by small and medium-sized enterprises (SMEs) which are likely to be locally owned.¹⁵ The County is also a popular location for satellite sites of operations that are headquartered in other parts of North America.

¹⁴ NAICS = North American Industry Classification System

¹⁵ Community Futures Wild Rose. "Fabricating Workforce Wild Rose Region." September 2017.



Sample of Fabricated Metal Product Manufacturers in Rocky View County:

- AGF Rebar inc.
- Alberta CNC Machining
- Benco Welding Ltd.
- Efficient Machine Works Ltd.
- Eureka-Tech Inc.
- GMP Custom Machining
- Grant Metal Products Ltd.
- GMP Custom Machining
- Hale Manufacturing
- OPSCO Process Corp.

- Precision Aluminum Manufacturing Inc.
- Premsteel Fabricators
- Professional Pipe & Steel Sales
- PTW Energy Services
- RollFab Industries Ltd.
- Sherwood Steel (2020) Ltd.
- Sifi Engineering and Fabrication
- Straight-Up Metal Buildings
- UltraFab Industries (ChampionX)
- Wasea Metal Industries Ltd.

Product Produced:

- Custom metal buildings
- Custom pipe
- Heavy pressure vessels
- Rebar
- Stairs, railings, beams
- Steel frames
- Steel fabrication

Potential Opportunities within Rocky View County:

- Construction / building materials: Fabricated metal products are critical in the construction of commercial and residential buildings, as well as the fabrication and assembly of modular processing units, and architectural and structural metals, and in specialized areas like prefabricated structures and modular construction.
- Aviation and aerospace products: De Havilland's new aircraft plant in neighbouring Wheatland County will consist of a new, state-of-the-art aircraft assembly facility, runway, parts manufacturing and distribution centres and maintenance repair and overhaul centre. Nationally, production of aerospace products and parts reached its highest level on record in December 2023, with \$2.5 billion manufactured sales.¹⁶
- Clean energy and renewable technology: With increasing interest in sustainability and clean energy, there is growth potential in fabricating metal components for wind turbines, solar installations, hydrogen production, and bioenergy projects.

¹⁶ "Canadian fabricated metal manufacturing shows growth in December." Shop Metalworking Technology. February 15, 2024. <u>https://shopmetaltech.com/uncategorized/canadian-fabricated-metal-manufacturing-shows-growth-in-december/</u>

C.2 Machinery Manufacturing (NAICS 333)

The Canadian economy is specialized in machinery-intensive industries. Strong demand for supplies, equipment and technology in Canada's natural resources sector (including agriculture, mining, oil and gas, utilities, construction, and forestry) fosters continuous growth in complementary industries such as machinery manufacturing.¹⁷ Machinery manufacturing is the fifth largest manufacturing subsector in the province. In the Calgary Economic Region, it is the third largest manufacturing subsector by employment (10.6%).

Machinery manufacturing includes:

- Agricultural, construction and mining machinery manufacturing (NAICS 3331)
- Industrial machinery manufacturing (NAICS 3332)
- Commercial and service industry machinery manufacturing (NAICS 3333)
- Ventilation, heating, air-conditioning and commercial refrigeration equipment manufacturing (NAICS 3334)
- Metalworking machinery manufacturing (NAICS 3335)
- Engine, turbine and power transmission equipment manufacturing (NAICS 3336)
- Other general-purpose machinery manufacturing (NAICS 3339)

Sample of Machinery Manufacturers in Rocky View County:

- Alberta Carriage Supply Ltd.
- Boundary Equipment (Calgary) Ltd.
- Canadian Global Manufacturing Ltd.
- Compass Energy Systems Ltd.
- Convrg Innovations Inc.

- Desa Holdings Ltd.
- KPS Industries
- Luff Industries Ltd.
- Mueller Company
- Wolf Oil Tools Inc.

Product Produced:

- Compression equipment
- Conveyor components
- Custom horse carriages
- Mining equipment
- Oilfield equipment
- Power generation units
- Water transmission, distribution and measurement

Industrial construction projects often hinge on using specialized construction equipment. From cranes to bulldozers, these tools are essential in constructing an industrial facility that meets the demands of modern industry.¹⁸

¹⁷ Invest in Canada. "Machinery and Equipment Sector. Canada's Competitive Advantages."

¹⁸ https://archosengineering.com/the-role-of-industrial-construction-in-economic-growth/



Potential Opportunities within Rocky View County:

- Machinery manufacturing for agriculture, construction, oil and gas, mining, clean technology and renewable energy.
- Commercial and industrial machinery equipment maintenance, repair and servicing. For example:
 - Preventative maintenance and equipment monitoring: Advancements in the Internet of Things (IoT) and Artificial Intelligence (AI) have advanced how data is collected and can be used. Consequently, there's a growing demand for predictive and preventative maintenance services to minimize machinery downtime.
 - Retrofits and upgrades: Older machinery, especially in agriculture, oil and gas, and mining, needs regular retrofitting with newer, more efficient technology.
 - Specialized repairs: Offering bespoke or on-site repair services can cater to industries where downtime is costly (e.g., oil refineries, construction sites, mining operations).
- Creating innovative products for emerging industries (i.e., hydrogen, aviation and aerospace, renewable energy, carbon capture and storage technologies).
- The growth of wind energy in Alberta has spurred the manufacturing of wind turbine components such as blades, towers, and nacelles. Manufacturers are producing advanced materials and parts that increase the efficiency and lifespan of wind turbines. Additionally, opportunities exist for machine shops particularly in repairing and rebuilding wind turbine gearboxes. These gearboxes typically weigh 40,000 pounds and require extremely accurate machine capabilities. Other opportunities exist in large part manufacturing and load-testing rebuilt gear units.¹⁹

C.3 Food (NAICS 311) and Beverage (NAICS 312) Manufacturing

Food manufacturing has been one of Alberta's fastest growing subsectors in recent years. Growth is largely attributable to demand for food products, innovation in food processing technologies, and expanding market access.²⁰

The Industrial Product Price Index (IPPI)²¹ for food products grew 23.7% between January 2020 and June 2022.²²

Alberta is experiencing a boom in craft beverages with breweries, distilleries, wineries, and cideries opening up across the province. These processors are utilizing Alberta's locally produced agriculture inputs.

¹⁹ Hendley, Nate. "Windfall in wind energy?" Canadian Metalworking. April 1, 2020.

²⁰ Canadian Manufacturers and Exporters "Manufacturing Alberta's Future." April 2024. Page 7.

²¹ The Industrial Product Price Index measures price changes for major commodities sold by manufacturers operating in Canada. The prices collected are for goods sold at the factory gate. It measures the movement in prices for manufactured goods produced in Canada, destined for domestic or export consumption.

²² Statistics Canada Infographic: Trends in Manufacturing resulting from the COVID-19 Pandemic and Supply Chain Disruptions. Source: Statistics Canada, Monthly Survey of Manufacturing. <u>https://www150.statcan.gc.ca/n1/en/pub/11-627-m/11-627-m/2022050-eng.pdf?st=IBTrMN3Q</u>

Alberta beverage exports totaled \$92.4 million in 2022. Whiskey is the largest export in this sector at \$71.7 million.²³

Alberta is known for producing excellent rye whisky which is made from rye crops that thrive in the cold northern climate and add a distinctive spicy, bitter edge to the drink.

Alberta Gaming, Liquor and Cannabis (AGLC) has an open liquor market or open border system which allows craft brewers, distillers, and cider makers to compete on a more level playing field with larger producers. AGLC does not restrict the number of licenses issued or enforce quotas on production sizes. This allows craft beverage producers to enter the market freely and compete alongside large producers without facing prohibitive regulatory barriers. Additionally, the open market structure allows consumers greater access to a wide variety of craft beverages. Craft brewers and distillers can sell their products in local liquor stores, bars, restaurants, and directly to consumers through tasting rooms and farmers' markets, offering more opportunities for exposure and sales.

Food and beverage manufacturing is the largest manufacturing employer in the Calgary Economic Region accounting for roughly one in four manufacturing jobs in 2021 (24.7%).²⁴ In Rocky View County, the industry is comprised of a handful of larger players like Harmony Beef, Highline Mushrooms, and OK Frozen Dough and a number of local craft producers.

Sample of Food and Beverage Processors in Rocky View County:

- Aitken Honey
- Bragg Creek Distillers
- Canada Malting Co. Ltd.
- Harmony Beef Company Ltd.
- Highline Mushrooms

- OK Frozen Dough
- Ol' Grumps' Honey
- TK Ranch
- Winters Turkey
- Your Local Ranch

Product Produced:

- Beef
- Chicken
- Eggs
- Frozen dough and bakery products
- Honey
- Malt
- Pork
- Sausage and deli meats
- Turkey
- Whiskey and spirits

²³ <u>https://www.alberta.ca/agricultural-trade-services-for-international-buyers</u>

²⁴ Canadian Manufacturers and Exporters. "Manufacturing Alberta's Future." April 2024. Page 12.



Potential Opportunities within Rocky View County:

- Agricultural processing for specialty crops, snacks, and other foods.
- Meat and specialty meat processing.
- Snack foods e.g. beef jerky.
- Nutraceuticals, pharmaceuticals.

C.4 Wood Product Manufacturing (NAICS 321)

In 2022, wood product manufacturing represented 8.5% of Alberta's manufacturing GDP, making it the province's fourth-largest subsector. This is also the Calgary region's fourth-largest manufacturing subsector by employment at 6.5%. Within Rocky View County, there are a number of prefabricated structural wood product manufacturers that are using state-of-the-art equipment and technology to improve productivity.

Sample of Organizations in Rocky View County:

- Darmac Building Systems
- NRB Inc.
- Remuda Building

- Star Building Materials
- Tech-Wood Building Components Ltd.
- Zytech Building Systems

Product Produced:

- Beams
- Floor trusses
- I-Joists
- Stairs
- Roof trusses
- Wall panels

Did you know? Star Building Materials installed the first Boise Cascade precision cut saw in Canada.

The Industrial Product Price Index for wood products grew 52.3% between January 2020 and June 2022.²⁵ A growing IPPI can influence the prices of goods that a country exports.

²⁵ Statistics Canada Infographic: Trends in Manufacturing resulting from the COVID-19 Pandemic and Supply Chain Disruptions. Source: Statistics Canada, Monthly Survey of Manufacturing. <u>https://www150.statcan.gc.ca/n1/en/pub/11-627-m/11-627-m2022050-eng.pdf?st=IBTrMN30</u>



Several strategic investments have been made in this subsector in Rocky View County. For example:

- Star Building Materials has expanded its presence with significant investments in new facilities: a 42,700 ft² Office and Joist Plant valued at \$7.4 million, and a 56,300 ft² Materials and Truss Plant valued at \$6.3 million. Additionally, plans for future growth include a 54,800 ft² Finish and Wall Plant, representing a further investment of \$6.3 million.
- Remuda Building has expanded with a new 16,000 ft² plant at their current site.
- RONA completed the acquisition of ZyTech Building Systems, a manufacturer and distributor of building components and engineered wood products headquartered in Balzac. The deal is intended to allow Dick's Lumber to expand its design and manufacturing footprint to developers and builders in Western Canada.

Potential Opportunities within Rocky View County:

 With the rise of advanced technology such as digital twin technology, 3D printing, and Building Information Modeling (BIM), the construction industry has seen exponential growth in infrastructure development. New technology has revolutionized the way construction manufacturing operates. This innovative approach allows quicker and more precise manufacturing of construction components, especially complex ones.²⁶

²⁶ <u>https://www.calahan.com/your-guide-to-construction-manufacturing/</u>



D. Industry Trends

Supply chain: Manufacturing supply chains are growing in complexity. The COVID-19 pandemic revealed a number of gaps in terms of lack of a domestic supply chain. Rising geopolitical tensions and concerns about being overly dependent on China for critical goods have driven a trend towards re-shoring and friend-shoring to reduce dependence on particular regions and countries. Additionally, some manufacturers are pivoting toward digital supply chain solutions to help bolster resilience.

Industry 4.0: Manufacturing requires constant innovation, the integration of new ideas and the adoption of up-to-date production processes.²⁷ New innovations in manufacturing are improving productivity. The use of digital technologies (also referred to as *Industry 4.0* or the *digital revolution* which includes AI, automation, robotics, and additive technology) is making manufacturers more agile, flexible and responsive to customers. However, new equipment and technologies are expensive, and the return on investment is uncertain. Additionally, businesses are not always aware of what technologies are available, what their benefits and capabilities are, and how they would integrate into existing operations.

Regulatory burdens: Canada's regulatory landscape is challenging given its inconsistent and everchanging nature. This volatility, along with red tape, can add to manufacturers' administrative cost burden. Despite these challenges, the Canadian Federation of Independent Business (CFIB) 2024 annual Red Tape Report Card gave top grades to Alberta with an "A" ranking.²⁸

Investment: Manufacturing investment in Alberta is rebounding from pandemic lows, however, Canada has experienced a prolonged period of weak business capital spending compared to its Organization for Economic Co-operation and Development (OECD) peers. Continued investment by manufacturers in innovation and other key productivity drivers, such as advanced machinery and equipment, is crucial to their long-term success. Labour and skill shortages, a relatively high tax burden, and sub-optimal regulatory environment contribute to weak investment.²⁹

Productivity: Nationally, labour productivity has been on a steady decline since the pandemic. Labour productivity is consistently higher in Alberta than other provinces. The main source of Alberta's advantage is the oil and gas sector. The productivity of this sector stands out due to its capital-intensive nature. Major investments in machinery and equipment drive efficient production processes and output.

Clean Technologies: Global demand for clean technologies is increasing. This represents an opportunity for Canada to grow its economy. Canada's commitment to build a clean, net-zero economy, has helped to push manufacturing further up the political agenda.³⁰

²⁹ Canadian Manufacturers and Exporters. "Manufacturing Canada's Future." November 2023. Page 3.
 ³⁰ Ibid. Page 7.

²⁷ https://ised-isde.canada.ca/site/canadian-manufacturing-sector-gateway/en

²⁸ Canadian Federation of Independent Business (CFIB). "Red Tape Report Card, 14th Edition | 2024 Red Tape Report Card." <u>https://www.cfib-fcei.ca/hubfs/research/reports/2024/2024-01-Red-Tape-Report-Card.pdf</u>

E. Rocky View County's Strategic Advantages

E.1 Strategic Connectivity

Rocky View County has great strategic connections via road, rail, and air. Operations in the County have good access to Calgary's Stoney Trail Ring Road which allows for easy movement of larger equipment around the city rather than through it.







Transportation and Logistics		
Highways:	 The County is at the epicentre of major east/west and north/south highway routes: Trans-Canada Highway which connects eastern and western Canada. Highway 2 (QE II), a north-south highway which forms part of the CANAMEX corridor that connects northern Canada with the US and Mexico. 	
Class 1 Rail / Intermodal:	 Canada's two class 1 rail lines have a "coast-to-coast" rail network. Rocky View County provides excellent access to both these rail lines including two major intermodal operations: CPKC mainline and CPKC terminal access. CPKC is the first and only single-line rail network connecting a continent - Canada, the United States and Mexico. CPKC provides direct rail access to the Port of Vancouver, Canada's largest seaport. CN Rail via their CN Logistics Park provides direct rail access to two deep sea Pacific ports (Port of Vancouver and Port of Prince Rupert). Both rail lines also provide rail access to and from the Port of Thunder Pay in Ontario 	
International Airport:	 Calgary International Airport (YYC) is a connecting hub for cargo services between North America, Asia, and Europe. YYC's four runways can handle some of the world's largest planes. Distribution companies such as FedEx, Purolator, UPS and DHL have cargo centres at the airport. 	
Inland Port:	Access to Calgary region inland port which has Foreign Trade Zone (FTZ) status. FTZ means investors are eligible for duty and tax relief, as well as value-added manufacturing to create Canadian labelled products.	

Table	2: Т	ransportation	and	Logistics in	Rock	v View	County
Tubic .	2. 1	ransportation	unu	Logistics in	NOUN	y vicvv	county



Transportation and Logistics				
Access to Ports	 Port of Vancouver The Port of Vancouver is Canada's largest seaport and North America's second largest export port. Port facilities handle: bulk commodities such as fuels, fertilizers, grains and oilseeds, feed, mineral, coal and potash breakbulk large volumes of containers automobiles 			
	 Port of Prince Rupert The Port of Prince Rupert is North America's closest port to Asia by up to three days sailing—it's 36 hours closer to Shanghai than Vancouver and over 68 hours closer than Los Angeles. The Port is the deepest natural harbour in North America. There is ample room for anchorages, which results in a pilot time that is 2-6 hours less than other major Northwest ports. 			
	 Port of Thunder Bay The Port of Thunder Bay and the St. Lawrence Seaway is the preferred marine route for European trade with Western Canada. The Port of Thunder Bay is a hub for dimensional and heavy-lift project cargo shipments destined for Western Canada. The port regularly handles wind turbines, mining equipment, structural steel, and electrical infrastructure. In partnership with CN Rail, it has the largest rail clearances to the oilsands of any Western Canadian port. It is the largest outbound port on the St. Lawrence Seaway, offering grain, coal and potash from Western Canada for export. 			

Table 2 (continued): Transportation and Logistics in Rocky View County

E.2 Warehouse and Distribution Connections

A high concentration of distribution warehouses in Rocky View County and region provides producers with a direct local link to distribution channels, which in turn facilitates an efficient, and costcompetitive movement of goods. Furthermore, several short and long-haul transportation companies have set up operations in the County.



E.3 Market Access

Rocky View County borders the city of Calgary and is part of the Calgary Metro Region, a centre with a population of approximately 1.5 million people. The region is within a day's drive (13 hours, a trucker's standard day) of a market of over 18 million people, and 50+ million people within 24 hours.

The County is a one-day drive from the Ports of Vancouver (Canada's largest port) and Prince Rupert (Canada's deepest natural port). Figure 4: Rocky View County to Ports of Vancouver and Prince Rupert



Canada is the only G7 nation to have comprehensive free trade agreements with all other G7 members, and have preferential access across the Americas, Europe, and the Asia-Pacific region.³¹ Canada has a free trade agreement with ten other countries in the Asia-Pacific region through the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP).³² With the CPTPP and the elimination of tariffs and non-tariff barriers, Canadian exports are expected to increase and expand across a wide range of sectors, including agriculture and non-agriculture (forestry, industrial machinery, heavy equipment and services).

Firms operating in Alberta have preferred market access to 49 countries representing approximately 1.5 billion consumers, with a combined GDP of \$49.3 trillion USD.

³¹ Government of Canada. Office of the Chief Economist. Global Affairs Canada. "2022 Canada's State of Trade: The Benefits of Free Trade Agreements." ISSN 2562-8321

³² https://agriculture.canada.ca/en/international-trade/market-intelligence/asia/cptpp/cptpp-benefits-canadian-beef-and-pork-exporters



E.4 Industrial Land and Sites

Rocky View County has several shovel-ready properties that are ideal for large and medium-sized manufacturing businesses:

- with yard requirements
- that are looking for space to grow
- wish to limit the risk of having rezoning and residential encroachment upon industrial lands

The County has 5 planned areas that directly support current and future industrial development.

Conrich

Conrich is a small community, just outside the eastern edge of Calgary. The Conrich Area Structure Plan (ASP) lays next to the Stoney Trail Ring Road and borders the Town of Chestermere to the northwest. The CN Calgary Logistics Park is in Conrich, providing easy access to an intermodal rail facility, connecting with markets across North America and numerous ports. Over half of the plan area has been devoted to industrial and commercial uses.



Figure 5: Land Use Strategy for Conrich



<u>Janet</u>

The Janet ASP is located immediately to the east of Calgary and south of Chestermere. The ASP proposes a natural extension of Calgary industrial lands into Rocky View County, providing the opportunity to develop a large swath of industrial land. The area is expected to transition into a Regional Business Centre.





North Central Industrial ASP (Crossfield)

The North Central Industrial ASP designates prime land, between the Town of Crossfield and Highway 2, for industrial uses. The land can be designated as Industrial, Heavy (I-HVY) and Industrial, Light (I-LHT) to support a broad range of industrial and manufacturing activities. The land is located approximately 30km north of Calgary and is integrated with adjacent industrial-designated land within the Town of Crossfield boundary.







Fulton Industrial (Indus)

The Fulton Industrial Park consists of a 523-acre master planned Industrial, Heavy (I-HVY) development, immediately north of Highway 22X, next to the Hamlet of Indus. The location is approximately 15km from the southeast corner of Calgary and is adjacent to the CPKC mainline.



Figure 8: Land Use Strategy for Fulton Industrial Park



Balzac East

Balzac East ASP is one of the most notable sites of current and future development in the County. It is made up of land to the northeast of Calgary, on the east side of Highway 2. Many manufacturing and supply chain companies are already based in Balzac, with available undeveloped land already designated for industrial uses.



Figure 9: Land Use Strategy for Balzac East

E.5 Local Labour Force

Rocky View County benefits from a skilled workforce. Beyond the County's own population, it draws from a robust regional labour pool that includes the cities of Airdrie, Calgary, and Chestermere, as well as the towns of Cochrane, Crossfield, and Strathmore, the villages of Irricana and Beiseker, and the Stoney Nakoda First Nation and Tsuut'ina Nation. The workforce has the flexibility to choose between living in either urban or more rural environments.

Rocky View County residents are well educated – 71.5% of the population aged 25 to 64 years old has a post-secondary certificate, diploma or degree.



*Figure 10: Highest Certificate, Diploma or Degree for the Population Aged 25 to 64 Years*³³



Source: Statistics Canada 2021 Census Profile.

Among residents with a post-secondary education, a higher percentage in Rocky View County, compared to Alberta overall, have specialized in architecture, engineering, and related trades, as well as business, management, and public administration.





Source: Statistics Canada 2021 Census Profile.

Alberta's manufacturing industry has substantial collective capability including:

- Pre-design and design
- Engineering
- Fabrication and manufacturing
- Custom fabrication
- Machining
- Welding
- And expertise in cold weather applications

Alberta offers a deep breadth of skilled professionals, with more engineers per capita than any other region in North America.

E.6 Vicinity to Post-Secondary Institutions

Nearby institutions offer a range of reputable programs that help build a skilled workforce with specialized knowledge for manufacturing roles. These programs equip professionals across various fields—such as skilled trades, supply chain management, engineering, scientists and technicians, accounting, human resources, and other business functions—with relevant training and expertise.

- University of Alberta
- University of Calgary
- University of Lethbridge
- Mount Royal University
- Bow Valley College
- Olds College of Agriculture & Technology
- Lakeland College

- Lethbridge College
- Medicine Hat College
- Red Deer Polytech
- Northwest Polytech
- Southern Alberta Institute of Technology (S.A.I.T.)
- Northern Alberta Institute of Technology (N.A.I.T.)

E.7 Technology and Sustainability

Manufacturers drive research and development in Canada as they are often the first adopters of new technologies. Alberta is investing in innovation, particularly in areas such as automation, AI, and clean technology. These advancements enable manufacturers to adopt cutting-edge technologies to improve efficiency and competitiveness. The Alberta government also supports innovation through grants and incentives aimed at fostering research and development.

The Calgary region has a one of the highest concentrations of high-tech workers among Canadian cities and boasts a burgeoning tech ecosystem.³⁴

³⁴ https://tracxn.com/d/explore/food-and-agriculture-tech-startups-in-calgary-canada/ HLjEqT_ _6UhEoCJ4cQUdHKGLNSvLqvkUEY7TeAzXEJ8/companies

E.8 Construction and Value of Building Permits

Rocky View County is situated in a rapidly growing region, within a province that is also experiencing significant expansion. Alberta's population has been mounting since 2021 and population in the Calgary Economic Region was up 5.76% between 2022 and 2023.³⁵

Calgary Economic Region³⁶



According to the Calgary Construction Association:

- 21,317 Building permits were issued by the City of Calgary in 2023
- Total building permit value in the City was \$5.96 billion, up 4% year-over-year from 2022

As of August 2024, the Inventory of Major Alberta Projects (IMAP)³⁷ has 760 projects in the pipeline valued at \$158.1 billion.

Sector	Number of Projects	Cost
Industrial	46	\$41.2B
Oil and Gas	30	\$39.9B
Infrastructure	162	\$29.4B
Power	79	\$21.8B
Institutional	121	\$7.1B
Mixed Use	10	\$5.3B
Tourism/Recreation	68	\$4.3B
Residential	156	\$4.2B
Pipelines	4	\$3.1B
Commercial	51	\$1.1B
Retail	33	\$0.604B

Table 3: Inventory of Major Alberta Projects (IMAP) Summary for August 2024

Alberta has one of Canada's highest levels of investment and has led the country in per-capita investment for most of the past decade. Traditionally, Alberta's high levels of non-residential investment can be attributed to Alberta's vast oil and gas sector.

 ³⁵ Alberta Regional Dashboard. Calgary Economic Region. <u>https://regionaldashboard.alberta.ca/region/customregion/5001/#/</u>
 ³⁶ Ibid.

³⁷ This Inventory lists projects in Alberta, valued at \$5 million or greater, that have recently been completed, are currently under construction, or are proposed to start construction within two years.



E.9 How Rocky View County Can Support

Rocky View County offers a full suite of support to all potential development partners who may have an interest in acquiring and developing land in the County. Our team of experts from Planning & Development, Engineering, Permitting and Economic Development provide a tailored approach to working with investors assisting them through the entire development process.

F. Rocky View County Opportunities

Adding value to its commodities is one of the greatest opportunities for Rocky View County's producers.

- **Agri-processing.** Rich in agriculture, the County is a natural fit for organizations for agriprocessing opportunities including:
 - grain and oilseed milling
 - food and beverage products
 - functional foods, nutraceuticals, and pharmaceuticals
 - pet food and animal nutrition
 - bio-industrial products such as biofuels, bioplastics, biochemicals, biomaterials, biopharmaceuticals, and other sustainable materials
- **Composite products.** The County has access to ample feedstocks for converting agricultural waste and by-products into bio-composite building materials.
- **Building products.** There are already several manufacturers in the region that are creating prefabricated building product components out of engineered lumber, precast concrete, metal, and aluminum. Canadian manufacturing has an opportunity to capitalize on the power of advanced technology and innovation to improve the designs, processes, and supply chains to manufacture homes and other construction projects faster, cheaper, and greener. Examples include:
 - modular and prefabricated construction
 - concrete products e.g., precast concrete, insulated concrete forms (ICFs)
 - engineered composites and other bio-composite building materials
 - steel and metal products e.g., structural steel and metal beams
 - insulation and energy-efficient products
 - industrial and commercial construction products
 - green building products
 - roofing materials
 - glass and glazing products
 - exterior cladding and siding
 - interior finishing products



• **Clean Technologies.** Cleantech is becoming a key driver of manufacturing growth in Alberta, as the province embraces innovation to reduce environmental impact while boosting industrial productivity. Alberta's rich natural resources, combined with its commitment to reducing carbon emissions, have led to significant investments in renewable energy, carbon capture and storage (CCS), hydrogen production and fuel storage, plus energy-efficient technologies. Cleantech innovations are fostering the growth of new manufacturing sectors in renewable energy equipment, electric vehicle components, energy-efficient equipment and appliances, and advanced materials.

	<u> </u>
Convrg Innovations' Engineered Power on Demand (EPOD) technology provides reliable power and compressed air for remote wellsites.	Northstar Clean Technologies Inc. is a Canadian clean technology company focused on the sustainable recovery and reprocessing of asphalt
The EPOD is a hybrid design powered primarily by solar energy. It includes a gas generator	shingles that would otherwise be sent to landfill.
(wellhead gas capable) and an advanced battery	Their Empower Calgary project is receiving
system that provides reliable power to a wellsite, with up to four days of backup power. The EPOD provides ample instrument air to run a pneumatic control system, which offsets methane emissions that would otherwise be generated by traditional gas-driven systems.	\$7.1 million from Emissions Reduction Alberta.
EPOD reduces capital cost, reduces operating costs, improves production uptime, and earns carbon credits. This project received support from Emissions Reduction Alberta.	

Examples of Clean Tech Manufacturing in Rocky View County

- Aviation and aerospace products. Alberta's aviation industry is expanding, and aerospace has been identified as an emerging growth sector.³⁸ The province benefits by having two of Canada's largest international airports, the Alberta Aerospace and Technology Centre at the Edmonton International Airport, and the Foremost Unmanned Aircraft Systems (UAS) Test Range in southern Alberta. Alberta companies are developing:
 - commercial drones
 - drone delivery services
 - specialized sensors
 - other electronic components.
 - imaging and instrumentation
- Machinery manufacturing. Alberta's strong industrial base across agriculture, energy, construction and mining supports local demand for machinery. This diversified industrial base, coupled with its move toward sustainability and clean technology, also provides significant opportunities for machinery manufacturing and equipment maintenance services across several sectors.

Analysis of Manufacturing:

³⁸ ATB Financial. "Productive diversification: Preserving Alberta's productivity advantage." August 13, 2024.

G. Incentives and Support

Rocky View County can help connect businesses with various regional, provincial, and national support organizations, as well as access to funds.

Table 4: Business, Research & Development Supports

Business, Research & Development Supports:			
Alberta Machine Intelligence Institute (Amii)	The Alberta Machine Intelligence Institute (Amii) is one of Canada's three Artificial Intelligence (AI) centres of excellence and part of the Pan-Canadian AI Strategy. Amii provides support for businesses looking to integrate artificial intelligence and machine learning technologies and offers training, advisory services, and collaborative research opportunities.		
Centre for Innovation in Manufacturing - Technology Access Centre (CIM-TAC)	The Centre for Innovation in Manufacturing - Technology Access Centre (CIM-TAC) is located on the Red Deer Polytechnic campus. It is equipped with cutting edge, industry-leading prototype and advanced manufacturing equipment. Their focus is on product and process development, improvement through innovative technical services, and applied research projects.		
Central Alberta Regional Innovation Network (CARIN) Innotech Alberta	 CARIN is a collaboration of central Albertan institutions promoting entrepreneurship and idea export. CARIN's Catalyst Incubator is specific to Central Alberta entrepreneurs looking to develop their business concept in the manufacturing, technology, smart agriculture, and oil pivot industries. Innotech Alberta provides support for research and development, commercialization, and technology adoption. Several funding programs such as the Product Demonstration Program, and the Voucher Program are offered 		
National Research Council of Canada Industrial Research Assistance Program (NRC-IRAP)	NRC-IRAP provides advisory services and funding to help small and medium- sized enterprises (SMEs) in developing and commercializing technologies.		
Innovation, Science and Economic Development Canada (ISED)	ISED offers programs and services to help Canadian businesses innovate and grow by providing client-centered support to help advance research, development, and the commercialization of innovative technologies and products.		
Canadian Manufacturers & Exporters (CM&E)	CM&E advocates for and represents member interests. They work to influence and recommend effective policies that will allow manufacturers to compete at home and abroad.		



Business, Research & Development Supports:				
Excellence in Manufacturing Consortium (EMC)	As Canada's largest manufacturing consortium, EMC offers members a diverse portfolio of services and programs designed to support all types of manufacturing businesses.			
Alberta Manufacturers & Exporters Enhancement Cluster (Alberta MEE)	The Manufacturing & Export Enhancement Cluster supports Western Canadian manufacturers in overcoming operational challenges through implementation of manufacturing best practices and Smart Manufacturing solutions. The Lean Accelerator Program (LEAP), available to Cluster members, allows manufacturers to gain insight into existing processes and identifies opportunities for implementation of best practices and digital tools that increase productivity, decrease costs, and reduce reliance on manual and paper-based processes.			
Construction Innovation Centre (CIC)	Established by the University of Alberta's Faculty of Engineering, the CIC's mission is to provide breakthrough research, education, and training that directly benefit Canada's construction industry.			
Alternative Construction Technologies Centre	Located at the Southern Alberta Institute of Technology (SAIT), this facility brings together the manufacturing, automation and robotics, material science, and construction sectors to create innovative technologies used in the construction industry. It is part of the SAIT's Centre for Advanced Manufacturing and Materials.			
Green Building Technology Lab and Demonstration Centre Smart, Sustainable, Resilient	Green Building Technologies researchers work with industry partners and students through Southern Alberta Institute of Technology's (SAIT) Applied Research and Innovation Services department to help small-to-medium- sized enterprises develop innovative technologies and processes, enhancing the commercialization of green technologies in Canada. The SSRIA is a nonprofit organization dedicated to transforming the Architectural, Engineering, and Construction (AEC) industry towards a zero-			
Infrastructure Association (SSRIA)	carbon built environment. They provide support in the form of demonstration project funding, business growth services, and expertise in innovative low-carbon building technologies, products, and practices.			
Next Generation Manufacturing (NGen)	NGen is an industry-led, non-profit organization leading Canada's Global Innovation Cluster for Advanced Manufacturing. NGen will provide funding to support collaborative, business-led projects that are aimed at de-risking, commercializing, and scaling-up innovative manufacturing capabilities in Canada. The Cluster is focused on helping to address a shortage of skills by offering manufacturers access to low-cost modular education and training programs, and micro-credentials in partnership with colleges and universities across Canada. NGen is also helping 'Made in Canada' to be recognized as a standard of excellence in innovative manufacturing.			

Table 4 (continued): Business, Research & Development Supports



Business, Research & Development Supports:				
Energy Transition Centre	The Energy Transition Centre, in collaboration with the University of Calgary, helps launch and scale cleantech startups with exclusive access to facilities, funding, and industry networking.			
Food Processing Development Centre (FPCD)	The Food Processing Development Centre, in Leduc, offers expertise, knowledge, and facility space for companies to develop and introduce new value-added products to the market. This facility has over \$20 million in equipment that supports food product innovation along the full development and commercialization continuum. It is Canadian Food Inspection Agency (CFIA) registered, a necessity for processors exporting product.			
	It also features the Agrivalue Processing Business Incubator which provides infrastructure and services to support food processing ventures in commercializing products and growing their business.			
Community Futures Wild Rose	Community Futures Wild Rose is part of Community Futures Canada - a network of community economic development organizations across Canada. This not-for-profit customer service centre assists rural businesses, individuals, and communities within the region. They offer support to new entrepreneurs and existing businesses and provide flexible, affordable financing and loans.			
Business Link	Business Link is a non-profit organization that helps Alberta's small businesses start and prosper. Business Link helps small business owners learn how to navigate the startup process, access market research, attend events and webinars, find online resources, and build a network. Free one- on-one coaching and advice for entrepreneurs and small business owners is provided both in-person and virtually.			
Foremost Unmanned Aircraft Systems (UAS) Test Range	The Foremost Unmanned Aircraft Systems (UAS) Test Range in southern Alberta offers more than 700 square nautical miles of restricted airspace. This gives small and medium-sized firms plenty of space to test new drone technologies. It is one of only two places approved by Transport Canada to conduct beyond visual line of sight (BVLOS) testing.			

Table 4 (continued): Business, Research & Development Supports

Manufacturers may be eligible for a number of funding supports and incentives. Table 5 lists some of the applicable programs available.

Table 5: Funding Supports and Incentives

Funding Supports and Incentives:				
Agri-processing Investment Tax Credit	Alberta's Agri-processing Investment Tax Credit program offers a 12 percent non-refundable tax credit based on eligible capital expenditures to corporations investing \$10 million or more to build or expand agri- processing facilities in the province. ³⁹			
Emissions Reduction Alberta (ERA)	 ERA has two funding streams: Technology Funding for transformative, sustainable technologies that reduce GHG emissions and position Alberta for success in a lower emissions economy. Energy Savings for Business helps Alberta businesses improve their efficiency and reduce emissions by supplying funding for commercial cost- and energy-saving technologies. The program is comprised of four offerings: Comprehensive Energy Savings (CES), Energy Savings for Business Program (ESB), Expanded Technologies Pilot (ETP), and the Small Producers Energy Efficiency Deployment (SPEED) stream. 			
Smart, Sustainable, Resilient Infrastructure Association (SSRIA)	The SSRIA's Innovation Fund will fund specific, incremental elements of approved building projects that demonstrate innovative designs, technologies, products, or services that support the reduction of greenhouse gas (GHG) emissions in building construction and operation.			
Innotech Alberta	Innotech Alberta has funding programs such as the Product Demonstration Program , and the Voucher Program .			
	Specific to manufacturing, the Advanced Manufacturing and Fabrication Initiative (AMFI) program supports the manufacturing sector by de-risking the adoption of new technologies and providing access to technical expertise and training. The program has strengthened the manufacturing sector by enabling process efficiencies, capital investments and job retention/creation.			
National Research Council of Canada Industrial Research Assistance Program (NRC-IRAP)	NRC-IRAP provides funding to help small and medium-sized enterprises in developing and commercializing technologies. They also offer the IRAP Youth Employment Program and various research grants.			
Innovation, Science and Economic Development Canada (ISED)	 ISED funds a number of programs and initiatives including: Canada Digital Adoption Program will provide businesses with financing, tools and resources to adopt e-commerce platforms and implement digital transformation plans. Canada Small Business Financing Program which makes it easier for small businesses to get loans from financial institutions by sharing the risk with lenders. 			

³⁹ <u>https://www.alberta.ca/alberta-agri-processing-investment-tax-credit</u>



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Funding Supports and	Incentives:		
NGen	Advanced Homebuilding Technology and Innovation Fund - NGen will strive to use this funding (\$50 million announced over two years starting in 2024- 25) to leverage an additional \$150 million from industry and other levels of government in support of a targeted \$200 million worth of investment in housing innovations in Canada.		
	 Cluster Accelerator Funding support can be used to support projects covering one or more of the following types of projects: Innovation Projects – The objective of these projects is to promote the development and/or adoption of advanced manufacturing technologies. Commercialization Projects – The objective of these projects is to scope out strategic opportunities for supplier and business development, support commercialization and export readiness of 		
	 cluster members, and/or facilitate participation in international export or investment missions. Sustainability Projects – The objective of these projects is to assist cluster members in improving environmental management, reducing GHG emissions, and/or strengthening domestic supply chain resilience. 		
	 Workforce and Management Enhancement Projects – The objective of these projects is to support upskilling of their members' workforce, attract young people and equity-seeking groups into careers in advanced manufacturing, develop new skills training and employee placement initiatives, enhance diversity and inclusion in Canada's advanced manufacturing workforce, and/or position the cluster as a magnet for international talent attraction. 		
	 Network Projects – The objective of these projects is to support collaborative initiatives among two or more clusters in pursuit of innovation, commercialization, sustainability, or workforce and management enhancement objectives. 		
	The Sustainable Manufacturing Challenge is seeking projects that will support Canada's path to net-zero greenhouse gas emissions and target challenges like emissions reduction. These projects aim to accelerate the application of Canadian cleantech and other advanced technologies to improve the environmental sustainability of Canadian manufacturing. NGen will invest up to \$35 million of Global Innovation Cluster funding and is seeking more than \$65 million from industry to launch over \$100 million in new collaborative projects.		

H. Alberta Strategic Advantages

- Alberta has the lowest tax rates in Canada. With no provincial sales tax, no payroll taxes, no health care premiums, low fuel taxes, and low personal income tax, Albertans and Alberta businesses continue to pay the lowest overall taxes, compared to all other provinces.
- The province is well regarded for its competitive business climate and efficient regulatory framework.
- Alberta's economy is growing and is expected to perform among the best in Canada.⁴⁰
- The province has a young, diverse and affluent population. It has the fastest-growing population with the highest median income in Canada.
- Alberta's well-established energy infrastructure, combined with access to low-cost natural gas and electricity, is a significant advantage for energy-intensive manufacturing industries.
- Alberta is rich in natural resources, including oil, natural gas, minerals, timber, and agricultural products. This resource base provides manufacturers with easy access to raw materials, especially in sectors such as petrochemicals, construction materials, and food processing.
- Alberta is strategically positioned in North America, with access to key markets both in Canada and the United States.
- Alberta has a well-educated and highly skilled workforce, particularly in engineering, trades, and technology. The province's education and training systems are aligned with the needs of industries like manufacturing, providing companies with a reliable pool of talent.
- Alberta's workforce is among the most productive in Canada. The province has a high concentration of professional engineers and engineering technologists, and computer programmers.
- The province is well-positioned to lead in renewable energy technologies and carbon capture and storage (CCS), giving manufacturers an edge in meeting global sustainability standards.

Business Council of Alberta. "Alberta Snapshot: A Quarterly Economic Update." Summer 2024.

⁴⁰ TD Economics. "Provincial Economic Forecast: Rate Cuts Heal With Time." September 19, 2024.

Varcoe, Chris. "Alberta expected to see stronger economic growth into 2025, but needs job gains — and no rail disruption." Calgary Herald. August 20, 2024.



I. Conclusion

Rocky View County has a cross-departmental team of experts from Planning & Development, Engineering, Building Services and Economic Development willing to provide a tailored and collaborative approach to working with investors unique needs and assisting them through the entire development process.

For more information, contact:

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Appendix A: Business Register Information

The major sources of information for the Business Register are updates from the Statistics Canada survey program and from Canada Revenue Agency's (CRA) Business Number account files. This CRA administrative data source allows for the creation of a universe of all business entities.

Included in the Business Register are all Canadian businesses which meet at least one of the three following criteria:

- i. Have an employee workforce for which they submit payroll remittances to CRA; or
- ii. Have a minimum of \$30,000 in annual revenue; or
- iii. Are incorporated under a federal or provincial act and have filed a federal corporate income tax form within the past three years.

There are two general industrial classification categories:

- Unclassified: new category for businesses which have not received a NAICS code
- Classified: existing category for businesses which have received a NAICS code

For more information: https://www.statcan.gc.ca/en/statistical-programs/document/1105 D16 T9 V1



Appendix B: Utility Maps

Figure 12: Conrich Utilities Map





Figure 13: Janet Utilities Map







Figure 14: North Central Industrial Utilities Map





Figure 15: Fulton Industrial Park Utilities Map





Figure 16: Balzac East Utilities Map