



Research Report | June 2023

Thunder Bay Key Economic Sectors

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By: William Dunstan

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NPI would like to acknowledge the First Peoples on whose traditional territories we live and work. NPI is grateful for the opportunity to have our offices located on these lands and thank all the generations of people who have taken care of this land.

We recognize and appreciate the historic connection that Indigenous peoples have to these territories. We support their efforts to sustain and grow their nations. We also recognize the contributions that they have made in shaping and strengthening local communities, the province, and Canada.

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About the Author

William Dunstan



William Dunstan is a recent graduate of Carleton University's Public Affairs and Policy Management program. During his undergraduate studies, William learned about the wide world of public policy and developed a particular research interest in economic policy and regional development. Professionally, he has worked in several policy-related roles both in the think tank sphere and with the federal government. Originally from Ottawa, William developed a love for Northeastern (or Central) Ontario and the region's high quality of living during his time as an Experience North intern in 2021.



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About:

The Thunder Bay Community Economic Development Commission is the city's lead economic development agency and champion for local growth. We use our local knowledge and expertise to promote Thunder Bay as the best small city in Canada to live, work, do business and visit.

We are led by an independent board and are driven by the needs of our community. Our business development team and sector specialists respond quickly to new opportunities to attract visitors, new talent, employment, business development and investment to Thunder Bay.

Vision

To grow prosperity, population and profile through partnership, knowledge and resources in support of our community and development ecosystem.

Mission

The CEDC's mission is to nurture: small city character, welcoming community and love of local with big city opportunities to grow, thrive and bring aspirations to life for all.

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The Northern Analyst Collective, a project of Northern Policy Institute, will allow members to "time share" a professional policy analyst. By merging our collective resources we can ensure that the smallest municipality or local charity can access high-end skills at an affordable price



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Key Economic Sectors

This report provides an overview of seven key economic sectors in Thunder Bay. Each sector employs a large share of Thunder Bay's workforce and/or makes up a larger share of the economy in Thunder Bay than that of the province.

Employment and wage statistics for each sector are sourced from Lightcast Analyst (2023). Gross domestic product (GDP) figures for each sector are estimates calculated by the author. To calculate these figures, GDP estimates by industry for Ontario have been sourced from Statistics Canada (2022a). Then, the percentage of Ontario's labour force that lives in the Thunder Bay CMA is calculated for each industry. If productivity is equal across the province, Thunder Bay's share of an industry's labour force should be the same as Thunder Bay's share of said industry's GDP. This share of an industry's Ontario-wide GDP is used as the Thunder Bay GDP estimate in this profile. For example, the Thunder Bay CMA contains 9.6 per cent of the people in Ontario who are employed in forestry. Using this method, therefore, it is estimated that the Thunder Bay CMA accounts for 9.6 per cent of Ontario's forestry GDP.

It should be emphasized that these are rough estimates. For any given industry, productivity in Thunder Bay may be lower – or higher – than the provincial average. Additionally, the employment statistics used (Lightcast Analyst 2023) pertain to residents of the Thunder Bay CMA. There are individuals who live in the Thunder Bay CMA but work outside of it, and individuals who live outside the CMA but commute to Thunder Bay for work. That said, 98.6 per cent of individuals who work in the Thunder Bay CMA also live there. This means that economic statistics for Thunder Bay CMA residents should capture almost all economic activity within the CMA (Statistics Canada 2022b). It should also be noted that the GDP estimates produced are in chained¹ dollars, with 2012 as the reference year. This means prices from 2012 are used to measure the value of output. In this case, they are used to measure the value of output during 2021.

The lists of major businesses and employers included in this report aim to capture five key economic players for each sector. The organizations listed are not necessarily those with the most employees, but they are all major local employers who play a crucial role in their sector's success in Thunder Bay.

¹ "Chained dollars" is a method of adjusting dollar amounts for inflation over time. The main distinction between chained dollars and "headline" measures of inflation is that chained dollar figures account for how changes in relative prices change consumption patterns. For example, if beef becomes more expensive, consumers will typically buy less beef and more chicken. Chained dollars reflect such changes in consumption whereas other measures of inflation do not.

Health care

Why invest in Thunder Bay?

Thunder Bay is the health care centre for Northwestern Ontario, a region of nearly 250,000 people. People from across the region – and beyond – come to Thunder Bay not only to receive health care services, but also for education, training, and research. Demand for health care in Thunder Bay is likely to grow further over the coming years as Northwestern Ontario's population ages. The number of individuals in Northwestern Ontario who are age 65 or older is expected to increase from 24,789 in 2021 to approximately 28,000 in 2035 (Ontario Ministry of Finance 2022). Hospitals, research institutes, education providers, and other health care organizations have emerged in Thunder Bay to meet this large demand for care, creating the human capital and infrastructure necessary to support new health care investments.

Education and training resources

Thunder Bay has several institutions involved in medical education, training, and research. The community is home to NOSM University, one of Northern Ontario School of Medicine's two campuses. NOSM University is a medical school mandated to educate doctors and contribute to health care in communities across Northern Ontario. In addition to NOSM, both Confederation College and Lakehead University offer courses and programs in health care fields such as nursing. Oshki-Pimache-O-Win: The Wenjack Education Institute (Oshki-Wenjack) offers several health care programs, including nursing and Indigenous wellness and addiction prevention. Finally, cutting-edge health care research is conducted in the city through the Thunder Bay Regional Health Research Institute.

Economic impact

In 2021, there were 9,874 people employed in health care in Thunder Bay. This represents an increase of 952 jobs since 2016. In 2022, the average annual salary for health care workers in Thunder Bay was \$54,577. In 2021, the health care industry contributed approximately \$740 million (2012 chained dollars) in GDP to the Thunder Bay economy.

Incentives

For individuals looking to enter the health care field, the **Ontario Learn and Stay Grant** provides a valuable incentive to study and start one's career in Thunder Bay. Through this grant, the Ontario government will cover tuition, books, and other direct educational costs for students studying in priority programs in priority communities in Ontario. In exchange, students are required to work in the region where they studied for a minimum of six months for every year of study funded by the grant. There are several programs eligible for the grant in Thunder Bay, including the nursing and paramedic programs at Confederation College and undergraduate and graduate programs in nursing at Lakehead University (Ontario Ministry of Colleges and Universities 2023).

Key businesses/employers:

Thunder Bay Regional Health Sciences Centre is a world-class acute care facility with 375 beds that serves the people of Thunder Bay and Northwestern Ontario. The hospital doubles as a teaching and research facility.

Thunder Bay Regional Health Research Institute conducts clinical research strategic to regional health care needs in Northwestern Ontario. The Institute is one of the first research facilities of its calibre to be based outside of a major metropolitan centre.

St. Joseph's Care Group offers a broad range of programs and services relating to addictions and mental health, chronic care, rehabilitative care, and seniors' care. SJCG's hospital is the leading rehabilitative care hospital in Northwestern Ontario.

Pioneer Ridge is a 150-bed long-term care facility offering a variety of programs, services, and amenities. As of November 2022, Pioneer Ridge has approximately 300 employees.

The **Thunder Bay District Health Unit** delivers public health programs and services to approximately 150,000 people over an area of roughly 230,000 square kilometres. Among other initiatives, it provides health information and prevention-related clinical care, investigates reportable diseases, and upholds regulations that apply to public health.

Air transportation

Why invest in Thunder Bay?

As the hub city for a region in which many communities and worksites are inaccessible by road, Thunder Bay has developed a large air transportation industry for a city of its size. There are approximately two dozen First Nations communities in Northwestern Ontario that do not have year-long road access. Air transportation is, therefore, essential for moving people and goods in and out of these communities, and much of that traffic goes through Thunder Bay. Thunder Bay occupies a similar role for remote mines that fly in their workforce.

Education and training resources

Thunder Bay has education and training resources for individuals looking to enter various occupations in the air transportation sector. Aspiring pilots can do their training at Confederation College or through KBM Aviation. Confederation also offers an aviation technician program.

Economic impact

In 2021, there were 422 people employed in air transportation in Thunder Bay. This represents a decrease of 120 jobs since 2016. In 2022, the average annual salary for air transportation workers in Thunder Bay was \$71,908. In 2021, the air transportation industry contributed approximately \$14 million² (2012 chained dollars) in GDP to the Thunder Bay economy.

Key businesses/employers

The **Thunder Bay International Airport** serves the city of Thunder Bay. The airport connects passengers to flights to and from Northwestern Ontario, other regions of Canada, and the United States.

Thunder Bay is connected to Toronto Pearson Airport through **Air Canada** and **Flair**; to Ottawa and Toronto City Centre by **Porter**; and to Winnipeg and Calgary by **Westjet**.

Wasaya Airways is a First Nations-owned airline headquartered in Thunder Bay. It runs flights servicing over 25 remote communities, delivering not only passengers, but also food, clothing, fuel, and other goods.

North Star Air is a charter, passenger, and cargo airline that primarily serves remote First Nations communities. Headquartered in Thunder Bay, it provides regular flights to approximately 20 communities and offers on-demand service to others.

Bearskin Airlines is a regional airline based out of Thunder Bay. It operates regular flights from Thunder Bay to Winnipeg, Sudbury, Sault Ste. Marie, Kenora, and several smaller Northern Ontario communities.

Thunder Airlines is a Northern Ontario regional airline headquartered in Thunder Bay. It is one of the largest medical transfer contractors for ORNGE (Ontario Ministry of Health) and the company supplies charter air service to many organizations in Ontario.



² Air transportation's contribution to GDP was unusually low in 2021. Air traffic was lower than usual due to the COVID-19 pandemic.

Mining

Why invest in Thunder Bay?

Thunder Bay serves as the urban hub for Northwestern Ontario's mining industry. The city offers access to finance, research facilities, transportation and communications infrastructure, and a large labour pool. As of April 2022, there are six active mines in Northwestern Ontario and 15 advanced mineral projects (Ontario Mining Association 2022). Northwestern Ontario has deposits of critical minerals like nickel and cobalt that will be required as part of the energy transition and related investment in green technologies. The Government of Ontario (Ministry of Mines 2022) has announced plans to support mining development in Northwestern Ontario and to integrate these operations into a "made-in-Ontario" supply chain for innovative technologies like electric vehicles and battery storage. In sum, Thunder Bay has an already prosperous mining industry with strong prospects for future growth.

Education and training resources

As the urban hub of a major mining region, Thunder Bay is home to many education and training resources connected to the mining sector. Confederation College offers a variety of programs and courses related to mining and trades that are in-demand in the mining industry. Additionally, NORCAT offers a range of classes and programs, including surface miner common core and equipment operator training. At Lakehead University, the Centre of Excellence for Sustainable Mining and Exploration supports research, education, and outreach activities regarding mining in Northern Ontario and the industry's impacts.

Economic impact

In 2021, there were 268 people employed in mining in Thunder Bay. This represents an increase of 23 jobs since 2016. In 2022, the average annual salary for mining workers in Thunder Bay was \$93,758. In 2021, the mining industry contributed approximately \$40 million (2012 chained dollars) in GDP to the Thunder Bay economy.

Incentives

Through the **Mineral Exploration Tax Credit (METC)**, Canadian companies can receive a 15 per cent non-refundable tax credit on mineral exploration expenses.

In Ontario, junior mining companies can receive financial assistance for early exploration projects through the **Ontario Junior Exploration Program (OJEP)**. Eligible junior mining companies can receive up to \$200,000 per project to cover 50 per cent of eligible costs and up to \$10,000 to cover 100 per cent of eligible costs per project supporting Indigenous employment and business opportunities.

Key businesses/employers

Newmont Corporation is one of the world's largest gold mining companies. The company conducts operations out of Thunder Bay for the fly-in/fly-out Musselwhite Mine located 500 kilometres north of the city.

Impala Canada is a mining company focused on palladium. The company maintains two offices in Thunder Bay, along with operations for the Lac des Iles mine located 85 kilometres north of the city.

Nordmin Group of Companies provides engineering, procurement, and construction services to the mining industry worldwide, including resource definition, project definition, construction, and mine site closure. The company is headquartered in Thunder Bay.

TBT Engineering Limited is Northwestern Ontario's largest independently owned multidisciplinary engineering consulting firm. Mining supply and services is one of TBT Engineering's areas of specialty.

Hatch Engineering specializes in providing innovative mining engineering solutions. Hatch has an office in Thunder Bay that offers expertise and services to mining companies across Northern Ontario.



Forestry

Why invest in Thunder Bay?

Forestry has been a major industry in Thunder Bay for over 100 years. The city is located in Canada's vast boreal forest and, accordingly, is in close proximity to a large supply of trees. The trees in the surrounding region are a varied mix of coniferous and deciduous species, enabling a strong forest-products industry. Crucially, Thunder Bay also has established processors and support activities, providing a foundation for new investments in forestry and the bioeconomy (CAI Global Group 2020). All this coupled with strong transportation links to move processed forest products to market makes Thunder Bay an ideal location to invest in forestry.

Education and training resources

Both Lakehead University and Confederation College offer courses and programs that can prepare an individual for a career in forestry. Lakehead University offers degree programs in Forestry, Environmental Management, and Natural Resources Management. Confederation College offers a Forestry Technician program.

Economic impact

In 2021, there were 364 people employed in forestry³ in Thunder Bay. This represents a decrease of 174 jobs since 2016. In 2022, the average annual salary for forestry workers in Thunder Bay was \$67,435. In 2021, the forestry industry contributed approximately \$47 million (2012 chained dollars) in GDP to the Thunder Bay economy.

Key businesses/employers

Paper Excellence operates a pulp and paper mill in Thunder Bay (previously owned by Resolute Forest Products). Forestry products are supplied to the facility, which produces market pulp and newsprint and has an annual production capacity of 554,000 metric tonnes.

Shuniah Forest Products is a locally owned logging company operating in Thunder Bay and the surrounding region. It supplies logs and chips to the Paper Excellence mill.

Greenmantle Forest Inc. holds the Sustainable Forest Licence (SFL) for the Lakehead Forest—the forest that surrounds Thunder Bay. Greenmantle facilitates forest harvest licencing for its shareholders; plans, coordinates, and monitors forest regeneration; and handles forest management planning.

Renewable Forest Products Inc. is one of the largest logging companies operating in Thunder Bay and the wider Northwestern Ontario region. It is a major contractor for the Resolute mill.

The **Ontario Ministry of Natural Resources and Forestry** is a major public sector employer of forestry workers in Thunder Bay. The MNRF employs forestry technicians, forestry planners, resource managers, and other experts to manage the health of the forests around Thunder Bay so they continue to provide ecological, economic, and social benefits.

³ Note that for the economic impact statistics, manufacturing of forestry products (e.g., sawmills and pulp & paper mills) is included under manufacturing instead of forestry.

Manufacturing

Why invest in Thunder Bay?

Thunder Bay has a large and diversified manufacturing sector. The city's excellent transportation infrastructure allows raw materials to be easily shipped into Thunder Bay and finished products to be easily shipped to market. Its most significant manufacturing industries are those relating to forestry products and transportation. Compared to the national average, Thunder Bay has an above-average number of residents employed in paper manufacturing and transportation equipment manufacturing (Lightcast Analyst 2023). With a large, educated labour force, Thunder Bay is well-positioned to build on its existing strength in manufacturing.

Education and training resources

Confederation College and Lakehead University both offer several programs that can prepare an individual for a career in manufacturing. Confederation offers programs in aviation, civil, electrical, and mechanical engineering as well as industrial manufacturing processes and mechanical and welding techniques. Lakehead offers programs in chemical, civil, electrical, mechanical, mechatronics, and software engineering.

Economic impact

In 2021, there were 2,328 people employed in manufacturing in Thunder Bay. This represents a decrease of 336 jobs since 2016. In 2022, the average annual salary for manufacturing workers in Thunder Bay was \$63,270. In 2021, the manufacturing industry contributed approximately \$290 million (2012 chained dollars) in GDP to the Thunder Bay economy.

Incentives

Businesses and organizations in advanced manufacturing sectors such as aerospace and life sciences can access financial support through the **Regional Development Program: Advanced Manufacturing and Innovation Competitiveness Stream**. Employers that invest at least \$500,000 in their project and commit to creating at least five new jobs and/or upskilled current jobs can receive loans and grants for up to 15 per cent of eligible project costs.

Key businesses/employers

Paper Excellence operates a pulp and paper mill in Thunder Bay (formerly owned by Resolute Forest Products). The facility produces market pulp and newsprint and has an annual production capacity of 554,000 metric tons.

Alstom has a rail vehicle manufacturing plant in Thunder Bay. The plant currently produces and refurbishes vehicles used for public transit projects across Canada.

Dingwell's Machinery & Supply Limited is a manufacturer of parts and equipment that specializes in serving the mining, pulp and paper, transportation, steel mill, construction, and energy industries. The company is headquartered and has a major production facility in Thunder Bay.

Venshore Mechanical is Northwestern Ontario's largest industrial multi-trade contractor and pipe fabricator. Headquartered in Thunder Bay, the company provides fabrication and mechanical services for industries, including forestry, petroleum, chemical, grain handling, power generation, mining, and natural gas transmission.

Lactalis Canada is a food manufacturer specializing in dairy products. Lactalis has a major processing facility in Thunder Bay.



Public administration

Why invest in Thunder Bay?

For a city of its size, Thunder Bay has a large public administration sector. Compared to the national average, the city has an above-average number of people employed in local, municipal, and regional public administration; Provincial and territorial public administration; and Aboriginal public administration (Lightcast Analyst 2023). As the major urban hub in the area, Thunder Bay is the natural headquarters for many regional and provincial public services in Northwestern Ontario. Furthermore, many Northwestern Ontario Indigenous communities, development agencies, and other organizations have offices in Thunder Bay. Locating public administrators in Thunder Bay allows governments to serve the vast Northwestern Ontario region while still having access to a large urban labour force.

Education and training resources

Lakehead University and Confederation College both offer a variety of courses and programs that are relevant to the field of public administration. Lakehead offers programs in political science, economics, and law, among other fields of study. Some of Confederation's offerings include programs in Aboriginal community advocacy and Business administration.

Economic impact

In 2021, there were 5,404 people employed in public administration in Thunder Bay. This represents an increase of two jobs since 2016. In 2022, the average annual salary for public administration workers in Thunder Bay was \$67,380. In 2021, the public administration industry contributed approximately \$640 million (2012 chained dollars) in GDP to the Thunder Bay economy.

Key businesses/employers

The **City of Thunder Bay** is one of the largest employers in Thunder Bay, with approximately 2,800 employees. The City provides a wide array of services, such as policing, infrastructure, and recreation.

The **Government of Ontario** has approximately 1,100 employees in Thunder Bay. Ministries with major offices in Thunder Bay include the Ministry of Northern Development, the Ministry of Natural Resources and Forestry, and the Ministry of Transportation.

The **Government of Canada** has numerous operations in Thunder Bay, including a Service Canada Centre and an Indigenous Services Canada office. There are approximately 800 federal government employees in Thunder Bay.

The **District of Thunder Bay Social Services Administration Board (TBDSSAB)** provides social services to individuals and families living in the District of Thunder Bay, including childcare, community housing, and homelessness prevention programs. The TBDSSAB employs over 175 people.

The **Nishnawbe Aski Nation (NAN)** is a political territorial organization representing 49 First Nations communities in northern Ontario. Headquartered in Thunder Bay, the NAN typically employs more than 100 full-time-equivalent staff at any given time.



Tourism

Why invest in Thunder Bay?

Thunder Bay is well positioned for a vibrant tourism industry. The city is surrounded by pristine nature while still offering the amenities and attractions of a major urban centre, all while being easily accessible from heavily populated regions of North America. There are abundant scenic sites, wilderness areas, and provincial and national parks both in the immediate vicinity of Thunder Bay and across the wider Northwestern Ontario region. The city also acts as the gateway for tourists looking to explore the region's more remote areas. Further, as a city with over 100,000 residents, Thunder Bay has many hotels, restaurants, and cultural and entertainment options. Crucially for investors looking to start a tourism-oriented business, the city's status as an urban hub means there is a large labour force available. Finally, the city is easy to access, owing to its large airport, placement on the Trans-Canada Highway, and port and rail connections.

Education and training resources

There is a wide array of professions involved in tourism, and Thunder Bay has a range of education and training resources available to meet these varied needs. Confederation College offers courses and programs in hospitality, marketing, business, aviation, and other fields. Notably, Lakehead University offers a degree in Outdoor Recreation, Parks & Tourism – the only program of its kind in Canada!

Economic impact

In 2021, there were 4,381 people employed in tourism-related⁴ industries in Thunder Bay. This represents a decrease of 1,382 jobs since 2016. In 2022, the average annual salary for workers in these industries in Thunder Bay was \$29,750. In 2021, tourism-related industries contributed approximately \$200 million⁵ (2012 chained dollars) in GDP to the Thunder Bay economy.

⁴ The employment statistics regularly collected by Statistics Canada sort jobs according to the North American Industry Classification System (NAICS). NAICS does not have a classification for tourism; however, one can manually calculate employment totals for tourism-related industries. In this report, industries that we identify as "tourism-related" include air travel, restaurants, accommodations, and heritage institutions. Much, but not all, of the economic activity in these industries is generated through tourism.

⁵ Tourism is another industry that was heavily negatively impacted by the COVID-19 pandemic.

Key businesses/employers

Ontario Parks is the provincial government branch that runs the province's parks. Many tourists come to Thunder Bay to visit the numerous provincial parks in the surrounding region.

The City of Thunder Bay's **Recreation and Culture Department** delivers various services that help draw tourists to the city. The department manages parks, trails, and conservation areas across the city, and arts and culture programs and city events throughout the year.

Valhalla Hotel & Conference Centre is the largest hotel in Thunder Bay, making it a key player in the city's tourism sector. The hotel has more than 250 guest rooms and ample meeting rooms and event space.

The **Sleeping Giant Brewing Company** is Thunder Bay's local craft brewery. The company has a brewery and taproom, and hosts events and tours.

Wilderness Supply Thunder Bay is Thunder Bay's largest outdoor store, selling equipment that locals and tourists alike use to explore nearby nature. Wilderness Supply offers the largest selection of boats and camping, hiking, and travel gear in Northwestern Ontario.



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Northern Policy Institute is Northern Ontario's independent, evidence-driven think tank. We perform research, analyze data, and disseminate ideas. Our mission is to enhance Northern Ontario's capacity to take the lead position on socio-economic policy that impacts our communities, our province, our country, and our world.

We believe in partnership, collaboration, communication, and cooperation. Our team seeks to do inclusive research that involves broad engagement and delivers recommendations for specific, measurable action. Our success depends on our partnerships with other entities based in or passionate about Northern Ontario.

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