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Welcome to the
***2013 Saskatchewan
Real Estate Forum***

**Secondary Markets: Is There Life
After Regina & Saskatoon?**



Panel & Moderator

- Martin Blair; President
West Humboldt Properties
- Tim Cheesman, Project Manager
Regina-Moose Jaw Industrial Corridor
- Clint Elenko, Vice President
Western Canada, Canadian Tire Real Estate Limited
- Ross Stathers, Director of Leasing
Enclosed Malls, SmartCentres
- Richard Jankowski, Managing Director
Avison Young Commercial Real Estate (Sask) Inc.

Where the Panel Operates

West Humboldt Properties Ltd.

Humboldt & Melville ↙

Moose Jaw Regina Industrial Corridor

Regina-to-Moose Jaw ↘

Canadian Tire Real Estate Limited ↙

Estevan; Humboldt; Melfort; Moose
Jaw; North Battleford; Prince Albert;
Swift Current; Weyburn; Yorkton (yes,
Regina & Saskatoon)

SmartCentres ↘

Regina & Saskatoon ↙

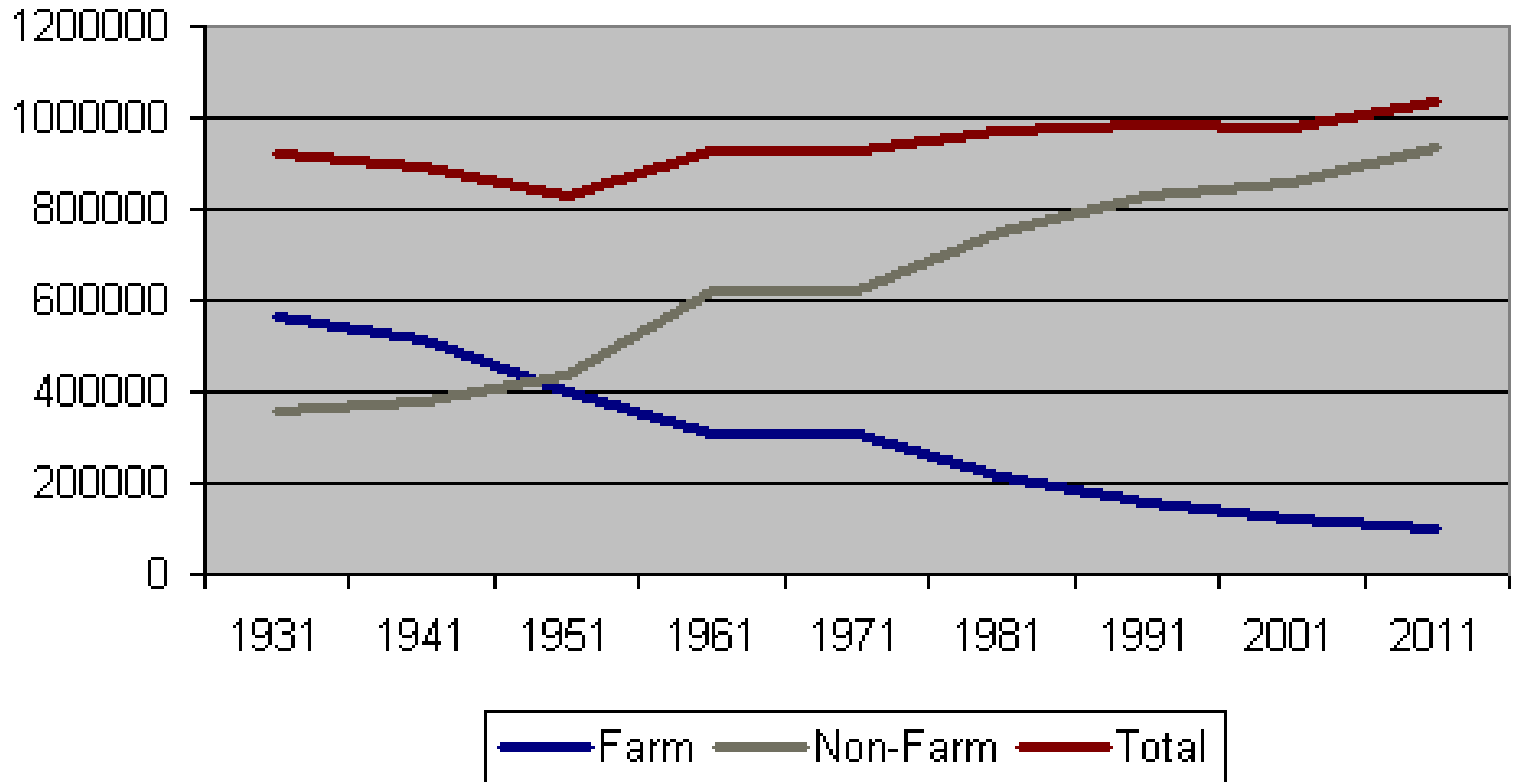


Trivia Session #1 – Our Population History

Did You Know.....?

- Saskatchewan was the 3rd most densely populated province in Canada from 1911 – 1951?
- Saskatchewan had over 921,000 people in 1931, or roughly 90,000 less than today?
- The province grew by 40,115 per year from 1901 – 11 and was the fastest growing province in Canada?
- It grew by around 10,000 in 2011 (last census), more than the previous 10 years combined?

The Shift in Population is Slowing



Trivia Session #2 – Our Natural Resources

Did You Know.....?

- Saskatchewan has 50% of the world's reserves of potash, 35% of current production, and is ranked #1 in Canada?
- Saskatchewan produces 22% of the world's uranium (highest grade) & 100% of Canadian production?
- The province is #2 in Canada for oil production (#1 for conventional crude), #3 for gas, and does 1/3 of Canada's coal production? We export more oil and gas than Kuwait to the United States?
- We are #4 for Canadian exports & now #1 on a per capita basis?
- We are the least reliant on trade to the United States and lead the country in trade to BRIC & MENA countries (emerging economies)?

Trivia Session #3 – Our Food & Ag Stats

Did You Know.....?

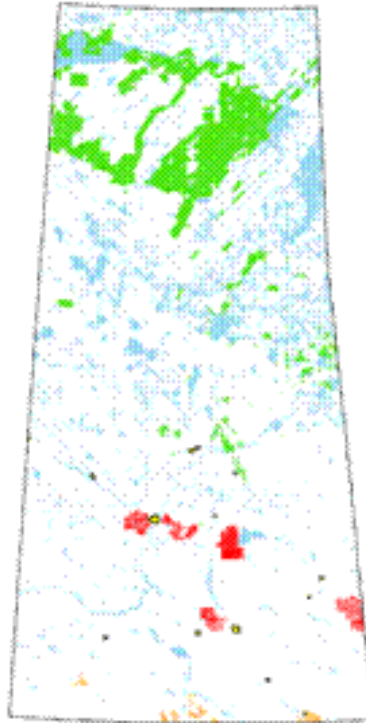
- Saskatchewan has almost ½ of the arable land in Canada?
- Saskatchewan leads the world in mustard, peas, flax and lentils and Canada in canola? Food is the #2 export, next to oil & gas?
- We do ½ of Canada's business with India and 58% with Bangladesh?
- International exports exceed domestic exports by 100%; they have grown from \$13 billion to over \$32.5 billion in 4 years?
- We are a world leader in bio-fuel, sustainable agriculture & renewable resource research?

The "World" as we know it can Change!

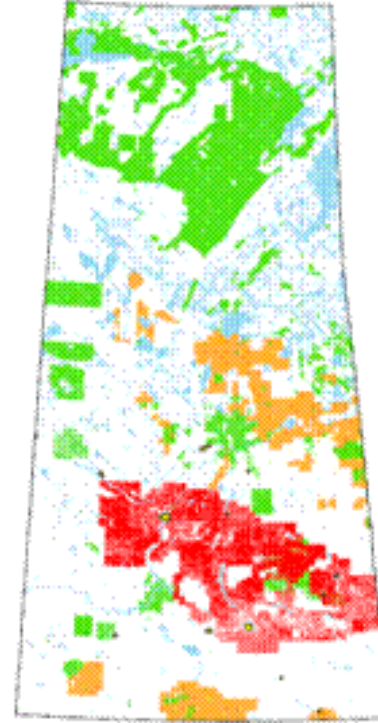


Just Look at Our Mineral Activity!

2005



2009



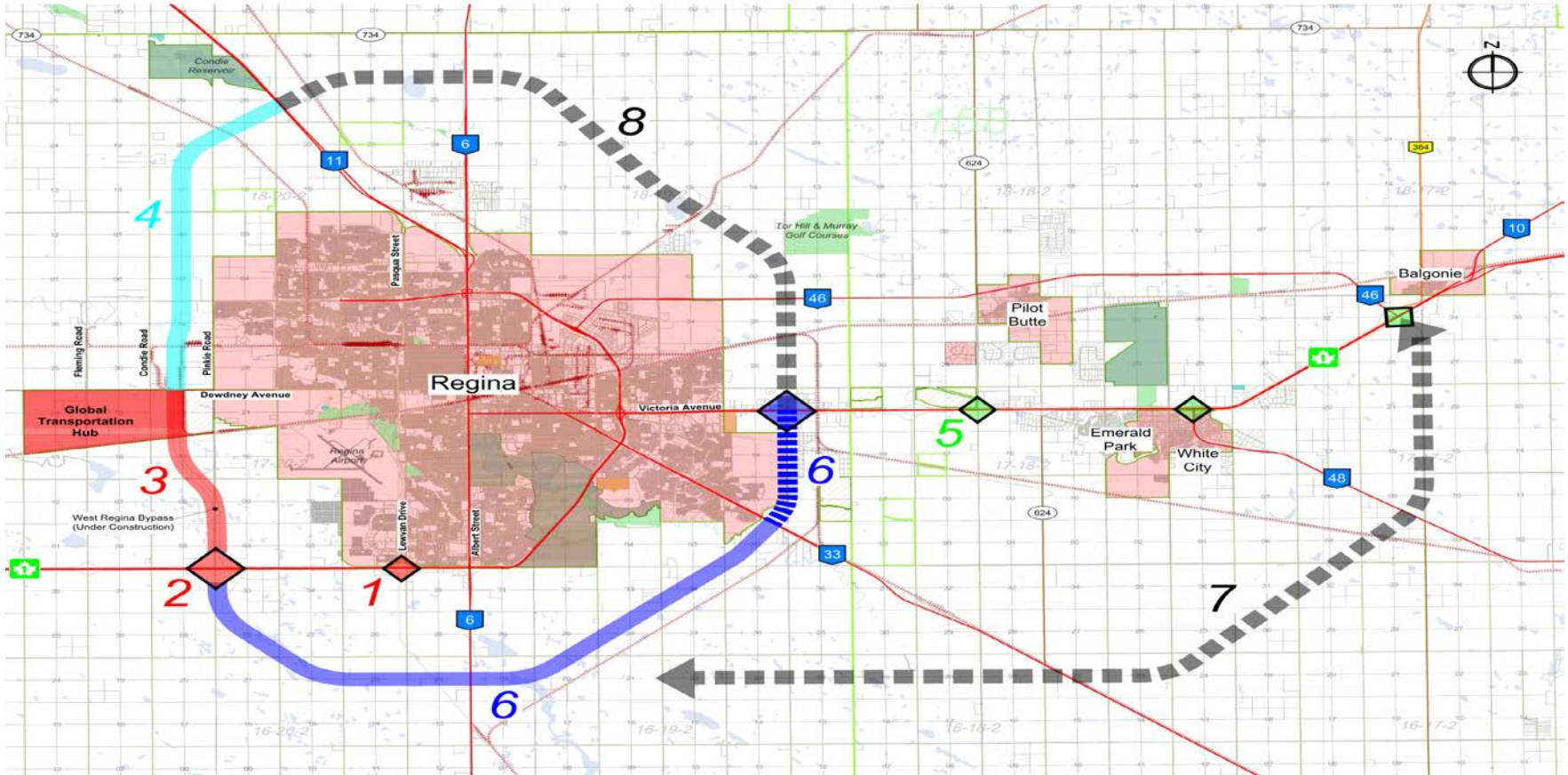
Green - minerals
Red - potash
Orange - coal

Source:
Government of
Saskatchewan

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Logistics Need to be Enhanced.....



At The End of The Day.....

We have what the world wants & needs....



We just have to get it there – and start telling our story!

What's Really Outside the Major Centres?

People want to know:

- Are there opportunities outside the major centres?
- If so, where and what are they?
- What's changed in the past few years??
- Are those locations 'ready' for growth?

Where are we headed?

- Is the labour shortage ‘real’? What’s being done to solve the problem(s)?
- Provincial budgets impact policy change; is the province doing a good job of managing volatility?
- Is there good cooperation & collaboration between various jurisdictions where you operate?

Competition Also Matters

And they're also asking:

- Just how tough is it to penetrate and/or expand in your market?
- What's the story on liquidity?
- Would you describe things as a 'roller-coaster', or 'steady as she goes'?
- Has the cost of doing business changed?

How Does the “Corridor” fit in??

Is it a well-kept secret?

- How will this affect east-west trade?
- Will that create opportunities in the south end of the province?
- What about the proposed by-pass routes; will that solve the transportation problems and open doors elsewhere?

What the Industrial Corridor looks like

Figure 2 Schematic Industrial Nodes and Fundamental Road Networks



General Schematic Development Concept for the Corridor:

- Three Initial Notes of Development within the Corridor - (1) Transportation, (2) Heavy Industry, and (3) Manufacturing
- Corridor generally bounded on the north by the extension of Dewdney Avenue from Regina to Moose Jaw - intersects Pinkie Road
- Corridor bounded on south by Trans-Canada Highway - development south of Trans-Canada Highway to be discouraged to avoid interchanges
- Full use of railway corridors and airports will also be utilized / caution regarding underground oil and gas transmission pipelines
- Agricultural land to be protected and land speculation to be discouraged outside the Corridor

What else have we left out???

Q & A with attendees.....

Thank you for your participation!

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