

TRADE PATHWAYS IN THE PRAIRIES:

Indigenous businesses navigating
shifting trade landscapes





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Project Partners



Funder: PrairiesCan

Prairies Economic Development Canada (PrairiesCan) is the federal department that supports economic growth in Alberta, Saskatchewan, and Manitoba. Western Economic Diversification Canada (WD) was established in 1987 to promote growth and diversification in the economy of the West. In August 2021, WD's operating name was changed to Prairies Economic Development Canada. PrairiesCan advances the interests of the Prairie provinces in national economic policy, program, and project development, including implementation. Its programs and services help businesses, not-for-profits, and communities grow stronger.



About CCIB

CCIB is committed to the full participation of Indigenous Peoples in Canada's economy. As a national, non-partisan association, its mission is to promote, strengthen, and enhance a prosperous Indigenous economy by fostering business relationships, opportunities, and awareness. CCIB offers knowledge, resources, and programs to its members to cultivate economic opportunities for Indigenous Peoples and businesses across Canada. For more information, visit www.ccib.ca.



About the Business Data Lab

The Business Data Lab (BDL) is the analytics and research arm of the Canadian Chamber of Commerce. Its mission is to democratize access to high-quality economic data and insights on Canadian business conditions. By providing real-time, accessible tools and analysis, BDL enables organizations—including Indigenous partners, businesses, and policymakers—to better understand economic conditions, navigate uncertainty, and make informed decisions. Central to this approach is empowering partners with the data and insights they need to tell their own stories and shape their own economic narratives. Through collaboration with Statistics Canada and support from Innovation, Science and Economic Development Canada, BDL is helping to build a more inclusive, data-informed understanding of Canada's economy.



About the Project

Tariffs introduced by the United States have shifted the country's trade relationship with Canada, impacting people and businesses across the country. Thus far, Indigenous businesses have been largely left out of the conversation around the impacts of the tariffs. In this report, CCIB and PrairiesCan explore Indigenous trade in the Prairies using a variety of methods:

- **Analysis of data from Statistics Canada** to explore the impacts of the tariffs on Indigenous businesses.
- **An online survey of 31 CCIB members in the Prairies**, which was published on the CCIB website and shared on social media and e-news. The survey includes responses from September 2025 to February 2026. Due to the small sample size, this survey can provide guidance and qualitative insights from the open-ended questions, but it is not considered representative.
- **Interviews with Indigenous-owned businesses** from Alberta, Saskatchewan, and Manitoba to better understand their perspectives, the strategies they have taken to adapt, and their outlook for the future.

The report features case studies of two Indigenous-owned exporters. We spoke to Mark Brown, President of Pro Metal, and Richard Missens, President and CEO of Pasqua First Nation (PFN) Group of Companies, to learn about how tariffs have impacted their work in manufacturing and defence. Michelle Cameron, CEO of Dreamcatcher Promotions, shared how customer demand and business relationships have evolved throughout shifts in trade policy.

This study was conducted in parallel with a project called [From Readiness to Reach: Indigenous Trade, Partnership and Economic Growth in Alberta](#). CCIB partnered with ATB Financial and the Business Data Lab to explore Indigenous trade in Alberta. This report uses data and analysis provided by BDL, as well as analysis and interpretation by CCIB Research. CCIB would like to thank ATB Financial for its willingness to help get this work started.

Note on data limitations:

Research relating to Indigenous Peoples often takes a pan-Canadian view; however, the experiences of Indigenous entrepreneurs vary widely depending on the region, industry, gender, or other factors. It is important to explore these perspectives; data about Indigenous Peoples is often limited. When data is available, it can become unreliable when broken down by region, gender, or Indigenous identity due to population size or sample size.

The findings and perspectives in this report are reflective only of the interview and survey participants and cannot be generalized to all Indigenous businesses in the Prairies. This report uses data from Statistics Canada, including the Canadian Survey on Business Conditions. While the data are broadly reliable, they are at times incomplete: We occasionally had too few respondents to report on for Alberta, Saskatchewan, and Manitoba. We have marked "F," "no data," or "n.d." on the graphs and tables to indicate when the data is particularly incomplete and unreliable¹. Please see Appendix C for a detailed note on analysis and data limitations.

¹ More information on how that is determined by Statistics Canada can be found here, under the heading "Data Accuracy."



Background

Indigenous businesses and exporters in Canada

Indigenous exporters are an emerging part of the Indigenous economy. Our report on Indigenous businesses' experience in exporting, *Adawe*, found that a lower proportion of Indigenous SMEs export (7.2%) than the Canadian average (12.1%). The reasons behind this disparity are partially related to industry, geography, and the digital divide. Only 2.6% of firms in remote areas export, compared with 11.7% in urban areas. Meanwhile, digitization is an enabling factor for exporters, with 80.3% of exporting SMEs offering online sales compared to only 27.5% of non-exporting SMEs. Digital infrastructure barriers in remote areas and on reserves are well documented and may be affecting Indigenous export potential: In Indigenous communities, only 23.9% of firms offer online sales, compared to 41% in non-Indigenous communities.

Given the increased trade uncertainty over the past year, we wanted to understand how tariffs are impacting Indigenous businesses. Our previous research indicated that exporting varied across regions, so we partnered with PrairiesCan to learn more about the experiences of Indigenous exporters in the Prairie provinces using data from Statistics Canada, an online survey of CCIB members, and interviews with Indigenous-owned businesses in the region.

This study helped build on CCIB's foundational trade and export research. We found that:

- **Four percent of businesses in Canada are Indigenous:** Data from the Canadian Survey on Business Conditions (CSBC) shows a promising increase in Indigenous business representation across Canada between 2021 and 2025. In that time, the proportion of Indigenous businesses in Canada grew from 1% to 4%, which is reaching parity with the Indigenous population in Canada (5% in 2021²).
- **Indigenous export productivity is increasing across Canada:** The value of Indigenous exports across Canada has increased overall between 2005 and 2022, while the number of exporters has decreased. This parallels trends in Canadian exports over the same timeframe.

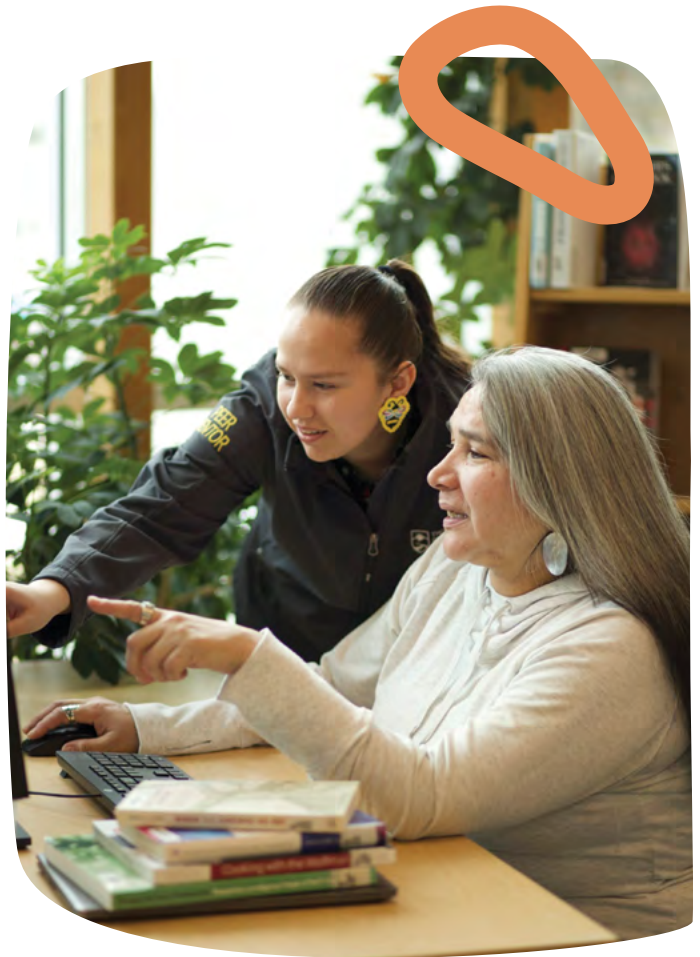
2 Government of Canada, "Canada's Indigenous Population."

Indigenous exports in the Prairies vary across provinces.

Across the Prairies, the average number of Indigenous businesses selling services outside Canada has increased, while the number selling goods has remained relatively steady between 2021 and 2025. Indigenous businesses in Alberta are driving a regional increase in services sold abroad, with the number rising from fewer than 100 in 2022 to 550 in 2025.

Canada's trade and exports

In 2024, Canada saw growth in global trade despite economic uncertainty. According to Canada's 2025 State of Trade, in 2024, "exports rose by 1.9% to reach \$997 billion, while imports increased by 2.9%, surpassing \$1 trillion for the first time, a testament to the tenacity of Canadian importers and exporters."³ Exports to the United States and Europe led this growth.⁴ Exports were led by the metal, mineral, and energy sectors, while consumer goods and food products led imports.



Shifting trade relationships

Canada and the United States have "long been allies with deeply integrated economies."⁵ However, after a record year for bilateral trade between Canada and the United States in 2024, the economic landscape went through major upheaval in early 2025:

- **On March 4, 2025**, the United States implemented a 25% tariff on products from Canada, in addition to a 10% tariff on energy resources and critical minerals, followed by 25% Canadian retaliatory tariffs the next day.
- **In the following months**, the United States instated tariffs on autos, copper, softwood timber, and lumber. These were followed by retaliatory tariffs from Canada on aluminum, steel, autos, and consumer products.
- **Tariffs on products and energy resources** from Canada were lifted on August 31, 2025, but tariffs on steel, aluminum, autos, copper, and softwood lumber remain in effect as of March 2026.⁶

³ Canada, "Canada's State of Trade 2025," June 23, 2025.

⁴ Canada, "Highlights of Canada's Merchandise Trade Performance - 2024 Update."

⁵ Government of Canada, "Impact of Tariffs on Businesses in Canada."

⁶ "U.S.-Canada Tariffs."

Ongoing uncertainty in 2026

Amidst rapidly shifting tariffs and threats of tariffs throughout 2025 and early 2026, several policy shifts may impact trade in the coming months and years. In February 2026, the US Supreme Court deemed that certain tariffs were invalid and unconstitutional. These include the March 4, 2025 tariffs on Canadian and Mexican products and the April 2, 2025 tariffs on global imports. In addition, a formal review of the Canada-United States-Mexico Agreement (CUSMA) is set to take place in 2026 and will shape trade among the three countries for up to 16 years if the agreement is extended.⁷ Updates to the Canada-European Union Comprehensive Economic and Trade Agreement (CETA) will be implemented in early 2026.⁸ Global conflicts may also impact supply chains in the coming year.

Impacts of tariffs

Research has shown that for Canadian exporters, “the primary source of uncertainty has been ongoing adjustments to US trade policy and the persistent threat of sector-specific tariffs. The average US tariff rate on imported goods now tops 18%, up from around 2% at the start of the year.”⁹ These shifts may disproportionately affect small and medium enterprises (SMEs).¹⁰

Impacts vary across industries

According to Statistics Canada’s report on the Q1 2026 CSBC survey, “Businesses most likely to have had lower revenues were in transportation and warehousing (47.5%), mining, quarrying, and oil and gas extraction (41.2%) and accommodation and food services (40.2%). Industries where price increases are most likely include accommodation and food services (40.2%).”¹¹

The impacts of tariffs have been uneven across industries. CUSMA protects most trade, but tariffs on “autos, metals, and softwood lumber ... has created a fragmented Canadian economy where a subset of sectors faces a significant trade shock, while most other exports continue to enter the US duty free.”¹² Ultimately, while some goods are directly subject to tariffs, businesses across sectors are feeling the strain of the changing trade relationship between the United States and Canada. Relevant to Alberta, for example, crude oil, gas, and other refined products were excluded from the tariffs. Still, the industry is facing rising steel and aluminum prices, which are driving up production and processing costs.¹³

Tariffs and Indigenous business

CCIB has stated that “the impact of economic downturns on Indigenous businesses and workers in affected sectors, combined with the high rate of food insecurity, inadequate infrastructure, and rate of poverty experienced by Indigenous communities, will lead to disproportionate consequences for Indigenous businesses, peoples and communities.”¹⁴ As expected, Indigenous businesses are feeling the

7 “The Review of the Canada–United States–Mexico Agreement.”

8 McGregor, “Canada Signing Agreement with EU to Enhance Free Trade Deal.”

9 “Global Export Forecast—Fall 2025.”

10 Canada, “Canada’s State of Trade 2025,” June 23, 2025.

11 Government of Canada, “The Daily — Canadian Survey on Business Conditions, First Quarter 2026.”

12 Fan and Zheng, “Tracking the Impact of U.S. Tariffs on Five Targeted Canadian Industries.”

13 “How Trump Tariffs Are Impacting The U.S. Oil And Gas Industry.”

14 “Canadian Council for Indigenous Business Statement in Reaction to U.S. Tariffs.”

effects: A May 2025 survey by the Indigenous Tourism Association of Canada (ITAC) showed a potential 68% drop in bookings to the United States, and about 19% of Indigenous tourism businesses planned to reduce hiring.¹⁵

Several Indigenous governments and organizations have been quick to respond to the trade dispute. In early 2025, National Chief Cindy Woodhouse Nepinak released a statement saying, “Both international and Canadian laws protect First Nations’ right to self-determination, including our rights to natural resources. That is why First Nations leaders must be included in First Ministers’ Meetings and other intergovernmental meetings on these matters—not as guests to be tolerated for a short time, but as full participants.”¹⁶

In the Prairies, the Manitoba Métis Federation announced it was reviewing its supply chains and reached out to the Little Red River business community to determine next steps. They began working to promote resources for Manitoba Métis businesses.¹⁷ The Indigenous Chamber of Commerce Manitoba called on the government to recognize Indigenous sovereignty and self-determination in intergovernmental tariff discussions, strengthen procurement policies, include Indigenous leaders in meetings addressing the tariff crisis, and co-create resources and strategies that centre Indigenous businesses.¹⁸ The Federation of Sovereign Indigenous Nations, based in Saskatchewan, reaffirmed support for the Jay Treaty and the rights of First Nations from Canada to enter the United States.¹⁹



15 “Indigenous Tourism Facing New Crisis as U.S. Visitation to Canada Plummet.”
16 Assembly of First Nations, “National Chief’s Response to US Tariffs.”
17 Manit. Métis Fed., “President’s Message - February 20, 2025.”
18 “Indigenous Leadership Critical in Response to U.S. Tariffs.”
19 Leader-Post, “Border Trouble.”

Key Findings



Indigenous businesses in the Prairies are exporting to the United States at lower rates.

The Q4 2025 edition of the CSBC indicated that, across Canada, Indigenous businesses export to the United States at lower rates than the average business and import from the United States at higher rates than Canadian businesses. Compared to 9% of Canadian businesses overall, 5.7% of Indigenous businesses sold directly to the United States. The CSBC survey shows lower rates in the Prairie provinces, with less than 1% of Indigenous businesses in Manitoba exporting to the United States, compared to 4.5% in Saskatchewan and 3.4% in Alberta.



Indigenous businesses in Canada are less likely than Canadian businesses to raise their prices.

Only 13.8% of Indigenous businesses plan to do so. In the Prairies, Indigenous businesses in Alberta and Saskatchewan follow this trend (11.7% and 8.0%, respectively); however, 22.1% of Indigenous businesses in Manitoba plan to raise prices.



Indigenous businesses in the Prairies import from the United States at higher rates.

Indigenous businesses that import from the United States rely less on those imports than Canadian businesses in general, reporting an average of 13% of purchases from the United States, compared to 24.6% for Canadian businesses. Alberta is slightly lower at 11.4%, but Manitoba (18.8%) and Saskatchewan (23.4%) report higher rates of American purchases.



Indigenous businesses in Manitoba and Alberta are focused on diversifying their supply chains.

18.8% of Indigenous businesses plan to increase domestic sourcing compared to 15.1% of Canadian businesses. In the Prairies, Indigenous businesses in Manitoba (26.3%) and Alberta (22.8%) plan to adopt this strategy, while only 3.6% in Saskatchewan plan to seek domestic sources. Indigenous businesses in Canada are slightly more likely than Canadian businesses to seek alternative suppliers outside the United States (13.4% vs. 12.3% of Canadian businesses). Indigenous businesses in Manitoba and Alberta are even more likely to take this approach (24.9% and 22.9%, respectively).

Data analysis: Indigenous Business Landscape in Canada

Increase in Indigenous Businesses Across the Country

Data from the CSBC shows a promising increase in Indigenous business representation across Canada between 2021 and 2025. In that time, the proportion of Indigenous businesses in Canada grew from 1% to 4%, which is approaching parity with the Indigenous population in Canada (5% in 2021²⁰).

Since 2021, representation has increased in nearly every sector. Indigenous businesses now represent 7% of transportation and warehousing businesses and 6% of retail trade, construction, and mining, quarrying, and oil and gas businesses.

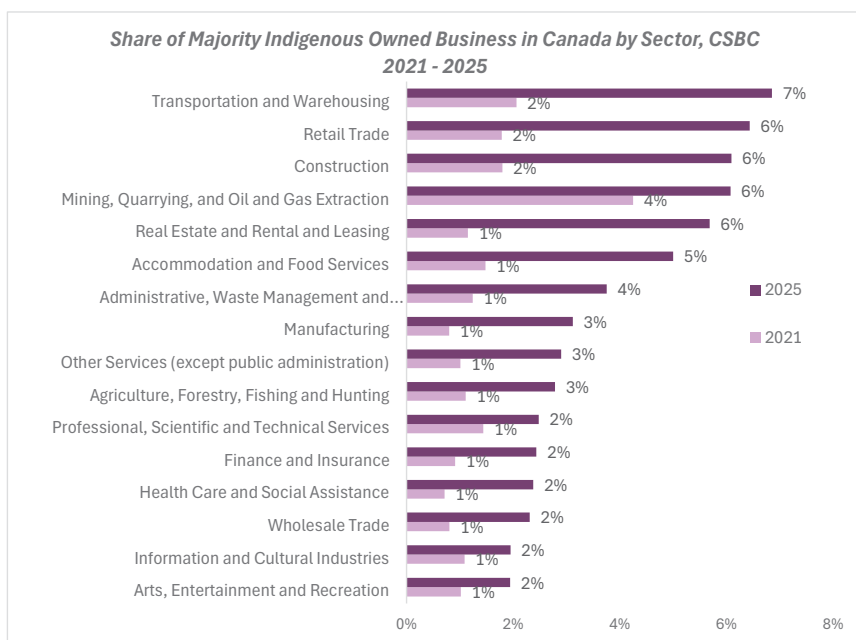


Figure 1: Share of majority Indigenous-owned businesses in Canada by sector. Source: CSBC Q1 2021 - Q4 2025

Indigenous Industry in the Prairies

When looking at Indigenous businesses, we can see that construction (19%), retail trade (18%), transportation and warehousing (10%), professional, scientific, and technical services (8%), and accommodation and food services (8%) are key industries across Canada.

²⁰ Government of Canada, "Canada's Indigenous Population."

Indigenous-owned businesses in the Prairies by sector, 2025								
	Alberta		Saskatchewan		Manitoba		Canada	
	#	%	#	%	#	%	#	%
Accommodation and food services	600	8%	130	11%	112.5	6%	3650	8%
Administrative and support, waste management and remediation	265	3%	30	2%	105	5%	1892.5	4%
Agriculture, Forestry, Fishing and Hunting	160	2%	105	9%	165	8%	1200	3%
Arts, entertainment and recreation	25	0%	15	1%	17.5	1%	335	1%
Construction	1815	23%	155	13%	180	9%	8490	19%
Finance and Insurance	75	1%	2.5	0%	50	3%	777.5	2%
Health care and social assistance	125	2%	65	5%	107.5	5%	2787.5	6%
Information and Cultural Industries	42.5	1%	12.5	1%	27.5	1%	337.5	1%
Manufacturing	220	3%	35	3%	52.5	3%	1697.5	4%
Mining, Quarrying, and Oil and Gas Extraction	225	3%	7.5	1%	5	0%	402.5	1%
Other services (except public administration)	700	9%	50	4%	152.5	8%	2960	7%
Professional, Scientific and Technical Services	1147.5	15%	112.5	9%	175	9%	3790	8%
Real Estate and Rental and Leasing	155	2%	65	5%	22.5	1%	3090	7%
Retail Trade	1290	17%	275	22%	487.5	24%	8062.5	18%
Transportation and Warehousing	787.5	10%	97.5	8%	232.5	12%	4540	10%
Wholesale Trade	172.5	2%	65	5%	87.5	4%	1245	3%
All Industries	7805	5%	1225	4%	1992.5	6%	45255	4%

Table 1: Indigenous-owned businesses in the Prairies by sector. Source: CSBC Q1 2021 - Q4 2025

In Alberta, Indigenous businesses are concentrated in construction (23% vs. 19% of Indigenous businesses in Canada). Professional, scientific, and technical services also stand out in the province, with 15% of Indigenous businesses in this industry, compared to 8% nationally. A lower proportion is in real estate, rental, and leasing compared to Indigenous businesses across the country (2% vs. 7%).

Indigenous businesses in Saskatchewan are more represented in retail trade (22% vs. 18% of Indigenous businesses in Canada) and agriculture, fishing, forestry, and hunting (9% vs. 3%). They are underrepresented in construction (13% vs. 19%).

In Manitoba, Indigenous businesses are more represented in retail (24% vs. 18% of Indigenous businesses in Canada) and agriculture, fishing, forestry, and hunting (8% vs. 3%). They are less concentrated in construction (9% vs. 19%) and real estate, rental, and leasing (1% vs. 7%).

Indigenous Exporters in Canada

The value of Indigenous exports across Canada has increased overall between 2005 and 2022, while the number of exporters has decreased. This parallels trends in Canadian exports over the same timeframe, which indicate higher export productivity among fewer exporters.²¹ Export Development Canada (EDC) notes that the 2008 global financial crisis is tied to the drop in Canadian exporters between 2008 and 2010 and to the subsequent slowdown in their growth.²² A substantial drop in Indigenous exporting businesses between 2019 and 2020 may be linked to the pandemic.

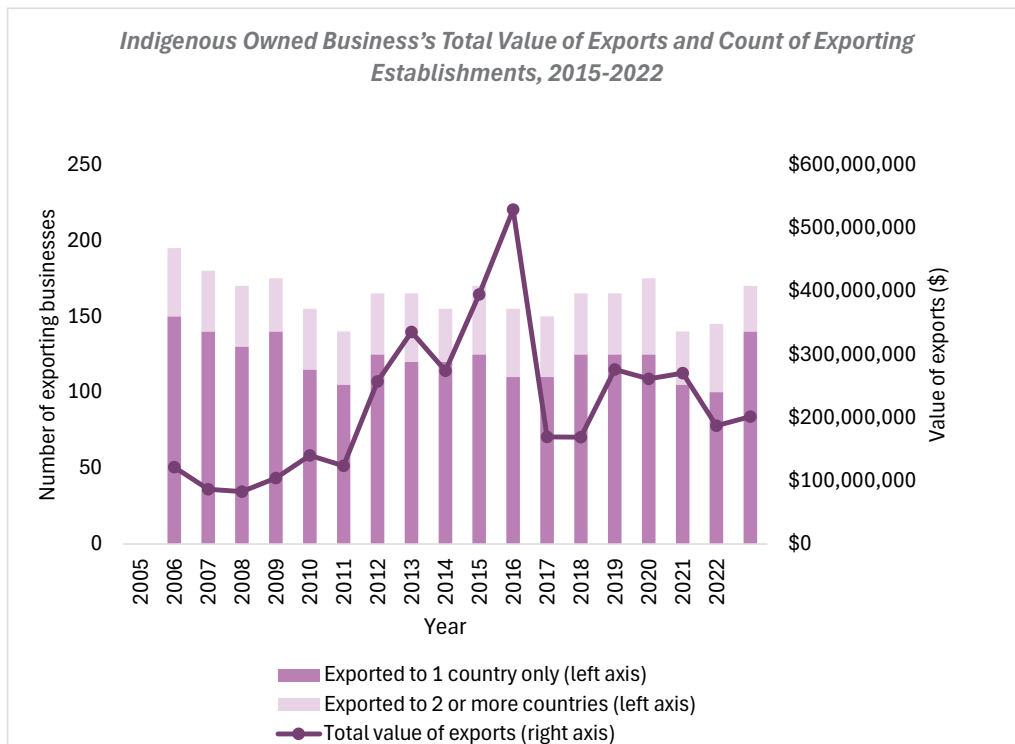


Figure 2: Indigenous-Owned Businesses' Total Value of Exports and Count of Exporting Establishments, 2015-2022. Source: StatCan table 12-10-0091-01 and 12-10-0098-01

²¹ "Long Road to Recovery."

²² "Long Road to Recovery."

Indigenous Exporters in the Prairies

In 2022, Alberta, Manitoba, and Saskatchewan were home to about 30% of Indigenous exporters in Canada and 16% of Canadian exporters.

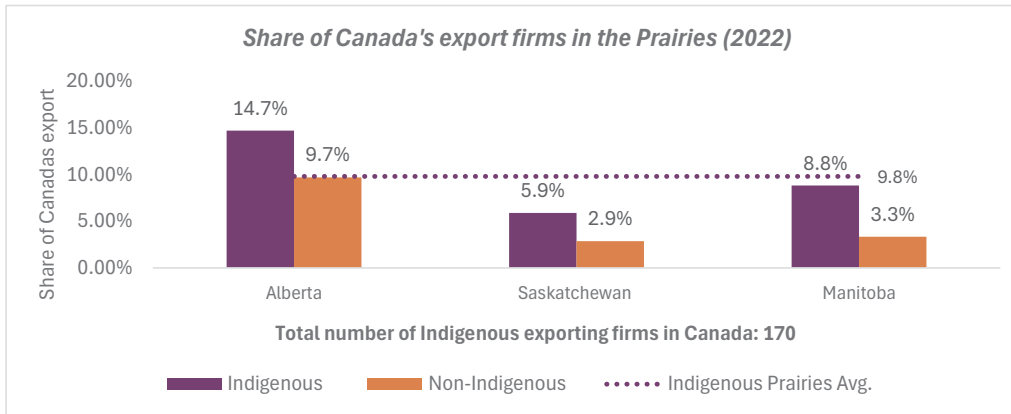


Figure 3: Share of Canada's export firms in the Prairies (2022). Source: StatCan Table 12-10-0091-01 and 12-10-0098-01

Indigenous exports in the Prairies were valued at over \$26.7M. The export value for 25 Indigenous exporting firms in Alberta exceeded \$18M. In comparison, 10 exporting firms in Saskatchewan had exports totalling \$5.3M, and 15 exporting firms surveyed in Manitoba had exports totalling \$3.4M in value.

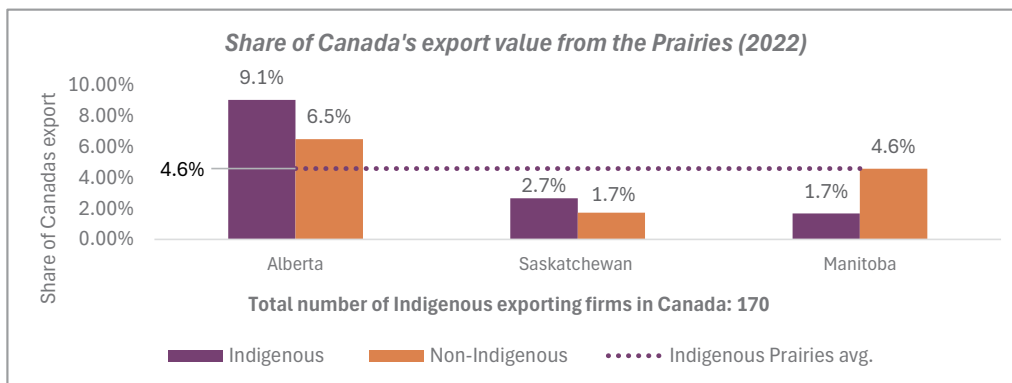


Figure 4: Share of Canada's export value in the Prairies (2022). Source: StatCan Table 12-10-0091-01 and 12-10-0098-01

Export-to-Revenue Ratio for Indigenous-Owned Businesses

Indigenous businesses in Alberta maintained a strong export-to-revenue ratio, often outperforming the rest of Canada between 2017 and 2022. Indigenous businesses in Saskatchewan outperformed the rest of Canada in 2017 and 2019, but fell behind in 2022. Indigenous businesses in Manitoba showed a relatively low but increasing export-to-revenue ratio from 2017 to 2022. There are several years for which Statistics Canada data were deemed unreliable, as indicated on the graph.

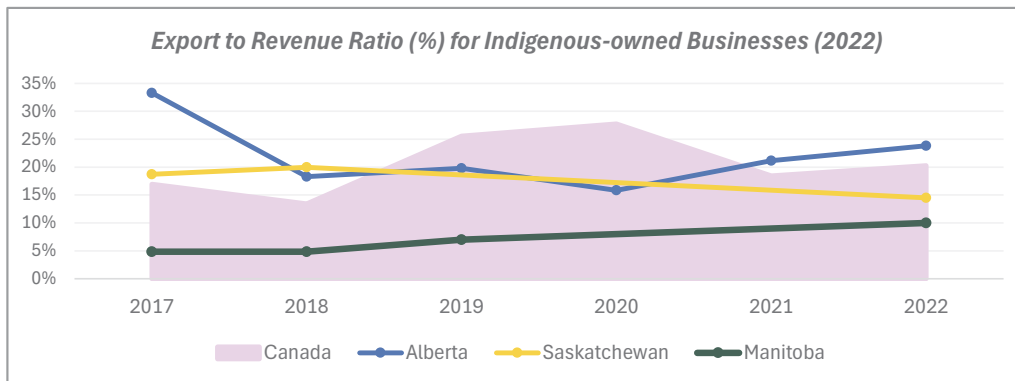


Figure 5: Export-to-Revenue Ratio (%) for Indigenous-owned Businesses, 2017–2022. Source: Statcan table 12-10-0091-01 and 12-10-0098-01 23

Five-Year Trends: Indigenous Trade Activity in the Prairies

In the Prairies, Indigenous businesses in Alberta lead the way in international trade. In terms of the average number of businesses that import and export goods and services, they outpace Indigenous businesses in Manitoba and Saskatchewan.

Exports

Across the Prairies, the average number of Indigenous businesses selling services outside Canada has increased, while the number selling goods has remained relatively steady between 2021 and 2025. Indigenous businesses in Alberta are driving the regional increase in services sold abroad, with the number rising from fewer than 100 in 2022 to 550 in 2025, following a drop between 2021 and 2022.

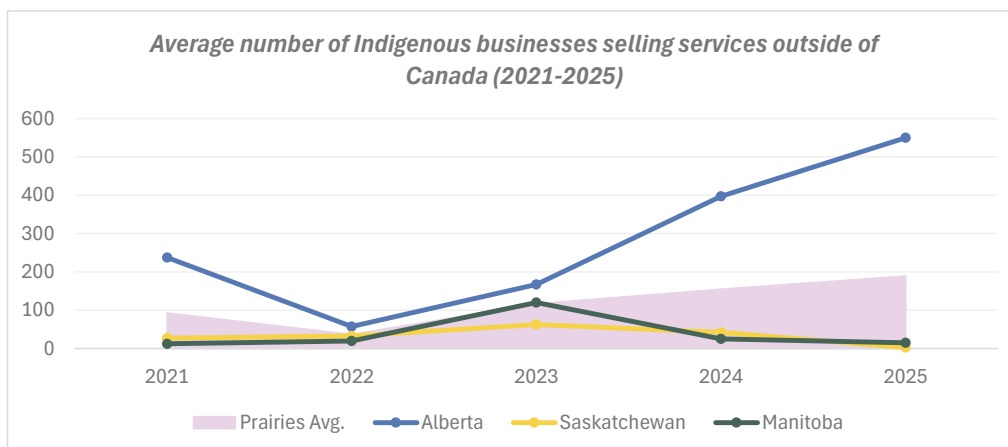


Figure 6: Average number of Indigenous businesses selling services outside of Canada (2021–2025). Source: Custom tabulations from CSBC 2021–2025

23 Data were unavailable for Saskatchewan (2019–2021) and Manitoba (2020–2021).



Figure 7: Average number of Indigenous businesses selling goods outside of Canada (2021-2025). Source: Custom tabulations from CSBC 2021-2025

Imports

The number of Indigenous businesses in Alberta that import goods has increased annually since 2021. Indigenous importers in Manitoba saw a jump between 2024 and 2025.

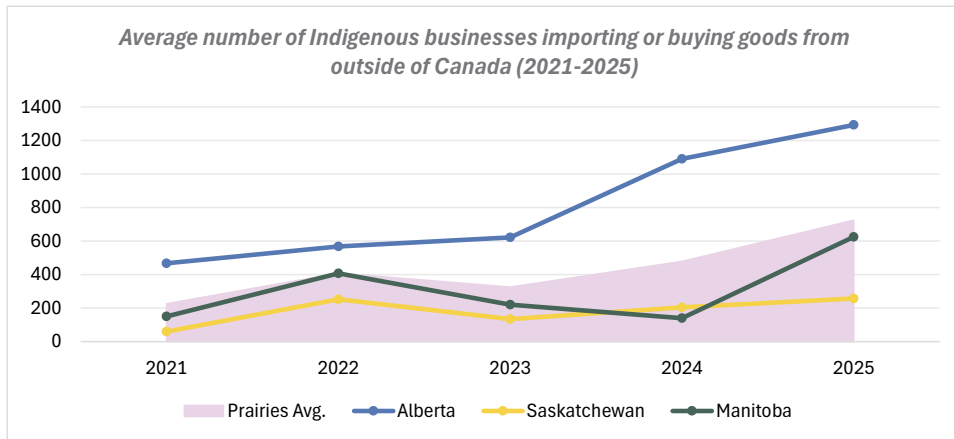


Figure 8: Average number of Indigenous businesses importing or buying goods from outside of Canada (2021-2025). Custom tabulations from CSBC 2021-2025

The average number of Indigenous businesses importing services rose in 2025 after remaining steady from 2021 to 2024. This increase is also driven by Indigenous businesses in Alberta, with the average number jumping from 225 in 2024 to 787 the next year. In Manitoba, there has been an increase in Indigenous businesses purchasing services abroad since 2023.

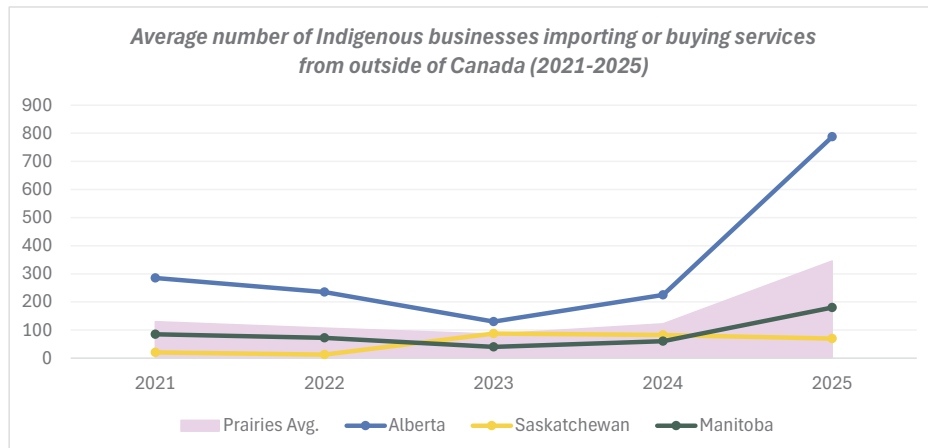
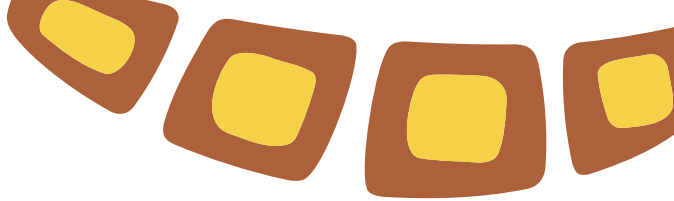


Figure 9: Average number of Indigenous businesses importing or buying services from outside of Canada (2021-2025). Source: Custom tabulations from CSBC 2021-2025



Indigenous Businesses in the Prairies: US Trade

Indigenous-US Trade in the Prairies

The Q4 2025 edition of the CSBC indicated that across Canada, Indigenous businesses are importing more than they export. They export less to the United States and import more than the average Canadian business.

Only 5.7% of Indigenous businesses sold directly to the United States, compared with 9% of Canadian businesses in general. The CSBC survey shows lower rates in the Prairie provinces, with less than 1% of Indigenous businesses in Manitoba exporting to the United States, compared to 4.5% in Saskatchewan and 3.4% in Alberta.

Businesses more commonly import from the United States. About 12.2% of Canadian businesses overall and 10.5% of Indigenous businesses across Canada reported purchasing from the United States over the past 12 months.

Indigenous businesses in Alberta are slightly less likely to import from the United States (9.4%), but Manitoba (40%) and Saskatchewan (18.5%) import at higher-than-average rates.

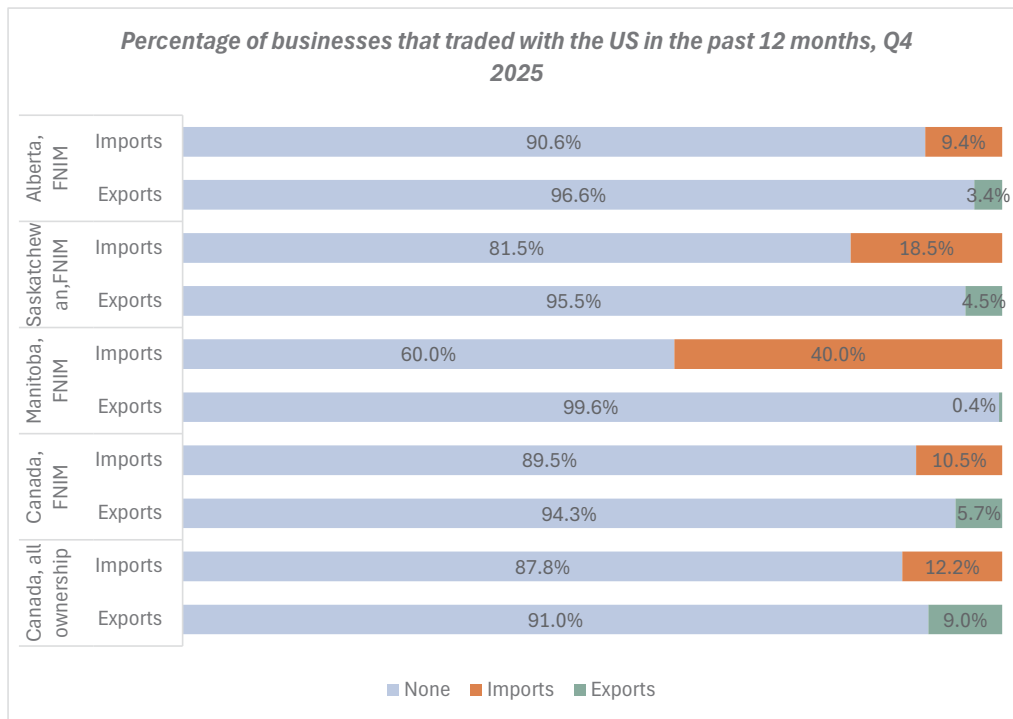


Figure 10: Percentage of businesses that traded with the United States in the past 12 months (Q4 2025). Source: Custom tabulations from CSBC Q4 2025

Sales to the United States

Although a relatively low proportion of Indigenous businesses in the Prairies export to the United States, cross-border trade accounts for a substantial share of their total sales. For Indigenous businesses in Canada, United States sales accounted for about 33.2% of their total sales, compared to 32.2% in Manitoba and 37.3% in Alberta. No data are available for Indigenous businesses in Saskatchewan.

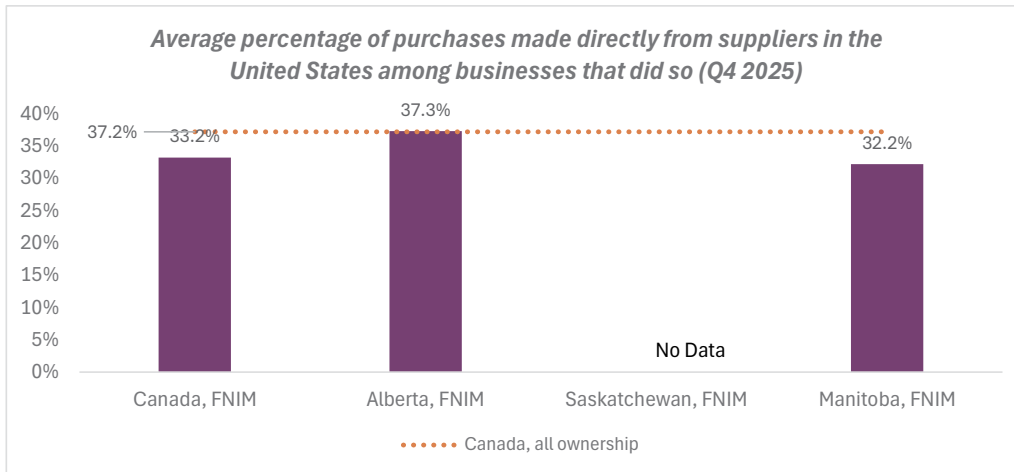


Figure 11: Average percentage of sales made directly to clients or customers in the United States over the last 12 months. Source: Custom tabulations from CSBC Q4 2025

Purchases from the United States

Indigenous businesses that import from the United States rely less on those imports than Canadian businesses in general, reporting an average of 13.0% of purchases from the United States, compared to 24.6% for Canadian businesses. Alberta is slightly lower at 11.4%, but Manitoba (18.8%) and Saskatchewan (23.4%) report higher rates of American purchases.

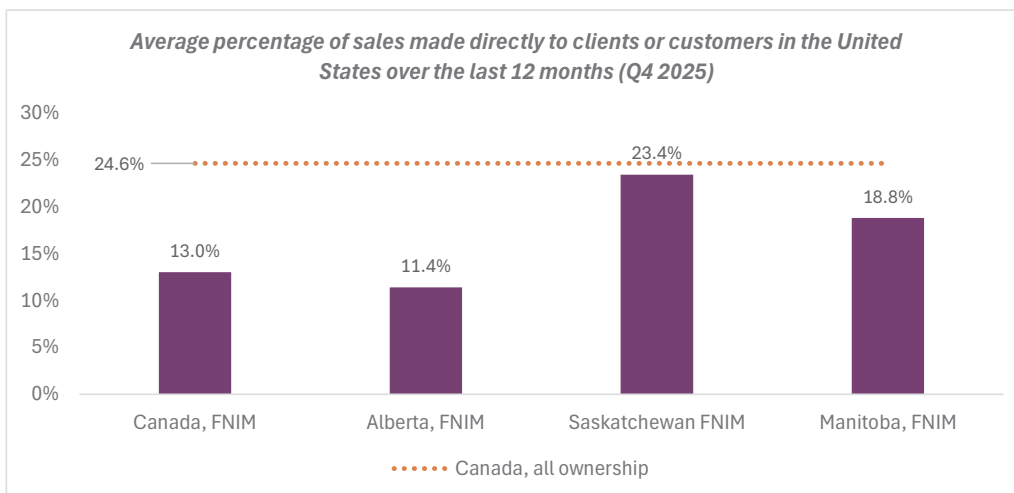


Figure 12: Average percentage of purchases made directly from suppliers in the United States among businesses that did so (Q4 2025). Source: Custom tabulations from CSBC Q4 2025

CASE STUDY:

Pro Metal Industries Ltd.

Interview with Richard Missens, President and CEO of PFN Group of Companies and Mark Brown, President of Pro Metal Industries Ltd.



Pro Metal Industries Ltd. is a metal fabricator based in Regina that is 100% owned by Pasqua First Nation (PFN). Pro Metal was established in 1990 and was purchased by PFN Group of Companies (Pasqua First Nation's economic development arm) in 2015 with two goals in mind. The first was to provide career opportunities to PFN members near an urban centre. The second was to expand PFN's business operations into federal procurement. Pro Metal manufactures and supplies parts in the defence, aerospace, construction, agriculture, and mining sectors. The company has grown from eight to 48 employees since the First Nation purchased it.

Pro Metal is proud to play a role in Canada's manufacturing and defence sectors. Pro Metal was purchased as a strategic decision by the First Nation to break into federal procurement. Over the years, Pro Metal has seen the industry shift. While it took "a lot of legwork" to get into the industry and for bureaucrats, former generals, established businesses, and the First Nation-owned company to learn how to engage with each other, it was generally a welcoming environment. Pro Metal sees it as an opportunity for Canada to strengthen its domestic supply chain, and for First Nations to grow: "10-15 years ago there were zero First Nations in the sector, and now we see it's one of the fastest growing sectors in First Nations economic development." According to Richard, "this industry creates a lot of jobs and opportunities, now we're beginning to see those jobs, that creation of wealth, the opportunities, and the business development reaching First Nations."

Training and career development opportunities for PFN members. Pro Metal needs journeyman welders, machinists, and sheet metal workers, but Richard noted that few PFN citizens have the experience for those roles. So, they developed apprenticeship programs (including tuition fees and allowances) to train and certify community members to work for them. Richard says, "we're developing the capacity within our own nation to create the jobs,



to help them be able to support their own families. Training is not just for jobs when we're talking about this kind of certification, professionalism, and career development."

Navigating challenges by conducting research and renewing client relationships. When the new tariffs were introduced in 2025, Pro Metal immediately went to work adapting by researching tariffs, legislation, and government positioning, and by working directly with customers to understand their needs. According to Richard, "there were times where we worked with them collaboratively in how we designed and redesigned their products to mitigate the impact and the costs." They found that direct engagement strengthened relationships with their customers and helped them navigate the shifting trade landscape.

Uncertainty, cost increases, and competition remain. The tariffs that have remained in place since August 2025 largely cover iron, steel, aluminum, and vehicles, so Pro Metal is feeling the effects. Rather than importing directly, Pro Metal works with Canadian intermediary companies to purchase materials subject to tariffs. Similarly, their customers use their parts to make finished products and sell them at home or abroad. For Pro Metal, these impacts are largely viewed as a cost passed down the chain—absorbed into operations and ultimately reflected in the price to the end customer. Mark noted that as overall trade declines, "competition has intensified, with more players vying for a shrinking share of the Canadian market. As a result, our margins are beginning to erode."



New markets are opening abroad. Opportunities have emerged despite the challenges of the past year. Across Canada and around the globe, governments and industry are looking to diversify their supply chains. Europe is emerging as a new market for Pro Metal, a market that would not typically have considered Canadian suppliers.

Canada is strengthening its supply chains. Richard and Mark are optimistic about Canada's renewed focus on strengthening its domestic supply chain. As Mark explains, "we're gaining a clearer understanding of Canada's capabilities and future potential by investing in our own domestic sources and working toward greater self-sufficiency. In the past, it was easy to assume the U.S. would protect or supply us... and we also relied heavily on our natural resource exports." He also noted increased collaboration within the province: "Here in Saskatchewan, companies—even competitors—are coming together to explore how we can be stronger collectively, rather than working against one another."

Impacts of Tariffs

Impacts of US Tariffs on Indigenous Businesses

Indigenous businesses in Canada were feeling the effects of US tariffs in Q4 2025, with 41.0% reporting a major or minor negative impact from the tariffs, compared with 37.1% of Canadian businesses. Conversely, 31.5% and 46.0%, respectively, reported no impact from the tariffs. Very few reported any positive impact nationally (1.2% of all businesses in Canada and 5.4% of Indigenous businesses across Canada), and 0% of Indigenous businesses in the Prairies reported a positive impact. In CCIB's online survey of businesses in the Prairies, about 50% said they were optimistic about their sales growth in the next 12 months, while 29% were pessimistic, and 21% were neutral.

Results vary across the Prairies for Indigenous businesses: slightly fewer in Manitoba report a negative impact (34.2%), and 44.0% report no impact. There are gaps in data on Indigenous businesses in Saskatchewan and Alberta, but 19.7% and 24.9% reported a minor negative impact, respectively—data on major negative impacts are not available. However, relatively fewer reported “no impact,” which may indicate that a higher proportion of respondents are feeling the effects of tariffs (27.0% in Saskatchewan and 19.5% in Alberta).

These varied results may relate to the industries the businesses operate in and the types of tariffs in place at the time.

Impact of US tariffs on goods sold by Indigenous businesses (Q4 2025)						
	Major negative impact	Minor negative impact	No impact	Minor positive impact	Major positive impact	Unknown
Canada, all ownership	19.5%	17.6%	46.0%	0.6%	0.6%	15.9%
Canada, FNIM	23.8%	17.2%	31.5%	2.7%	2.7%	24.9%
Manitoba, FNIM	13.3%	20.9%	44.0%	0.0%	0.0%	21.6%
Saskatchewan, FNIM	F ²⁴	19.7%	27.0%	0.0%	0.0%	16.1%
Alberta, FNIM	F	24.9%	19.5%	0.0%	0.0%	11.4%

Table 2: Custom tabulations from CSBC Q4 2025. Source: Custom tabulations from CSBC Q4 2025

A report from the Canadian Federation of Independent Business found that businesses were being impacted by “higher expenses (63%), reduced profits (53%), lower revenue (48%), supply chain disruptions (42%), and paused investments (36%).”²⁵ These impacts were reflected in our interviews. Richard Missens from PFN Group of Companies said that even if they are not purchasing directly from abroad, the tariffs are a cost “that’s pushed down to us and we incorporate it into our costs and so on, until it goes all the way down to the customer.” Michelle Cameron, CEO of Dreamcatcher Promotions, said that “there was a time when we were starting to get into the States, and because of the tariffs, we’ve actually paused our accounts with a lot of the suppliers that we were using.”

²⁴ Data labelled “F” are too unreliable to be published, and the data is suppressed by Statistics Canada. More information can be found under “Data Accuracy” [here](#).

²⁵ “Impact of the U.S.-Canada Trade War on Businesses.”

Risk of Business Closures

The CSBC Q4 2025 survey found that 7% of Indigenous businesses could not operate for more than 12 months if tariffs remained at their current levels. Michelle Cameron, CEO of Dreamcatcher Promotions, said that “it’s impacting a lot of companies, especially the smaller ones.” She has seen small businesses and artisans close because they could not keep up with the extra costs incurred by the tariffs.



Planned Actions as a Result of Tariffs

Across Canada, businesses plan to adapt to tariffs by raising prices and diversifying their supply chains. In the CSBC Q4 2025 survey, businesses across Canada said they planned to adapt to tariffs by:

- Raising prices of goods or services (17.7% of businesses in Canada)
- Increasing domestic sourcing (15.1%)
- Seeking alternative suppliers outside the United States (12.3%)

These approaches are reflected in the market, as Statistics Canada reported that after a record high in January 2025, trade with the United States fell steadily from January to April 2025 and, in December 2025, remained below levels last seen in 2022.²⁶ Meanwhile, “exports to countries other than the United States rose 5.8% in December [2025] to reach an all-time high.”²⁷

Indigenous businesses in Canada are less likely than Canadian businesses to raise their prices, with only 13.8% planning to do so. Indigenous businesses in Alberta and Saskatchewan follow this trend (11.7% and 8.0%, respectively), but 22.1% of Indigenous businesses in Manitoba plan to raise prices.

Indigenous businesses in Canada are more likely to plan to diversify their supply chains both domestically and abroad. A higher percentage of Indigenous businesses plan to increase domestic sourcing, at 18.8% compared to 15.1% of Canadian businesses. A large proportion of Indigenous businesses in Manitoba (26.3%) and Alberta (22.8%) plan to adopt this strategy, but only 3.6% in Saskatchewan do.

Indigenous businesses in Canada are slightly more likely than Canadian businesses to seek alternative suppliers outside the United States (13.4% vs. 12.3% of Canadian businesses), but Indigenous businesses in Manitoba and Alberta commonly report this as a planned approach (24.9% and 22.9%, respectively).

Although many businesses plan to diversify their supply chains, they are less likely to seek new customers outside of the United States.

26 Government of Canada, “The Daily — Canadian International Merchandise Trade, December 2025.”

27 Government of Canada, “The Daily — Canadian International Merchandise Trade, December 2025.”

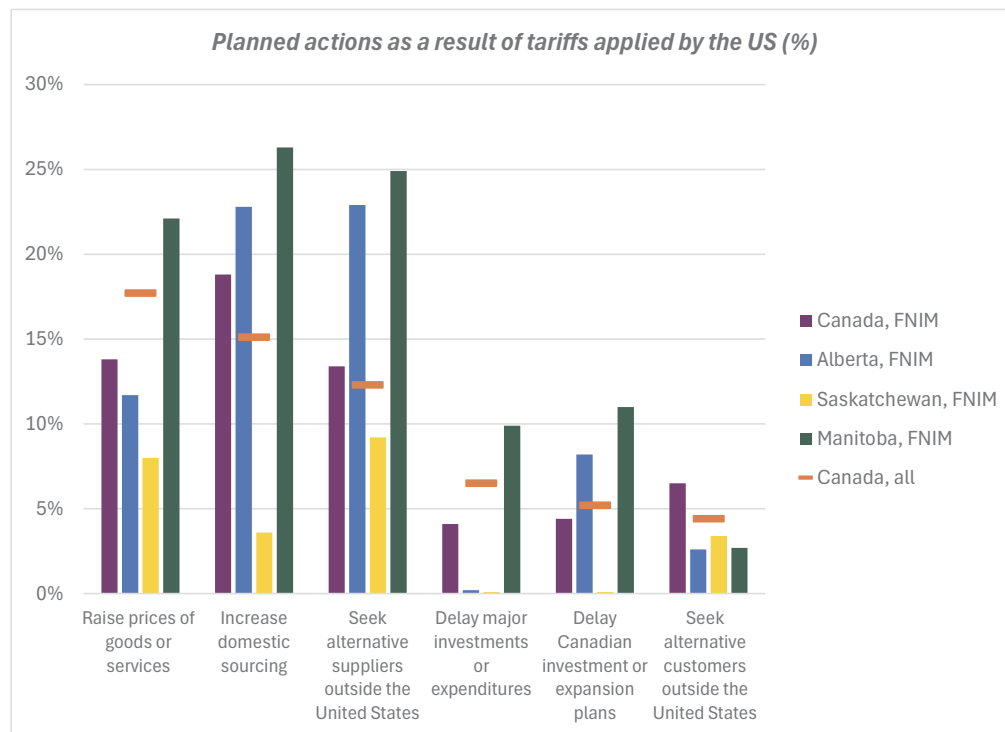


Figure 13: Planned actions as a result of tariffs applied by the United States (%), Q4 2025). Source: Custom tabulations from CSBC Q4 2025

In our interview with Dreamcatcher Promotions, they explained that they initially tried to work with their supply chain to keep costs down, but eventually had to find other suppliers. CEO Michelle Cameron said that “it was really sad that we weren’t able to keep our relationship with suppliers going because they were based in the US. Our clients are not interested in paying more for a product, and they ask us to try [to] source Canadian goods or a Canadian sub-distributor.” They adapted to primarily using Canadian products. Over time, the cost of doing business increased, and Dreamcatcher Promotions had to raise prices for both Canadian and US products, but they offer sourcing options so their customers can decide what is best for them.

In CCIB’s online survey, we found that most respondents said they would change their prices for Canadian (21%) or American (9%) customers (about two-thirds of respondents were not exporters, which partially accounts for the lower rate of price change for US customers). Eighteen percent were planning to change their suppliers, and 14% were seeking new non-US customers, signalling plans to diversify their supply chains and markets. Increased costs appear to be affecting respondents, as people are looking for ways to reduce margins (19%) and improve efficiency (18%).

CASE STUDY:

Dreamcatcher Promotions

*Interview with Michelle Cameron, CEO,
Dreamcatcher Promotions*



Dreamcatcher Promotions was established in 2011 by Michelle Cameron, a member of Peguis First Nation, and under her leadership, the company grew into the largest Indigenous-owned promotional company in Canada. With an array of embroidery and screen-printing services, they create custom promotional materials for sports teams, corporate clients, events, and more for customers across Canada. Michelle also established the Indigenous Nations Apparel Company and Dreamcatcher Executive Offices.

Growing from a home-grown business to a national competitor. Michelle has wanted to be an entrepreneur her whole life and has started several businesses over the years, including a cookie business, a pizza-and-wings stop, and a food truck. With experience from her early endeavours, she noticed demand in her community for branded goods for sports teams, local businesses, and community pride. Dreamcatcher Promotions began at Michelle's home with a single embroidery machine and now occupies a 33,000-square-foot space in Winnipeg, employing over 50 staff members, including graphic artists and print technicians.

Uncertainty and collaboration after new tariffs were introduced. According to Michelle, "it was a scary time when the news of tariffs first came out because I wasn't sure how it would impact us." Over the years, Dreamcatcher Promotions has built up a cross-border supply chain, often sourcing goods from the United States and customizing them in Canada. When tariffs were introduced in 2025, their long-term business partners tried to support each other: "Some of our suppliers tried to hold pricing as long as they could without passing those tariffs on to us ... The buyers were of the same mindset." She said that it worked for a while, but as costs rose, they had to look for other suppliers.

Customers want more options. Customer demand shaped Dreamcatcher Promotions' path forward. With longtime and new customers looking to support Canadian and Indigenous companies, Dreamcatcher researched domestic companies to add to its supply chain. But rising business costs also come into play. So, Dreamcatcher Promotions began to offer customers the choice of Canadian and American products so they could balance pricing and sourcing to decide what option was best for them: "It might not be that the goods are 100% sourced from Canada, but you're definitely supporting a Canadian company ... or a local Indigenous company."

Businesses and customers are rethinking their buying habits. Michelle has noticed less competition with US companies and increased interest in Canadian suppliers. She is excited for the change, noting that we're "looking in our own backyard, what can we do here? What can we make here ...? Whereas we got complacent with our suppliers, and a lot of them were from the US. So it really made us get creative and start digging in holes that we never did before, and we found gems right here in Canada." She hopes they can continue looking for new suppliers in Canada and eventually renew long-term business relationships across the border when trade legislation allows.





Resources for Indigenous Businesses Navigating Tariffs

Uncertainty surrounding rapid policy shifts and the difficulty of finding information on tariffs have posed challenges for businesses. Michelle at Dreamcatcher Promotions said that when the tariffs were introduced, “literally every day you never knew how it was going to affect you. And today we know that there are tariffs in certain areas of our business, but as a whole it’s still a gray area.” This is underscored by CCIB’s online survey, in which participants highlighted confusion about shifting policies and reliable sources of information. One said their main challenge was “uncertainty and no clarity on what is going on” with the tariffs, while another said it was challenging to find information without having to “go down the rabbit hole of websites and social media outlets.”

The CCIB survey also found that 48% of respondents rated current support for Indigenous businesses to participate in trade as poor. Twenty-nine percent rated current support as good (22%) or very good (7%), and 22% rated it as fair. While the businesses we interviewed have been able to navigate trade uncertainty so far, they suggested that a consolidated factsheet or a more “fine-tuned resource to get up-to-date information without having to go to 10 different websites or watch the news every night” would go a long way toward improving clarity around the tariffs.

The federal and regional governments have developed informational and training resources for business. Canada’s [list of counter tariffs](#) provides a detailed reference for businesses, and its list of customs notices helps businesses communicate trade requirements to their clients. PrairiesCan and the other regional development agencies are operating the Regional Tariff Response Initiative (RTRI) to support SMEs to “diversify their markets, create new export revenue sources, adopt innovative technologies ... and build more resilient supply chains.”²⁸ Several other initiatives are listed below, and Indigenous businesses can find a more [detailed list of resources](#) put together by CCIB:

- **The Trade Impact Program through Export Development Canada (EDC).** The program will deploy \$5 billion over two years, starting this year, to help exporters reach new markets for Canadian products and help companies navigate the economic challenges imposed by the tariffs.

- **\$500M in favourably priced loans available** through the Business Development Bank of Canada (BDC) to support impacted businesses in sectors directly targeted by tariffs, as well as companies in their supply chains. Businesses will also benefit from advisory services in areas such as financial management and market diversification.
- **Trade Commissioner Service (TCS) is offering** Canadian businesses support by connecting them with funding and support programs, international opportunities, and a network of trade commissioners in more than 160 cities worldwide.

Industry-specific resources may be particularly useful to businesses as they navigate trade tensions. For example, Dreamcatcher Promotions is a member of a local printing association that keeps members up to date on industry-specific tariffs, down to how paint and ink choices could affect them. Michelle says, “it’s great to be a part of an association, especially in your industry, because they keep a close eye on where the tariffs are. The [Manitoba Print Industry Association] even holds training sessions or information sessions on what they’re seeing.” Pro Metal is part of a group of Indigenous businesses in defence that advocates for Indigenous businesses in the sector; they also participate in trade shows and conferences to learn from their peers in the industry.

Informal business networks also make a difference. According to Michelle, promotional companies in Winnipeg have a good relationship with one another. She says that “if I’m really busy, I’ll give something to another printer. We have a good network, and we support each other that way.” As a member of several boards and councils, Michelle said she has a business network that turns to each other to ask questions and share ideas. Similarly, Pro Metal noted that in Saskatchewan, companies are working together even though they are competitors.

Although businesses are supporting each other, Richard Missens of Pro Metal says they are “looking to Canada to help continue to create the policies and legislation that help build capacity for Indigenous business. We appreciate any support, funding, or training development that can help First Nations continue to increase their participation in the industry.” Richard Missens says organizations like CCIB have helped by developing incubator programs and other resources for Indigenous businesses and exporters. He says, “I really appreciate CCIB for being a champion for indigenous manufacturers in the supply chain. It amplifies our voices when a national organization like CCIB can step up and do those kinds of things for us.”

RESOURCES AT A GLANCE:

- **Easy-to-navigate factsheets and reference sheets**
- **Industry-specific resources provided by Industry associations, trade shows, or chambers of commerce**
- **Funding and educational programs for business development**
- **Networking events to help businesses build connections**



Discussion

Indigenous businesses are a growing part of the economy, accounting for 4% of businesses nationwide. With trade, export, and supply chains top of mind for many Canadians due to the tariffs introduced by the United States, it is crucial to ensure that Indigenous voices lead conversations on these issues.

Indigenous businesses in the Prairies have close ties to the United States. Across the country, Indigenous export productivity is increasing. In the Prairies, Indigenous exports were valued at \$26.7M in 2022, with about \$18M of that coming from Indigenous businesses in Alberta. Alberta has seen the highest growth in the number of Indigenous exporters, but the numbers are trending upwards in Saskatchewan and Alberta as well. Imports from the United States exceed exports; Indigenous businesses in Manitoba and Saskatchewan are more likely than the average business to import from the United States, while those in Alberta are less likely to do so.

Indigenous businesses, like Canadian businesses overall, are focused on diversifying their supply chains by seeking domestic suppliers and alternatives to the United States. Adaptations to tariffs vary across the Prairie provinces; Indigenous businesses in Manitoba are more likely to take these approaches, whereas those in Alberta and Saskatchewan are less likely to plan to diversify their supply chains.

Businesses are feeling the effects of tariffs, whether or not they are directly affected. Participants we spoke to said that much of their goods are purchased from abroad through Canadian intermediaries, or that they sell a product to a customer who then exports it. Participants said that ultimately, the costs of tariffs are being baked into the supply chain, meaning the effects are felt by businesses and customers who are not directly importing or exporting. The most common approach for businesses was to raise prices to offset rising costs.

Looking Ahead

Indigenous businesses want better trade resources amid ongoing uncertainty. CCIB's online survey found that nearly half (48%) of respondents rated current support for Indigenous businesses to participate in trade as poor. Respondents highlighted challenges in finding reliable information amidst changing legislation. Industry-specific resources may be particularly useful given the wide-ranging tariffs applied in recent years.

CCIB has worked to support Indigenous businesses and exporters throughout the trade dispute and in earlier years. We have kept an ongoing resource on tariffs, including FAQs and a list of government initiatives to support businesses. We have advocated on behalf of Indigenous businesses through our [Buy Indigenous to Buy Canadian](#) campaign. Our earlier research on trade provided a foundation for webinars on trade and tariffs, trade missions, and trade accelerator programs. But there is a role to play for the Canadian government and industry to support Indigenous business and trade.

It is time to invest in Indigenous business. CCIB's Buy Indigenous to Buy Canadian campaign emphasizes the vital role Indigenous businesses play in shaping the national economy. The businesses we spoke to are optimistic that more attention will be drawn to Indigenous businesses and Canadian suppliers as a whole through Canada's [Buy Canadian Policy](#) and corporate Canada's efforts to diversify their supply chains. Although it has been challenging to navigate the tariffs, they see an opportunity to build up Canadian and Indigenous capabilities, rather than relying on the United States or other countries.

Invest in dedicated supports for small businesses, including financing and training. Although shifts in trade may create new opportunities, tariffs can be particularly damaging for small businesses. "Buy Indigenous" and "Buy Canadian" initiatives have helped open new avenues for Dreamcatcher Promotions and Pro Metal, including expansion into international and domestic markets. Both companies entered this period of trade tension with decades of experience, well-established supply chains, and loyal customer bases. However, as Mark noted, many small businesses lack the resources and capacity needed to effectively navigate tariffs and complex procurement systems.

Michelle emphasized that ultimately tariffs can be an insurmountable cost for small Indigenous businesses, such as "the beaders and artisans that get some goods from the US, and as a small business it's hard to absorb those costs."





I've seen a lot of people go out of business because a lot of their customer base or a lot of the goods that they purchased were from the US, and they just couldn't recoup those costs."

Develop accessible, up-to-date, and easy-to-use resources on tariffs.

We heard that, especially early on, businesses found it a significant challenge to keep up with new tariffs. Some had a hard time finding reliable sources of information, and when they did, it could be hard to navigate. Clarity around policy changes, tariffs, and exemptions would be valuable for Indigenous businesses moving forward, who suggested that fact sheets or finely tuned resources would greatly help in a rapidly changing environment. Advertising, outreach, and leveraging networks to raise Indigenous businesses' awareness of programs would help improve effectiveness.

Industry groups play an outsized role in supporting Indigenous entrepreneurs and exporters. Industry-focused supports may be particularly useful for businesses. An "all-purpose" resource might overlook details related to materials, processes, or other distinctions that might impact whether or not a good will be tariffed. Indigenous businesses can look for industry associations or trade shows as a starting point for resources like this. Regional chambers of commerce or other business associations may also help businesses to find reliable resources.

Indigenous leadership must inform policy and strategy moving forward. As Canada's trade relationships continue to evolve, government and industry must keep Indigenous business and communities central to conversations on policy and strategic approaches, including investments in the Canadian supply chain and the upcoming CUSMA negotiations. Too often, Indigenous Peoples and businesses are an afterthought in new resource development and policy shifts, so at this pivotal moment, it is all the more important that Indigenous businesses lead the way forward.

Appendix A: Business Snapshot

Graph: Distribution of Indigenous-Owned Businesses in the Prairies

Master data file (Prairies) 01.2 RD Counts ID Size (STC); RD Counts (STC) Summary

Source: Table: 33-10-0631-01

Indigenous-owned business counts, StatsCan 2021				
	Canada	Manitoba	Saskatchewan	Alberta
Indigenous-owned	18,605	1,300	1,190	4,055
First Nations	7,520	275	310	1,280
Métis	10,110	1,000	855	2,645
Inuk (Inuit)	330	X	X	35
Other Indigenous ownership	645	X	X	95

Table 3: Indigenous-Owned Business Counts, 2021. Source: Table 33-10-0631-01

Indigenous businesses by gender ownership, 2021					
	Canada - All	Canada - Indigenous	Manitoba	Saskatchewan	Alberta
Men-owned	892,550	13,265	940	880	2,960
Women-owned	301,675	4,925	320	275	985
Equally owned	212,840	410	40	30	110

Table 3: Indigenous-Owned Business Counts, 2021. Source: Table 33-10-0631-01

Top industries per region, by output attributable to Indigenous Peoples, 2023 (thousands of dollars)				
Region	Regional output	Top 3 industries	Output	Share of regional total (%)
Canada	\$118,250,647	Construction	\$14,290,756	12%
		Manufacturing	\$12,008,543	10%
		Health care and social assistance	\$9,871,447	8%
Manitoba	\$12,227,317	Health care and social assistance	\$1,264,679	10%
		Construction	\$1,154,914	9%
		Real estate and rental and leasing	\$1,020,907	8%
Saskatchewan	\$9,030,865	Construction	\$881,257	10%
		Health care and social assistance	\$806,800	9%
		Real estate and rental and leasing	\$705,079	8%
Alberta	\$19,863,106	Construction	\$3,198,023	16%
		Mining, quarrying, and oil and gas extraction	\$2,044,797	10%
		Real estate and rental and leasing	\$1,405,214	7%

Table 5: Top industries per region, but output attributable to Indigenous Peoples, 2023. Source: Table 36-10-0695-01

Appendix B: Planned Actions

Planned actions over the next 12 months by a business or organization as a result of any tariffs applied by the United States on imports from Canada, Q4					
	Canada, all	Canada, FNIM	Alberta, FNIM	Saskatchewan, FNIM	Manitoba, FNIM
Seek alternative customers outside the United States	4.4	6.5	2.6	3.4	2.7
Seek alternative suppliers outside the United States	12.3	13.4	22.9	9.2	24.9
Increase domestic sourcing	15.1	18.8	22.8	3.6	26.3
Delay major investments or expenditures	6.5	4.1	0.2	0.1	9.9
Delay Canadian investment or expansion plans	5.2	4.4	8.2	0.1	11.0
Acquire or partner with United States-based businesses as a beachhead strategy	1.1	1.0	8.3	0.0	0.1
Explore trade-related financial tools	0.9	0.3	0.0	0.5	1.1
Establish operations in the United States	1.1	0.0	0.0	0.0	0.0
Increase inventory or stockpiled goods	2.9	6.4	0.1	0.9	3.9
Invest in technology improvements	3.4	1.3	0.0	1.2	8.1
Lay off employees	3.1	3.5	0.2	F	2.1
Hire employees	2.4	0.5	0.0	0.3	4.1
Raise prices of goods or services	17.7	13.8	11.7	8.0	22.1
Lower prices of goods or services	0.7	0.2	0.0	0.3	0.1
Other action	0.2	0.1	0.0	0.0	0.0
None	48.1	37.5	F	34.5	43.9
Unknown	17.0	25.6	35.8	31.0	19.7

Table 6: Planned actions over the next 12 months by a business or organization as a result of any tariffs applied by the United States on imports from Canada, Q4. Source: Custom tabulations from CSBC Q4 2025

Appendix C: Data Classification and Scope Limitations Acknowledgment

This report draws on a combination of public and restricted Statistics Canada datasets, including the Canadian Employer–Employee Dynamics Database (CEEDD), the Canadian Survey on Business Conditions (CSBC), the Indigenous Peoples Economic Account (IPEA), and the 2021 Census of Population. Each source provides complementary insights into Indigenous entrepreneurship, labour participation, and trade in the Prairies, but each also carries methodological and interpretive limitations that should be considered when reading this report.

The CEEDD microdata provides a unique longitudinal view of private enterprises and their ownership characteristics from 2005 to 2021. However, as with all administrative datasets, coverage is limited to formal, tax-filing enterprises and does not capture unincorporated, community-owned, or informal economic activities that are significant in many Indigenous communities. Indigenous ownership identity is determined through linked surveys and administrative records, and self-identification remains incomplete for some firms.

The CSBC offers valuable and timely insights into business sentiment and expectations from 2021 to 2025. Because it is a voluntary, online survey with a cross-sectional design, its results are subject to sampling variability and non-response bias. Responses are weighted to reflect the national business population, but margins of error are higher for smaller subgroups, such as majority Indigenous-owned firms in Alberta, Saskatchewan, and Manitoba. Findings from the CSBC should, therefore, be interpreted as indicative rather than definitive trends.

The IPEA provides model-based estimates of Indigenous labour income, gross domestic income, and output across industries. These estimates rely on the integration of multiple data sources, including the Census, Labour Force Survey, and tax files. While they represent the most comprehensive national and provincial estimates currently available, they are not directly comparable with provincial gross domestic product statistics. They should be viewed as indicators of income generated by Indigenous Peoples within industries rather than measures of total value added.

It is important to note that Table 36-10-0695-01, Gross domestic income attributable to Indigenous people by industry, provides results only at the two-digit North American Industry Classification System (NAICS) level. This level of aggregation does not allow for further disaggregation into sub-classifications, such as NAICS 914 (Indigenous Governments and Administrations), which falls within the broader NAICS 91 (Public Administration) category. As a result, it is not possible to determine from this dataset whether observed growth in public administration reflects expansion of Indigenous self-governments and administrations or greater Indigenous participation within federal, provincial, or municipal government bodies. Similarly, self-governing Indigenous entities that operate as not-for-profits before formal recognition are classified under different NAICS codes, which may understate the scale of Indigenous government and administrative activity.

Finally, data from the 2021 census forms the demographic foundation for this report. Although the Census provides high-quality population estimates, undercounting remains an issue in some Indigenous communities, particularly in remote and northern regions.

Taken together, these sources provide a robust yet partial view of Indigenous entrepreneurship and trade in Alberta, Saskatchewan, and Manitoba. They illuminate measurable aspects of economic activity while acknowledging that many forms of Indigenous value creation, including traditional, land-based, and community enterprise, remain underrepresented in current data systems. Continued efforts to improve Indigenous data governance, self-identification, and disaggregated analysis are essential for building a more complete and accurate picture of Indigenous economic strength and opportunity.



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