



SOUTHEAST

Industry Report

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Executive Summary

Southeast's economy combines a broad employment base with clear signs of structural change. Construction, education, health care, manufacturing, and retail form the region's main employment pillars, while the business base is led by construction, agriculture, and real estate. Recent years also show a marked recovery in active establishments after the earlier decline through 2021, with totals rising steadily through 2025. At the same time, the region remains heavily shaped by very small firms, especially no-employee businesses, giving Southeast a business landscape that is large in count but uneven in scale.

The strongest momentum is not always coming from the largest employers. Health care and educational services posted solid recent growth, while construction remained the largest employer despite a slight short-term decline. Over a longer period, finance, professional services, real estate, administrative services, and construction recorded some of the fastest gains, pointing to an economy that has been expanding beyond its traditional base. Specialization remains strongest in agriculture and construction, but recent concentration measures softened across several established sectors even as utilities and finance posted sharp longer-term gains. Short-term industry shifts are also uneven: some service activities recorded very rapid percentage increases, while a forestry-support activity fell sharply. In the declining industries, the steepest losses were concentrated in sectors with very small workforces, meaning the percentage drops were dramatic but the absolute job losses were limited.

This leaves a picture of Southeast as a region with both stability and churn. Its largest employment and establishment counts still sit in foundational sectors such as construction, education, health care, and agriculture, but much of the recent dynamism is coming from service-oriented fields and from growth in smaller and mid-sized business segments. The labour market data also suggest that, in most industries, resident workers outnumber local jobs, with only a few sectors near parity or above it. Southeast therefore appears as a sizable and diversified regional economy whose recent growth has been real but uneven, with expansion concentrated in selected sectors rather than spread uniformly across the whole employment base.

Fastest Growing Industries

Employment is booming in Southeast, especially florists, which jumped 1,000% to 22 workers, and taxi services, up 240% to 17 workers, showing strong job growth in niche retail and transport sectors.

Fastest-growing industries in Southeast show concentrated, large swings in employment over the most recent year. The list highlights both rapid expansion in a few service areas and a notable contraction in one resource-support activity, so momentum rather than size defines growth patterns. Taxi and limousine service recorded the largest one-year gain, rising by 112.5% to 17,240 people. Community food and housing and related relief services grew 71.4% to 12,300 people over the same period. By contrast, support activities for forestry declined 60.0% to 6,200 people. Two wholesale and manufacturing-related cate-

gories — ventilation and HVAC manufacturing (12,500 people) and textile, clothing and footwear merchant wholesalers (4,300 people) — are listed by size but have no one-year change reported in the dataset. The pattern is one of uneven short-term momentum: a few service industries are driving sharp percentage increases while a forestry-support activity shows a steep short-term decline. These changes describe recent direction but do not establish long-term trends beyond the one-year figures provided.

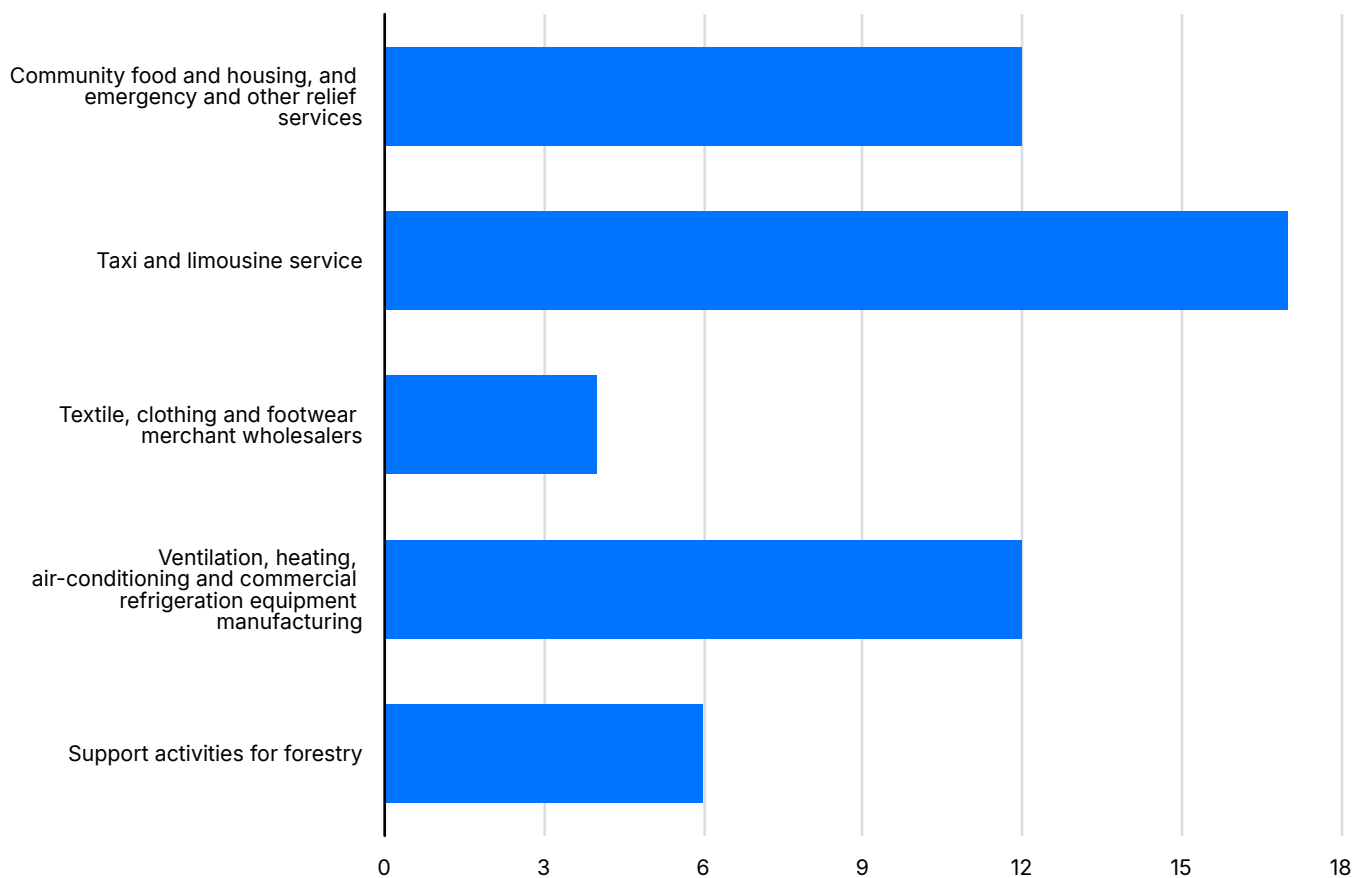


Figure 1.1: Shows industries where employment has increased the most over the selected time period. It helps identify where job growth is strongest in the local economy. (Southeast, 2025)¹

Largest Industries

Schools dominate employment in Southeast, Manitoba with 5,530 jobs, a 3.33% rise over the past year. Nursing care facilities show the biggest growth, adding 1,575 jobs and increasing 28.89% year-on-year.

Southeast's largest employers by industry in 2025 are led by elementary and secondary schools, which account for 5,530 employees, followed by depository credit intermediation with 2,897 employees and other local, municipal and regional public administration with 1,708 employees. The table reflects the region's mix of public services, finance and health-care-related employers. Short-term momentum is mixed. Nursing care facilities recorded a notable one-year rise of 28.9% to 1,575 employees, while general freight trucking fell 17.3% to 1,230

employees. Over five years several sectors show large cumulative growth: depository credit intermediation is up 257.2% and non-residential building construction is up 117.4%. Structurally, the largest single employer is education, but the strongest five-year gains are in finance and construction, indicating divergent growth rates across sectors rather than uniform expansion. These patterns show a region where employment size and recent growth do not always align across industries.

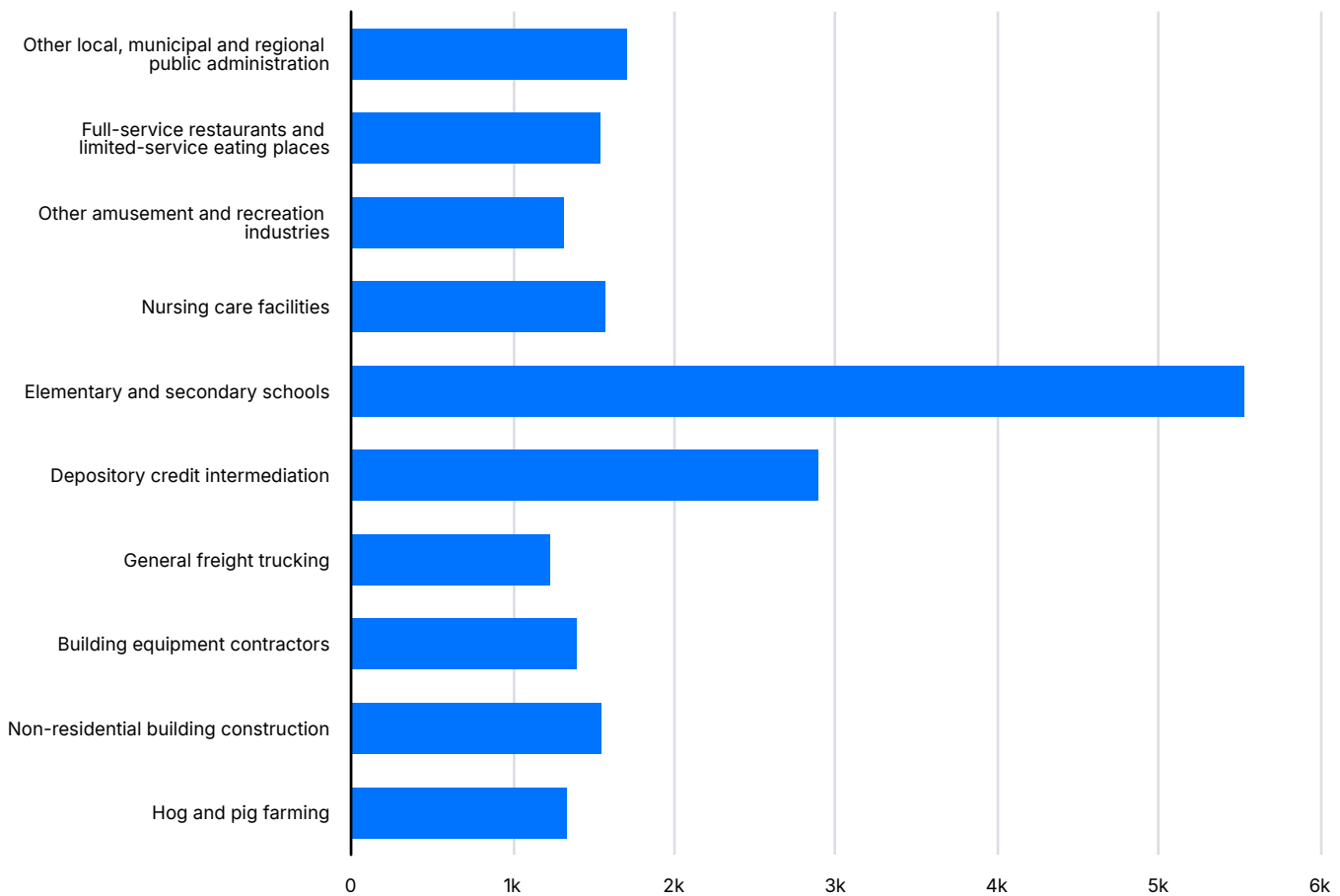


Figure 2.1: Shows the industries with the highest employment. It helps identify the biggest sources of jobs in the local economy. (Southeast, 2025)¹

Declining Industries

Employment in Southeast's largest declining sector fell dramatically, with only three workers remaining—a 92 % drop over the past year and a 94 % decline over five years. Other sectors lost up to 98 % of jobs.

Southeast's employment losses over the selected period are concentrated in a very small number of workers but show exceptionally large percentage declines. The dataset lists four industries where headcounts fell sharply by 2025, each with one to three employees before the decline was measured. Converted paper product manufacturing fell to 3 people, a 92.1% drop in the most recent year and a 94.0% decline over five years. Electronics and appliances retailers reported 2 people and a 90.0% one-year decrease; a five-year change is not

provided. Other transit and ground passenger transportation dropped to 1 person with an 87.5% one-year fall and a 50.0% five-year decline. Performing arts companies also registered 1 person and an 80.0% decline in both the one-year and five-year measures. The pattern is one of steep percentage contractions built on very small employment bases. Because the counts are low, large percent changes reflect small absolute losses. These figures identify specific industry pockets with notable job erosion in Southeast during the period reported.

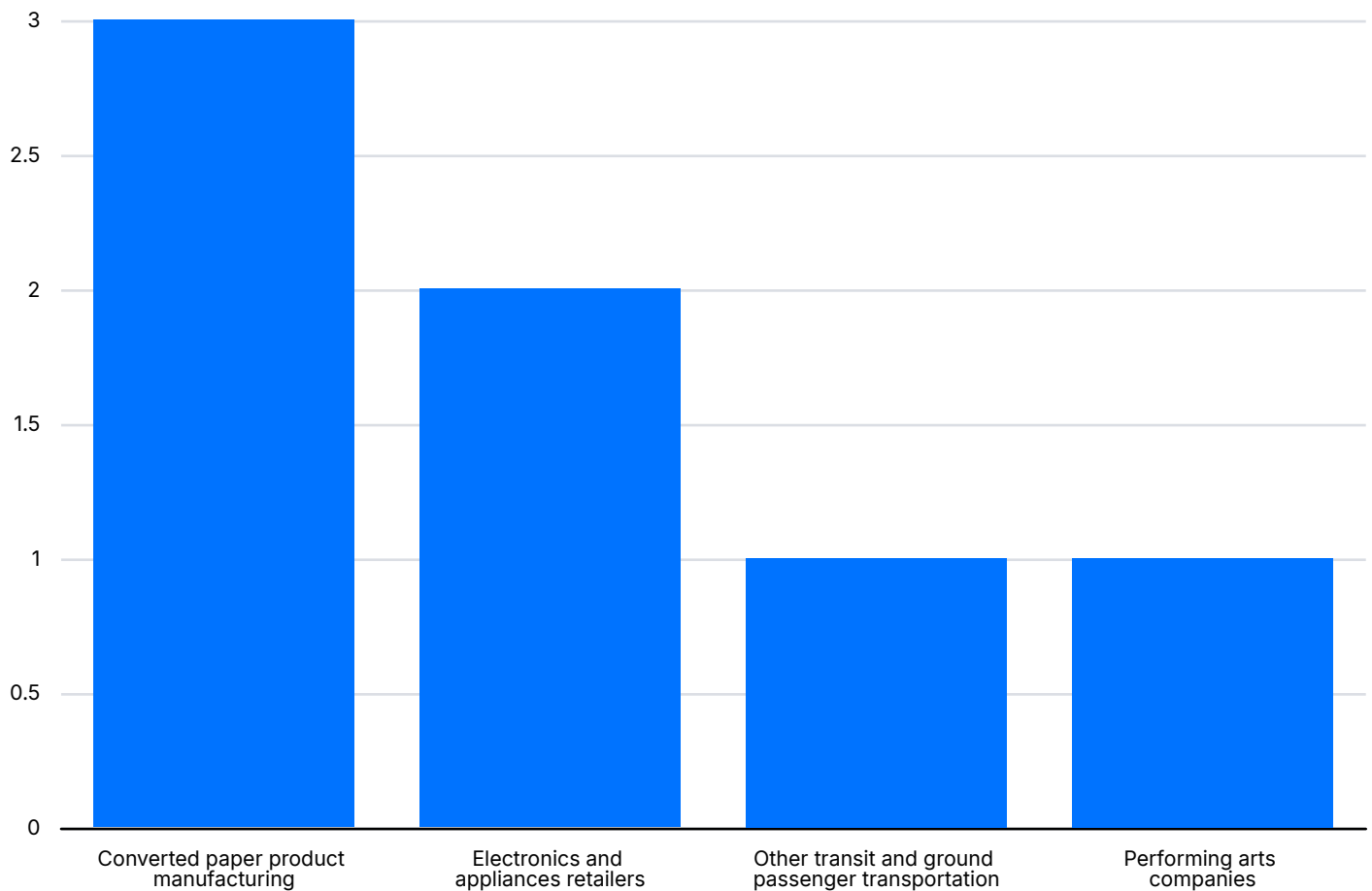


Figure 3.1: Shows industries where employment has decreased the most over the selected time period. It helps identify parts of the local economy that are losing jobs. (Southeast, 2025)¹

Employment by Sector

Construction dominates Southeast's job market with 7,810 positions, a modest 0.75% decline this year but an 86.5% rise over five years; wholesale trade fell 16% YoY, yet grew 43% in the same period.

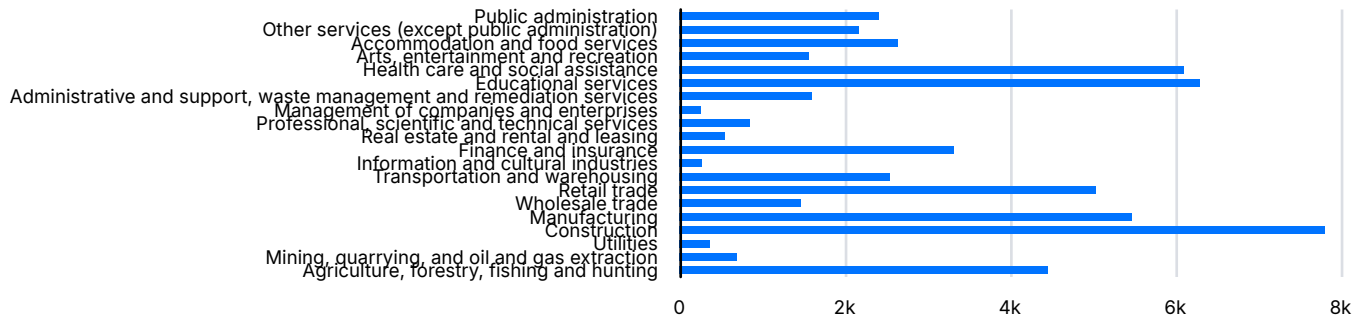


Figure 4.1: Shows how employment is distributed across industry sectors. It helps indicate which sectors account for the largest share of local jobs. (Southeast, 2025)^{2,1}

Employment in Southeast is concentrated in construction (7,810 jobs), education (6,299) and health care (6,102), followed by manufacturing (5,480) and retail trade (5,045). These counts are for 2025 and cover employees aged 15 and over. Short-term momentum is mixed: health care rose 11.2% year over year and manufacturing 4.5%, while wholesale trade fell 16.0% and management of companies fell 15.6%. Over five years several small sectors expanded sharply: utilities (+354.3%), finance (+200.0%) and construction (+86.5%). The pattern shows large employers alongside rapid proportional growth in smaller sectors, indicating structural change in the region's employment base.

Southeast's employment is concentrated in construction, education and health care, shaping the region's labour mix and recent momentum. Construction accounts for 7,810 jobs (1-year change -0.8%, 5-year +86.5%), educational services 6,299 (+7.3%, +54.7%), and health care 6,102 (+11.2%, +44.9%). Manufacturing (5,480, +4.5%) and retail (5,045) are sizable secondary employers. The pattern signals growth in public and construction-related employment while agriculture (4,463, -2.8%) shows smaller short-term declines.

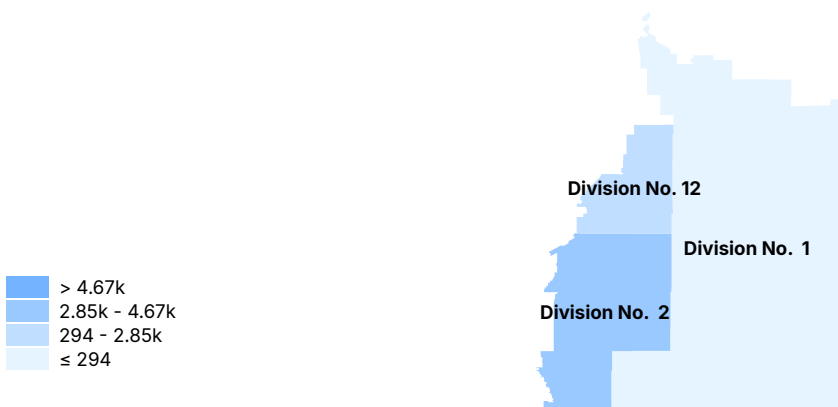


Figure 4.2: Distribution of Largest Group: Naics - Construction (Southeast)^{2,1}

Establishments by Sector

Construction dominates Southeast Manitoba with 2,591 firms in 2025, up 0.23% from last year and 34.6% over five years. Utilities saw the biggest jump, rising to 18 firms, a 28.6% annual gain.

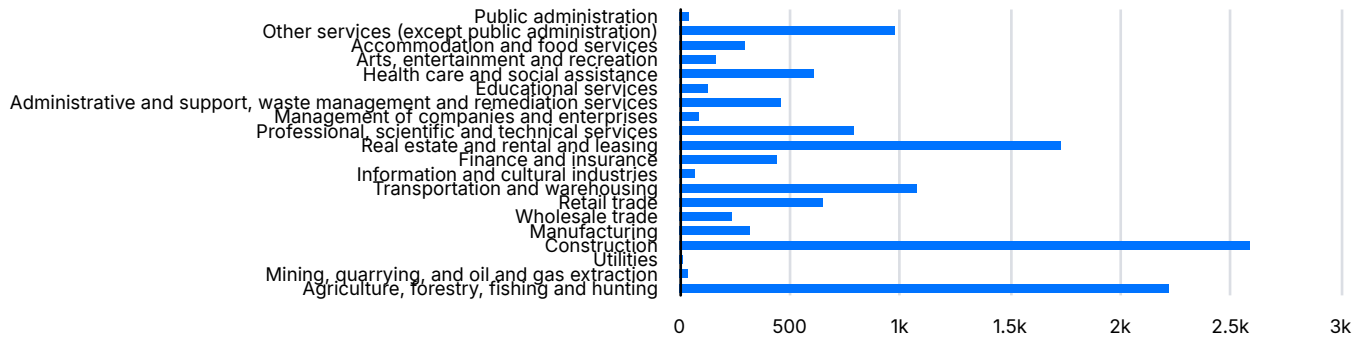


Figure 5.1: Shows how business establishments are distributed across sectors. It helps indicate the sector mix of the local business base. (Southeast, 2025)³

Southeast's business base in 2025 is concentrated in a few large sectors. Construction (2,591 businesses), Agriculture, forestry, fishing and hunting (2,222), and Real estate and rental and leasing (1,730) are the largest by count, followed by Transportation and warehousing (1,076). Most large sectors show modest short-term change: Construction +0.2% (1-year) and Agriculture +1.7% (1-year). Smaller sectors recorded strong five-year growth rates: Educational services +108.1% and Management of companies +100.0% (5-year). The pattern suggests size is concentrated in a handful of sectors while rapid proportional growth has occurred in several smaller categories.

The distribution of business establishments in Southeast (2025) is concentrated in a few large sectors that shape the local economy. Construction leads with 2,591 establishments, followed by Agriculture, forestry, fishing and hunting at 2,222 and Real estate and rental and leasing at 1,730; Transportation and warehousing totals 1,076. Division-level counts show this concentration is uneven: Division No. 2 reports 1,853 construction and 1,405 agriculture establishments. These figures indicate building, primary production and property services are principal components of the region's business base.

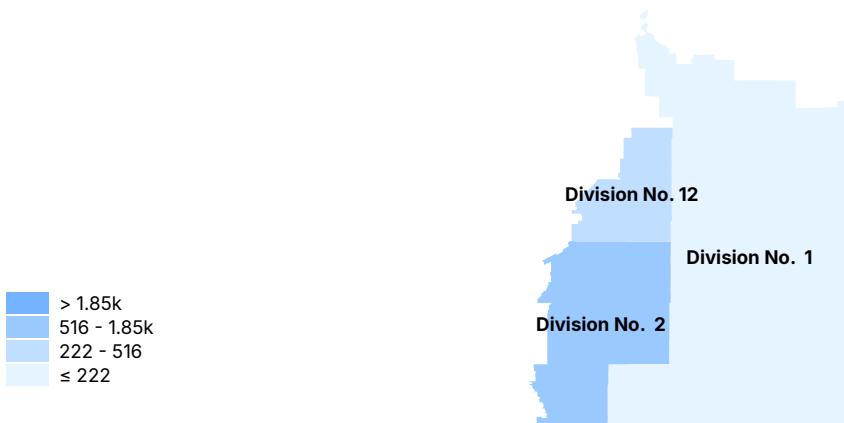


Figure 5.2: Distribution of Largest Group: Naics - Construction (Southeast)³

Business Establishments

Southeast, Manitoba now hosts 14,406 active businesses, up 3.3% from 2024 and 42% over five years, reversing a post-2020 decline as establishments rose from 9,513 in 2021 to 14,406 in 2025.

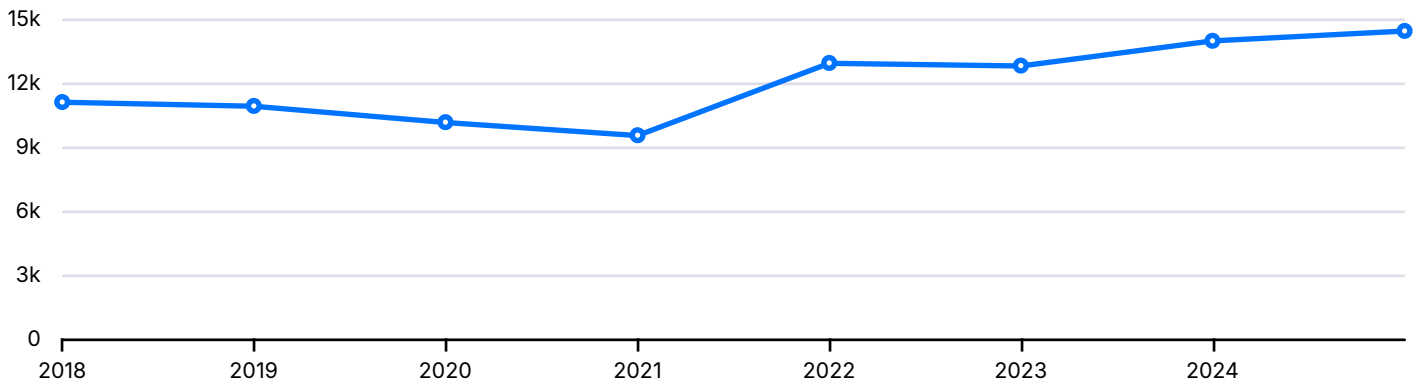


Figure 6.1: Shows the total number of active business establishments in the area, including those without employees. It helps indicate the scale and diversity of the local business base. (Southeast, 2018-2025)³

The number of active business establishments in Southeast shows a clear shift in recent years. After a decline from 11,070 in 2018 to 9,513 in 2021, the region experienced a rapid rebound beginning in 2022. Establishments rose to 12,903 in 2022 (up 35.6% from 2021) and continued increasing to 14,406 by 2025 (up 3.3% from 2024). The short-term momentum since 2022 contrasts with the earlier multi-year drop. This pattern points to recovery and expansion of the local business base between 2022 and 2025.

Southeast has 14,406 active business establishments in 2025. The count declined from 11,070 in 2018 to 9,513 in 2021, then rose sharply to 12,903 in 2022 and continued upward to 14,406 by 2025, a 1-year change of 3.3% and a five-year change of 42.3%. Compared with other Manitoba regions, Southeast is smaller than Winnipeg (75,516 businesses in 2025) and Southwest (16,466), but larger than North Central (6,542) and North (2,602). The data show recent recovery and steady growth in establishment numbers after 2021.

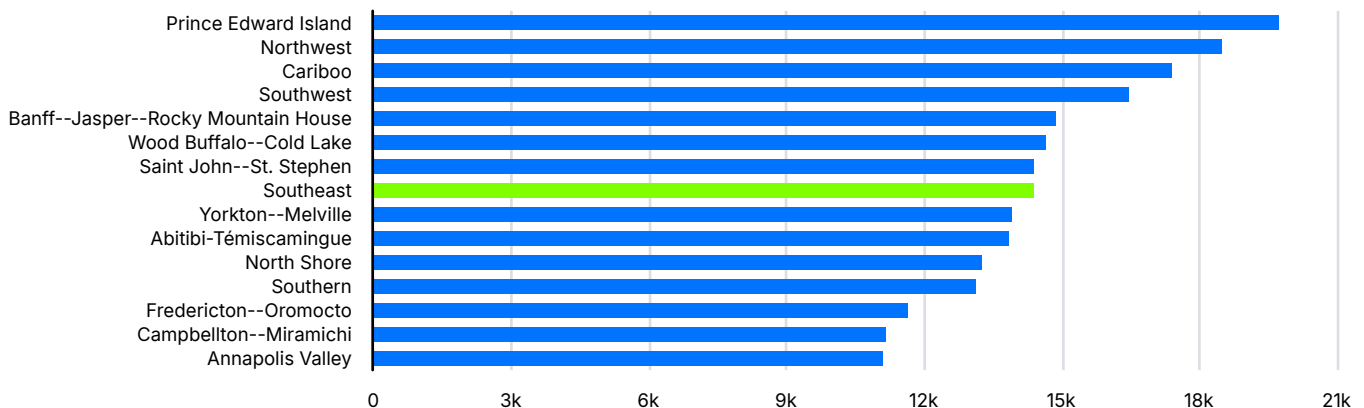


Figure 6.2: Comparison of Business Establishments with other locations (Southeast, 2025)³

Establishments by Size

Most Southeast Manitoba firms have no employees, totaling 9,714 in 2025 and rising 4.8% YoY; the fastest-growing segment is 200-499-employee businesses, now 19 firms with 11.8% annual growth over the period.

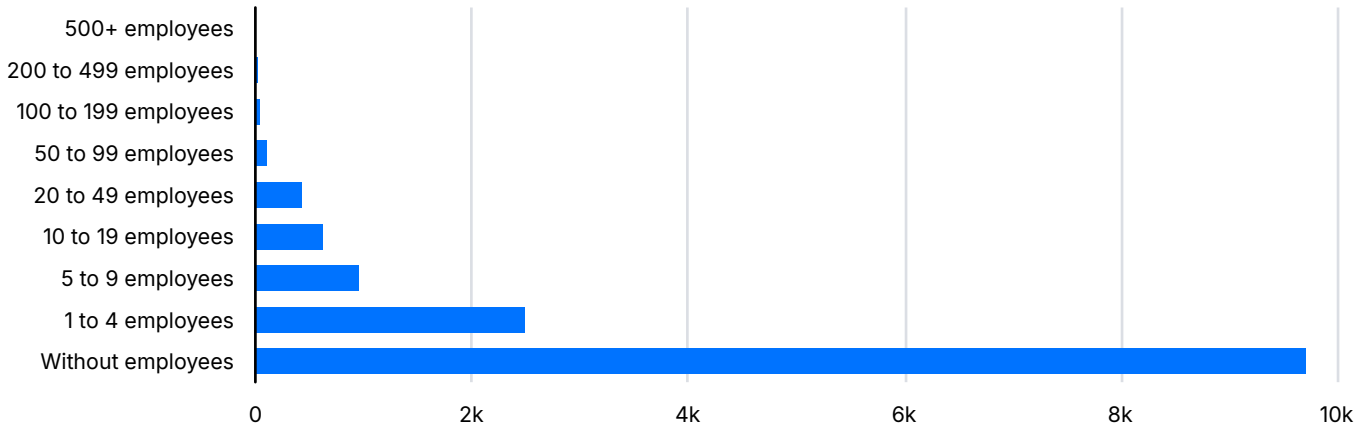
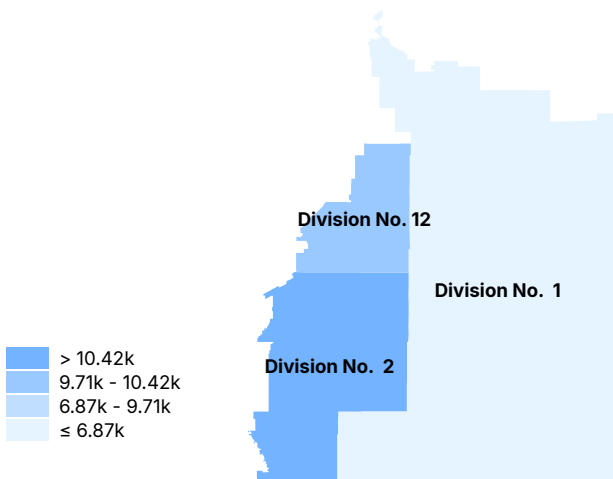


Figure 7.1: Shows how businesses are distributed by number of employees. It helps indicate whether the local economy is dominated by very small, small, or larger firms. (Southeast, 2025)³

The Southeast’s business landscape is concentrated in very small firms. In 2025 there are 9,714 establishments without employees and 2,497 with one to four employees, making the smallest size classes the largest by count. Recent momentum is mixed. Over five years the region saw strong gains among small and mid-size firms — for example, 20–49 employee establishments rose 72.7% — while short-term changes to 2025 include an 8.3% one-year increase for 20–49 and declines of 9.8% and 6.4% for the 50–99 and 100–199 classes. This pattern shows sustained growth among smaller establishments over five years alongside short-term volatility among mid-sized firms, suggesting uneven size-class dynamics in the Southeast’s business base.



Southeast's business base is concentrated in very small firms: 9,714 establishments without employees and 2,497 with one to four in 2025. Mid-sized categories expanded faster over five years: 20–49 employees rose 72.7% and 10–19 rose 51.2%. Division No. 2 contains 6,530 no-employee firms; Division No. 12 recorded strong five-year gains in mid-size bins. The mix suggests a large microbusiness presence with meaningful growth among mid-sized employers.

Figure 7.2: Distribution of Largest Group: Business Establishment Size - Without employees (Southeast)³

Fastest Growing Sectors

Professional, scientific and technical services are the fastest-growing sector in Southeast, adding 848 jobs and rising 13.7% in the past year and 104.8% over five years, while education remains the largest employer with 6,299 workers.

The data for Southeast shows which sectors have contributed most to employment growth between 2020 and 2025. The standout pattern is very rapid expansion in several service-oriented sectors, with shorter-term gains also clustered in the same groups. Over five years, Professional, scientific and technical services and Real estate and rental and leasing more than doubled, with 5-year changes of 104.8% and 102.6% respectively. Administrative and support services rose by 89.4% over five years. Education and Health care grew more moderately over five years, by 54.7% and 44.9%. In terms of scale,

Educational services and Health care account for the largest employment totals: 6,299 and 6,102 people respectively, while Administrative services employ 1,604, Professional services 848, and Real estate 545. Recent momentum is visible: 1-year changes are positive across all five sectors, led by Professional services (13.7%), Real estate (13.3%) and Health care (11.2%). The pattern signals strong, ongoing employment gains concentrated in professional, property and support services alongside steady growth in education and health.

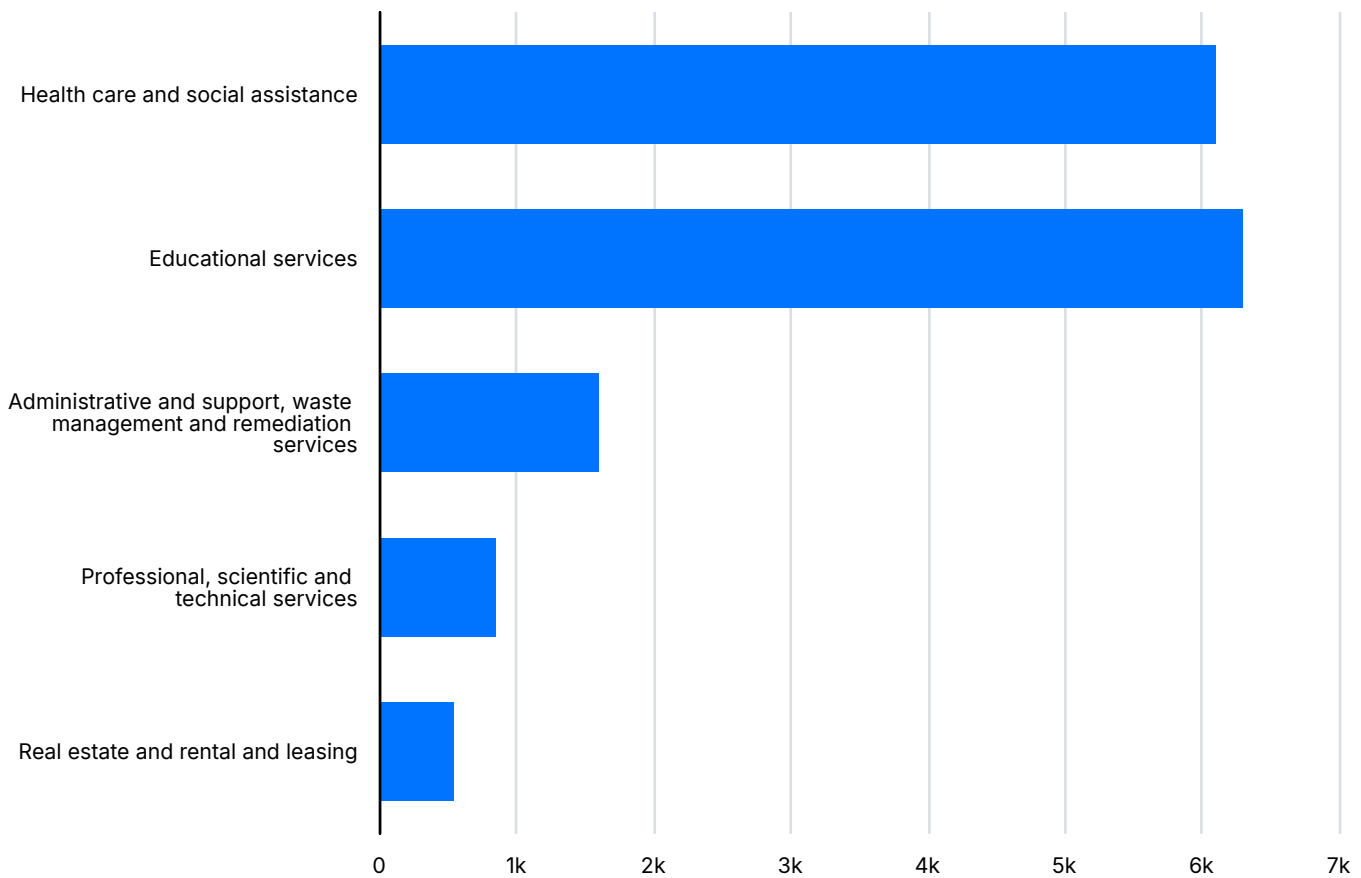


Figure 8.1: Shows sectors where employment has increased the most over the selected time period. It helps identify the main drivers of job growth in the local economy. (Southeast, 2025)¹

Largest Sectors

Construction remains Southeast’s biggest employer with 7,810 jobs, down 0.75% last year but up 86.5% over five years; health care added the most jobs, growing 11.2% in the past year.

Southeast’s employment is concentrated in five sectors that together form the region’s largest hiring pillars. Construction is the single largest employer, followed by educational services, health care and social assistance, manufacturing and retail trade. The dataset covers employees aged 15 and over for 2025. Construction employed 7,810 people in 2025 but recorded a small one-year decline of -0.8% after a substantial five-year increase of 86.5%. Health care and social assistance employed 6,102 people and posted the largest short-term gain, rising 11.2% year over year and 44.9% over five years. Educational

services supplied 6,299 jobs with a 7.3% one-year increase and a 54.7% five-year rise. Manufacturing (5,480) and retail trade (5,045) are smaller by headcount; manufacturing grew modestly by 4.5% year over year and 4.3% over five years, while retail fell slightly in the last year (-0.6%) but expanded 37.6% over five years. The pattern shows strong medium-term expansion across multiple sectors, with recent momentum strongest in health and education and a minor short-term contraction in construction and retail.

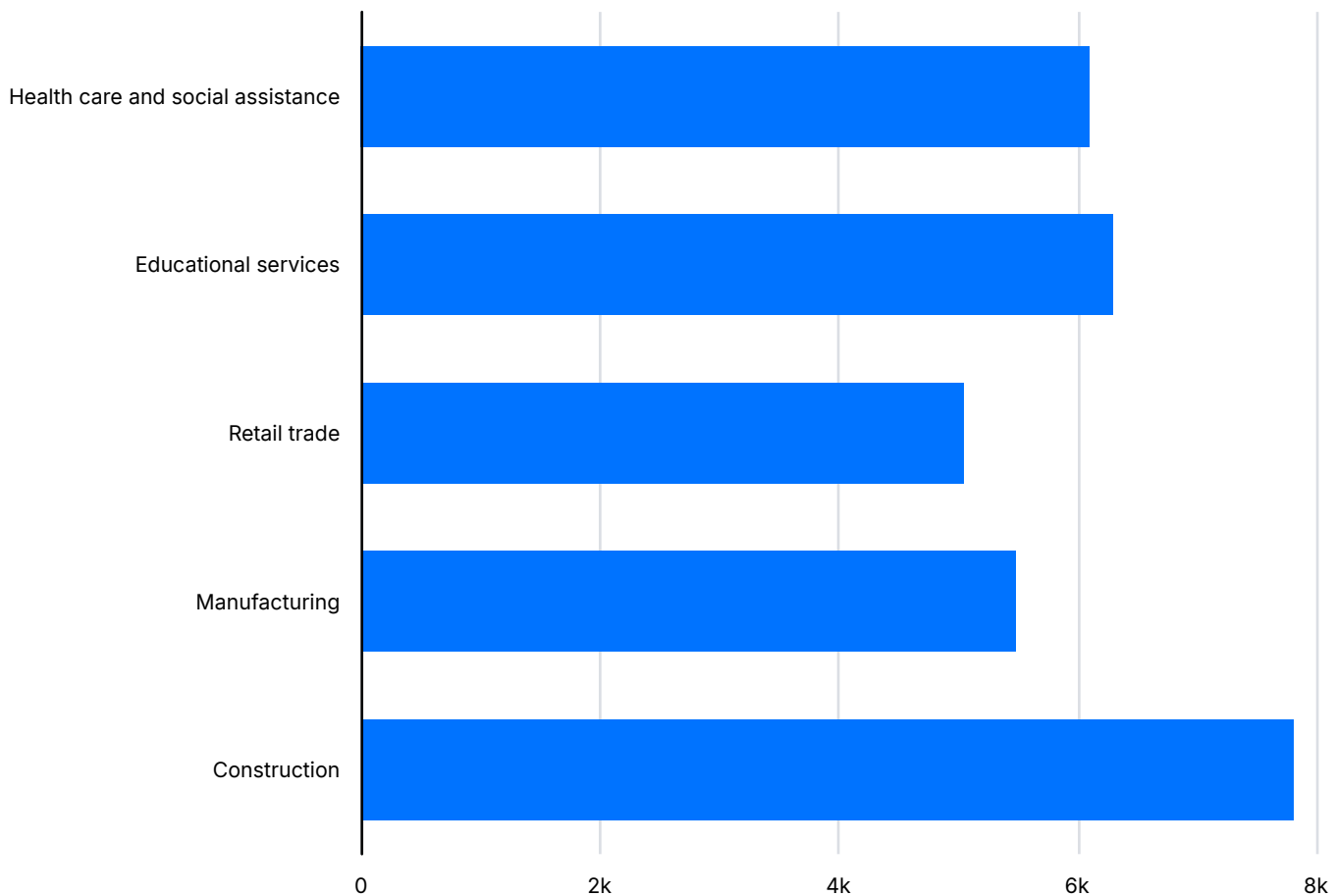


Figure 9.1: Shows the sectors employing the most people. It helps identify the largest pillars of the local economy. (Southeast, 2025)¹

Specialist Sectors (LQ)

Southeast’s economy is most specialized in agriculture, forestry, fishing and hunting with a location quotient of 3.69, though it fell 5 % last year and 13 % over five years. The arts sector changed most, dropping 7 % annually but rising 9 % over five years.

Southeast shows clear sectoral specialization in 2025, with several industries exhibiting location quotients above the national average. The strongest concentration is in primary production, while a cluster of service sectors also registers modest specialization. All figures refer to employees aged 15 years and over. Agriculture, forestry, fishing and hunting has the highest LQ at 3.7, though it recorded a 1-year change of -2.2% and a 5-year decline of -12.5%. Construction follows with an LQ of 2.1 and mixed momentum: a small 1.0% decline over one year but a 13.8% increase over five years. Finance and insurance, edu-

cational services, and arts, entertainment and recreation have LQs of about 1.2–1.4; finance shows the largest five-year rise at 89.8%, while arts saw a 1-year drop of 6.8%. The pattern is one of strong specialization in agriculture alongside service-sector concentrations that have varied trajectories over the past five years. These trends highlight sectors where employment concentration has shifted recently without implying causes beyond the data. Overall, the region’s specialization profile is concentrated and dynamic.

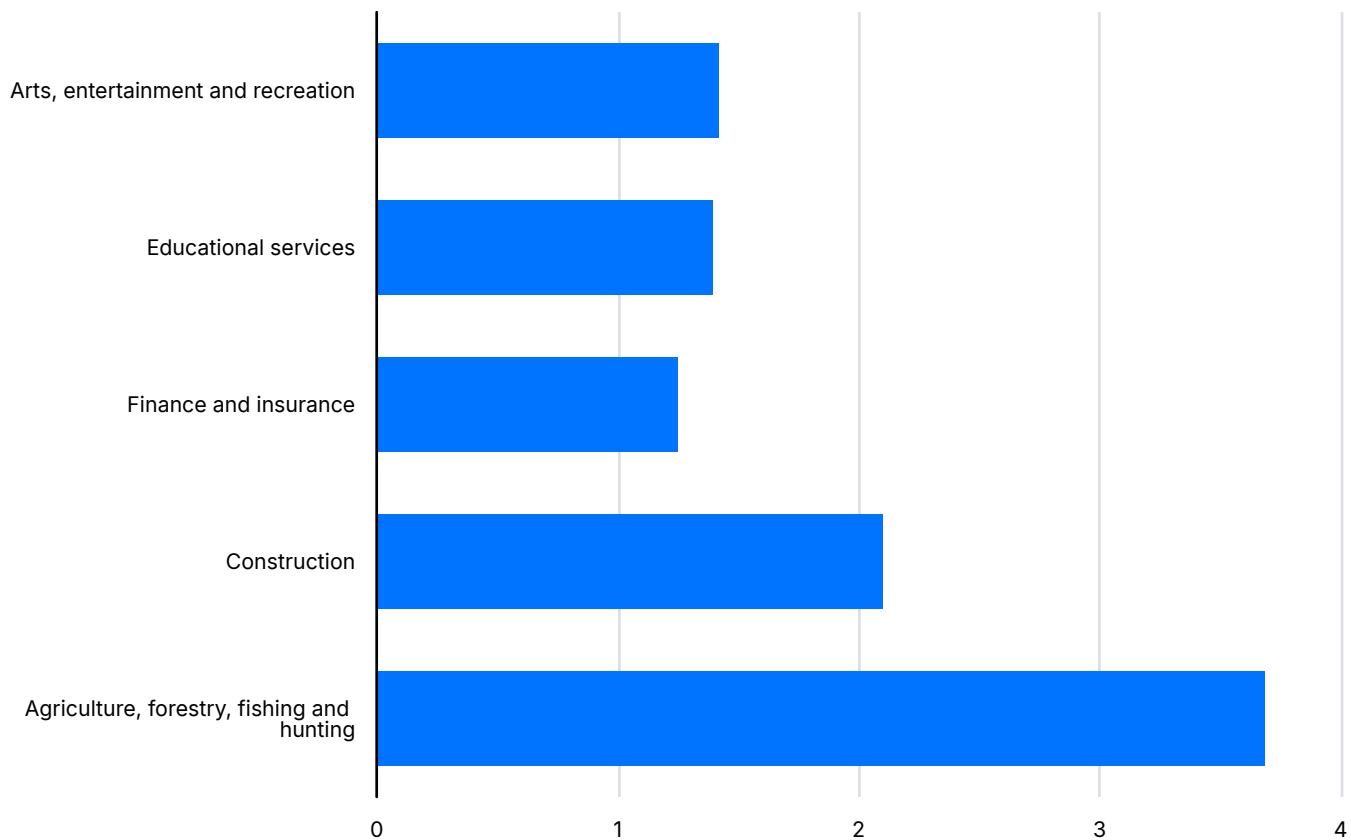


Figure 10.1: Shows sectors where the local economy has the highest level of specialization based on employment concentration compared with the national average. Sectors are categorized based on specialization (location quotient) and recent employment growth or change in concentration. (Southeast, 2025)⁴

Star Sectors

Utilities lead Southeast's star sectors, with a location quotient of 1.11 and a 17.79% employment rise in 2025, plus a 253% five-year surge. Educational services also rank high at a 1.40 LQ and 2.43% growth.

In 2025 the Southeast economic region shows two sectors identified as locally specialized when measured by location quotients within the labour force. The strongest specialization is in Educational services, followed by Manufacturing; both sectors are treated here as star sectors because they combine above-average local concentration with recent positive momentum. Educational services has a location quotient of about 1.4 and recorded a 1-year concentration increase of 2.8% and a 5-year increase of 0.9%. Manufacturing's location quotient is roughly 1.1; it also recorded short-term growth with a 1-year

change of 3.7% but a notable 5-year decline in concentration of 26.9%. The contrast between short- and longer-term trends is the dominant pattern. Educational services shows steady, modest gains in local specialization over five years, while Manufacturing's recent uptick follows a much larger multi-year fall in concentration. Within the dataset's scope these patterns indicate Educational services as the more consistently specialized sector and Manufacturing as one with recent recovery after substantial longer-term decline.

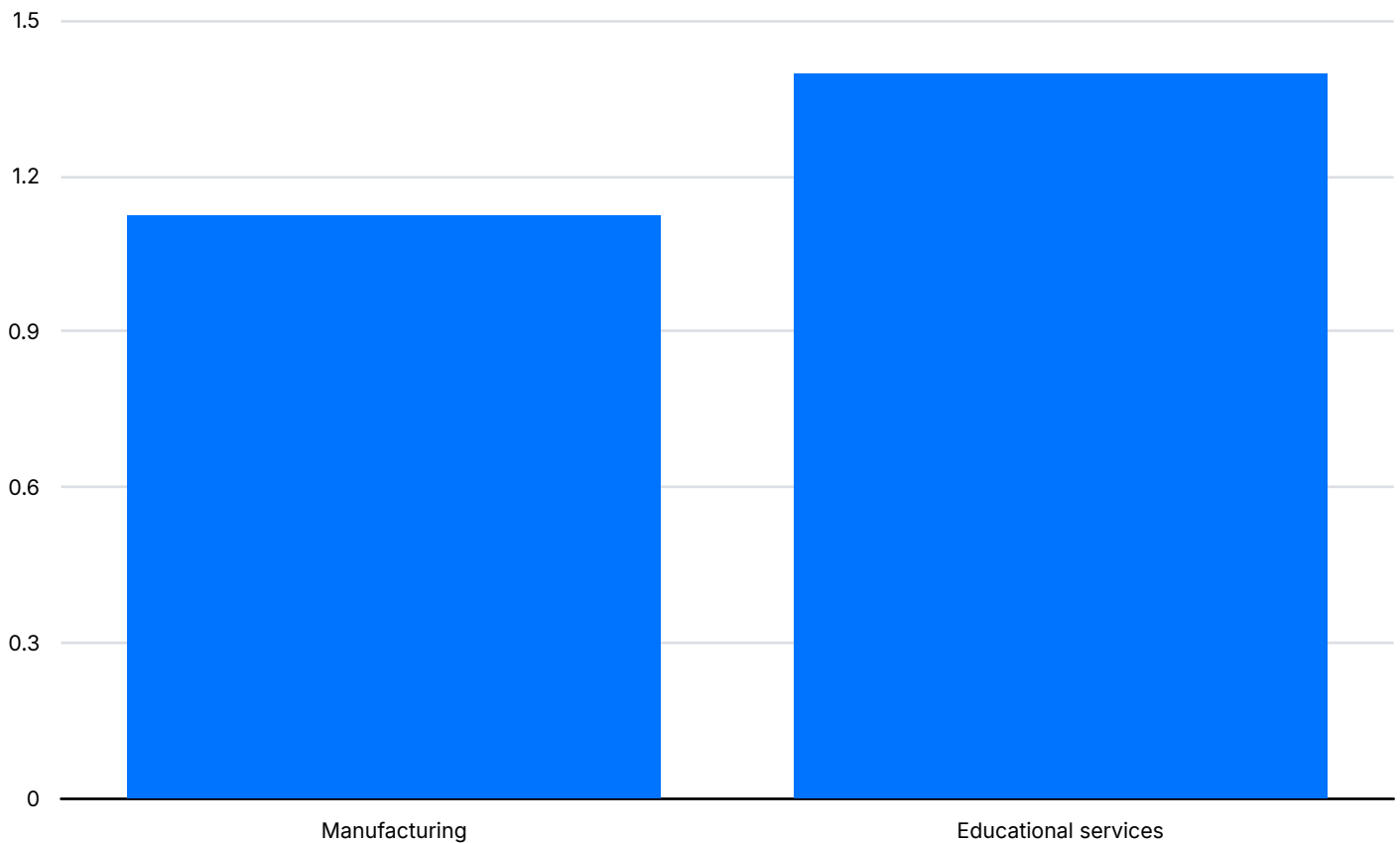


Figure 11.1: Shows major industry sectors where the local economy has strong specialization and increasing concentration or strong growth. Sectors are categorized based on specialization (location quotient) and recent employment growth or change in concentration. (Southeast, 2025)⁴

Anchor Sectors

Agriculture, forestry, fishing and hunting remains Southeast's largest sector with a location quotient of 3.69, yet its concentration fell 5 % last year and 13 % over five years. Mining shows the biggest shift, now at 1.00 LQ, down 7.6 % annually but up 21 % over five years.

The Southeast economic region shows clear sectoral specialization alongside mixed momentum over recent years. Agriculture stands out as the most specialized sector with a location quotient of about 3.7, followed by Construction at 2.1; several other sectors record LQs near or just above 1.0, indicating modest local concentration. Most sectors recorded negative short-term change in concentration over the last year: Agriculture -2.2%, Construction -1.0%, Arts, entertainment and recreation -6.8%, and Mining -8.2%. By contrast, five-year change figures

vary widely. Utilities and Finance show large increases in concentration over five years (Utilities +253.4%, Finance +89.8%), while Agriculture declined over the same period (-12.5%). The dominant pattern is therefore one of entrenched specialization in a few sectors combined with across-the-board short-term softening and divergent longer-term trajectories. That mix suggests the region's sector profile is stable in scale but experiencing recent downward shifts in relative concentration for many industries.

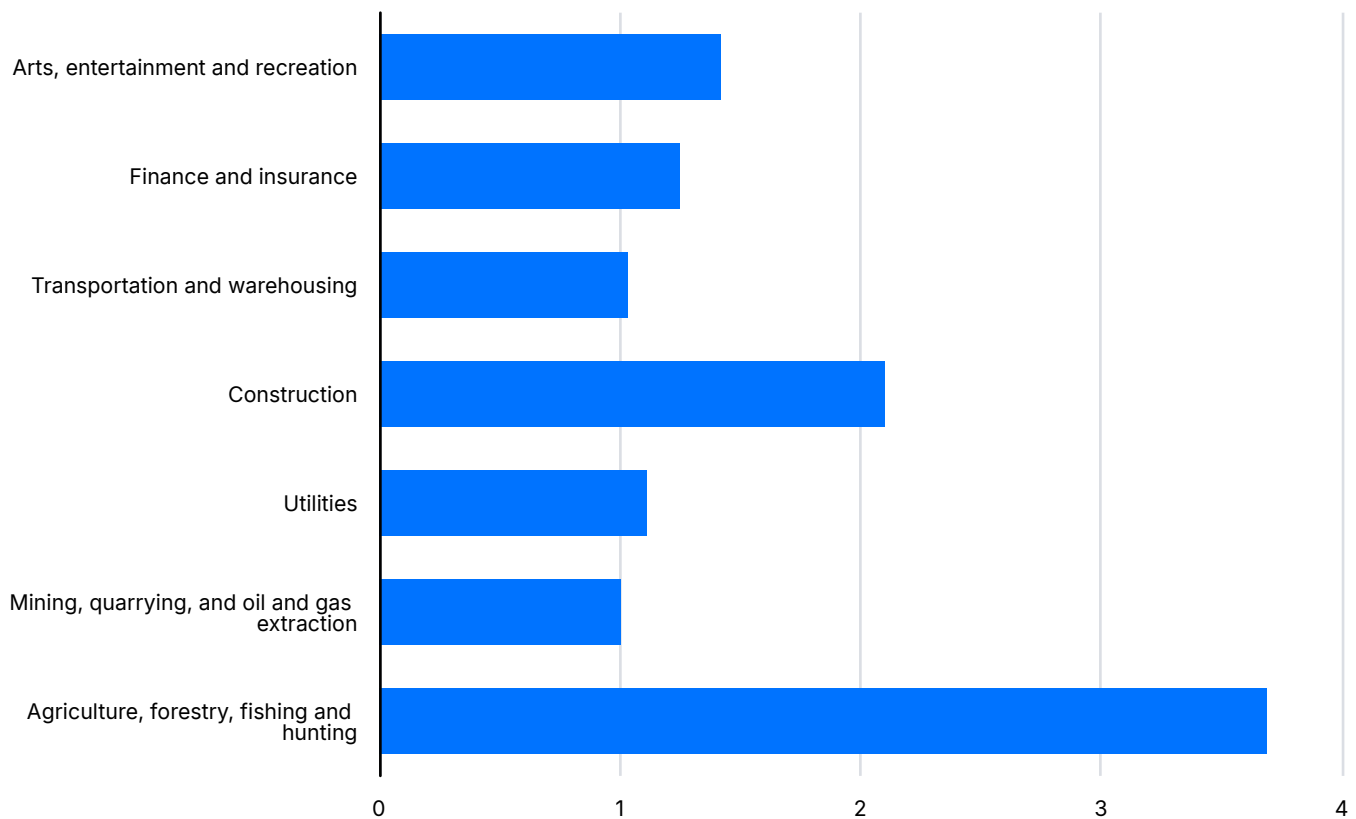


Figure 12.1: Shows major industry sectors where the local economy has strong specialization but relatively stable or declining concentration over time. Sectors are categorized based on specialization (location quotient) and recent employment growth or change in concentration. (Southeast, 2025)⁴

Micro Establishments Share

Utilities now have the lowest micro-business share at 61.1%, down 33.37% over five years, marking the most dramatic decline among sectors in Southeast Manitoba.

The share of micro establishments (0–4 employees) in Southeast in 2025 varies widely by sector, ranging from 13.3% to 98.3%. That spread shows that very small firms dominate some parts of the local business base while being rare in others. At the top, real estate and rental and leasing records 98.3% micro establishments, and professional, scientific and technical services is 93.7%. Agriculture is also high at 91.1%. At the low end, public administration reports 13.3%. Notable recent moves include a large one-year rise in mining (+18.2 percentage points) and

sizable one-year increases for utilities (+22.2) and public administration (+16.7). Structurally, many service sectors cluster above 75% micro share—finance 87.8%, management 91.1%, health care 76.8%—while retail (58.7%), manufacturing (61.4%) and accommodation (50.5%) have lower micro shares. Time trends are mixed: several sectors show short-term increases but several five-year changes are negative (utilities –33.4, retail –9.6, manufacturing –6.0), indicating differing momentum across industries.

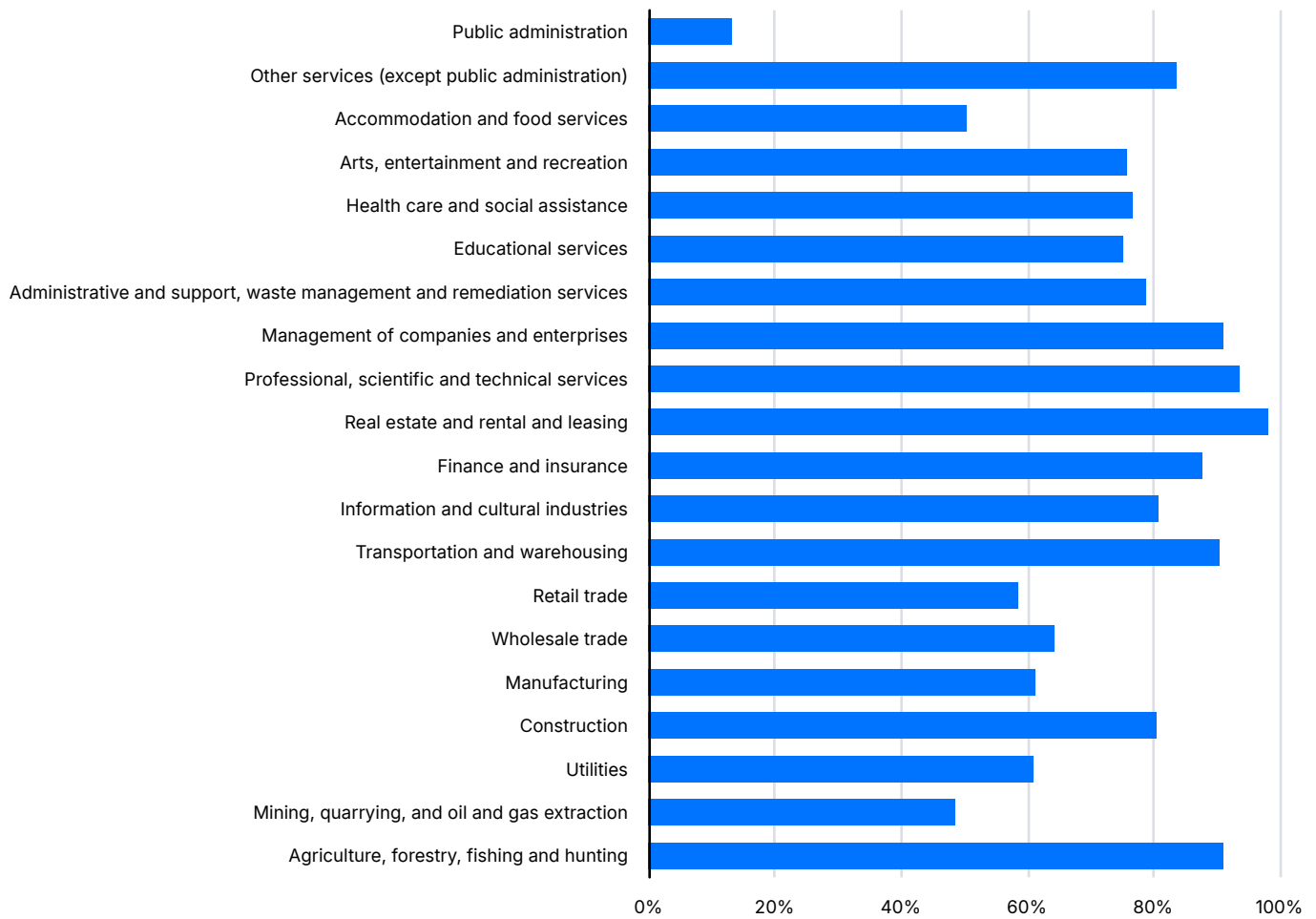


Figure 13.1: Shows the share of businesses with 0 to 4 employees. It helps indicate how much the local business base is made up of very small firms. (Southeast, 2025)⁵

Resident Labour Force

Construction is the biggest employer in Southeast, Manitoba's resident labour force with 8,855 workers, up 10.8% since 2016, while administrative and support services grew fastest, adding 26.6% to reach 1,930 workers.

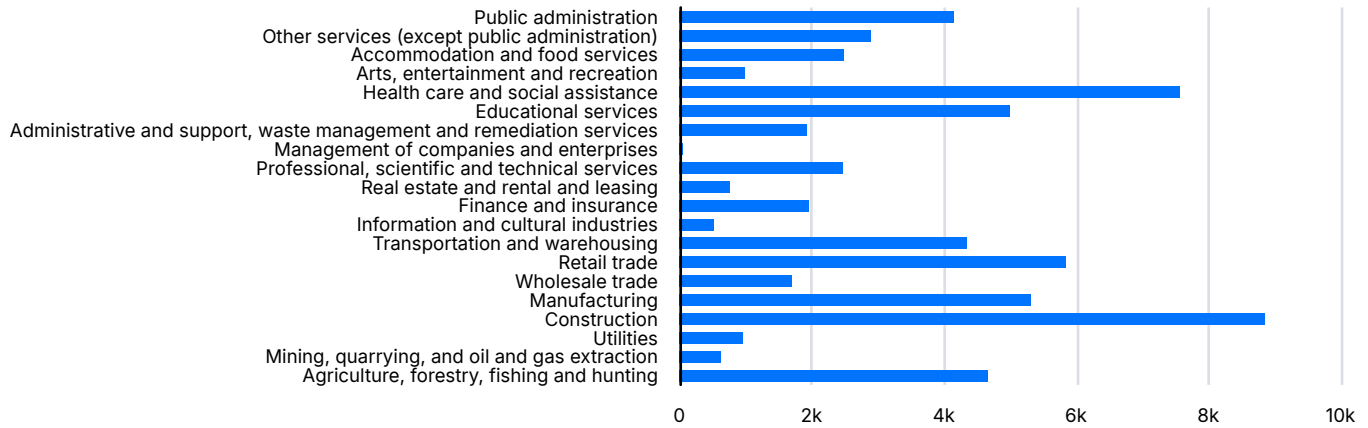


Figure 14.1: Shows the number of residents who are in the labour force. It helps indicate the size of the locally available workforce. (Southeast, 2021)⁶

The resident labour force by industry in Southeast (2021) shows a mix of large employment concentrations and pronounced five-year shifts. Construction (8,855 people), health care and social assistance (7,575) and educational services (5,005) are among the largest employers. Recent growth is concentrated in administrative and support services (+26.6%), professional, scientific and technical services (+21.0%) and real estate (+15.8%). Several sectors declined, notably accommodation and food services (-15.8%), information and cultural industries (-13.1%) and wholesale trade (-12.1%). These patterns reflect both size and momentum differences across sectors.

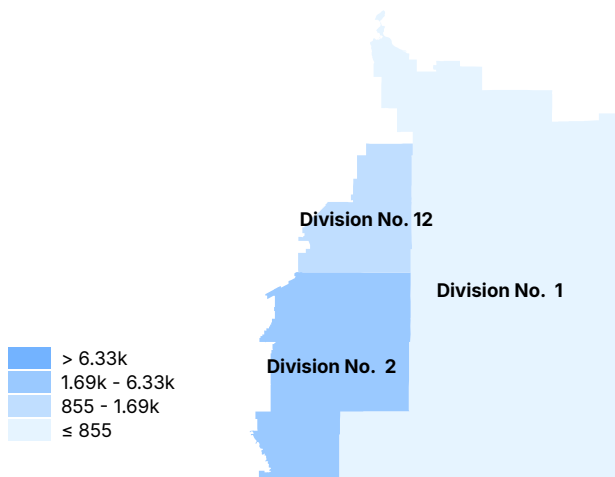


Figure 14.2: Distribution of Largest Group: Industry Sector - Construction (Southeast)⁶

Resident labour force in Southeast is concentrated in construction (8,855 people), health care and social assistance (7,575) and manufacturing (5,320), with education (5,005) and agriculture (4,665) also sizable sectors. Several service sectors show strong five-year gains: administrative and support services (+26.6%), professional, scientific and technical services (+21.0%) and construction (+10.8%). At the same time, wholesale trade (-12.1%), information and cultural industries (-13.1%) and accommodation and food services (-15.8%) declined. These patterns point to shifting demand within the local workforce.

Labour Market Gap

Southeast’s biggest labour-market gap is in Management of companies and enterprises, with a ratio of 4.22, far surpassing the next highest sector, Manufacturing at 1.02, while all other industries stay below 0.8.

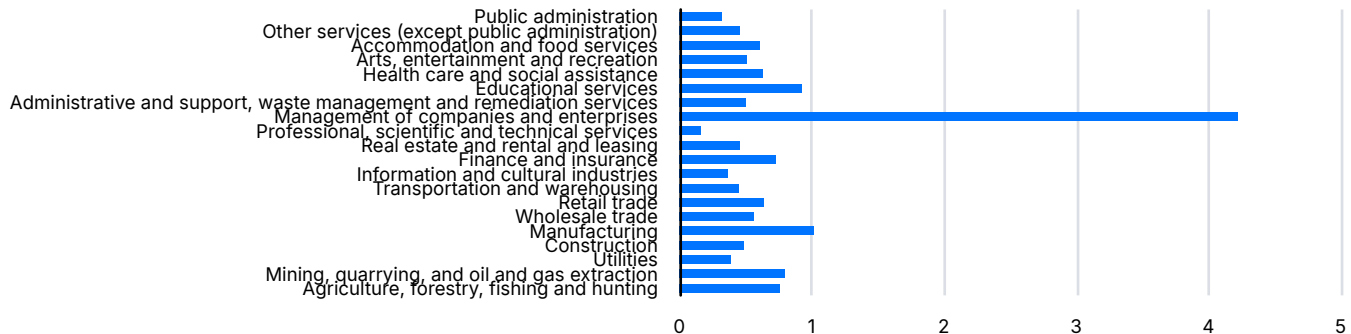


Figure 15.1: Shows the gap between the number of local jobs and the number of resident workers across all sectors. It helps indicate whether the area attracts workers in or sends workers out. (Southeast, 2021)⁷

The labour market gap for Southeast (2021) reports the ratio of local jobs to resident workers across sectors and shows a consistent pattern of fewer local jobs than local workers in most industries. Key figures: Manufacturing has a ratio of 1.0, indicating roughly parity, while Management of companies and enterprises stands out at 4.2. Educational services is near parity at 0.9. Nearly all other sectors fall below 1.0, for example utilities 0.4 and information and cultural industries 0.4. These values are for 2021 only and describe the distribution of jobs relative to resident workers in that year.

The labour market gap for Southeast in 2021 shows a consistent pattern: most industries have fewer local jobs than resident workers, indicating the region supplies workers beyond what local firms employ. Key figures include a ratio of 4.2 in Management of companies and enterprises, 1.0 in Manufacturing and 0.4 in Utilities. Several professional and technical services categories sit well below parity (professional services 0.2). Subregional splits are notable: Division No. 12 posts a manufacturing ratio of 1.8, while Division No. 1 records health care at 1.6. These contrasts highlight industry-specific concentration and uneven local absorptive capacity across the region.

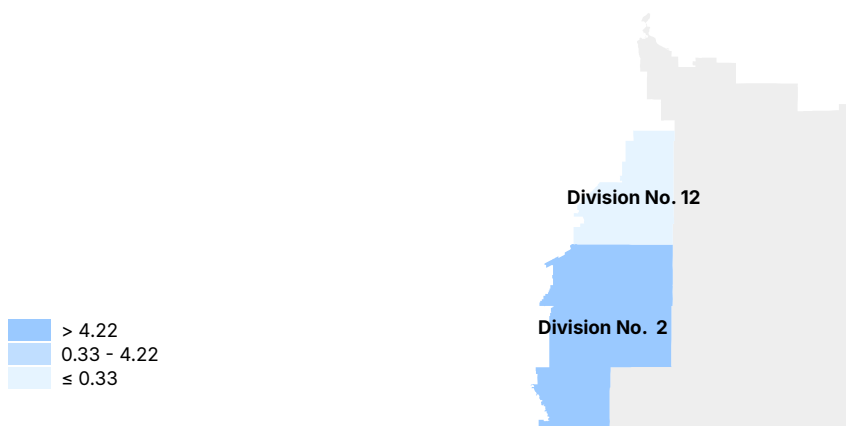


Figure 15.2: Distribution of Largest Group: Industry Sector - Management of companies and enterprises (Southeast)⁷

Data Sources

1. Statistics Canada, Business Register; Localintel, Employment by Industry Estimates of Census Areas. Published in Mar 13, 2026.
2. Statistics Canada, Employment by Industry, Annual, Table 14-10-0202-01. Published in Mar 27, 2025.
3. Statistics Canada, Business Register. Published in Jun 1, 2025.
4. Statistics Canada, Business Register; Localintel, Employment Location Quotient by Industry Estimates of Census Areas. Published in Mar 13, 2026.
5. Statistics Canada, Business Register; Localintel, Micro Establishments Share of Census Areas. Published in Mar 13, 2026.
6. Statistics Canada, Census Profile. Published in Dec 15, 2022.
7. Statistics Canada, Business Register; Statistics Canada, Census Profile; Localintel, Labour Market Gap Estimates of Census Areas. Published in Mar 13, 2026.

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