

NEW BRUNSWICK

Holding steady over the near term

An extended period of relative stability is expected in New Brunswick's construction and maintenance market. Over the near term, a modest decline in new housing and engineering construction is buttressed by rising levels of residential renovation work, industrial expansion, and infrastructure investment, while employment demands over the longer term are supported by rising maintenance and renewed engineering construction requirements.

Moderate declines in new homebuilding and a significant reduction in road, highway, and bridge infrastructure investment contribute to a slight decline in overall employment between 2019 and 2021. The anticipated timing of work on the Mactaquac hydro dam along with other infrastructure requirements should bolster non-residential employment requirements starting in 2022. Employment growth, however, is limited by continued weakening demand for new housing and institutional buildings, which reflects a general slowing in the province's population growth over the decade. These competing and offsetting trends translate into only moderate changes in total employment requirements across the 2019–2028 scenario period.

While overall employment is mostly unchanged, older age demographics drive the need to replace more than 7,400 workers expected to retire over the next decade. With only 4,500 new entrants projected to be available locally, the industry will likely need to recruit a significant number of additional workers from outside the local market.

10-YEAR WORKFORCE OUTLOOK FOR NEW BRUNSWICK

2028



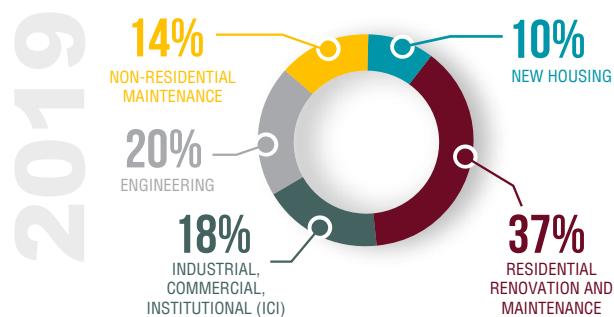
AVERAGE UNEMPLOYMENT RATE

17.2%



HIGHLIGHTS 2019–2028

DISTRIBUTION OF CONSTRUCTION EMPLOYMENT IN 2019, NEW BRUNSWICK



HIGHLIGHTS

- Employment increased moderately in 2018, driven by increased road, highway, and bridge work.
- Employment is expected to recede between 2019 and 2021 due to the completion of highway and bridge work and other major projects. Overall employment recedes by a modest 5% by 2021.
- Hiring demands are driven primarily by the anticipated retirement of 7,400 workers over the next decade.

BuildForce's LMI System

BuildForce Canada uses a scenario-based forecasting system to assess future construction labour requirements in the heavy industrial, residential, and non-residential construction markets. This labour market information (LMI) system tracks 34 trades and occupations. To further improve the robustness of the system, BuildForce consults with industry stakeholders, including owners, contractors, and labour groups, to validate the scenario assumptions and construction project lists, and seeks input from government on related analysis. The information is then distilled into labour market condition rankings to help industry employers with the management of their respective human resources.

NEW BRUNSWICK CONSTRUCTION OUTLOOK

After holding steady in 2018, construction activity in New Brunswick is expected to slow in 2019 and 2021 due to declines in the construction of new housing and receding major projects, but the anticipated decline is less than 3% over a three-year period. Requirements related to industrial maintenance work and major engineering and infrastructure construction contribute to stable levels of employment after 2021.

Previous federal and provincial government investments in roads, highways, bridges, and other infrastructure elevated related engineering construction requirements in recent years. As current projects are completed, employment requirements related to road, highway, and bridge work are projected to drop by 1,100 jobs (-60%) through 2021. Declines are projected to be partly offset by work on a number of hospital projects and rising levels of investment in the manufacturing sector that contribute to modest gains in total industrial, commercial, and institutional (ICI) building construction. Non-residential employment requirements will be bolstered between 2022 and 2024 as refurbishing work on the Mactaquac Dam takes place.

Employment in the residential sector, which accounts for almost half (48%) of total construction requirements in New Brunswick, is projected to be sustained near 2019 levels across the scenario period, as moderate growth in renovation investment will offset further declines in the construction of new housing.

Sustaining labour force capacity at current levels across the next decade will require ongoing recruitment and training of new workers to contend with the projected retirement of 7,400 workers and a shrinking pool of available new entrants as population growth slows and fewer youth enter the labour force.

SECTOR INSIGHTS

The following sections provide sector-specific insights into the provincial non-residential and residential labour markets.

The BuildForce LMI system tracks supply and accounts for the change in the available labour force, including retirements, new entrants¹, and net in-mobility².

BuildForce assesses market conditions for 34 construction trades and occupations using a ranking system that combines measures of the change in employment, unemployment, net in-mobility, and adjustments based on industry input. The rankings reflect residential and non-residential market conditions unique to New Brunswick

based on current and proposed construction activity. In addition, assumptions on provincial economic and population growth, new entrants to the labour force, and migration patterns (interprovincial and international) are built into the forecast scenario and included in the ranking assessment.

The rankings for some trades are suppressed due to the small size of the workforce (<100 workers) and limited statistical reliability when assessing labour market conditions at the sector level. Some trades are also excluded because they typically do not work in the sector being assessed (e.g., boilermakers and millwrights in residential construction, and homebuilding and renovation managers in non-residential). For New Brunswick, rankings are reported for 16 residential and 23 non-residential trades and occupations.

RESIDENTIAL SECTOR

New Brunswick's population declined between 2013 and 2015, leading to significant declines in housing starts. Positive in-migration provided a lift to household formations³ and housing demand between 2016 and 2018, but housing starts in 2018 were almost half of the peak achieved in 2010. The downward trend in new housing resumes in 2019, but related declines are entirely offset by growth in renovation work, maintaining total residential employment requirements near current levels.

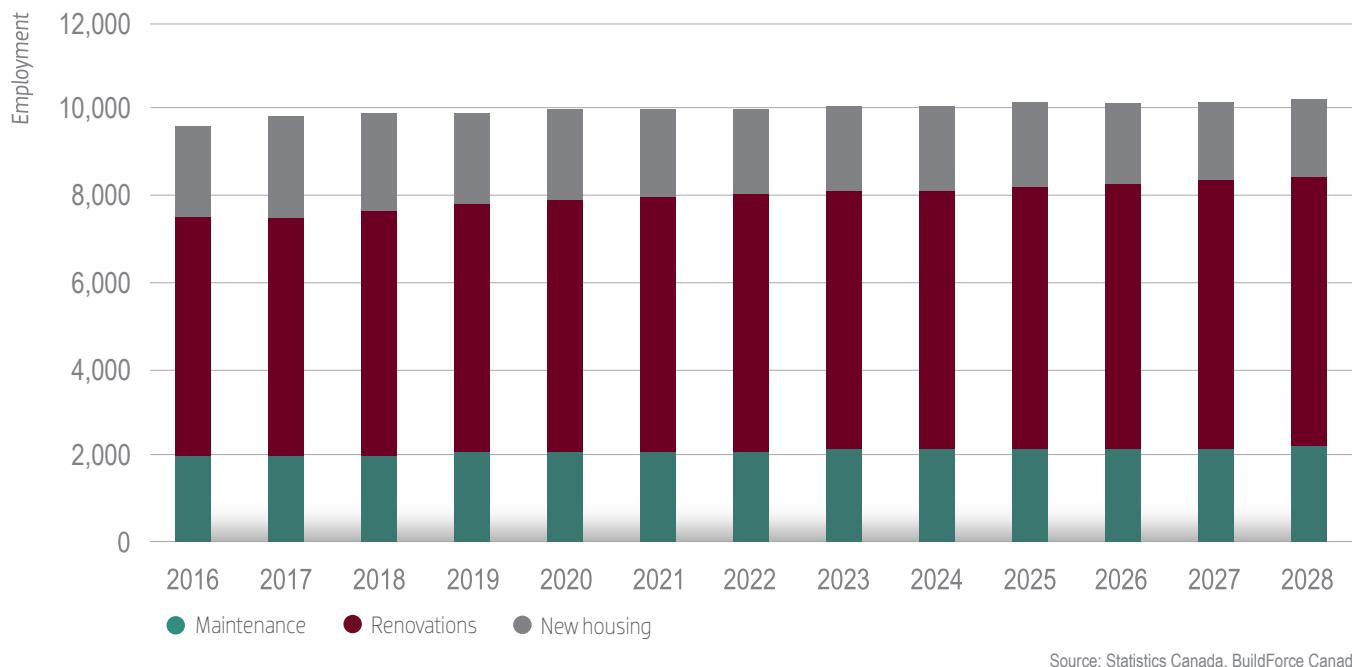
Housing starts, which fell to 1,800 units in 2016, recovered to 2,300 units in 2017 and are expected to remain above 2,000 units over the scenario period. Demand for renovation and maintenance work, which accounts for 80% of residential employment in the province, is expected to rise modestly, increasing related employment by close to 700 jobs over the decade. Diverging trends between new housing and renovation work result in a modest increase of 300 residential construction jobs over the scenario period.

Figure 1 shows the employment trends by sector for residential construction.

¹ **New entrants** are measured by applying the traditional proportion of the provincial labour force that enters the construction industry. The projected estimate across the scenario period assumes that the construction industry can recruit this group in competition with other industries.

² **In-mobility** refers to the arrival of workers from outside the local construction industry. In-mobility includes the interprovincial employee workforce described above. Many members of this group will move quickly out of the province as work declines, and this out-mobility, even if it is a very short-term change, signals a weak market.

³ **Household formation** refers to the change in the number of households (persons living under one roof or occupying a separate housing unit) from one year to the next. It is how population growth is transformed into demand for new housing.

Figure 1: Residential construction employment growth outlook, New Brunswick

THE AVAILABLE LABOUR FORCE

The modest anticipated decline in the residential labour force occurs through age-related attrition and, potentially, out-mobility to other labour markets (industries, geographic regions or occupations). Over the next decade, hiring requirements are driven by the expected exit of 3,600 residential workers due to retirement. Replacing these workers assumes that industry can attract an estimated 2,100 first-time new entrants aged 30 and younger from the local population into the construction labour force.

Table 1 provides a summary of the estimated changes in the residential labour force in 2018, the five-year period between 2019 and 2023, and across the full 2019–2028 scenario period.

RESIDENTIAL RANKINGS, RISKS, AND MOBILITY

Compared to 2017, residential labour markets weakened in 2018, while recruitment challenges persisted for several trades and occupations, as shown in Table 2. Labour market conditions for trades involved in new construction are expected to weaken further between 2019 and 2021, but the expected declines should be modest.

Older age demographics and resulting retirements contribute to lower natural rates of unemployment⁴, which contribute to maintaining balanced labour market conditions at lower levels of employment over the scenario period.

Table 1: Changes in the residential labour force, New Brunswick

RESIDENTIAL LABOUR FORCE ADJUSTMENT		2018	5 years 2019–2023	10 years 2019–2028
Demand	Labour force change	200	-100	-100
	Retirements	400	1,900	3,600
Supply	New entrants	200	1,000	2,100
	Net mobility	400	700	1,400

Source: BuildForce Canada

⁴ Normal unemployment or natural unemployment refers to the unemployment that results from workers moving from one job to another. This unemployment rate exists because some workers are in-between jobs, some workers' skills do not align with employers' needs, or because there is a mismatch in the wage expectations between employers and workers. For New Brunswick, the natural rate of unemployment had been declining since the mid 1980s, but began rising in 2009. It currently stands between 17-20%.

RESIDENTIAL HIGHLIGHTS

- Over the decade, total residential employment is expected to rise by 300 jobs.
- Housing starts were sustained at 2,200 units in 2018, up from a low of 1,800 in 2016. Starts are expected to remain around 2,100 units across the scenario period.
- Employment related to renovation and maintenance, which accounts for 80% of the residential labour force, continues to rise at an average of 1% per year.

MARKET RANKINGS

1

Workers meeting employer qualifications are available in local markets to meet an increase in demand at the current offered rate of compensation and other current working conditions. Excess supply is apparent and there is a risk of losing workers to other markets.

2

Workers meeting employer qualifications are available in local markets to meet an increase in demand at the current offered rate of compensation and other working conditions.

3

The availability of workers meeting employer qualifications in the local market may be limited by large projects, plant shutdowns or other short-term increases in demand. Employers may need to compete to attract needed workers. Established patterns of recruiting and mobility are sufficient to meet job requirements.

4

Workers meeting employer qualifications are generally not available in local markets to meet any increase. Employers will need to compete to attract additional workers. Recruiting and mobility may extend beyond traditional sources and practices.

5

Needed workers meeting employer qualifications are not available in local markets to meet current demand so that projects or production may be delayed or deferred. There is excess demand, competition is intense and recruiting reaches to remote markets.

Table 2: Residential market rankings, New Brunswick

TRADES AND OCCUPATIONS – RESIDENTIAL	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Bricklayers	4	3	3	3	3	3	3	3	3	3	3
Carpenters	3	3	3	3	3	3	3	3	3	3	3
Construction estimators	3	3	3	3	3	3	3	3	3	3	3
Construction managers	3	3	3	3	3	3	3	3	3	3	3
Contractors and supervisors	3	3	3	3	3	3	3	3	3	3	3
Electricians	3	3	3	3	3	3	3	3	3	3	3
Floor covering installers	3	3	3	3	3	3	3	3	3	3	3
Painters and decorators (except interior decorators)	3	3	3	3	3	3	3	3	3	3	3
Plasterers, drywall installers and finishers, and lathers	4	3	3	3	3	3	3	3	3	3	3
Plumbers	3	3	3	3	3	3	3	3	3	3	3
Residential and commercial installers and servicers	3	3	3	3	3	3	3	3	3	3	3
Roofers and shinglers	4	3	3	3	3	3	3	3	3	3	3
Trades helpers and labourers	3	3	3	3	3	3	3	3	3	3	3
Truck drivers	4	3	3	3	3	3	3	3	3	3	3

Source: BuildForce Canada

NON-RESIDENTIAL SECTOR

New Brunswick's non-residential employment requirements were buoyed in 2018 due to high levels of road and highway construction and major maintenance/shutdown work. Requirements are expected to decline between 2019 and 2021 as work on major road and other infrastructure projects recedes, but are sustained near 2019 levels across the next decade by rising major engineering and industrial building construction.

Figure 2 tracks the change in non-residential employment by sector for key reference points across the scenario period, including the start in 2019, the bottom in 2021, and then at the peak in 2024.

Rising exports and growth in the manufacturing sector are expected to increase the construction of industrial buildings by 50% between 2019 and 2024, increasing employment requirements by 200 jobs. Over the same period, hospital projects in Bathurst, Saint John, and Fredericton should sustain institutional activity.

Repair work on the Mactaquac Dam is anticipated to significantly increase employment requirements for engineering construction between 2022 and 2024, followed by a decline once work is completed. Although no final decisions have been made, the project is likely to require significant numbers of electricians, millwrights, concrete finishers, crane operators, pipefitters, carpenters, and labourers.

Between 2019 and 2021, total non-residential employment should decline by 500 jobs (-5%) before rising again by a similar number to peak in 2024, driven by work on the Mactaquac Dam. Most of the gains are lost as work on the dam is completed.

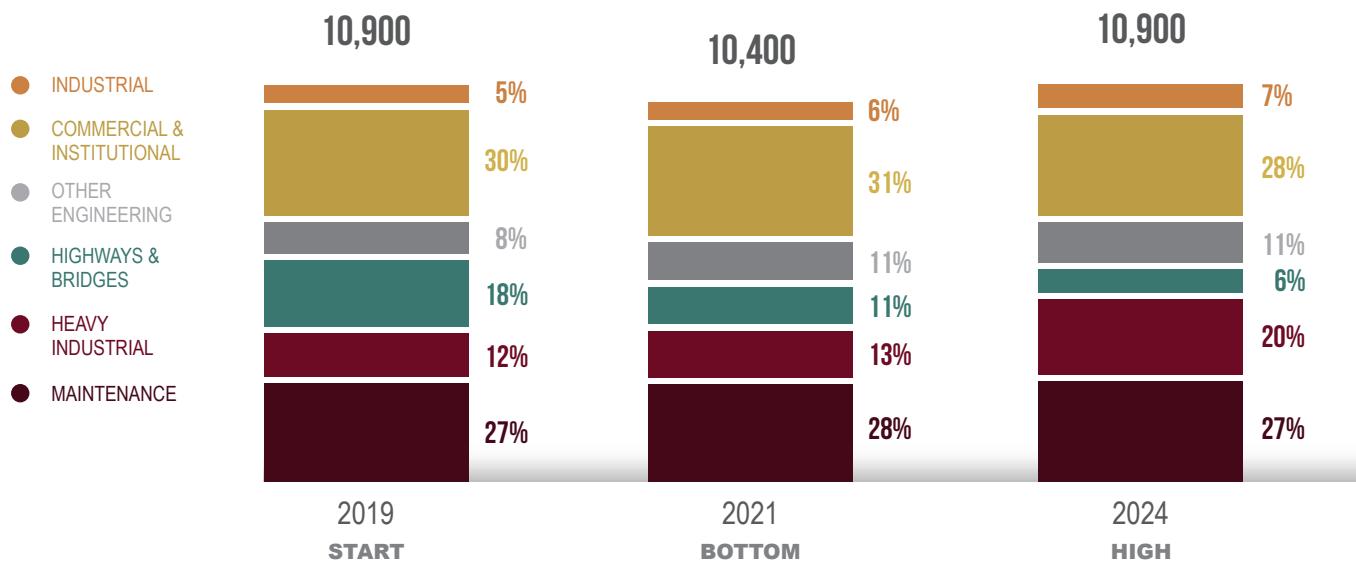
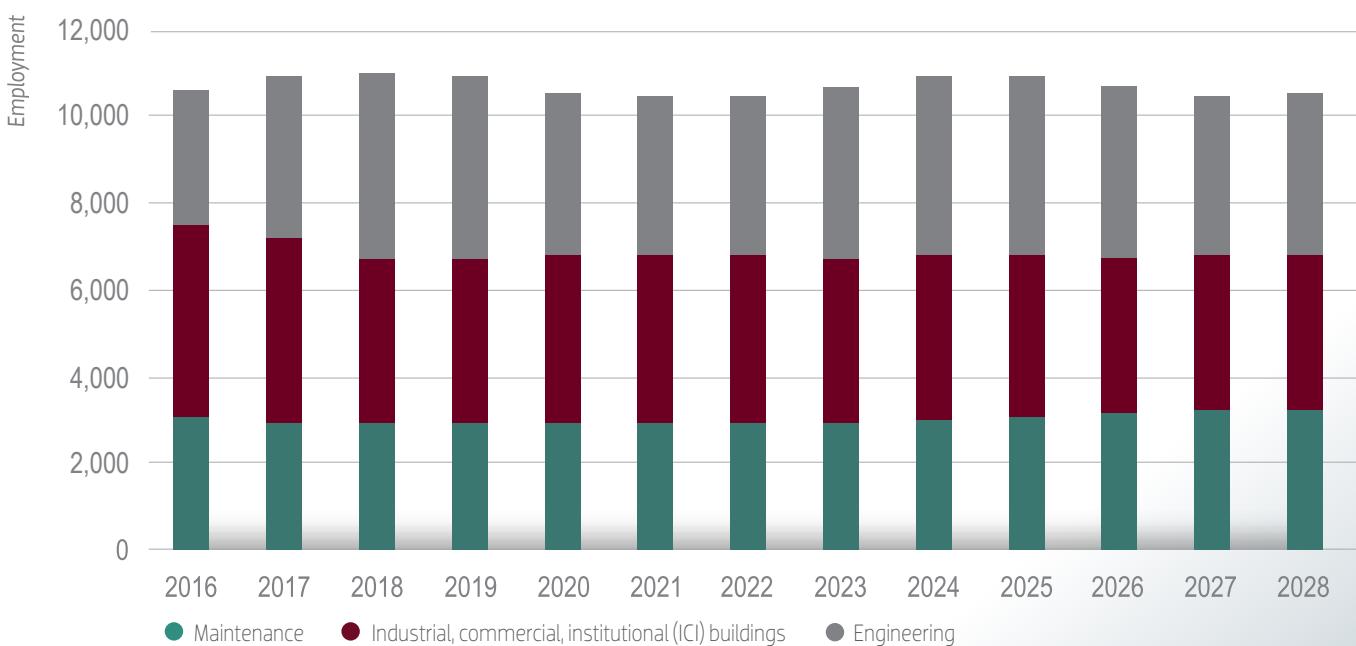
Table 3 summarizes the percent change in non-residential employment by sector across two periods: the first captures the expected rise over the next five years to 2023, and the second from 2024 to 2028.

Figure 3 shows the employment trends by sector for non-residential construction.

Table 3: Changes in non-residential employment by sector, New Brunswick

SECTOR	% CHANGE 2019–2023	% CHANGE 2024–2028
Total non-residential employment	-3%	1%
ICI buildings	Industrial	33% 5%
	Commercial, institutional and government	-5% -11%
Engineering	Highways and bridges	-61% -12%
	Heavy industrial	42% 4%
	Other engineering	25% 9%
Maintenance	1%	11%

Source: Statistics Canada, BuildForce Canada

Figure 2: Non-residential employment distribution by sector, New Brunswick, 2019, 2021 and 2024**Figure 3: Non-residential construction employment growth outlook, New Brunswick**

NON-RESIDENTIAL HIGHLIGHTS

- Total non-residential employment stays between 10,000 and 11,000 jobs across the scenario period.
- Major highway and bridge construction ramped up in 2018 and is expected to peak in 2019 before declining by 1,100 jobs (-60%) through 2021.

- The Mactaquac Dam refurbishment is a key driver of engineering construction employment from 2022 onwards. Requirements are expected to reach a high between 2024 and 2025.

THE AVAILABLE LABOUR FORCE

An estimated 3,800 workers are expected to exit the non-residential labour force due to retirements over the coming decade. This exceeds the estimated 2,400 first-time new entrants aged 30 and younger expected to be drawn into the construction labour force from the local population.

Table 4 provides a summary of changes in the non-residential labour force in 2018, the five-year period between 2019 and 2023, and across the full scenario period.

NON-RESIDENTIAL RANKINGS, RISKS, AND MOBILITY

At the start of the scenario period in 2019, non-residential labour markets for New Brunswick are generally balanced, signalled by a rank of 3 in Table 5. Completions of ICI building construction

projects lowered demands and weakened market conditions for several trades and occupations in 2018. By 2020, when most of the current major highway and bridge projects approach completion, demand weakens for trades more directly involved in engineering construction before rising again as work begins on the hydro dam refurbishment in 2022.

An annual ranking system does not accurately capture the peak employment demand driven by seasonal maintenance shutdown work, where the demand for workers is concentrated for a brief period within a year and then declines rapidly as the work ends. In the fall of 2018, a major refinery shutdown heightened recruiting challenges for several trades and occupations, including boilermakers, refractory workers, carpenters/scaffolders, electricians, instrumentation technicians, insulators, millwrights, labourers, pipefitters, and supervisors.

Table 4: Changes in the non-residential labour force, New Brunswick

NON-RESIDENTIAL LABOUR FORCE ADJUSTMENT		2018	5 years 2019–2023	10 years 2019–2028
Demand	Labour force change	100	-400	-800
	Retirements	400	1,900	3,800
Supply	New entrants	200	1,200	2,400
	Net mobility	200	300	600

Source: BuildForce Canada

Table 5: Non-residential market rankings, New Brunswick

TRADES AND OCCUPATIONS – NON-RESIDENTIAL	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Boilermakers	4	3	3	3	3	3	3	3	3	3	3
Bricklayers	4	3	3	3	3	3	3	3	2	3	3
Carpenters	3	3	3	3	3	3	3	3	2	3	3
Construction managers	4	3	2	3	3	3	3	3	3	3	3
Construction millwrights and industrial mechanics	3	3	3	3	4	4	4	3	3	2	3
Contractors and supervisors	3	3	3	3	3	3	3	3	3	3	3
Crane operators	3	3	3	3	3	3	3	3	3	3	3
Electricians	3	3	3	3	3	3	3	3	2	2	3
Heavy equipment operators (except crane)	4	3	2	3	3	3	3	3	3	3	3
Heavy-duty equipment mechanics	4	3	3	3	3	3	3	3	3	3	3
Insulators	3	3	3	3	3	3	3	3	3	3	3
Ironworkers and structural metal fabricators	3	3	3	3	3	3	3	3	3	3	3
Painters and decorators (except interior decorators)	2	3	3	3	3	3	3	3	3	3	3
Plasterers, drywall installers and finishers, and lathers	2	3	3	3	3	3	3	3	3	3	3
Plumbers	2	3	3	3	3	3	3	3	2	2	3
Refrigeration and air conditioning mechanics	2	3	3	3	3	3	3	3	3	3	3
Residential and commercial installers and servicers	2	3	3	3	3	3	3	3	3	3	3
Roofers and shinglers	3	3	3	3	3	3	3	3	3	3	3
Sheet metal workers	2	3	3	3	3	3	3	3	3	3	3
Steamfitters, pipefitters, and sprinkler system installers	4	3	3	3	4	4	4	3	2	2	3
Trades helpers and labourers	4	3	2	3	3	3	3	3	3	3	3
Truck drivers	4	3	2	3	2	3	3	3	3	3	3
Welders and related machine operators	4	3	3	3	3	3	3	3	3	3	3

Source: BuildForce Canada

BUILDING A SUSTAINABLE LABOUR FORCE

Replenishing a retiring labour force will continue to challenge New Brunswick's recruitment efforts over the coming decade, as an estimated 7,400 construction workers, or 30% of the current labour force, are expected to be lost to age-related attrition. Meeting labour needs will require industry to remain focused on attracting, training, and retaining new workers.

Although aging is robust across Canada, the Atlantic provinces already face a much older age profile than the rest of the country. Over the next 10 years, the share of the population in the older age bracket (65 years and over) is expected to increase, while the share of the population at prime working age (25-54 years old) is expected to decline. Additionally, the share of the population potentially available to enter the labour force (15-24 years old) is also in decline. (See Figure 4.)

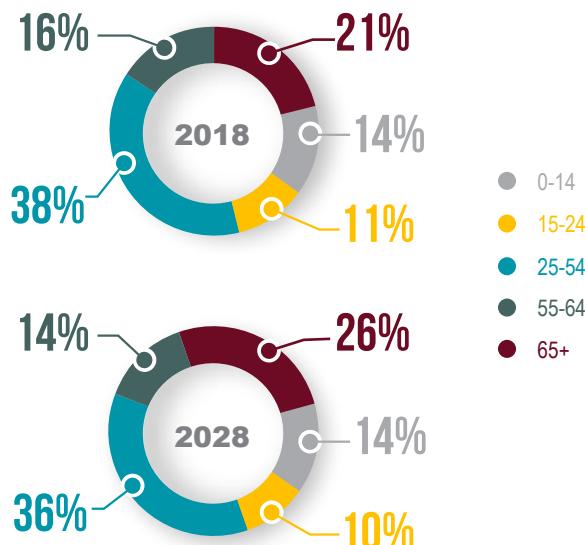
These demographic shifts suggest all industries will be competing for talented youth over the coming decade, adding to the challenges of recruiting young workers to the construction industry.

As a considerable share of the population moves into the older age bracket, the labour force participation rate (percent of the population 15 years and older in the labour force) is expected to fall steadily.

Aging demographics suggest weakening population growth despite the province's effort to bring in migrants. As shown in Figure 5, despite relatively stable net in-migration over the next decade, population growth is anticipated to recede due to a negative natural rate of population growth (births less deaths). For New Brunswick, maintaining population growth will require the province to bring in migrants from outside of the country.

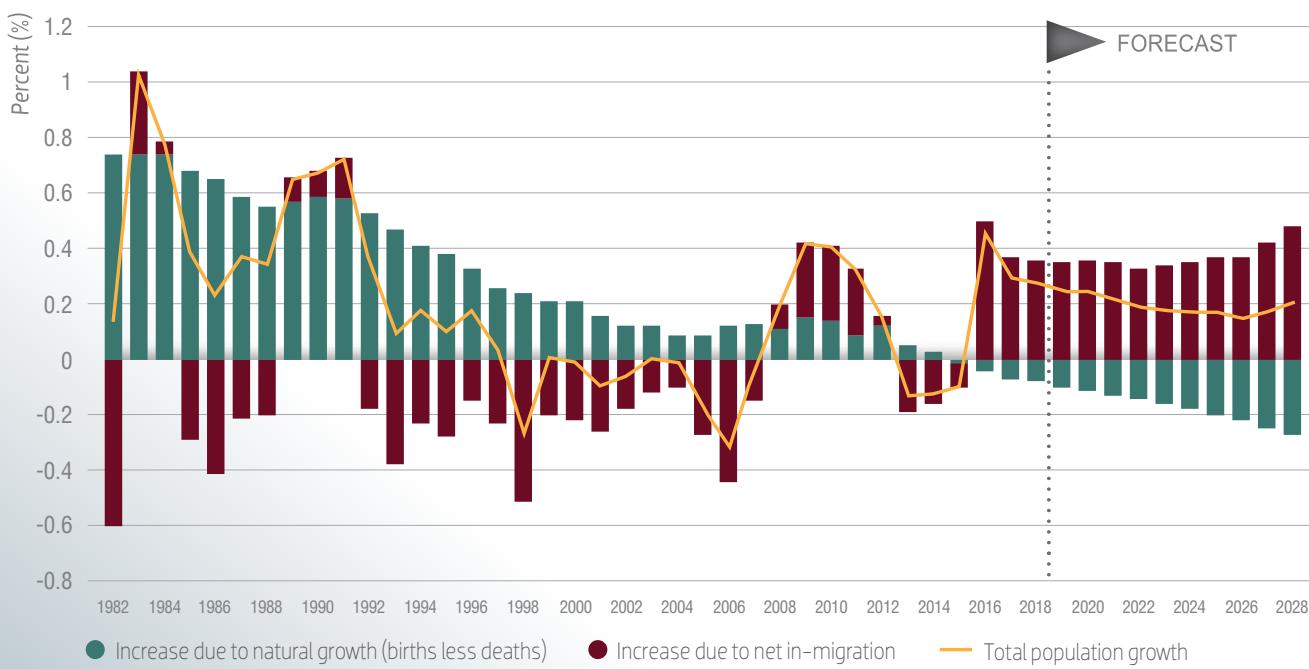
Based on historical trends, New Brunswick's construction industry is expected to draw in an estimated 4,500 first-time new entrants aged 30 and younger from the local population over the next decade. In the scenario period, the pace of retirements exceeds the number of youth coming into construction, forcing the industry to look to other industries, other provinces, and other countries for additional workers to augment the available pool of local new entrants.

Figure 4: Population age distribution, New Brunswick



Source: BuildForce Canada

Figure 5: Sources of population growth (%), New Brunswick



Source: Statistics Canada, BuildForce Canada (2019–2028)

APPRENTICESHIP

More than 4,700 apprentices registered in the 15 largest construction programs⁵ in New Brunswick between 2012 and 2018⁶. Completions totalled 2,700 over the same period. Apprenticeship data from Statistics Canada's Registered Apprenticeship Information System (RAIS) shows annual new registrations have remained static from 2012 to 2018, while construction employment decreased by 13% over the same period. There were nearly 600 new registrations in 2016, down from 730 in 2014. Following the 2016 decline, new registrations have increased 12%, eventually equalising the number of registrations in 2012. BuildForce Canada is working to better track apprenticeship training information to provide data on industry trends and training needs to ensure there are sufficient numbers of apprentices and newly certified journeypersons to sustain a skilled workforce over the long term.

UNDERREPRESENTED GROUPS OF WORKERS

Building a sustainable workforce will require the construction and maintenance industry to increase recruitment from groups traditionally underrepresented in the current construction labour force, including women, Indigenous Canadians, and new Canadians.

In 2018, there were 174,100 women employed in New Brunswick, representing 49% of the province's total labour force. Most women

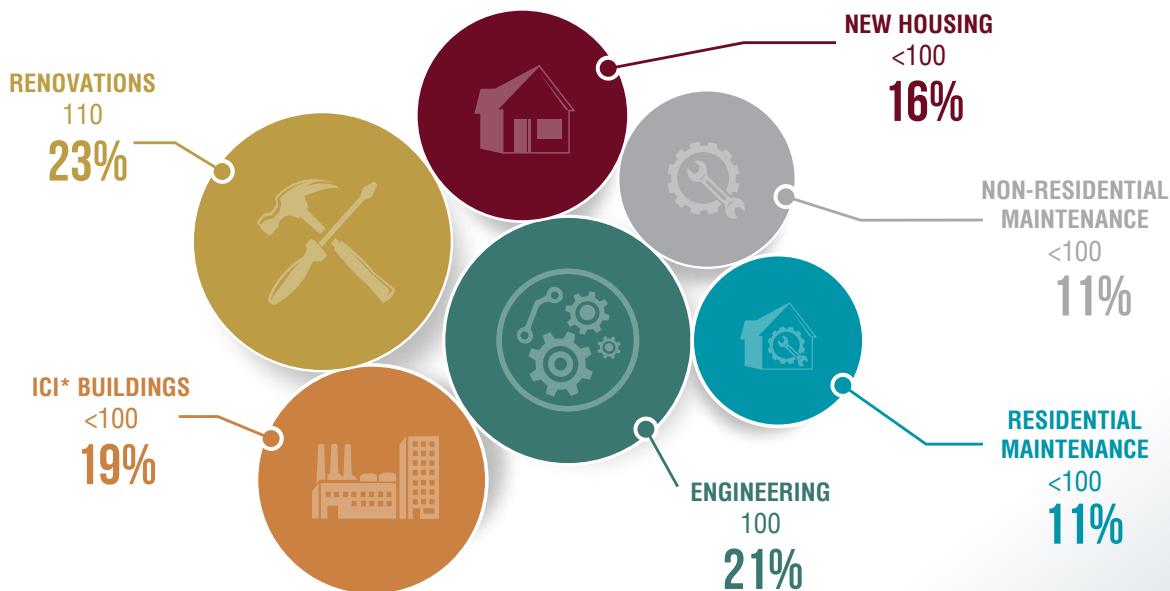
(54%) in the province are employed in the healthcare and social assistance, educational services, and retail services industries. The construction industry employed 1,900 women, or a mere 1% of all women in the province.

New Brunswick's construction labour force is made up of approximately 8% women, of which about 27% work directly on construction projects, while the remaining 73% work primarily in administrative and management-related occupations. This translates into women representing around 2.1% of employment in direct trades and occupations.

Tradeswomen in New Brunswick are primarily involved in the construction of residential and ICI buildings, as these sectors employ 330 women (69%) in construction. The province's engineering construction and non-residential maintenance sectors employ 150 women (32%) and have the lowest female participation. Figure 6 illustrates the breakdown of female employment in construction.

Over much of the last decade, women's representation in the construction industry declined, as the booming engineering construction sector is dominated by males. Receding engineering construction caused male employment to decline by 20% between 2011 and 2017, while female employment rose by 22% during the same period, causing a sharp rise in the share of women in the industry (from 8% in 2010 to 11% in 2017).

Figure 6: Breakdown of female construction employment (2018), New Brunswick



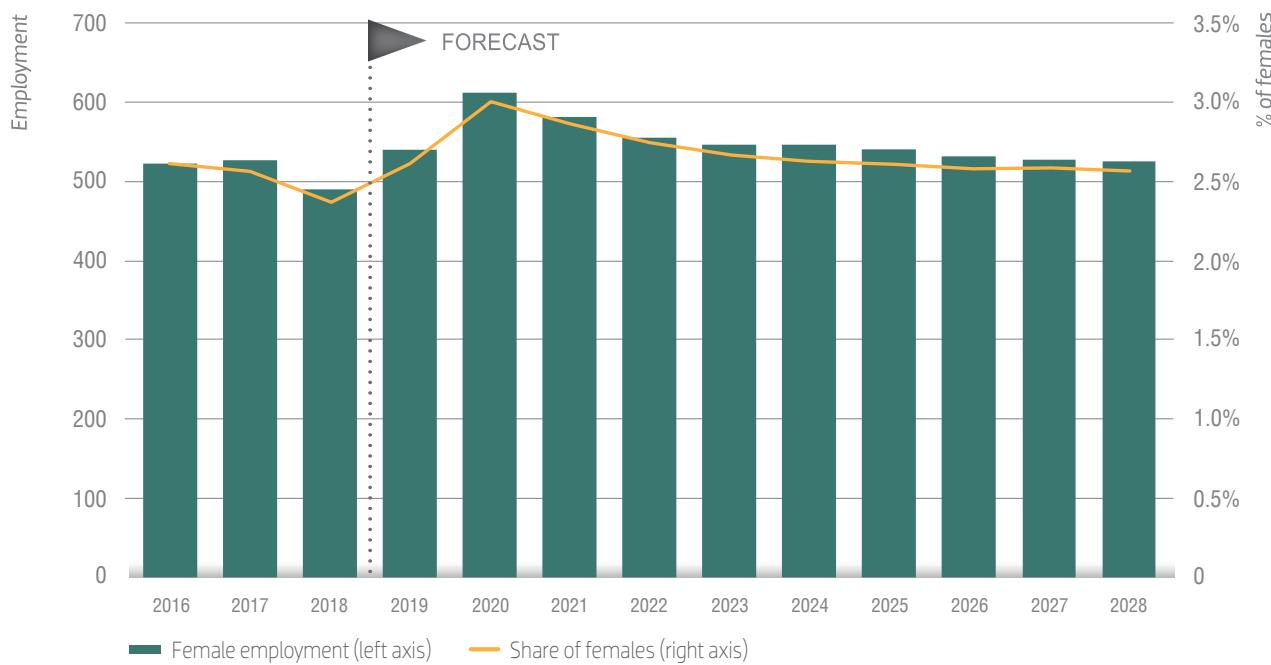
* industrial, commercial, institutional

Source: BuildForce Canada calculations based on Statistics Canada's Labour Force Survey (LFS) and 2016 Census of the Population.

⁵ Programs include Sheet Metal Worker, Boilermaker, Metal Fabricator, Welder, Construction Electrician, Steamfitter/Pipefitter, Sprinkler System Installer, Carpenter, Bricklayer, Roofer, Insulator, Industrial Mechanic (Millwright), Refrigeration and Air Conditioning Mechanic, Mobile Crane Operator, and Plumber.

⁶ Statistics Canada's apprenticeship data is only available to 2016. BuildForce Canada estimated the 2017 and 2018 values.

Figure 7: Female construction employment and share of total direct trades and occupations*, New Brunswick



* Direct trades and occupations refers to the 34 trades and occupations tracked by BuildForce Canada, which excludes administrative-type occupations.

Source: BuildForce Canada calculations based on Statistics Canada's Labour Force Survey (LFS) and 2016 Census of the Population.

Based on historical in- and out-flows of women in the construction industry, female employment and industry representation is expected to improve over the next two years, driven primarily by more steady growth in residential renovation and maintenance work, and commercial and institutional building construction. Moreover, as major road, highway, and bridge work slows, a disproportionate number of male workers are expected to be released. Although employment recedes modestly from the expected peak in 2019, it lands at a higher level than in 2018. Figure 7 shows female construction employment and industry representation.

Residential and ICI building construction is expected to see the strongest gains in female participation. Alternatively, female participation is anticipated to decline in engineering construction and non-residential maintenance work.

The Indigenous Canadian population is another underrepresented group that presents opportunities for New Brunswick's construction industry. In 2017, approximately 7% of all Indigenous people resided in Atlantic Canada. The Indigenous population is the

10-YEAR AVERAGE

0.2%	6,700	8,000	2,900
POPULATION GROWTH	BIRTHS	DEATHS	NET MIGRATION

BY 2028

43	29%
AVERAGE AGE OF CONSTRUCTION WORKFORCE	PERCENT OF CURRENT LABOUR FORCE LOST TO RETIREMENT

fastest growing in Canada and they have a higher propensity to choose the construction industry as a career choice. In 2016, an estimated 7.6% of non-Indigenous Canadians were employed in the construction industry, compared to 9.6% for the Indigenous population.

Approximately 2.7% of New Brunswick's construction labour force is made up of Indigenous Canadians, of which about 79% work directly on construction projects, while the remaining 21% work primarily in administrative and management-related occupations.

New Brunswick's construction industry may also leverage new Canadians (immigrants) over the coming decade to meet labour requirements. The province is expected to welcome 36,100 new immigrants between 2019 and 2028, making the immigrant population a key driver of labour force growth.

Approximately 2% of New Brunswick's construction labour force is made up of new Canadians. Historically, a key source of immigrants to the province were from Europe and the Americas (primarily the United States), whose citizens tend to have a higher propensity to choose the construction industry. A shift is currently underway whereby most new immigrants (65%) are from Asia (primarily China, Syria, Philippines, and South Korea), whose citizens may have a lower tendency to join construction.

CONCLUSIONS AND IMPLICATIONS

The 2019–2028 *Construction and Maintenance Looking Forward* scenario for New Brunswick anticipates modest, though stable, non-residential and residential employment demands that sustain construction employment across the scenario period. There are a number of potential major projects, however, that could alter the outlook for New Brunswick.

The province's older population demographics contribute to long-term hiring needs and make recruiting new young workers into the industry a priority. Meeting the significant replacement demands of an already old and aging labour force will likely place greater emphasis on mobility, in-migration, and international immigration.

The industry scenario-based approach developed by BuildForce Canada to assess future labour market conditions provides a powerful planning tool for industry, government, and other stakeholders to better track labour market conditions and identify potential pressure points. The anticipated labour market conditions reflect current industry expectations based on proposed major project schedules. Any changes to these assumptions presents risks and potentially alters anticipated market conditions.

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