



CANADA'S TERRITORIES

**HIGHLIGHTS
2022–2027**

CONSTRUCTION TRADES OUTLOOK FOR MAJOR PROJECTS IN CANADA'S TERRITORIES

In the territories, construction employment, and particularly the non-residential component focused on engineering construction, is typically supplemented by the workforces of neighbouring provinces. This makes employment conditions across provinces a significant factor governing the ability of the territories to meet their labour force needs. Historically, British Columbia and Alberta have contributed construction labour to Yukon and the Northwest Territories, whereas Quebec, Ontario, and Newfoundland and Labrador will often support projects in Nunavut and eastern parts of the Northwest Territories.

In 2021, construction employment rebounded on the strength of higher investment flows into new-home construction, public-sector institutional buildings, and public-transit systems. Although construction employment varies year to year depending on investment levels, labour market conditions in 2021 were particularly challenging in Ontario, Quebec, British Columbia, and Nova Scotia; four provinces experiencing investment increases in both residential and non-residential construction segments.

Although labour market conditions in 2021 were tight in Ontario, Quebec, British Columbia, and Nova Scotia, nearly all provinces experienced some challenges, as employment grew at a faster rate than the labour force, contributing to lower overall levels of industry unemployment. In most provinces, this was welcome news, but in provinces such as Ontario and Quebec, where unemployment levels were already low, the additional construction demands created recruitment challenges for many employers, both in the residential and non-residential sectors. As workers displaced from the construction labour force rejoin the industry in 2022 and an expected moderation in demand for new-home construction takes hold, industry labour market pressures are expected to ease slightly, but not significantly, until the middle part of the decade.

Meeting peak demands will be challenged by limited provincial mobility, as higher or sustained levels of activity are projected across most provinces over the near term. Adding to market challenges is construction's aging workforce and the expected retirement of almost 156,000 workers over the 2022–2027 forecast period, or almost 13% of the 2021 labour force. This represents a significant loss of skills and experience that is unmatched by new workers entering the labour force.

The task of attracting new workers to construction may also become increasingly more difficult, as many industries face similar challenges related to replacing an aging labour force. Meeting near- and long-term demand requirements will require a combination of industry strategies that include increased recruitment and training of youth, looking to traditionally underrepresented groups, such as women, Indigenous people, and newcomers to Canada, or to other industries to augment the available pool of local workers.

For the territories, balancing labour requirements will require a mix of short- and long-term mobility that includes fly-in, fly-out movement into remote northern locations and more long-term additions of young and permanent workers to each regional labour market. The BuildForce labour market information (LMI) system has been tracking these developments and assessing the impacts on labour markets for 34 construction trades and occupations in each province. Large construction projects regularly increase labour requirements, creating peak demands and recruiting challenges for skilled trades and occupations.

The purpose of this document is to identify key projects in the territories and provide estimates of construction trades requirements for these projects. While BuildForce produces provincial forecasts for construction trades, the lack of detailed historical labour market information for Canada's territories makes it difficult to provide similar outlooks for these regions. Nevertheless, there are several major construction projects proposed for the territories, mainly in the mining sector, that will draw on the same skilled labour pool needed for other major resource projects underway and proposed across Canada.

The next section of this report provides some background on the economies in the three territories. The third section identifies the major projects currently being tracked. The fourth section provides estimates of the trades requirements for the projects.

BACKGROUND

The Northwest Territories has the largest economy in the North, with the mining industry accounting for more than 25% of total GDP in 2020. The territory hosts three diamond mines that account for roughly 90% of the mining sector's output; the rest largely consists of oil and gas production. Under the new ownership of the Arctic Canadian Diamond Company, the Ekati mine reopened in early 2021. Its closure, combined with weaker demand due to the global pandemic, was the main cause of the near 45% reduction in mining

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.

GDP from 2018 to 2020. The current life of the mine runs until 2028; however, an extension to the life of the mine is possible.

Economic growth in the Yukon economy accelerated to 5.2% in 2021, as Victoria Gold Corp.'s Eagle Gold Mine started production. Since 2017, the construction of the Eagle Gold Project has supported economic growth, while waning metal mining production has acted as a hinderance. The mining share of Yukon's GDP fell from 10% in 2016 to about 5% in 2019. The Eagle Gold Project helped to restore value in the sector, bringing the share back up to 11% of Yukon's GDP in 2020.

Mining investment has propelled exceptional growth in Nunavut since 2017. As construction at these projects has been completed and they have transitioned to production, exports have jumped while overall construction has slowed. The mining industry accounted for one-third of the territory's GDP in 2020.

Table 1 shows the level and percent change in real GDP by region for the period of 2011 to 2020.

Over the last few years, the divergent patterns for the territories are primarily due to the differing development paths of each region's mining industry. In the Northwest Territories, the diamond mining sector has reached maturity and production declines can be expected in the future. The Diavik mine is expected to shut down mid decade, and the Ekati mine may also be shuttered before the end of the forecast period if they do not initiate an expansion. The new Gahcho Kué mine adds to production but will not be a sufficient offset for the industry. The Northwest Territories, in partnership with the federal government, is working on developing new road, electrical, and telecommunications infrastructure to the mineral-rich northeastern part of the territory; however, these plans are expected to occur over decades. In Yukon, exploration has seen an uptick, as prices for many base metals have risen, though various mining projects remain in the assessment stage.

As territorial and federal governments work with companies to develop new road infrastructure to access resources, it is expected that some projects will commence. Meanwhile, the re-opening of the Minto Mine, the start of production at Eagle Gold coupled with soaring gold prices, and the construction of Kudz Ze Kayah mine will help to push economic growth higher. Sustained output at the Meadowbank Complex, production at the new Meliadine gold mine, and the possible expansion of road infrastructure all provide encouragement for Nunavut's mining industry in the coming years.

The Grays Bay Road Project in Nunavut and the attaching Slave Geological Province Corridor that would extend into the Northwest Territories would be a significant boon to projects in that region.

PLANNED MAJOR CONSTRUCTION PROJECTS IN THE TERRITORIES

This section provides brief overviews of proposed major construction projects across Canada's territories.

There are exploration projects currently being tracked but not included in this analysis, as there is limited information available on the estimated capital costs or anticipated schedules. These include Seabridge Gold's 3 Aces Project, Gold Terra Resource Corp.'s Yellowknife City Gold Project, and Selwyn Chihong's proposed zinc-lead project.

Table 2 lists the major current and proposed projects for the territories, including the estimated capital costs associated with the construction phase, as well as the anticipated start and end dates, where available. The construction capital costs are used to estimate trades requirements. Despite the current positivity in current market conditions as the global economy recovers from the COVID-19 pandemic, a number of known projects have not made final investment decisions. Pending approvals, the start and end dates for these projects are unknown.

NORTHWEST TERRITORIES

Giant Mine Remediation Project, Northwest Territories

The Giant Mine was a large gold mine located on the Ingraham Trail just outside of Yellowknife. Remediation work, which began in July 2021, will remove material contaminated with arsenic and asbestos. Preliminary work will involve ground stabilization and construction of a land fill for non-hazardous waste, while the larger focus of the project is permanently freezing toxic waste underground. The entire project is estimated to take up to 10 years, with estimated capital costs expected at around \$1 billion, generating hundreds of jobs in the process.

Table 1: Real GDP of the territories (millions of chained 2012 dollars*)

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Northwest Territories	4,408	4,394	4,521	4,735	4,779	4,712	4,873	4,941	4,637	4,151
	-9.0%	-0.3%	2.9%	4.7%	0.9%	-1.4%	3.4%	1.4%	-6.2%	-10.5%
Yukon	2,460	2,558	2,595	2,614	2,409	2,588	2,634	2,702	2,645	2,782
	5.0%	4.0%	1.4%	0.7%	-7.8%	7.4%	1.8%	2.6%	-2.1%	5.2%
Nunavut	2,150	2,199	2,410	2,379	2,372	2,492	2,821	2,953	3,102	3,183
	5.4%	2.3%	9.6%	-1.3%	-0.3%	5.1%	13.2%	4.7%	5.0%	2.6%

Source: Statistics Canada

* **\$2012 millions** indicates that the investment values are in year 2012 dollars (base year), that is, adjusted for inflation. This is used to calculate the real year-to-year change of the value of production, factoring out growth (increased value) due to increases in prices.

Table 2: Major projects and capital costs

	PROJECTS	CONSTRUCTION		
		Start year	End year	Capital Cost (\$Millions)
Northwest Territories	Giant Mine Remediation Project	2021	2030	\$1,000
	Great Bear River Bridge	2023	2027	\$140
	Mackenzie Valley Highway project	---	---	\$700
	Nechalacho (Thor Lake) Project	---	---	-
	NICO Project	---	---	\$210
	Pine Point Mine	---	---	\$556
	Prairie Creek Mine	2024	2026	\$278
	Prairie Creek all-season road	2023	2025	\$89
	Slave Geological Province Corridor	---	---	\$1,100
	Total			\$4,073
Yukon	Brewery Creek	---	---	\$105
	Carmacks Copper	---	---	\$264
	Casino mine	---	---	\$2,900
	Coffee Gold Project	---	---	\$317
	Kudz Ze Kayah Project	2022	2024	\$321
	MacMillan Pass Project	---	---	\$404
	Resource Gateway Project	2021	2026	\$468
	Total			\$4,779
Nunavut	Black River Project	---	---	\$610
	Grays Bay Road and Port Project	---	---	\$550
	Mary River Expansion Project (phases 2 & 3)	---	---	\$1,300
	Total			\$2,460

Source: Yukon Economic Development, NWT Bureau of Statistics, Nunavut Bureau of Statistics, and company websites

Great Bear River Bridge, Northwest Territories

The Great Bear River Bridge will support the Mackenzie Valley Winter Road and future highway. The project is expected to begin in 2024 and be completed by 2027 at a cost of \$140 million.

Mackenzie Valley Highway project, Northwest Territories

The Mackenzie Valley Highway project is a proposed 321 kilometre two-lane gravel highway connecting Norman Wells and Wrigley. The project is estimated to cost \$700 million (including the Great Bear River Bridge project) and will replace the current Mackenzie Valley Winter Road.

Nechalacho (Thor Lake) Project, Northwest Territories

The Nechalacho rare earth deposit is located at Thor Lake, about 100 kilometres southeast of Yellowknife. It is currently in the first year of a three-year demonstration project during which it will scale up production to reach 1,000 tonnes annually. Phase 2 would involve development of the Tardiff deposit.

NICO Project, Northwest Territories

The NICO deposit is located 150 kilometres northwest of Yellowknife. The cobalt-gold-bismuth-copper deposit has proven and probable mineral reserves totalling 33 million tonnes.

The Tlichio all-season road, which opened at the end of November, was critical to the mine's future. Fortune Minerals Limited now plans to build a 50 kilometre spur road to connect with the Tlichio all-season road. The price of cobalt has more than doubled since mid 2020, adding to the positive outlook for the mine. Despite the recent progress, it is still unclear where materials from the mine will be processed. Estimated capital costs are \$210 million.

Pine Point Mine, Northwest Territories

The Pine Point Mine is located west of Fort Resolution on the south shore of Great Slave Lake. Osisko Metals acquired the lead-zinc project in December 2017. The 2020 preliminary economic assessment valued construction costs at \$555.7 million and sustaining costs at \$458 million. The mine would produce an average of 327 million pounds of zinc and 143 million pounds of lead annually over the 10-year life of the mine. There is currenting an in-fill drill program ongoing at the mine. Higher zinc and lead prices may increase the mining project's potential.

Prairie Creek all-season road, Northwest Territories

The Prairie Creek all-season road consists of the construction and operation of a 180 kilometre all-season access road from the Prairie Creek Mine to the Liard Highway. The route, in use since 1982, is currently a winter-only road. The all-season road construction is proposed over three years, with an operating life of 17 years. Due to regulatory requirements, the project has been delayed by up to one year to 2023.

Prairie Creek Mine, Northwest Territories

Prairie Creek is an advanced-stage zinc, lead, and silver mine located 250 kilometres west of Fort Simpson. The mine is expected to have a 15-year life, employing 330 workers in the Dehcho Region in its operation phase. NorZinc had originally hoped to begin production in 2021; however, due to delays associated with the construction of an all-season road to the mine, it has been pushed back to 2023. The company already has permits to construct and operate the mine, for which construction is planned to take around three years, commencing in 2021. Construction capital costs are estimated at \$88.9 million for the road and \$278.2 million for the mine.

Slave Geological Province Corridor, Northwest Territories

The Slave Geological Province (SGP) Corridor consists of a 413 kilometre two-lane gravel infrastructure corridor. The road would serve as an important transportation, hydro, and communications corridor while connecting the northeastern part of the territory and its vast mineral deposits to points south. Preliminary estimates for the road construction and infrastructure are valued at \$1.3 billion. Historic value of production (2018 dollars) from mines within the 213,000 sq km SGP Corridor was estimated at \$45 billion. The project, which would link up with the Grays Bay Road project in Nunavut, is currently undergoing assessments.

YUKON

Brewery Creek, Yukon

The Brewery Creek property is located within the foothills of the Ogilvie Mountains along the northeastern boundary of the Tintina Trench. The property is now owned by Sabre Gold Mines Corp. following the merger of Golden Predator Mining Corp. and Arizona Gold Corp. It is a past-producing heap leach gold mine. Sabre Gold filed an independent technical report in January 2022 in support of the preliminary economic assessment. Pre-construction capital costs are estimated at \$105 million, with an additional \$18 million over the life of the mine. Average annual production would be 60,000 ounces annually over an estimated eight-year mine life.

Carmacks Copper, Yukon

Granite Creek Copper Ltd. is the sole owner of the Carmacks Copper project located 198 kilometres north of Whitehorse. The project is progressing to a feasibility study for the early production of copper, gold, and silver from proposed leach operations. A preliminary economic assessment (2016) estimated pre-production capital costs at \$263.6 million, with construction to extend over a two-year period and an operating life of seven years. The company reported a positive 2021 drilling campaign, supporting findings that the resource is a high-grade copper deposit. The company will continue trying to grow the resource this year. The proximity of infrastructure, including grid power, all-season roads, and existing deep-sea ports, is also reported to increase the project's potential.

Casino mine, Yukon

Casino Mining Corporation is developing the Casino Project, a copper, gold, molybdenum and silver deposit, located about 300 kilometres northwest of Whitehorse. It is among the largest copper-gold deposits in the world. Casino is proposing a conventional open-pit, truck and shovel operation to make the project economically viable. The mill is expected to process about 120,000 tons of ore per day over a 22-year mine life. The estimated capital cost is in the range of \$2.9 billion. In May 2021, Rio Tinto purchased a \$25.6 million stake in the project, which is currently in the environmental assessment review stage. A feasibility study is set for completion in Q2 2022.

Coffee Gold Project, Yukon

Coffee Gold is a proposed open-pit heap leach gold mine, approximately 130 kilometres south of Dawson City. It is expected to produce roughly 200,000 ounces of gold per year for about 10 years. It had been previously stated that the goal was for construction to begin in 2021; however, with the merger of Goldcorp and Newmont, there is some uncertainty regarding the development timeline of the project. In November, Transport Canada and Natural Resources Canada had informed the Yukon Environmental and Socio-economic Assessment Board (YESAB) that a further panel review is needed, only weeks after YESAB said the project could proceed without a review.

Kudz Ze Kayah Project, Yukon

The Kudz Ze Kayah Project is a proposed predominantly open-pit operation in southeast Yukon within the traditional territory of the Kaska First Nation. The project owner, BMC Minerals, recently released an updated feasibility study that reports promising results. It is expected to produce seven million ounces of silver, 65,000 ounces of gold, 235 million pounds of zinc, 32 million pounds of copper, and 56 million pounds of lead annually during its nine-year mine life. Development costs are expected to total \$320.8 million. On their second review of the project, the YESAB was deadlocked and deferred to their previous decision that the mine be allowed to proceed; the provincial and federal governments are now reviewing the proposal.

MacMillan Pass Project, Yukon

The January 2018 Mineral Resource Estimate puts Macmillan Pass among the world's most significant zinc resources. Fireweed Zinc's Macmillan Pass Project includes the large Tom and Jason zinc-lead-silver deposits. Significant mineral deposits have been proven on the site for decades. The project benefits from having established road access. Exploration continues at the project and with the appreciation in zinc prices since mid 2020, a positive development outlook for the mine is expected.

Resource Gateway Project, Yukon

The Government of Canada, the Government of Yukon, and the mining industry have committed to contributing \$468 million in infrastructure investment for the Resource Gateway Project. The aim is to increase access to the resource-rich territory and promote private investment. The project is broken up into 11 components, with the first, the \$29.6 million Carmacks Bypass Project construction contract having been awarded and expected to be completed in 2024. Agreements are in place for six other components, while the remaining four require further negotiation with First Nations.

NUNAVUT

Back River Gold Project, Nunavut

The Back River Gold Project is owned by Sabina Gold & Silver Corp. and holds proven resources of 1.34 million ounces of gold. Sabina will employ both shovel and truck open-pit and underground mining methods. The expected life of the mine is 11.8 years, with an average production of 198,000 ounces of gold. Pre-production capital expenditures are expected to total \$610 million; \$55 million of which was spent in 2018 on port construction, pre-development, earthworks, and the purchase of heavy equipment. Sabina has already acquired various permits for the mine and received its final operational approval for the placement of the tailings on June 25, 2020. Pre-construction work is ongoing while Sabina works on a financing package for the mine that could be available in early 2022.

Grays Bay Road and Port Project, Nunavut

The Grays Bay Road and Port Project consists of a 227 kilometre all-season road linking the northern terminus of the Tibbitt to Contwoyto winter road to a deep-water port at Grays Bay on the Northwest Passage. The road will encourage resource development projects by increasing the ease in which companies can export products from remote locations in the territory. Previous funding received through Transport Canada's National Trade Corridor Fund, along with a recently agreed upon loan from Nunavut Tunngavik Inc., will allow the Kitikmeot Inuit Association to carry out pre-construction work and get the project shovel ready. Capital expenditures were expected to total around \$500 million; however, costs have increased over the last two years.

Mary River Expansion Project (phases 2 and 3), Nunavut

The expansion proposal of phase 2 and phase 3 of the Mary River Mine, which currently produces six million tonnes of iron ore per year after phase 1 construction was completed in 2016, is looking to raise production by an additional six million tonnes per year in each phase, reaching 18 million tonnes per year. The project would involve the construction of a railway from the Mary River Mine site to the port site, along with a second ore dock at the port. Baffinland Iron Mines Corp. has stated that if phase 2 is not approved and if iron ore prices decline in 2022, they could be forced to put the operation into care and maintenance. The Nunavut Impact Review Board closed its hearing regarding the expansion plans in late January. The company has urged the Board to release its recommendations within 45 days, as the process has already been delayed due to COVID-19.

TRADES REQUIREMENTS

The construction and operation of a mine often faces challenges in attracting and training skilled workers. This is especially problematic for mines located in remote locations. Companies are reporting that skilled workers are becoming increasingly difficult to find and this problem is being accentuated by an aging workforce and a wave of retirements from the industry.

The development of the mining sector in Canada's territories will require key construction trades and occupations that are common to engineering and industrial work and in high demand in other industries and provinces. The demand for these construction trades has grown dramatically and steadily for at least a decade and, while growth is expected to slow with some projects postponed, industry groups and governments will need to remain focused on recruiting and training plans.

The BuildForce LMI tracking system is limited to broad occupational classifications. The requirements of mine construction and related resource projects have traditionally focused on the following trades and occupations:

- boilermakers
- carpenters
- construction estimators
- construction managers
- contractors and supervisors
- drillers and blasters
- electricians
- heavy-duty equipment mechanics
- heavy equipment operators
- ironworkers
- pipefitters
- trades helpers and labourers
- truck drivers
- welders

The estimated capital cost for each project and additional information on occupation requirements associated with heavy construction is used to estimate trades requirements. Importantly, it is assumed that all announced projects will proceed as scheduled.

Tables 3 and 4 provide estimates of trades requirements that are generated by the construction of the various projects from 2022 to 2027. The total number of workers required for all projects by territory is shown in Table 3. The timeframes for construction of the projects in the territories as a whole are shown in Table 4.

The total number of trades tracked by BuildForce¹ required for the projects as a whole in this time period is estimated at 2,800 workers. The largest number of requirements is for trades helpers and labourers at just over 820 workers, followed by almost 750 heavy equipment operators.

Table 3: Construction trades demand by territory, 2022–2027

	Northwest Territories	Yukon	Nunavut	Total
Boilermakers	14	7	0	22
Construction estimators	43	43	0	86
Construction managers	119	205	0	324
Construction millwrights and industrial mechanics (except textile)	5	4	0	9
Contractors and supervisors	93	131	0	224
Crane operators	40	16	0	57
Drillers and blasters – surface mining, quarrying, and construction	47	33	0	80
Electricians	32	56	0	88
Heavy-duty equipment mechanics	53	66	0	119
Heavy equipment operators (except crane)	434	315	0	749
Ironworkers, structural metal and platework fabricators and fitters	31	29	0	60
Sheet metal workers	1	0	0	2
Steamfitters, pipefitters, and sprinkler system installers	5	3	0	8
Trades helpers and labourers	343	477	0	821
Truck drivers	72	37	0	108
Welders and related machine operators	29	12	0	41
Total	1,361	1,435	0	2,797

Source: Yukon Economic Development, NWT Bureau of Statistics, Nunavut Bureau of Statistics, company websites, and BuildForce Canada

¹ The BuildForce LMI system tracks labour market conditions for 34 trades and occupations. This group includes on-site workers and accounts for approximately 75% of the full construction workforce. Excluded from this group are office workers, engineers, office managers, etc.

Table 4: Construction trades demand (all projects), 2022–2027

All projects	2022	2023	2024	2025	2026	2027
Boilermakers	3	5	4	4	4	2
Construction estimators	8	16	20	20	18	4
Construction managers	20	50	83	88	75	7
Construction millwrights and industrial mechanics (except textile)	1	2	2	2	2	1
Contractors and supervisors	17	38	55	58	50	7
Crane operators	9	14	10	10	9	5
Drillers and blasters – surface mining, quarrying and construction	10	17	17	16	15	5
Electricians	5	14	23	24	20	2
Heavy-duty equipment mechanics	10	21	28	30	26	4
Heavy equipment operators (except crane)	90	158	157	157	143	44
Ironworkers, structural metal and platework fabricators and fitters	6	12	14	14	12	3
Sheet metal workers	0	0	0	0	0	0
Steamfitters, pipefitters, and sprinkler system installers	1	2	2	2	1	0
Trades helpers and labourers	63	139	201	211	182	25
Truck drivers	15	25	21	20	19	8
Welders and related machine operators	6	10	7	7	7	3
Total	266	523	644	661	583	119

Source: Yukon Economic Development, NWT Bureau of Statistics, Nunavut Bureau of Statistics, company websites and BuildForce Canada

CONCLUSIONS

The labour requirements for projects in the Northwest Territories, Yukon, and Nunavut add to the complexity of demand requirements for construction trades and occupations across Canada. While some of the proposed resource development projects in the territories have been postponed or are pending final investment decisions, meeting labour demands for ongoing resource projects and replacing an aging workforce will require a mix of short- and long-term mobility options that include both the movement of workers into remote northern locations and more long-term additions of young and permanent workers to address an aging workforce. Some new workers may be drawn from the populations of the Northwest Territories, Yukon, and Nunavut, while others

will have to be drawn to the territories from outside the local construction industries. The development of additional major projects would increase labour demands and enhance the need for the territories to attract more workers.

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 the current long-term economic outlook and industry major project assumptions. Any changes to these assumptions present risks and potentially alters anticipated market conditions.

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