



CONSTRUCTION AND MAINTENANCE LOOKING FORWARD:

AN ASSESSMENT OF CONSTRUCTION LABOUR
MARKETS FROM 2023 TO 2032

APRIL 2023

 **BUILDFORCE**
CANADA

ABOUT BUILDFORCE CANADA

Originally created in 2001 as the Construction Sector Council, BuildForce Canada is a national industry-led organization committed to working with the construction industry to provide information and resources to assist with its management of workforce requirements.

The mandate of BuildForce Canada is to provide accurate and timely labour market information (LMI) to advance the needs of the entire construction industry in order to develop a highly skilled labour force that will support the future needs of Canada's construction industry.

ACKNOWLEDGEMENTS

BuildForce Canada wishes to acknowledge the participation and input of the numerous industry volunteers for their dedication and contributions to the development of this annual forecast. Please see the appendix for a full list of the committee participants.

CONTENTS

BuildForce LMI system	4
National	4
Canada's construction industry	4
National construction forecast overview (2023 to 2032)	5
Employment	5
Labour force	6
Sector insights	7
Residential investment	7
Residential employment	7
Residential labour force	8
Non-residential investment	8
Non-residential employment	9
Non-residential labour force	11
Provincial insights	11
Newfoundland and Labrador	11
Prince Edward Island	11
Nova Scotia	12
New Brunswick	12
Quebec	12
Ontario	12
Central Ontario	13
Eastern Ontario	13
Greater Toronto Area	13
Northern Ontario	14
Southwestern Ontario	14
Manitoba	14
Saskatchewan	15
Alberta	15
British Columbia	15
Lower Mainland	15
Vancouver Island	16
Building a sustainable labour force	16
Labour force diversification	16
Under-represented groups of workers	16
Conclusion and implications	18
Appendix: Committee participants	19

BUILDFORCE LMI SYSTEM

BuildForce Canada uses a scenario-based forecasting system to assess future construction labour requirements in the residential, non-residential, and heavy-industrial construction markets. This labour market information (LMI) system tracks 34 trades and occupations. **Unless otherwise stated, references in this report to employment and the labour force are limited to the analysis of these direct trades and occupations.¹**

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. The information is then distilled into labour market condition rankings to help industry employers with the management of their respective human resources.

The BuildForce LMI system tracks labour force supply and accounts for the required labour force changes based on demand projections, retirements, new entrants to the industry's labour force, as well as mobility requirements to reflect changes in demand.

NATIONAL

CANADA'S CONSTRUCTION INDUSTRY

Construction is one of Canada's largest industrial sectors. In 2022, total construction industry employment exceeded 1.5 million Canadians, which amounts to approximately one out of every 13 working Canadians. As a whole, the industry accounts for 7% of Canada's GDP. It is made up mostly of small businesses, with approximately 60% of industry firms classified as micro businesses consisting of fewer than five employees.

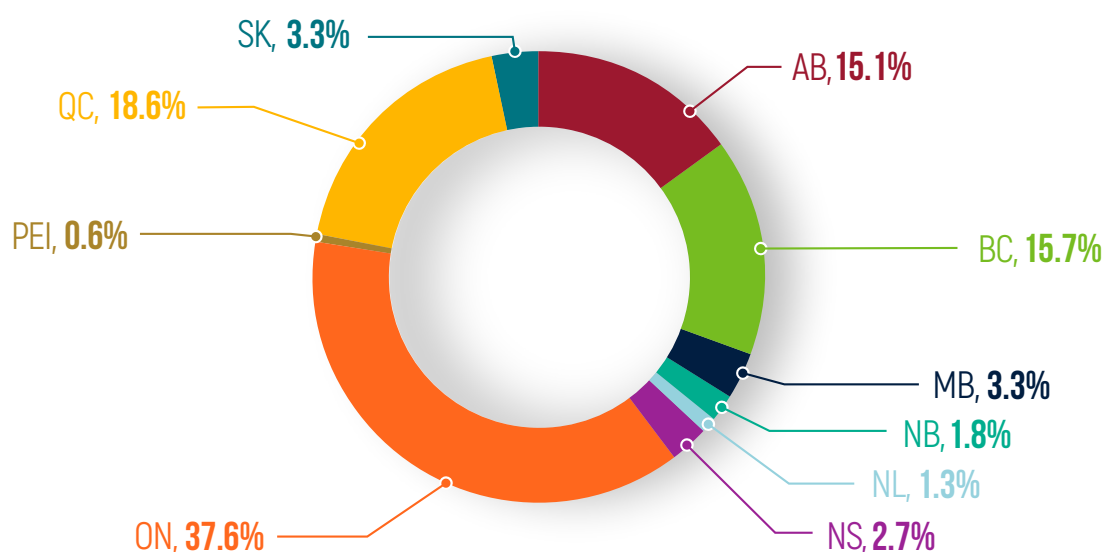
As with many sectors of the economy, the construction industry has emerged from the COVID-19 pandemic in a strong position, but with the additional challenge of recruiting from a shrinking labour force. Labour Force Survey² data from Statistics Canada shows employment grew by 101,400 workers (+7%) in 2022, while the labour force grew by 85,200 workers (+5.5%). The inability of the labour force to grow as quickly as employment helped to bring the construction industry's average unemployment rate down from 6% in 2021 to 4.7% in 2022. The national construction unemployment rate reached a low of 2.4% in July 2022, its lowest-recorded rate since 1976.

Figure 1 provides a breakdown of the share of total construction industry employment by province.

Total construction industry employment increased in 2022, on the strength of elevated investment levels in new-home construction, public-sector institutional buildings, and public-transit systems. In nearly all provinces, this rapid rise in construction demands created tighter labour market conditions throughout most of the year. Provinces such as Ontario, British Columbia, Quebec, Nova Scotia, and Prince Edward Island were particularly impacted, as investment levels were high in both residential and non-residential construction segments.

These additional construction demands created recruitment challenges for many employers, both in the residential and non-residential sectors. Labour market pressures in the residential sector should ease in 2023 and 2024, as the rapid rise in interest rates recorded in 2022 has moderated demands for new homes. Renovation and maintenance demands, however, showed little sign of moderation and are expected to grow almost continuously through the forecast period. In the non-residential sector, labour market demands are unlikely to ease until the middle years of the forecast period, given the high volume of large projects underway in most regions of the country.

Figure 1: Share of total construction industry employment by province, 2022



¹ **Direct trades and occupations** include all construction industry professions except management and office administration positions.

² Statistics Canada's Labour Force Survey captures the labour force status of all workers within the industry, including those in occupations outside of the direct trades and occupations tracked by BuildForce Canada.

NATIONAL CONSTRUCTION FORECAST OVERVIEW (2023 TO 2032)

While less impacted than other sectors of the economy, construction continues to recover from the lingering effects of the emergency measures introduced to control the spread of COVID-19. Although temporary, these emergency measures not only impacted industry training, but they also forced some older workers to leave the workforce to deal with pandemic-related family obligations. The slow return of these older workers to the labour force helped contribute to tighter labour markets in 2021 and the early part of 2022. Strong demand for construction services created market conditions in which employment demands for much of the year outstripped the capacity of the labour force to keep pace with growth, leading to lower overall industry unemployment rates across most of the country.

Construction investment has increased dramatically since the pandemic, with governments at all levels investing heavily in infrastructure as a tool to stimulate the economy. In 2022, combined residential and non-residential construction investment increased by 3% over 2021's record high. Residential investment levels were driven by record-low interest rates in the first half of the year and a growing demand for housing that was spurred by low rental vacancy rates in many cities and high levels of immigration. The non-residential sector benefited from stronger levels of public-sector investment in health care, utilities, transportation, and public transit, as well as robust levels of private-sector investment.

Figure 2 shows that overall investment in the residential sector was up 2% from 2021 levels, while investment in the non-residential sector

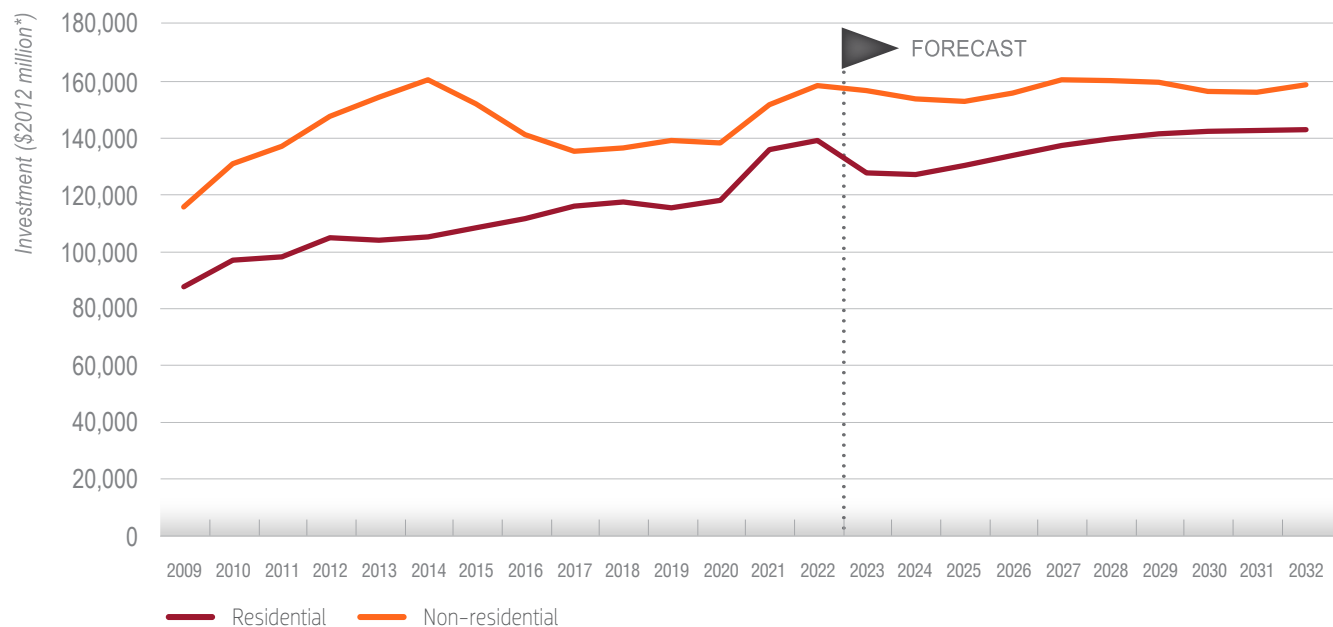
added 4%. In this *Construction and Maintenance Looking Forward 2023–2032* report, BuildForce Canada forecasts that construction investment is poised to contract in 2023 and 2024 as higher interest rates cool the country's strong housing market, and as a number of key non-residential mega-projects conclude. Total construction investment is poised to contract by 4% in 2023, with demand reductions of 8% in the residential sector and 1% in the non-residential sector. The contraction is brief, however. By 2032, total investment is expected to grow slightly, up 1% compared to 2022 levels.

EMPLOYMENT

Continued investment growth lifted construction employment in the 34 trades and occupations tracked in the BuildForce Canada LMI model to above 1.16 million workers in 2022, an increase of around 5% compared to 2021 levels. (See Figure 3.) Both the residential and non-residential sectors added workers. As construction investment contracts into 2023, total employment is expected to decline. A loss of 4% of the residential-sector workforce will more than offset further growth of just above 1.5% in the non-residential sector to create an overall employment contraction of 1%. These diverging trends continue into 2024, before growth resumes in both sectors in the medium term and remains mostly unchanged through the long term. By 2032, overall employment is expected to add 1%, as a gain of 4% in the non-residential sector more than offsets a loss of 1% in the residential sector.

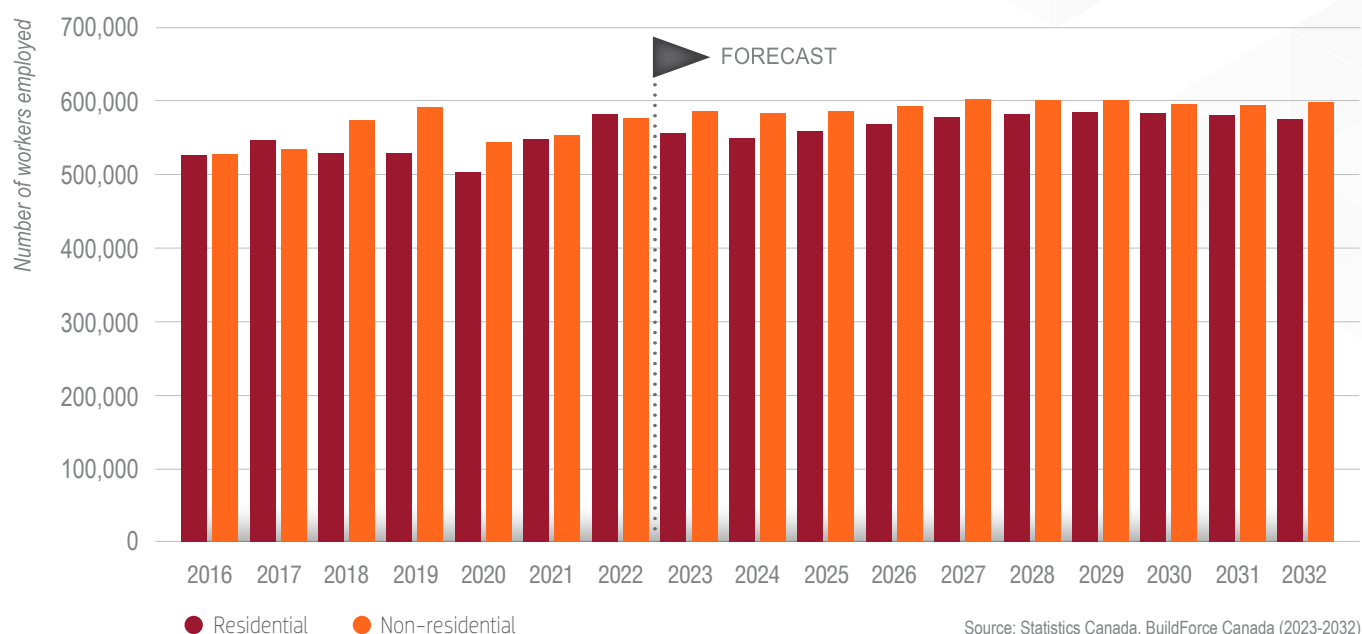
Figure 3 tracks employment over the forecast period.

Figure 2: Total construction investment, 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 physical year-to-year change of the value of construction, factoring out growth (increase in value) due to increases in prices.

Source: Statistics Canada, BuildForce Canada (2023-2032)

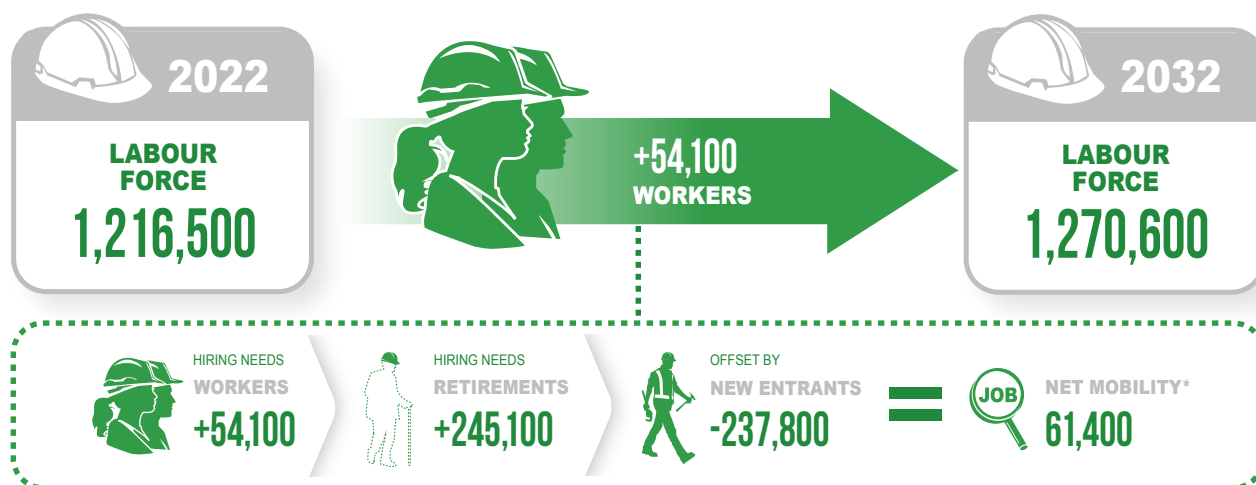
Figure 3: Construction employment growth outlook, Canada

LABOUR FORCE

Although employment is expected to record only modest increases over the 10-year forecast period, labour force management will be challenging. Industry retirements are expected to reach their highest levels in the near term as large numbers of workers from the baby boomer generation exit the industry. Construction demands will require the industry's labour force to expand by 54,100 workers over the forecast period. When this demand growth is added to the 245,100 individuals expected to retire during this period – in total,

approximately 20% of the 2022 labour force – the overall industry recruitment requirement rises to 299,200 workers by 2032. Although the industry is expected to recruit approximately 237,800 new-entrant workers under the age of 30 during this period to help offset some of this requirement, even at these heightened levels of recruitment, the industry is likely to be short 61,400 workers by 2032.

Figure 4 shows estimated changes in the construction labour force over the forecast period.

Figure 4: Changes in the construction labour force, Canada

* Net mobility refers to the number of workers needed to be brought into the industry from other industries or other provinces to meet rising demands or the number of workers that exit the industry in downturns. Positive net mobility means that industry must attract workers, while negative net mobility arises from an excess supply of workers in the local construction labour force.

Note: Due to rounding, numbers may not add up to the totals indicated.

Source: BuildForce Canada

SECTOR INSIGHTS

RESIDENTIAL INVESTMENT

Canada's residential construction sector is being driven by growth in its new-housing market. Housing starts responded to elevated levels of pre-pandemic household formations and record-low lending rates to grow from just below 218,000 units in 2020 to just over 265,000 in 2022. Although the latter represented a slight decline (-3%) from the peak set in 2021, starts nonetheless continue to exceed historical highs, with significant demand for both single-detached³ and multi-unit builds.

Housing starts are expected to contract by as much as 15% in 2023 as consumers react to rising interest rates. Single-detached starts, in particular, are expected to decline by as much as 20% as higher borrowing costs slow demand for these more expensive units. Declines are expected to be less pronounced (-12%) in the multi-unit segment.

Contractions are expected to be short-lived. As consumers adjust their expectations to higher interest rates and population growth increases pressure for new homes, starts are expected to return to growth commencing in 2024, climbing to above 240,000 units by 2026 and remaining so through 2029.

Meanwhile, investment in residential renovation and maintenance work is expected to grow across the forecast period. Activity will be driven by the turnover of older homes in densely populated, mature urban markets, the aging of the existing housing stock, and the desire of older-age individuals to prepare their homes to enable them to age in place⁴. By 2032, renovation and maintenance

investment is expected to increase by more than 23% above 2022 levels. Across the decade, investment in renovation activity increases from 40% of total residential investment to 48% by 2032.

Figure 5 shows anticipated residential investment throughout the forecast period.

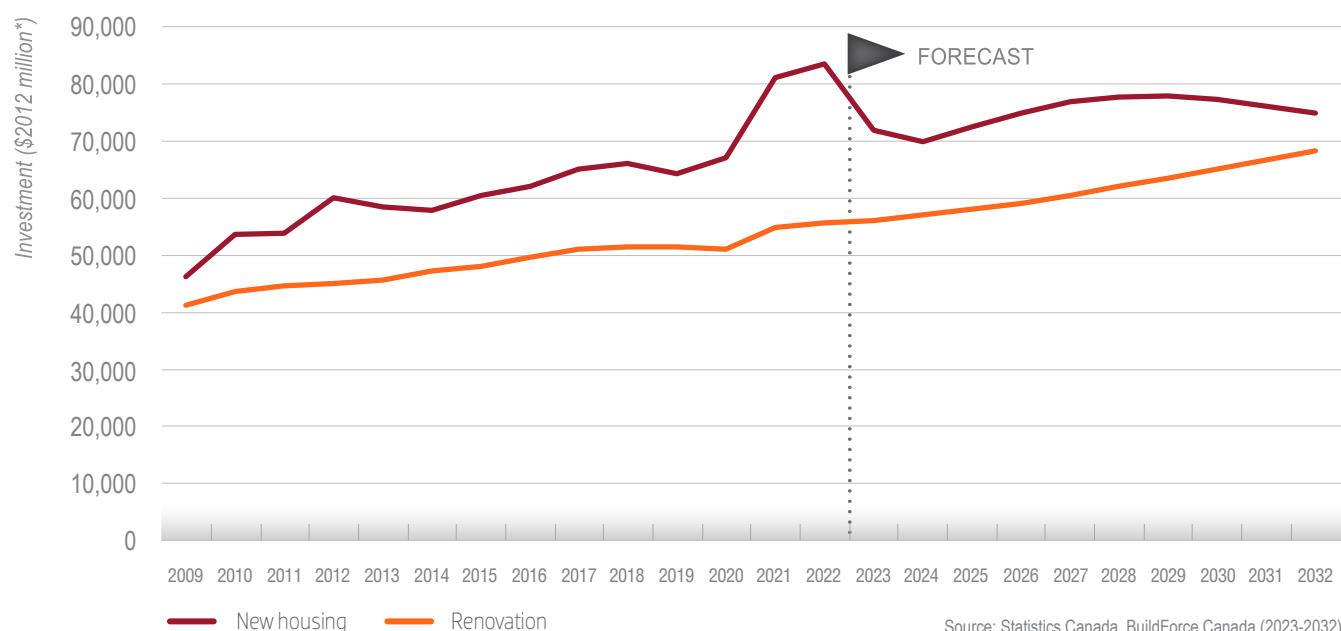
RESIDENTIAL EMPLOYMENT

Residential construction employment has been increasing as a share of overall construction employment since 2019. In 2022, the sector accounted for just over 50% of total employment.

Further growth in the country's housing markets pushed residential construction employment to above 580,000 workers in 2022 – a growth of around 33,500 workers (+6%) over 2021 levels. Meanwhile, the residential labour force grew at a slower rate, adding 31,000 workers (+5%) over the same period. This in turn drove unemployment rates in the sector lower and, in some markets, produced very tight labour markets for several key trades and occupations.

As demand for new-home construction, in particular, weakens over the forecast period – a contraction of almost 30,000 workers (-9%) is forecast for the segment in 2023 – many workers may choose to pursue activity in the renovation and maintenance segments, which are forecast to add a combined 5,400 workers in 2023. Across the forecast period, employment in new-housing construction is projected to contract by 42,300 workers (-13%). Over the same period, the renovation and maintenance segments will add workers continuously. By 2030, combined employment in those segments is expected to exceed employment in new housing, and by 2032,

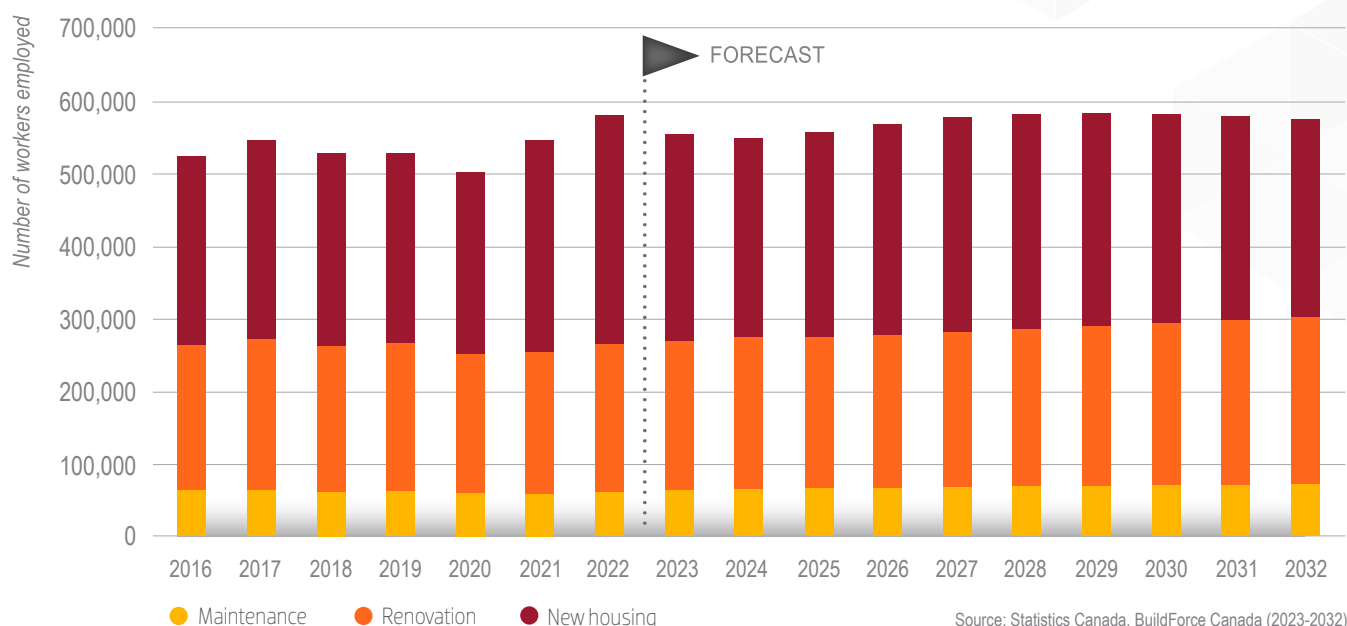
Figure 5: Residential construction investment, Canada



* \$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 physical year-to-year change of the value of construction, factoring out growth (increase in value) due to increases in prices.

³ **Single-detached (single)** refers to a building containing only one dwelling unit that is completely separated on all sides from any other dwelling or structure.

⁴ **Age in place** is defined as required renovations and modifications to enable individuals to continue to live independently and safely in their residence as they age.

Figure 6: Residential construction employment growth outlook, Canada

renovation employment is projected to add almost 27,000 workers (+13%), while maintenance employment is projected to increase by 10,000 workers (+16%). Although large, the combined increases are not enough to offset the losses in the new-housing segment. Overall, residential employment is anticipated to contract by a modest 5,300 workers (-1%) by 2032 from the record-low unemployment and elevated demand levels achieved in 2022. (See Figure 6.)

Table 1 shows the anticipated changes in residential employment by province across three periods: the short term (2023–2025), the medium term (2026–2028), and the long term (2029–2032).

Table 1: Changes in residential employment, by province

REGION	% CHANGE 2023–2025	% CHANGE 2026–2028	% CHANGE 2029–2032
Canada	-4%	4%	-1%
Newfoundland and Labrador	-1%	-1%	-11%
Nova Scotia	4%	3%	-4%
New Brunswick	3%	0%	-1%
Prince Edward Island	8%	-1%	-8%
Quebec	-5%	-2%	-3%
Ontario	-5%	7%	0%
Manitoba	-1%	-2%	-1%
Saskatchewan	7%	19%	-8%
Alberta	-2%	-4%	-5%
British Columbia	-5%	8%	4%

Source: BuildForce Canada

Note that federal efforts to double the number of new homes built across Canada over the next 10 years were not factored into this analysis. As these efforts accelerate, they will be added to future BuildForce Canada outlook reports.

RESIDENTIAL LABOUR FORCE

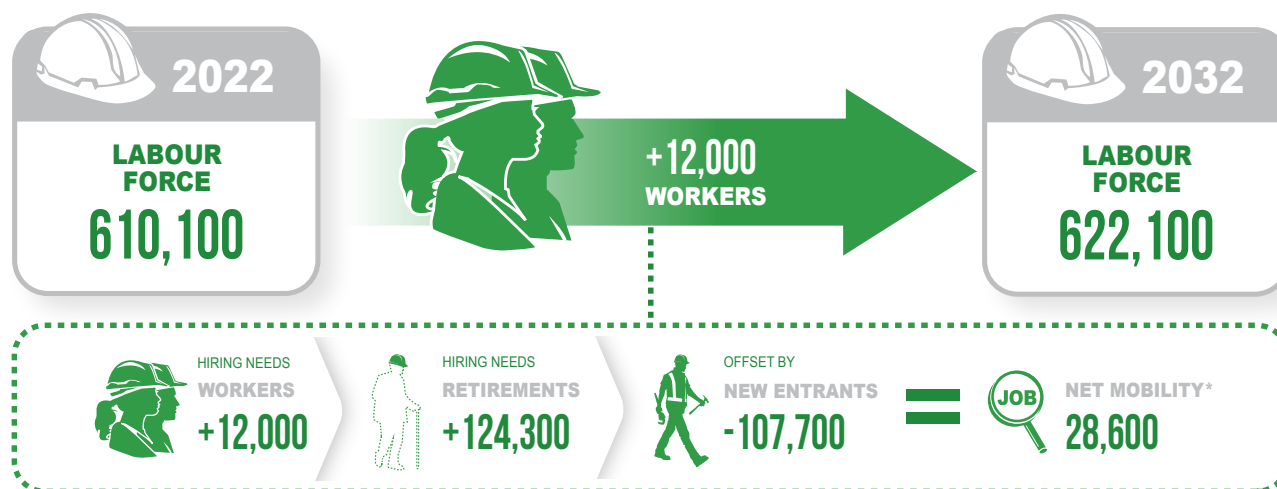
Although employment in the residential sector is expected to decline modestly, the sector will face significant labour force pressures over the life of the forecast. Approximately 124,300 workers (20% of the 2022 labour force) are expected to retire by 2032. When combined with a projected growth in the labour force of 12,000 workers, the industry's overall hiring requirement will rise to 136,300. Historical recruitment levels suggest the industry will add 107,700 new workers by 2032, leaving a recruiting gap of as many as 28,600 workers.

Figure 7 shows the anticipated labour force changes in the residential sector over the forecast period.

NON-RESIDENTIAL INVESTMENT

Since the onset of the pandemic, non-residential construction investment has been supported by a series of major projects underway across the industrial, commercial, and institutional (ICI) and engineering-construction sectors. These were deployed as tools to stimulate the economy, and in response to growing population demands. After rising by almost 10% in 2021, non-residential construction investment increased again in 2022 – by just over 4%, with both the ICI and engineering-construction sectors recording growth.

Activity in the engineering-construction sector has grown since 2020 on the strength of major transit, utility, and roads, highways, and

Figure 7: Changes in the residential construction labour force, Canada

* **Net mobility** refers to the number of workers needed to be brought into the industry from other industries or other provinces to meet rising demands or the number of workers that exit the industry in downturns. Positive net mobility means that industry must attract workers, while negative net mobility arises from an excess supply of workers in the local construction labour force.

Note: Due to rounding, numbers may not add up to the totals indicated.

Source: BuildForce Canada

bridges projects in Ontario, British Columbia, Quebec, Nova Scotia, and Prince Edward Island. As several of these projects conclude in the near term, investment cycles down. By 2032, engineering investment contracts by 8% compared to elevated 2022 levels.

Investment in the ICI sector has been on a steady growth curve since 2017. Levels have increased in every province, supported by demand for major education and health care projects, as well as across the commercial and industrial sectors. The outlook for the sector calls for a series of increases across the forecast period, with investment ending the decade 14% above 2022 levels. Growth is particularly strong in the commercial sector, where investment increases annually to 2032, adding 26% over 2022 levels. Gains in the industrial sector (10%) and the institutional sector (6%) are less pronounced.

Figure 8 shows expected non-residential investment levels over the entire forecast period.

NON-RESIDENTIAL EMPLOYMENT

Employment in the non-residential sector added nearly 24,000 workers in 2022, rising by 4% over 2021 levels. Employment is poised to grow continuously between 2023 and 2027, rising to above pre-pandemic levels and a forecast peak of more than 602,900 workers (+5% above 2022 levels) by 2027. Growth will be greatest in those provinces in which engineering construction and institutional demands are strongest. Between 2022 and 2026, employment will increase by more than 26,000 workers before declining slightly through most of the remaining forecast years. By 2032, non-residential employment is expected to increase by 21,600 workers – a 4% rise over 2022 levels. A loss of 1,800 workers (-1%) in the engineering-construction sector is more than offset by gains of 13,100 workers (+7%) in ICI construction and of 10,300 workers (+7%) in maintenance activity.

Note that the widespread conversion of ICI buildings to the greater use of electricity for heating and cooling is excluded from this report,

as these efforts are still in their early phases and have had only minor impacts on overall construction labour markets. As these efforts accelerate, they will be added to future BuildForce Canada outlook reports.

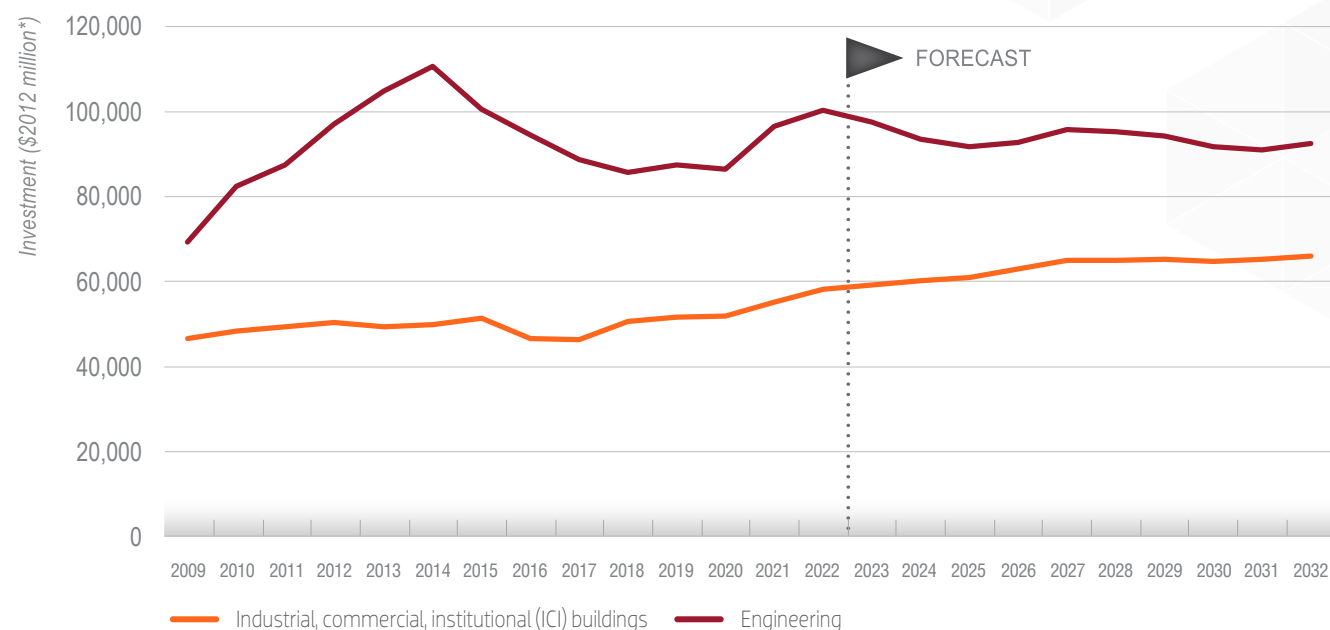
Figure 9 shows anticipated non-residential employment changes over the forecast period.

Table 2 shows the anticipated changes in non-residential employment by province across three periods: the short term (2023–2025), the medium term (2026–2028), and the long term (2029–2032).

Table 2: Changes in non-residential employment, by province

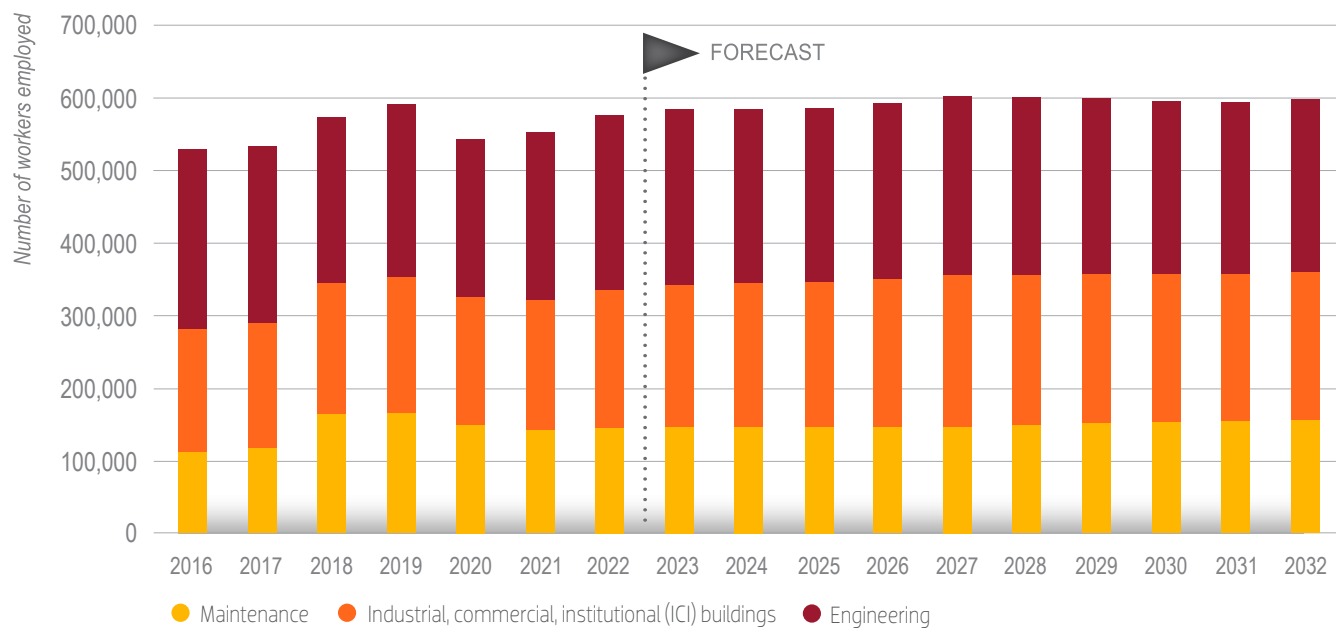
REGION	% CHANGE 2023–2025	% CHANGE 2026–2028	% CHANGE 2029–2032
Canada	1%	3%	-1%
Newfoundland and Labrador	1%	6%	-9%
Nova Scotia	6%	1%	-5%
New Brunswick	-4%	7%	2%
Prince Edward Island	-6%	-7%	4%
Quebec	-3%	-1%	3%
Ontario	7%	7%	-4%
Manitoba	-2%	1%	1%
Saskatchewan	1%	-5%	-1%
Alberta	-1%	3%	0%
British Columbia	-1%	0%	3%

Source: BuildForce Canada

Figure 8: Non-residential construction investment, 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 physical year-to-year change of the value of construction, factoring out growth (increase in value) due to increases in prices.

Source: Statistics Canada, BuildForce Canada (2023-2032)

Figure 9: Non-residential construction employment growth outlook, Canada


Source: Statistics Canada, BuildForce Canada (2023-2032)

NON-RESIDENTIAL LABOUR FORCE

Rising demands across the non-residential sector will require the labour force to increase by some 42,100 workers across the forecast period. Over the same period, an estimated 120,800 workers are expected to retire, bringing recruitment requirements to 162,900. Based on historical trends, and supplemented by the industry's ongoing career-promotion efforts, an estimated 130,000 workers under the age of 30 are expected to join the non-residential construction sector. However, without additional recruitment efforts, the industry may be short as many as 32,900 workers by 2032. Figure 10 shows the anticipated labour force changes in the non-residential sector over the forecast period.

Addressing peak demands through interprovincial mobility may be challenging. With many provinces reporting higher or sustained levels of construction activity, in the non-residential sector in particular, there may not be strong incentive for workers to relocate. Competition for workers will be most intense in British Columbia and Ontario, where many major projects are planned and underway, and where labour markets are already tight. Seasonal demands relating to industrial shutdown/turnaround maintenance work in Alberta, Ontario, Quebec, and New Brunswick may exacerbate these short-term pressures further.

PROVINCIAL INSIGHTS

NEWFOUNDLAND AND LABRADOR

A continued rise in new-home, institutional, and engineering construction supported further growth across Newfoundland and Labrador's construction market in 2022. Those factors helped to drive employment higher, although the inability of the labour force to match employment-growth rates also contributed to unemployment levels as low as 10% in the summer months.

The short-term outlook for the construction market is supported by slight increases in residential construction activity and a return to strong performance levels in the engineering-construction sector. Work on the West White Rose redevelopment project will bolster employment through 2024, even as such major mining projects as Voisey's Bay conclude. Longer term, work on the Bay du Nord project supports further growth.

Employment rises to a forecast peak of just below 16,000 workers in 2029. It contracts thereafter as current projects wind down. By the end of the forecast period, employment is expected to contract by 940 workers (-6%) compared to 2022 levels. An aging workforce presents a significant challenge for the industry, as an estimated 5,700 workers, or 29% of the current labour force, are due to retire by 2032.

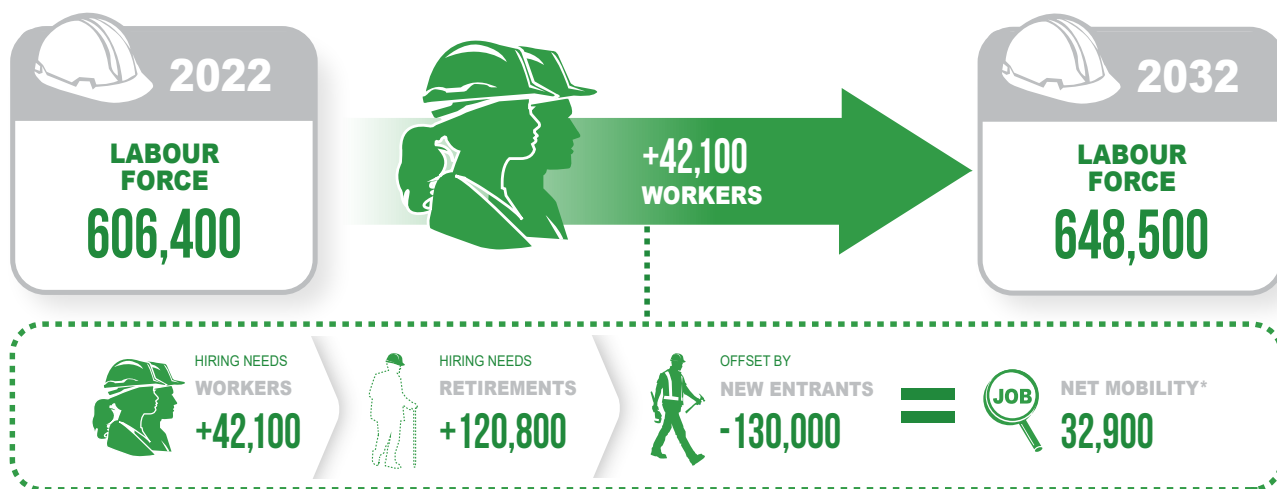
We also note there is a significant upside risk to this scenario, as several proposed resource development projects (e.g., hydrogen, mining) are awaiting final investment decisions. Several of these could come on stream over the medium term and could therefore affect labour markets.

PRINCE EDWARD ISLAND

Prince Edward Island's construction and maintenance labour force enters the 2023–2032 forecast period under strained conditions. Strong activity in both the residential and non-residential sectors has placed considerable demands on almost all of the province's trades and occupations. Market pressures are expected to ease in 2023 and again in 2024 before achieving balance.

Residential construction activity declined from its peak in 2022 and is expected to contract again in 2023 as builders catch up with demand created by surging in-migration. Housing starts should then cycle back up to 2025 before contracting again through the end of the forecast period.

Figure 10: Changes in the non-residential construction labour force, Canada



* Net mobility refers to the number of workers needed to be brought into the industry from other industries or other provinces to meet rising demands or the number of workers that exit the industry in downturns. Positive net mobility means that industry must attract workers, while negative net mobility arises from an excess supply of workers in the local construction labour force.

Note: Due to rounding, numbers may not add up to the totals indicated.

Source: BuildForce Canada

Non-residential construction, meanwhile, is supported by a strong program of education and health care projects, as well as elevated road, highway, and bridge work, and the recovery from Hurricane Fiona. These combine to create market pressures into the short term. Demands ease between 2023 and 2027 as current projects wind down, returning labour markets to more balanced conditions for the remainder of the forecast period.

An anticipated rise in labour demand of 100 workers across the forecast period is expected to be exacerbated by the retirement of a further 1,490 workers, or about 22% of the 2022 labour force. Although the industry is projected to recruit as many as 1,450 workers aged 30 and younger over the forecast period, it will likely need to recruit close to 140 additional workers to meet demands.

NOVA SCOTIA

Nova Scotia enters the 2023–2032 forecast period coming off a brief but intense time of growth. Investment levels in both the residential and non-residential sectors reached peak levels in 2022 and are expected to contract only slightly in 2023.

The province's housing market has been driven by strong levels of in-migration and historically low interest rates. As rates rise into 2023, the market for new-housing construction is expected to slow marginally in 2023 before renewed growth drives investment to peak in 2027 and then recede across the remainder of the period. Investment in the renovation sector, however, should increase annually across the forecast period.

The longer-term forecast sees investment growth sustained in both the non-residential and residential sectors between 2024 and 2028. The non-residential sector, in particular, will be influenced by investment on several key projects such as mining, wastewater, schools, and hospitals. Thereafter, growth slows with the conclusion of major projects and a slowdown in housing activity.

Rising demands across the forecast period will require the provincial construction labour force to increase by 2,900 workers. By 2032, the industry will likely need to recruit and retain as many as 10,700 additional workers to keep pace with expansion and replacement demands, as an estimated 7,800 workers, or 24% of the 2022 construction labour force, are expected to retire.

NEW BRUNSWICK

Sustained activity in New Brunswick's housing market and in its industrial, commercial, and institutional (ICI) sector created further growth in the province's construction markets in 2022. Activity in both segments brought overall employment 7% higher, with further gains projected for 2023. Labour markets in both the residential and non-residential sectors were strained in 2022, and are unlikely to ease much before 2024.

The outlook for the province's construction sector calls for activity to be sustained into 2023, with continued strength in the renovation and new-housing sectors, and ongoing activity on several institutional-sector projects. Although investment in new housing contracts after 2026, activity in the renovation sector increases across the forecast period.

As current projects wind down, and with little new growth forecasted, non-residential employment demands decline to 2026. The start of core construction on the refurbishment of the Mactaquac Dam, however, creates additional employment demands and pushes overall sector employment higher in 2027 and through to the end of the forecast period.

Overall, rising demands will require the provincial construction labour force to increase by 2,000 workers by 2032. The expected retirement of 6,500 workers, or 27% of the current labour force, maintains pressure on the industry to recruit and train 8,500 new workers to keep up with construction demands.

QUEBEC

Quebec's construction market experienced another strong year of overall growth in 2022.

Although residential investment stepped down off the peak it set in 2021, pulled back by the effects of rising interest rates on new-housing construction, the sector nonetheless reported a strong year in 2022. The outlook for the residential sector sees new-construction investment declining as renovation and maintenance work climbs in response to an aging housing stock. Employment contracts by 10,700 workers (-10%) by 2032 compared to the 2022 peak.

The provincial non-residential construction sector, meanwhile, continues to experience growth, driven by a post-COVID private-sector recovery, and by higher levels of public-sector investment in the health care, education, public-transit, and engineering-construction sectors. Employment demands are expected to peak in 2023 and be sustained into 2024, before receding in line with the timing of major projects and then growing again after 2028. Non-residential employment contracts by nearly 1% by the end of the forecast period.

Overall, construction employment steps down from a 2022 peak of more than 215,000 workers, declining through to 2028 before sustaining itself at those levels in the later years of the forecast period. The industry must remain focused on hiring and training to meet near-term demands, as well as replacing an estimated 48,200 workers, or 21% of its current labour force, that are expected to retire by 2032.

ONTARIO

Labour market challenges persist across Ontario's construction market. Even as interest rates rise, levels of new-housing construction remain elevated in most regions of the province. Non-residential construction activity continues to be supported by a long list of major projects, including public transportation, health care, utilities, manufacturing, and other infrastructure. These factors combined to increase employment faster than the labour force and to bring unemployment levels to record lows.

The pace of residential construction activity is expected to moderate from record highs in 2023 and 2024. As incomes and wages adjust to higher borrowing costs, and greater numbers of migrants arrive in the province, residential investment is expected to resume an upward trend beginning in 2025. A growing inventory of major

infrastructure projects and a projected recovery in commercial-building construction contributes to non-residential labour market pressures into 2027.

As the pace of growth levels off, efforts to increase recruitment should translate into more new entrants entering the labour force than individuals leaving to retirement. While positive, this brings new challenges, as the replacement of seasoned workers with inexperienced ones may, in some cases, have productivity implications.

Between 2023 and 2032, the industry will need to add approximately 36,300 additional workers to keep pace with construction demands. The retirement of more than 82,600 workers – 18% of the current labour force – will increase the recruitment requirements for the industry to approximately 118,900 workers over the forecast period. Recent heightened promotional and recruitment activities are bearing fruit. Over the forecast period, however, the industry is expected to add 88,400 new entrants, creating a projected recruitment gap of some 30,500 workers that will need to be filled from outside the province's existing construction labour force to meet increased demands.

The following sections provide region-specific outlook highlights and labour market conditions for Ontario's five regions: Central, Eastern, Greater Toronto Area (GTA), Northern, and Southwestern.

CENTRAL ONTARIO

The Central region⁵ includes some of the fastest-growing communities in the province, many of which have benefitted from increased out-migration from the Greater Toronto Area in recent years. Central Ontario recorded a record number of housing starts (24,000 units) in 2021. That figure declined slightly in 2022 as interest-rate increases began to erode housing affordability. Residential investment is expected to decline in 2023, with an approximate 20% reduction in housing starts. Investment follows population growth patterns through the remainder of the forecast period, with growth anticipated to resume after 2024, before cycling to a peak in 2028 and contracting to the end of the period.

Non-residential investment continued its upward cycle in 2022 with the start of several major projects for Amazon, Hamilton Health Sciences, and Stelco. Commercial construction was further supported by continued growth in the service sector. Investment through the remainder of the forecast period will be driven by a combination of major engineering-construction projects relating to transit, and several major road, highway, and bridge projects. The industrial, commercial, and institutional (ICI) sector will benefit from large contributions from major health care projects in the short term, and strong expansion in the industrial sector in the medium term.

Employment is expected to peak in 2028 as a number of projects – many in the Hamilton area – come online. As these conclude, employment recedes to 4,600 workers (+11%) over 2022 levels, with significant gains recorded in the ICI and maintenance sectors.

Although labour markets are expected to return to generally balanced conditions for many trades and occupations after 2023, it is important to note that rising demands in other regions of the province will create competition for workers in Central Ontario. These, in turn, should contribute to lower unemployment rates for the region's construction labour force.

EASTERN ONTARIO

Eastern Ontario's⁶ construction sector reported another strong year in 2022, driven by increased housing starts, institutional-building construction, and major transportation infrastructure activity. The pace of growth in the sector is expected to moderate across the remainder of the forecast period, as investment in the residential and non-residential sectors chart different courses. The current high interest-rate environment is expected to slow residential-sector investment in 2023 and 2024, while non-residential investment surges to a peak in 2027, bolstered by work initially on the Ottawa light rail project and then the start of hospital projects in Ottawa and Kingston. These are supplemented by ongoing work on the Parliamentary precinct and the modernization of the Supreme Court of Canada and other public buildings in the Ottawa area.

Overall, construction employment is projected to rise to a peak of nearly 61,000 workers in 2027 on the strength of a robust schedule of work in the non-residential sector. Residential employment drops initially in 2023 and 2024, before remaining at an elevated level for the remainder of the decade. By 2032, residential employment contracts by 10% (-3,000 workers), while non-residential employment adds nearly 4,200 workers in 2027 before cycling down to 3% (+830 workers) over 2022 levels.

Across the forecast period, the contraction in overall employment – concentrated entirely in the residential sector – alongside an estimated 11,800 retirements could cause as many as 1,700 workers to seek work elsewhere in the province or exit the region's construction industry.

GREATER TORONTO AREA

Construction activity in the Greater Toronto Area (GTA)⁷ rose again in 2022, supported by further gains in the residential and non-residential construction sectors. After reaching peaks in 2020 and 2021, activity in the residential sector moderated in 2022. Investment added 1% over 2021 levels. Total non-residential sector activity reported much the same increase, driven by strong investment levels on major transportation and nuclear refurbishment projects, and increased investment in education and health services projects.

The pace of growth across the non-residential sector, in particular, alongside declines in the construction labour force, has resulted in the re-emergence of recruitment challenges that are poised to intensify as major project requirements mount over the near term.

⁵ **Central Ontario** includes the economic regions of Muskoka-Kawartha, Kitchener-Waterloo-Barrie, and Hamilton-Niagara Peninsula as defined by Statistics Canada, which includes the census metropolitan areas (CMAs) of St. Catharines-Niagara, Hamilton, and Kitchener-Waterloo. The region includes such cities as Peterborough, Orangeville, Guelph, Barrie, and Brantford.

⁶ **Eastern Ontario** includes the economic regions of both Ottawa and Kingston-Pembroke, including the census metropolitan areas (CMAs) of Ottawa and Kingston. Cities include Cornwall, Brockville, Belleville, and Petawawa.

⁷ The **Greater Toronto Area (GTA)** includes the municipalities of Ajax, Aurora, Bradford West Gwillimbury, Brampton, Brock, Caledon, Clarington, East Gwillimbury, Georgina, Georgina Island, Halton Hills, King, Markham, Milton, Mississauga, Newmarket, Oakville, Oshawa, Pickering, Richmond Hill, Scugog, Toronto, Uxbridge, Vaughan, Whitby, and Whitchurch-Stouffville.

The GTA's construction employment requirements are expected to contract by a modest 1% in 2023, as the residential sector experiences contractions relating to reduced demand for new-housing construction. Growth in the non-residential sector, meanwhile, is driven primarily by the increasing requirements of numerous major public-transit, health care, infrastructure, and utility projects. Non-residential employment is estimated to rise by 15,500 workers (+21%) by the end of the forecast period.

Residential construction employment reached a high of more than 100,000 workers in 2022 and is expected to step down by about 5% into 2023, with a loss of approximately 5,600 workers in new-housing construction. Modest gains in renovation and maintenance activity only partially offset this decline.

Maintaining labour force capacity to keep pace with increased construction demands while grappling with the anticipated retirement of 39,600 workers over the next 10 years (or 22% of the current labour force) will require the industry to actively promote and recruit an estimated 37,200 additional workers throughout the forecast period.

NORTHERN ONTARIO

Construction investment in Northern Ontario⁸ enjoyed successive highs in 2021 and 2022, driven mostly by strong activity in the mining sector. Although investment steps down in subsequent years, it remains elevated by historical standards and sustains overall employment above 23,000 workers through 2027. Positive final investment decisions to a long list of proposed resource development projects currently not included in the forecast could elevate growth well beyond the projected levels of activity.

Overall, construction employment is expected to remain relatively unchanged in 2023, as growth in the non-residential sector offsets losses in new-housing construction. By the end of the forecast period, industry employment is expected to fall by more than 1,300 workers (-6%) compared to 2022 levels. In absolute terms, declines are spread evenly between the residential and non-residential sectors, with both contracting by approximately 670 workers.

Tight labour market conditions are expected into 2026 for most residential trades and occupations, with demand tightest among residential construction managers. Most non-residential trades and occupations are particularly strained into 2024, with conditions easing into balance by 2027 as current projects reach completion and workers are released. There is, however, a significant upside risk to this scenario. Several major resource development projects are awaiting final investment decisions. These could carry market pressures well beyond the current anticipated 2024 employment peak.

Northern Ontario will compete with other regions for skilled labour over the near term, and the replacement of retiring workers across the forecast period. Approximately 4,900 workers are expected to exit the industry during the 10-year forecast period, which equates to almost 21% of the 2022 labour force.

SOUTHWESTERN ONTARIO

Southwestern Ontario's⁹ construction industry continues to enjoy a sustained period of post-pandemic growth, with total employment rising by nearly 9% in 2022. Non-residential growth was driven by

major projects, including ongoing work at the Gordie Howe bridge, Nova Chemicals' petrochemical projects, Bruce Power's nuclear refurbishments, and rising industrial shutdown/turnaround maintenance work in Sarnia. Residential demands also rose due to continued high levels of new-housing construction and growth in the renovation sector. The pace of employment growth outpaced the capacity of the labour force to respond, pushing unemployment rates lower and creating recruiting challenges across most trades and occupations.

Labour markets for most trades and occupations in the non-residential sector were strained in 2022 and will remain so into 2023 as the Stellantis and LG Energy electric-vehicle battery manufacturing facility and automotive Windsor Assembly Plant retooling projects come online. Pressures on most residential trades ease in 2023 as housing starts respond to high interest rates.

Across the forecast period, overall employment rises to a peak of just below 63,500 workers in 2028, with both the residential and non-residential sectors remaining above 2022 levels. As large projects wind down thereafter, construction employment is expected to decline by some 1,600 workers (-3%) over the decade, but recruitment pressures will remain due to the need to replace an estimated 10,700 retiring workers (17% of the 2022 labour force).

MANITOBA

Manitoba's construction and maintenance sector continued its post-pandemic recovery in 2022, as further work on a series of infrastructure projects offset the winding down of activity at the Keeyask dam project. Residential construction, meanwhile, stepped down from its 2021 peak, but nonetheless recorded strong levels of activity.

Construction employment decreased slightly in 2022, with losses in the non-residential sector offsetting gains in the residential sector. Looking ahead, employment is expected to contract by a further 2% in 2023, with contractions in new-housing and engineering construction.

Labour market demands are expected to contract in the residential sector across the forecast period (-600 workers; -4% compared with 2022 levels) as housing starts recede from recent highs. By the end of the period, sustained growth in renovation activity means the segment will eventually replace new-home construction as the dominant driver of residential activity and employment in the province.

Non-residential employment is expected to increase marginally – by 200 workers (+1%) – over the forecast period. Engineering construction employment is expected to remain unchanged over the period, with employment following the pattern of large projects cycling up and down. Employment in the industrial, commercial, and institutional (ICI) sector is expected to add 240 workers (+4%) with strong government investment and rebounding commercial activity.

Although overall employment is expected to see little change (-1%) over the forecast period, the industry must remain focused on hiring and training workers to replace the estimated 7,600

⁸ **Northern Ontario** includes the economic regions of the Northeast and Northwest as defined by Statistics Canada, including the census metropolitan areas (CMAs) of Thunder Bay and Sudbury. Cities include Sault Ste. Marie, Timmins, Kirkland Lake, Dryden, Kenora, and Fort Frances.

⁹ **Southwestern Ontario** includes the economic regions of London, Windsor-Sarnia and Stratford-Bruce Peninsula as defined by Statistics Canada, including the census metropolitan areas (CMAs) of London and Windsor. Cities include Chatham, Ingersoll, Sarnia, Stratford, Goderich, and Owen Sound.

workers, or nearly 19% of the current labour force, that is expected to retire by 2032. Manitoba's younger population should help to meet hiring needs, assuming industry can attract its historical share of new entrants to the labour force from the local population.

SASKATCHEWAN

An upswing in Saskatchewan's construction sector that began in 2020 continued into 2022, with growth in both the residential and non-residential sectors.

The recovery in the province's new-housing market was sustained further in 2022. Housing starts reached more than 4,100 units in 2021 and stepped down off that level only slightly in 2022. Demand for renovation activity, meanwhile, continued to be high. Residential growth is expected to relax slightly in 2023 before sustaining a series of increases to a peak in 2028.

Non-residential construction activity will be sustained in the short term by new and ongoing manufacturing, utility, mining, school, and health care projects. Investment cycles up and down through 2027, after which it remains relatively unchanged.

Total industry employment is projected to rise to a peak of nearly 40,800 workers in 2027, before contracting through the remainder of the decade. Overall, employment is expected to rise by 1,150 workers (+3%) compared to 2022 levels by 2032.

Despite benefiting from a younger demographic relative to most other provinces, Saskatchewan's construction industry will need to recruit an additional 10,800 workers over the forecast period to meet its hiring requirements.

ALBERTA

Alberta's construction sector was supported by growth in the residential and non-residential sectors in 2022. A strong rise in new-housing construction, ongoing major projects, and a recovery in oil and gas prices contributed to a rebound in construction market demands.

The 2023–2032 BuildForce Canada outlook anticipates that overall construction employment will remain unchanged in 2023. Thereafter the segments take different turns. Residential-sector investment, and therefore employment, drops continuously through 2032 compared to elevated 2022 levels. Although renovation investment trends up through the forecast period, it does not increase by nearly enough to offset losses in new housing. Residential employment is anticipated to contract by 6,300 workers (-10%), with all of those contractions recorded in new-housing employment (-7,000 workers).

Non-residential employment, meanwhile, is expected to rise to a peak of just under 117,000 by 2030. Gains will be driven by ongoing major road and highway, health, education, commercial, industrial, and public-transportation projects, as well as growth in the oil and gas sector. Employment increases by more than 1,800 workers across the forecast period (+2% over 2022 levels).

Alberta's construction labour force is expected to increase by 4,900 workers over the forecast period. Combined with the projected

retirement of 38,200 workers, the industry will need to recruit and train 43,100 additional workers.

BRITISH COLUMBIA

British Columbia's construction market enjoyed strong growth in 2021 and 2022, with investment levels in its residential and non-residential sectors both rising to peaks. The outlook across the remainder of the near term calls for contractions, with the housing sector affected by rising interest rates, and the non-residential sector concluding key major projects.

Activity across the forecast period sees varying trends. The residential sector is expected to recover swiftly after 2024 as interest rates ease, and consumer wages adapt. Growth in renovation activity, in particular, helps to sustain employment above 2022 levels. Meanwhile, activity in the non-residential sector will fluctuate with the ebb and flow of work on several major projects and is underpinned by growth in maintenance work.

Overall, construction employment is expected to contract from its 2022 peak through the early years of the forecast period before growing by some 7,400 workers by 2032. Labour market challenges in the near term will be sustained by recent contractions in the labour force, and in the longer term by the expected retirement of 38,200 workers, or 20% of the current labour force, by 2032.

To keep pace with construction demands, the industry will need to recruit and train an estimated 52,600 workers throughout the forecast period.

LOWER MAINLAND

The Lower Mainland¹⁰ construction market, which accounts for 60% of the province's construction employment, strengthened again in 2022, led by peak levels of investment in both the residential and non-residential sectors.

Residential investment rose by just below 5%, as low interest rates in the early part of the year maintained housing starts above 30,000 units. Activity in the non-residential sector was supported by gains across all industrial-, commercial-, and institutional-building types, with institutional investments rising the most on the strength of sustained activity in hospital and health care infrastructure. Engineering construction was bolstered by the start of work on several multi-billion-dollar projects.

Varying market forces will come into play in 2023. While activity in the non-residential sector is expected to continue to rise with increased work across all segments, activity in the residential sector is expected to contract, as housing starts fall by 24% with rising interest rates and affordability concerns.

Total construction employment in the Lower Mainland's construction market is expected to contract through to 2026, as employment losses in the residential sector offset gains in the non-residential sector. Thereafter, employment rises to the end of the forecast period, increasing by 3% to 2032. The addition of 3,100 workers in the non-residential sector accounts for the entirety of the increase. Residential employment is mostly unchanged.

¹⁰ The **Lower Mainland** region is defined by the economic regions of Greater Vancouver, Fraser Valley, Sunshine Coast, Squamish, and Lillooet.

Over the same period, the industry will need to replace 22,000 workers expected to retire. An estimated 19,200 new-entrant workers under the age of 30 from the local population may join the industry during this period, but unless recruitment is increased, a potential recruitment gap of almost 8,900 workers may need to be recruited from outside the local construction industry to meet future labour force needs.

VANCOUVER ISLAND

The Vancouver Island region¹¹ experienced a strong year of construction growth in 2021, buoyed by significant gains in the residential market. Although less pronounced in 2022 (+3%), the market nonetheless grew again – supported by a more modest increase in housing investment, and stronger growth in non-residential construction.

Both sectors are expected to step back in 2023. The regional housing market is feeling the effects of higher interest rates. These will cause housing starts to contract by just under 600 units. Non-residential construction investment, meanwhile, is expected to fall by 2% as projects are completed and business investment slows with rising interest rates.

Construction activity is expected to moderate later in the forecast period, but employment is projected to decline by 1,100 workers (-3%) by 2032 compared to 2022 levels. Hiring demands will be driven by the requirement to replace an estimated 7,900 workers, or 23% of the current labour force, that are expected to retire from the construction industry by 2032.

BUILDING A SUSTAINABLE LABOUR FORCE

Employment growth in 2022 was widespread, though younger workers made up a larger share of employment gains. The increased participation among youth in the industry is a positive signal. Not only does it reverse a decades-old trend of contracting numbers of workers in the sector, but it also suggests that the industry's efforts to attract more young people into careers are bearing fruit. These efforts will

be increasingly important over the forecast period, particularly as Canada's population ages and the youth population declines. These demographic shifts will contribute to tighter labour markets, as labour force participation by older workers is much lower than that of their younger counterparts.

LABOUR FORCE DIVERSIFICATION

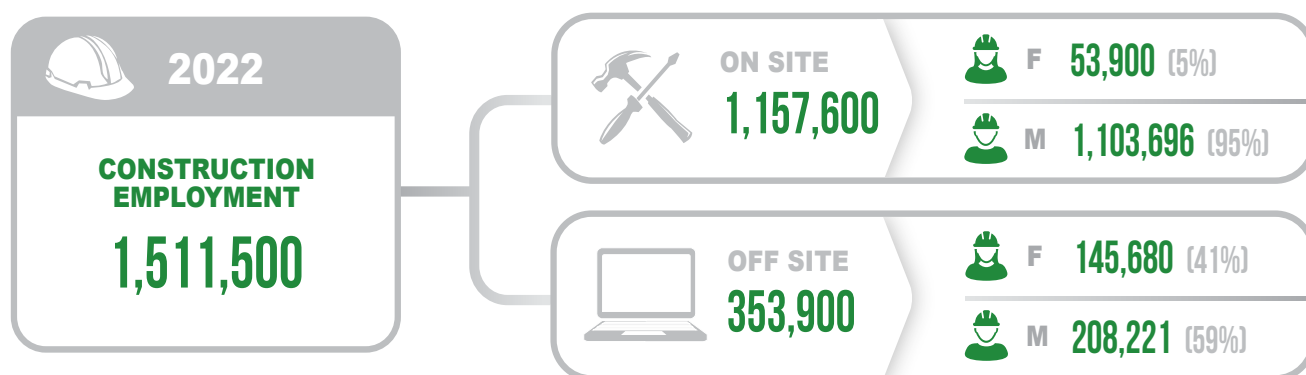
UNDER-REPRESENTED GROUPS OF WORKERS

Due in part to lower fertility rates and smaller family sizes in Canada for more than three decades, the share of younger Canadians available to enter the labour force has been in decline for several years. As the baby boomer generation of workers commences retirement over the next decade, the competition for younger workers will be intense. To help mitigate the impact of this demographic shift, the construction industry must diversify its recruitment. In order to succeed, the industry must increase recruitment of individuals from groups traditionally under-represented in the current construction labour force, including women, Indigenous People, and newcomers.

In 2022, there were approximately 199,600 women employed in Canada's construction industry, of which 27% worked on site, directly on construction projects, while the remaining 73% worked off site, primarily in administrative and management-related occupations. Of the 1.16 million on-site tradespeople employed across the 34 trades and occupations tracked by BuildForce Canada, women made up 5% (see Figure 11).

The estimated 53,900 tradeswomen in Canada are represented across all sectors of construction, but given the nature of construction work, women account for a higher share of total tradespeople (5%) in residential construction. Across sectors, new housing and residential maintenance construction have the highest representation of women, each accounting for more than 5% (see Figure 12). The top five trades and occupations in which women tend to be employed are trade helpers and labourers (18% of all tradeswomen), construction managers (15%), painters and decorators (14%), contractors and supervisors (8%), and carpenters (7%).

Figure 11: Detailed construction employment by gender, Canada, 2022



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

¹¹ The Vancouver Island & Coast Economic Region includes a number of regional districts, including the Capital Region, Cowichan Valley, Nanaimo, Alberni-Clayoquot, Strathcona, Comox Valley, Powell River, Mount Waddington, and Central Coast.

Figure 12: Women's share of total direct trades and occupations (on site), Canada

* industrial, commercial, institutional

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

The Indigenous population is the fastest growing population in Canada and therefore presents recruitment opportunities for Canada's construction industry. In 2021, Indigenous People accounted for 5.1% of Canada's construction labour force, which is a slight decline from the share of 5.2% observed in 2016.¹² This share is notably higher than the share of Indigenous workers represented in the overall labour force (see Table 3). However, the share of Indigenous People in the labour force across all industries has been growing at a faster pace than construction over the last five years. As the Indigenous population continues to expand, the industry may need to dedicate further efforts to increasing the recruitment of Indigenous People.

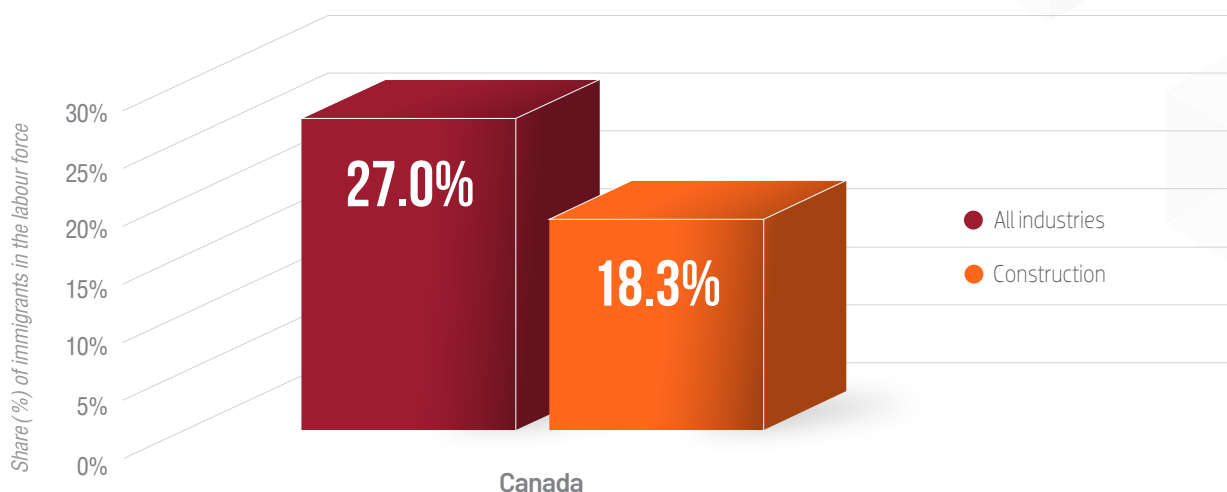
Canada's construction industry may also leverage newcomers (immigrants) over the forecast period to meet labour requirements. Due to the declining natural rates of population growth, immigrants are the primary source of labour force growth in Canada. Immigrants have been playing an increasingly important role in replenishing the workforce, with the share of immigrants in the workforce increasing from 21% in 2011 to 27% in 2021. Canada has been successful in attracting and integrating immigrants into the labour force; however, immigrants remain under-represented in the construction industry. The construction labour force share of immigrants was 18% in 2021, which is notably lower than the share in the overall labour force. (See Figure 13).

Table 3: Representation of Indigenous population in the construction workforce, Canada

Industry		Indigenous	Non-Indigenous	Total	Indigenous share of total workforce, %
Construction	2016	71,150	1,293,860	1,365,010	5.2%
	2021	74,385	1,394,680	1,469,085	5.1%
All industries	2016	716,605	17,551,520	18,268,120	3.9%
	2021	764,075	18,059,405	18,823,480	4.1%

Source: BuildForce Canada calculations based on Statistics Canada's 2021 and 2016 Census of the Population

¹² Statistics Canada, 2021 Census, custom data request

Figure 13: Share (%) of immigrants in the construction labour force, 2021, Canada

Source: BuildForce Canada calculations based on Statistics Canada's 2021 data.

Based on historical trends, and given recent increases to federal immigration targets, Canada is expected to welcome 4.45 million new international migrants between 2023 and 2032¹³. As these individuals will make up an increasing share of the country's core working-age population, additional recruitment efforts will be required to ensure the construction industry recruits its share of newcomers into the labour force.

CONCLUSIONS AND IMPLICATIONS

The 2023–2032 BuildForce Canada *Construction and Maintenance Looking Forward* forecast sees construction employment continuing to grow as the sector maintains its post-pandemic growth curve. In the short term, growth will be constrained somewhat by a reduction in residential investment created by higher interest rates. Activity in the non-residential sector, meanwhile, remains on a steady upward trend in most provinces. By 2032, overall employment is expected to increase by 1% from 2022 levels.

Across the forecast period, employment in the residential sector will experience competing pressures. A contraction of more than 13% (-42,300 workers) in new-housing construction is driven, initially, by consumer concerns over affordability and lending rates; in later years, an aging population further reduces demands. Meanwhile, the renovation and maintenance segments will add workers continuously across the forecast period, driven by an aging housing stock and the desire of many Canadians to age in place. Although significant, the combined increases in maintenance and renovation activity are not enough to offset the losses in the new-housing segment. Overall, residential employment is forecast to contract by 5,300 workers (-1%) by 2032.

Non-residential employment enters the forecast supported by a broad range of major institutional and engineering-construction projects across the country. These include public-transit works in

Ontario and Quebec; utilities in British Columbia and Ontario; mining in Ontario and Saskatchewan; roads, highways, and bridges in British Columbia, Nova Scotia, Ontario, and Quebec; and hospital and health care facilities in Nova Scotia, Quebec, Ontario, and British Columbia. Employment is anticipated to rise to a peak around 602,900 workers in 2027 (and to above pre-pandemic levels by 2026), before declining modestly through the remainder of the forecast period. By 2032, employment is expected to increase by 21,600 workers – a 4% rise over 2022 levels.

Meeting peak demands will be challenged by limited provincial mobility. Many provinces are already experiencing high or sustained levels of construction activity, giving workers no strong incentives to relocate in the near term. Labour market challenges are complicated by the retirement of an estimated 245,100 workers, or 20% of the 2022 workforce. 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 become further complicated, as other 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 under-represented groups, such as women, Indigenous People, and newcomers to Canada, or to other industries to augment the available pool of local 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 current industry expectations of population growth and the timing of major projects. Any changes to these assumptions present risks and potentially alter anticipated market conditions.

¹³ Long-term national immigration levels are calibrated as a share of population to align with historical shares. The total cycles, based on the natural unemployment rate gap, to adjust for labour supply needs. All levels are reviewed annually against Statistics Canada's 2050 population scenario estimates.

APPENDIX: COMMITTEE PARTICIPANTS

The production of *Construction and Maintenance Looking Forward 2023–2032* would not have been possible without the valuable input from the following organizations:

NEWFOUNDLAND AND LABRADOR

- Canada's Building Trades Unions
- Canadian Construction Association
- Canadian Home Builders' Association – Newfoundland and Labrador
- Construction Labour Relations Association of Newfoundland and Labrador
- Defence Construction Canada
- Heavy Civil Association of Newfoundland and Labrador
- Infrastructure Canada
- Newfoundland and Labrador Construction Association
- Newfoundland and Labrador Department of Finance
- Newfoundland and Labrador Department of Immigration, Population Growth and Skills
- Service Canada
- Trades NL

PRINCE EDWARD ISLAND

- Canada's Building Trades Unions
- Canadian Construction Association
- Canadian Home Builders' Association – Prince Edward Island
- Construction Association of Prince Edward Island
- Defence Construction Canada
- Infrastructure Canada
- PEI Road Builders and Heavy Construction Association
- Prince Edward Island Department of Finance
- Prince Edward Island Workforce Development Apprenticeship
- Service Canada
- Timber Mart

NOVA SCOTIA

- Atlantic Home Building and Renovation Sector Council
- Canada's Building Trades Unions
- Canadian Construction Association
- Canadian Home Builders' Association – Nova Scotia
- Construction Association of Nova Scotia
- Defence Construction Canada
- Infrastructure Canada
- Nova Scotia Construction Labour Relations Association Limited
- Nova Scotia Construction Sector Council
- Nova Scotia Department of Finance
- Nova Scotia Road Builders Association
- Service Canada

NEW BRUNSWICK

- Building Owners & Managers Association New Brunswick and Prince Edward Island
- Canada's Building Trades Unions
- Canadian Construction Association
- Canadian Home Builders' Association of New Brunswick
- Construction Association of New Brunswick
- Defence Construction Canada
- Infrastructure Canada
- Irving Oil
- Moncton Northeast Construction Association and Mechanical Contractors Association of New Brunswick
- New Brunswick Building Trades Unions
- New Brunswick Finance
- New Brunswick Post-Secondary Education, Training and Labour
- New Brunswick Road Builders and Heavy Construction Association
- Saint John Construction Association
- Service Canada – New Brunswick

QUEBEC

- Not applicable

ONTARIO

- Birnam Excavating Ltd.
- Bricklayers BACU Local 28
- Bruce Power
- Canada Mortgage and Housing Corporation
- Canada's Building Trades Unions
- Canadian Construction Association
- Canadian Home Builders' Association
- Carpenters' District Council of Ontario
- Carpenters Local 494
- Carpenters Local 675
- Carpenters Local 1669
- Carpenters Local 2486
- Central Ontario Building Trades
- CLAC
- Construction Association of Thunder Bay
- Construction Employers Coordinating Council of Ontario
- Construction Labour Relations Association of Ontario
- Council of Ontario Construction Associations
- Crosslinx Transit Solutions
- Defence Construction Canada
- Eastern Ontario and Western Quebec Building Trades Council
- Electrical Power Systems Construction Association
- EMCO Waterworks
- Employment and Social Development Canada
- Essex and Kent Building Trades Council
- General Contractors' Association of Toronto
- General Presidents' Maintenance Committee for Canada

- Grand Valley Construction Association
- Hamilton-Brantford Building & Construction Trades Council
- Hamilton-Halton Construction Association
- IBEW Local 115
- Infrastructure Canada
- Infrastructure Ontario
- Ironworkers Local 759
- J-AAR Excavating/AAROC Aggregates
- Kingston Construction Association
- LiUNA Local 1059
- LiUNA Ontario Provincial District Council
- London and District Construction Association
- London Building Trades Council
- Millwright Regional Council of Ontario
- Niagara Construction Association
- Niagara-Haldimand Building and Construction Trades Council
- Northeastern Ontario Construction Association
- Ontario Construction Secretariat
- Ontario Formwork Association
- Ontario General Contractors Association
- Ontario Home Builders' Association
- Ontario Masonry Contractors' Association
- Ontario Ministry of Colleges and Universities
- Ontario Ministry of Labour, Immigration, Training and Skills Development
- Ontario Pipe Trades Council
- Ontario Power Generation
- Ontario Road Builders' Association
- Ontario Sewer and Watermain Construction Association
- Ottawa Construction Association
- Progressive Contractors Association of Canada
- Provincial Building and Construction Trades Council of Ontario
- Public Services and Procurement Canada
- Rankin Construction
- RESCON
- Sarnia Construction Association
- Sarnia-Lambton Building & Construction Trades Council
- Sault Ste. Marie Construction Association
- Service Canada
- Sheet Metal Workers Local 235
- Sheet Metal Workers Local 397
- Shell Canada
- Toronto Construction Association
- UA Local 71
- UA Local 628
- UA Local 787
- UA Local 800
- Waterloo, Wellington, Dufferin and Grey Building Trades Council
- Windsor Construction Association
- Workforce Planning for Sudbury & Manitoulin

MANITOBA

- Apprenticeship Manitoba
- Canada's Building Trades Unions
- Canadian Construction Association
- Construction Labour Relations Association of Manitoba
- Defence Construction Canada
- Infrastructure Canada
- Manitoba Building & Construction Trades Council
- Manitoba Construction Sector Council
- Manitoba Economic Development and Training
- Manitoba Finance
- Manitoba Heavy Construction Association
- Manitoba Home Builders' Association
- Manitoba Hydro
- Mechanical Contractors Association of Manitoba
- Merit Contractors Association of Manitoba
- Northern Manitoba Sector Council
- Service Canada
- Winnipeg Construction Association

SASKATCHEWAN

- Canada's Building Trades Unions
- Canadian Construction Association
- Canadian Home Builders' Association – Regina
- Canadian Home Builders' Association – Saskatoon
- CLAC
- Construction Labour Relations Association of Saskatchewan
- Defence Construction Canada
- Infrastructure Canada
- Mechanical Contractors Association of Saskatchewan
- Saskatchewan Apprenticeship and Trade Certification Commission
- Saskatchewan Building Trades
- Saskatchewan Construction Association
- Saskatchewan Heavy Construction Association
- Saskatchewan Ministry of Finance
- Saskatchewan Ministry of Immigration and Career Training
- Saskatchewan Public Safety Agency
- SaskBuilds
- SaskPower
- Service Canada – Saskatchewan
- Women in Trades and Technology

ALBERTA

- Alberta Advanced Education
- Alberta Construction Association
- Alberta Jobs, Economy and Northern Development
- Alberta Labour and Immigration
- Alberta Roadbuilders and Heavy Construction Association

- Building Trades of Alberta
- Canada Mortgage and Housing Corporation
- Canada's Building Trades Unions
- Canadian Construction Association
- Canadian Home Builders' Association
- Canadian Home Builders' Association – Alberta
- Canadian Natural Resources Limited
- Cenovus Energy
- CLAC
- Comco Pipe & Supply Company
- Construction Labour Relations – Alberta
- Construction Maintenance and Allied Workers Canada
- Defence Construction Canada
- Enbridge Inc.
- Energy Safety Canada
- Fluor Canada Ltd.
- Infrastructure Canada
- Merit Contractors Association
- National Construction Council
- PCL Constructors Inc.
- Progressive Contractors Association of Canada
- Service Canada
- Shell Canada
- Suncor Energy Inc.
- Syncrude Canada Ltd.

BRITISH COLUMBIA

- BC Building Trades Council
- BC Hydro

- BC Ministry of Advanced Education and Skills Training
- BC Regional Council of Carpenters
- BC Road Builders and Heavy Construction Association
- British Columbia Construction Association
- British Columbia Insulation Contractors Association
- Canada's Building Trades Unions
- Canadian Construction Association
- Canadian Home Builders' Association
- Canadian Home Builders' Association – British Columbia
- CLAC
- Construction Foundation of British Columbia
- Construction Labour Relations Association of BC
- Construction, Maintenance and Allied Workers Canada
- Defence Construction Canada
- Fluor Canada Ltd.
- Industry Training Authority
- Infrastructure Canada
- LNG Canada
- Mechanical Contractors Association of BC
- National Construction Council
- Northern Regional Construction Association
- PCL Constructors Inc.
- Progressive Contractors Association of Canada
- Roofing Contractors Association of British Columbia
- Service Canada – BC
- Shell Canada
- Southern Interior Construction Association
- Urban Development Institute
- Vancouver Island Construction Association
- Vancouver Regional Construction Association

FOR THE MOST DETAILED & COMPREHENSIVE CONSTRUCTION LABOUR MARKET DATA IN CANADA, VISIT

www.constructionforecasts.ca

Developed with industry for industry

Customizable tables and graphs available for:

- Data on more than 30 construction trades and occupations by province looking ahead 6 years
- Macroeconomic and investment data
- Key economic indicators, construction investment and labour market conditions by province and/or sector

BUILDFORCE
CANADA

Timely construction forecast data is available online at constructionforecasts.ca. Create customized reports on a broad range of selected categories within sector, trade or province covering up to 10 years.

For more information, contact:



Phone: 613.569.5552 | info@buildforce.ca

The opinions and interpretations in this publication are those of the author and do not necessarily reflect those of the Government of Canada

Funded in part by the Government of
Canada's Sectoral Workplace
Solutions Program

Canada

APRIL 2023