

SASKATCHEWAN

HIGHLIGHTS 2023–2032

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

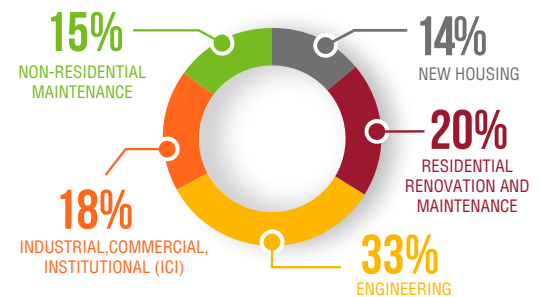
The recovery in the province's new-housing market was sustained further in 2022. Housing starts reached more than 4,100 units in 2021 and stepped down off that level only slightly in 2022. Demand for renovation activity, meanwhile, continued to be high. Residential growth is expected to relax slightly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

DISTRIBUTION OF CONSTRUCTION EMPLOYMENT IN 2022, SASKATCHEWAN



10-YEAR WORKFORCE OUTLOOK FOR SASKATCHEWAN



 **AVERAGE
UNEMPLOYMENT
RATE** **8.1%**

HIGHLIGHTS

- Housing starts contracted to just below 4,000 units in 2022 but are projected to rise as high as 6,300 by 2028.
- Total construction employment is expected to reach a peak of nearly 40,800 workers by 2027, with strong levels of investment in the residential and non-residential sectors that year.
- Non-residential employment opens the forecast period at more than 26,400 workers. That level is sustained into 2024 and then recedes across the period, contracting to 5% below 2022 levels by 2032.

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.

SASKATCHEWAN CONSTRUCTION OUTLOOK

Saskatchewan's construction sector enters the 2023–2032 BuildForce Canada forecast period on a high note. Its market recovered in 2021 after reaching a pandemic-induced floor in 2020. Growth was particularly strong in the residential sector, as a recovery in new-housing construction brought residential investment forward by 17%. Non-residential construction market demands also increased, driven by increased public-sector investment in hospitals and schools, manufacturing investment, and a recovery in commercial activity.

Many of these same market conditions were repeated in 2022, although to a lesser degree. Housing starts in the province contracted from 2021 levels to just below 4,000 units. High rates of construction reported earlier in the year were curtailed somewhat by rising interest rates. Renovation activity, meanwhile, rose by 9%. Investment in the non-residential sector also grew, with greater demand for engineering construction and industrial, commercial, and institutional-sector projects.

The provincial construction market is expected to remain on an upward trend through 2024, driven by further increases in residential renovation activity, as well as a potash mine expansion, two canola processing plants, several pulp mill projects, a natural gas power plant, and ongoing work on health care and education projects. Investment cycles down slightly in 2025 and 2026 with the conclusion of key resource projects, including the Jansen

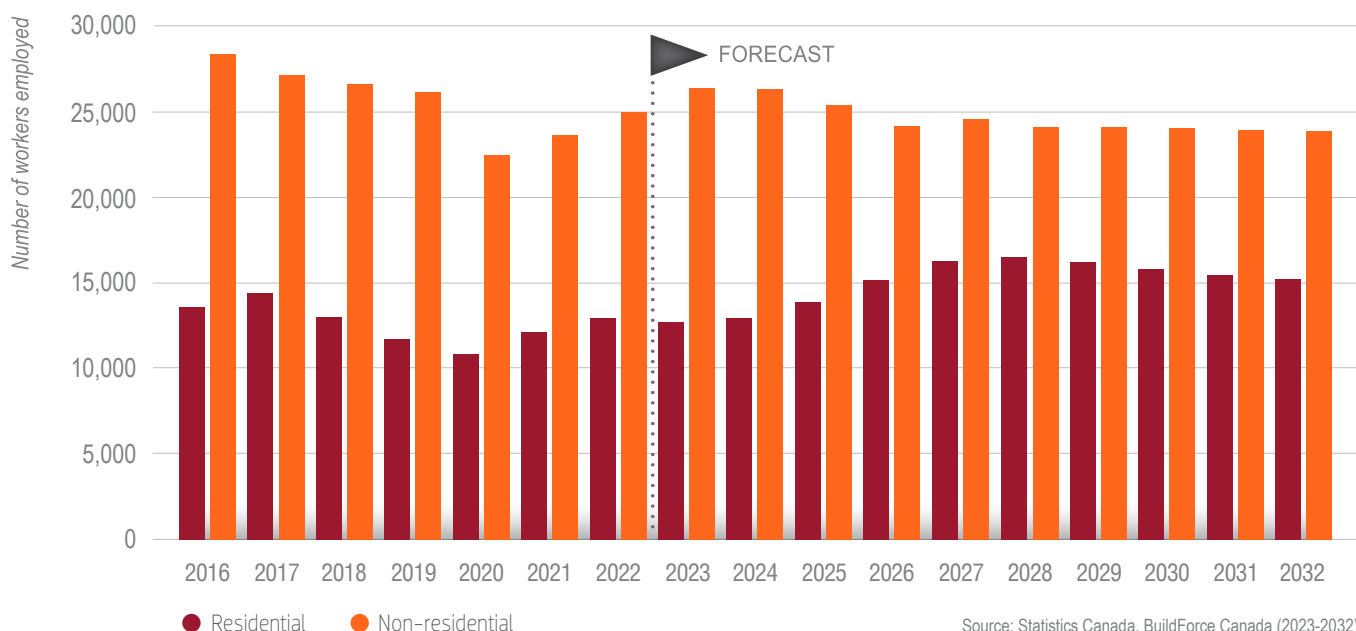
mine. After a brief surge in 2027, which is driven by a growing residential sector, investment remains largely unchanged through the end of the decade.

Non-residential employment opens the forecast period at a peak of more than 26,400 workers, driven by the current private- and public-sector projects. It decreases almost continuously thereafter, contracting to nearly 1,200 workers (-5%) below 2022 levels by 2032. Employment in the residential sector is expected to contract slightly in 2023 as interest rates moderate investment in new housing. Renovation activity remains on a steady but moderate upward trend throughout the forecast period in line with growing household income. Overall, residential construction employment is expected to grow by just over 2,300 workers (+18%) throughout the forecast period.

Total construction 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%) between 2022 and 2032, while the labour force will need to increase by 2,200 workers to address construction demand. When combined with the expected outflow of 8,600 workers to retirement, the industry will need to recruit an additional 10,800 workers over the forecast period to meet its hiring requirements.

Figure 1 shows the anticipated change in residential and non-residential employment across the forecast period.

Figure 1: Construction employment growth outlook, Saskatchewan



DEMOGRAPHICS: CANADA'S AGING POPULATION CREATES WORKFORCE CHALLENGES

Across the country, the share of the labour force aged 65 and over, who are mainly retired, has increased from 15% in 2012 to 19% in 2022. As Figure 2 shows, it is projected to grow again – to 22% – by 2032.

The labour force will be further challenged by a dwindling pool of youth. The group of people aged 15 to 24 years – i.e., people who are poised to enter the labour force – is shrinking as a percentage of the national population. This cohort was 13% in 2012, dropping to 12% in 2022, and is projected to fall to 11% by 2032.

These trends will create challenges for all industries, including construction, as it pertains to labour force recruitment.

There is good news, however. New federal immigration targets, announced in November 2022, call for the addition of 465,000 permanent residents in 2023, 485,000 in 2024, and a further 500,000 in 2025. These new targets should support further growth in the core working-age group of 25–54 years, and may help moderate labour market pressures over the next decade. They will also require domestic industries to improve their recruitment of newcomers to supplement their traditional domestic recruitment programs.

YOUNGER DEMOGRAPHICS SUPPORTED BY STRONG IMMIGRATION TRENDS

Saskatchewan's demographics follow a similar trend. Figure 3 shows that youth aged 15 to 24 years comprised 13% of the province's population in 2022. That figure is expected to be unchanged into 2032. Meanwhile, the proportion of those aged 65 and older, and who are mostly retired, is projected to grow from 17% to 19% over the same period.

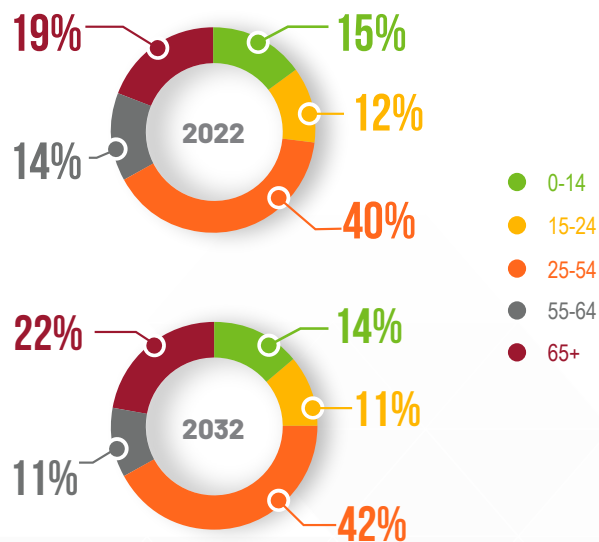
Saskatchewan is among only a handful of provinces to report a positive natural rate of population growth¹. Projections in Figure 4 show that natural growth will remain positive over the decade, but that fertility rates will stabilize as the population ages and the mortality rate increases.

Migration statistics tell diverging stories.

On the one hand, net interprovincial migration has been negative since 2013 and, but for a minor reduction in the medium term, is expected to remain the same, or deepen over the forecast period as the perception of better market conditions elsewhere compels people to leave Saskatchewan.

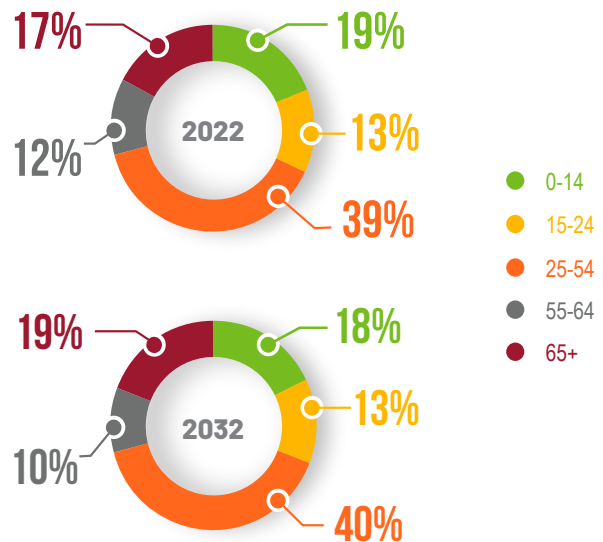
On the other hand, immigration from outside Canada has been, and will continue to be, positive. Immigration levels to the

Figure 2: Population age distribution, Canada



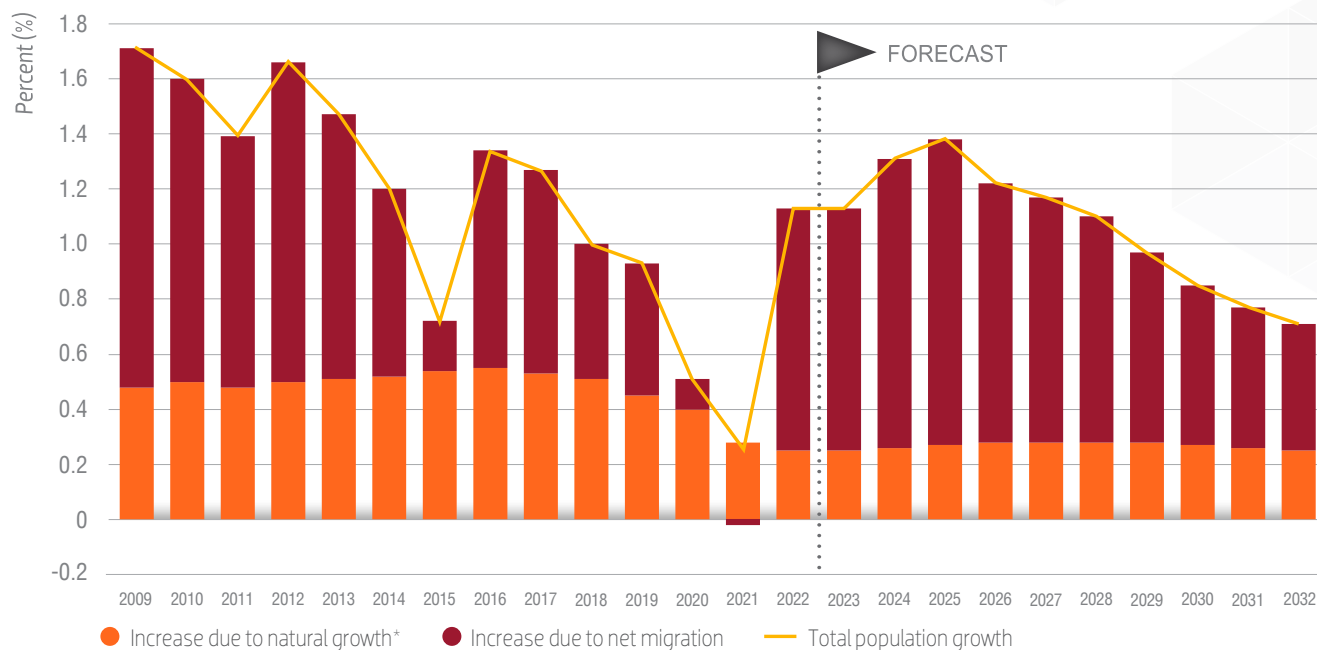
Source: BuildForce Canada

Figure 3: Population age distribution, Saskatchewan



Source: BuildForce Canada

¹ The **natural rate of population growth** refers to the growth in the population due to the number of births relative to the number of deaths, which leads to a positive or negative natural rate.

Figure 4: Sources of population growth (%), Saskatchewan

* **Natural rate of population growth** refers to the growth in the population due to the number of births relative to the number of deaths, which leads to a positive or negative natural rate.

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

province exceeded 18,000 in 2022, and population growth was supported with another nearly 2,500 non-permanent residents, mostly in the form of students returning to in-person learning. Although that rebound of non-permanent residents is unlikely to be repeated, immigration levels are expected to remain at or near this elevated level into the medium term, supported by new federal targets.

As a result of these factors, population growth should remain at or near 1% for most of the forecast period, buoyed by net migrations as well as upward pressure on fertility rates created by new families arriving in the province.

SECTOR INSIGHTS

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

The BuildForce LMI system tracks supply and accounts for the change in the available labour force, including retirements, new entrants², and net mobility³.

BuildForce assesses market conditions for 34 construction trades and occupations using a ranking system that combines measures of the change in employment, unemployment, net mobility, and adjustments based on industry input. The rankings reflect residential and non-residential market conditions unique to the province based on current and proposed construction activity. In addition, assumptions on provincial economic and population growth, new entrants to the labour force, and migration patterns (interprovincial and international) are built into the forecast scenario and included in the ranking assessment.

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

For Saskatchewan, rankings are reported for 15 residential and 29 non-residential trades and occupations.

² **New entrants** are measured by applying the traditional proportion of the provincial labour force that enters the construction industry. The projected estimate across the forecast period assumes that the construction industry can recruit this group in competition with other industries.

³ **Net mobility** refers to the movement of labour in and out of the local construction industry labour force. In-mobility captures the movement into the labour force of out-of-province industry workers and/or workers from outside the industry. Many members of this group will move quickly out of the provincial labour force as work declines, referred to as out-mobility.

RESIDENTIAL SECTOR

As shown in Figure 5, Saskatchewan's residential construction market enjoyed a strong rebound in 2021 and 2022, driven by increased new-home construction and renovation work. Although housing starts contracted slightly – to just below 4,000 units in 2022 – overall residential investment was supported by growth in renovation activity.

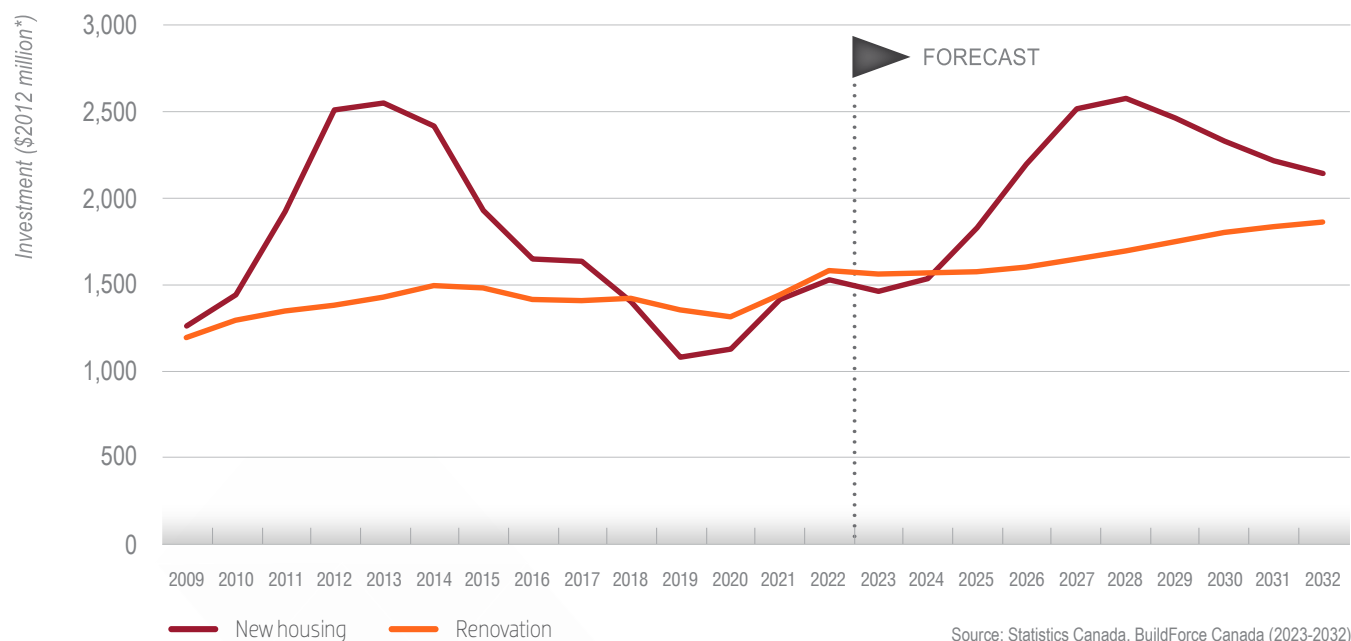
Housing starts are expected to moderate further – by as much as 13% – in 2023 as interest-rate increases curb consumer spending. That contraction is short lived, as the sector experiences a period of strong growth after 2024, with starts rising to just below 6,300 units by 2028. Multi-unit construction is anticipated to trend upward and maintain a relatively high share of new-home construction, driven in part by older-age populations downsizing to lower-maintenance apartment-structure types.

Although renovation investment declined in 2020, resulting from the slowdown in activity due to COVID-related lockdowns and uncertainty surrounding key construction inputs, it more than recovered in 2021, and is expected to grow almost continuously across the forecast period, adding 18% over 2022 levels by 2032.

After a brief contraction in 2023, total residential construction employment is projected to rise to a peak of nearly 16,500 workers by 2028 before contracting slightly over the remaining years of the forecast period. Overall, employment adds 2,310 workers (+18%) between 2022 and 2032, with nearly 1,500 of those workers added in the new-housing sector. The renovation (+570 workers; +10%) and maintenance (+290 workers; +16%) sectors also show gains.

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.

Figure 5: Residential construction investment, Saskatchewan



* \$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.

RESIDENTIAL RANKINGS, RISKS, AND MOBILITY

The tight labour market conditions created in the residential sector in 2021 are sustained across nearly every trade and occupation in 2022, as shown in Table 1. Demand is pronounced for construction estimators.

An anticipated slowdown in the number of housing starts in 2023 and 2024 allows for a brief period of recovery. A surge in requirements between 2025 and 2027 leads to a further up-cycle, and greater demand in almost every residential construction trade and occupation.

MARKET RANKINGS

1

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

2

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

3

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

4

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

5

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

Table 1: Residential market rankings, Saskatchewan

TRADES AND OCCUPATIONS – RESIDENTIAL	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032
Bricklayers	4	3	3	4	4	4	3	3	3	3	3
Carpenters	4	3	3	4	4	4	3	3	3	3	3
Construction estimators	5	4	3	4	4	4	3	3	3	3	2
Construction managers	4	3	3	4	4	4	3	2	2	2	2
Contractors and supervisors	4	4	3	4	4	4	3	3	3	3	3
Electricians	4	3	3	4	4	4	3	3	3	3	3
Floor covering installers	4	4	3	3	3	3	3	3	3	3	3
Home building and renovation managers	4	4	3	3	3	3	3	3	3	3	3
Painters and decorators (except interior decorators)	3	3	3	3	4	3	3	3	3	3	3
Plasterers, drywall installers and finishers, and lathers	4	3	3	4	4	4	3	3	3	3	3
Plumbers	4	3	3	3	4	4	3	3	3	3	3
Residential and commercial installers and servicers	3	3	3	3	4	3	3	3	3	3	3
Roofers and shinglers	3	3	3	3	3	3	3	3	3	3	3
Sheet metal workers	4	3	3	4	4	4	3	3	3	3	3
Trades helpers and labourers	4	3	3	4	4	4	3	3	2	3	3

Source: BuildForce Canada

NON-RESIDENTIAL SECTOR

As shown in Figure 6, the outlook for the province's non-residential sector sees investment remain high in the near term, with greater demand for projects in both the industrial, commercial, and institutional (ICI) and engineering-construction sectors. Engineering-construction investment will be bolstered in the short term by the provincial government's injection of more than \$2 billion in planned capital investment, a natural gas power plant in Moose Jaw, two canola processing plants, pulp mill projects, and the expansion of the Jansen potash mine. ICI-sector investment also remains elevated, near term, with expansions in the manufacturing sector and on public infrastructure like schools and hospitals.

Thereafter, downward pressures and the conclusion of key resource and industrial and institutional projects create a drop. Natural gas projects at Lanigan and Yellowhead help to support investment

before levels are then sustained in line with population growth through the remainder of the decade. By 2032, non-residential investment is expected to have declined by 5%. A contraction of nearly 10% in engineering-construction investment more than offsets an increase of just below 3% in the ICI sector.

Non-residential employment is expected to peak above 26,400 workers in 2023, supported by strong growth in the ICI sector and ongoing work on a major natural gas power plant and the Jansen potash mine expansion. Employment remains above 26,000 again in 2024 before cycling down in 2025 and 2026 as work on major resource projects concludes. After 2027, employment levels remain relatively unchanged, cycling around 24,000 workers. By the end of the forecast period, the sector is expected to contract by about 1,160 workers (-5% over 2022 levels), with losses in engineering (-1,240 workers; -10%) and ICI (-220 workers; -3%) offsetting a gain of 5% in the maintenance sector.

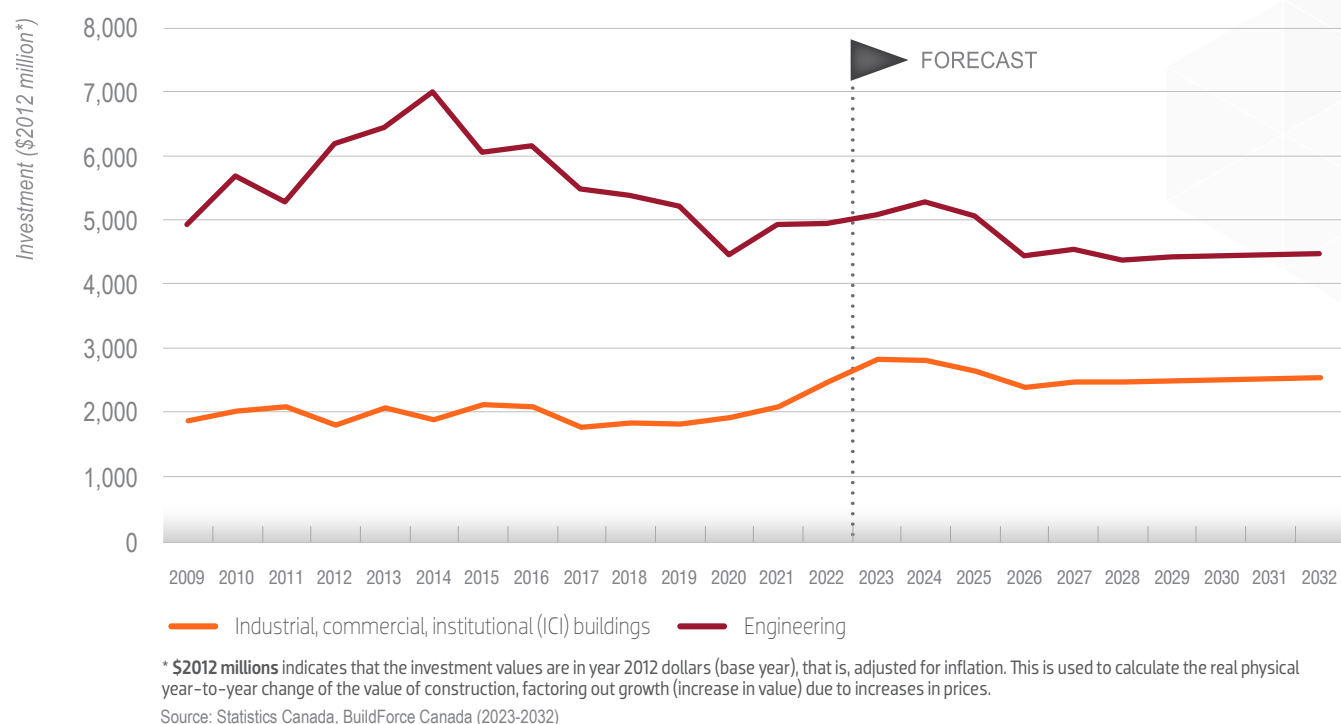
Figure 6: Non-residential construction investment, Saskatchewan

Table 2 summarizes the estimated percent change in non-residential employment by sector 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 sector, Saskatchewan

SECTOR		% CHANGE 2023–2025	% CHANGE 2026–2028	% CHANGE 2029–2032
Total non-residential employment		1%	-5%	-1%
ICI* buildings	Industrial	11%	-18%	0%
	Commercial, institutional and government	1%	0%	-1%
Engineering	Highways and bridges	-6%	-5%	-2%
	Heavy industrial	0%	-10%	-2%
	Other engineering	-3%	-2%	2%
Maintenance		5%	1%	-1%

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

* industrial, commercial, institutional

NON-RESIDENTIAL RANKINGS, RISKS, AND MOBILITY

As shown in Table 3, non-residential labour markets ended 2022 under strained conditions. Employment demand has been driven by growth in the ICI sector, particularly among health care, school, and manufacturing industrial projects. Many trades were strained in 2022 with pressures unlikely to ease to any significant degree in 2023. Industrial work such as Phase 2 at the Jansen mine and wastewater projects will see further demand into 2023 and 2024.

Demands cycle down into 2024, but reductions are moderate. The completion of Jansen phase two in 2025 will lower demand for many specific trades in 2026. This coincides with the conclusion of some large health-sector projects. Demand patterns will be erratic, with increases of as many as 1,400 workers in the next two years followed by contractions of as many as 2,200 by 2026.

Over the remainder of the forecast period, employment remains relatively flat, and markets are generally balanced.

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.

Table 3: Non-residential market rankings, Saskatchewan

TRADES AND OCCUPATIONS – NON-RESIDENTIAL	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032
Boilermakers	3	3	3	2	2	3	3	3	3	3	3
Bricklayers	4	4	3	3	3	3	3	3	3	3	3
Carpenters	4	4	3	3	2	3	3	3	3	3	3
Concrete finishers	5	4	3	2	2	3	3	3	3	3	2
Construction estimators	4	4	3	2	2	3	2	3	3	3	3
Construction managers	4	5	3	3	2	3	3	3	3	3	3
Construction millwrights and industrial mechanics	3	4	3	2	2	3	3	3	3	3	2
Contractors and supervisors	4	4	3	2	2	3	3	3	3	3	3
Crane operators	3	4	3	2	2	3	3	3	3	3	3
Electrical power line and cable workers	3	3	3	3	3	3	3	3	3	3	3
Electricians	3	4	3	3	3	3	3	3	3	3	3
Elevator constructors and mechanics	5	5	3	3	2	3	3	3	3	3	3
Floor covering installers	5	5	3	2	2	3	3	3	3	3	3
Glaziers	5	5	3	2	2	3	3	3	3	3	3
Heavy equipment operators (except crane)	4	3	3	2	2	3	3	3	3	3	3
Heavy-duty equipment mechanics	4	4	3	2	2	3	3	3	3	3	3
Insulators	3	3	3	3	3	3	3	3	3	3	3
Ironworkers and structural metal fabricators	4	3	3	2	2	3	3	3	3	3	2
Painters and decorators (except interior decorators)	5	5	3	3	3	3	3	3	3	3	3
Plasterers, drywall installers and finishers, and lathers	5	5	3	2	2	3	3	3	3	3	3
Plumbers	4	4	3	3	3	3	3	3	3	3	3
Refrigeration and air conditioning mechanics	5	5	3	2	2	3	3	3	3	3	3
Residential and commercial installers and servicers	4	5	3	3	3	3	3	3	3	3	3
Roofers and shinglers	4	4	3	3	2	3	3	3	3	3	3
Sheet metal workers	4	4	3	3	2	3	3	3	3	3	3
Steamfitters, pipefitters and sprinkler system installers	3	3	3	3	2	3	3	3	3	3	3
Trades helpers and labourers	4	4	3	2	3	3	3	3	3	3	3
Truck drivers	4	4	3	2	2	3	3	3	3	3	3
Welders and related machine operators	3	4	3	2	3	3	3	3	3	3	3

Source: BuildForce Canada

BUILDING A SUSTAINABLE LABOUR FORCE

THE AVAILABLE LABOUR FORCE

Despite a younger population, Saskatchewan's construction industry will need to recruit about 10,800 additional workers over the forecast period to keep pace with labour force growth and replace approximately 8,600 retiring workers, or 21% of the 2022 construction labour force.

Given Saskatchewan's younger age demographics, many of those hiring requirements may be met by an estimated 9,500 first-time new entrants under the age of 30 from the local population, leaving a gap of about 1,300 workers that will need to be recruited from outside the local construction labour force.

The COVID-19 pandemic may have accelerated the labour force renewal.

Statistics Canada's Labour Force Survey⁴ data shows Saskatchewan's construction labour force was mostly unchanged between 2019 and 2021 compared to a 2.9% increase in employment over the same period. These combined bring the annual average unemployment rate to 6.3%.

Keeping pace with recruitment and training will require a combination of strategies, including maintaining local recruitment and training efforts, particularly from groups traditionally under-represented in the construction labour force, the hiring of workers from other industries with the required skills sets, and the recruitment of immigrants to Canada with skilled trades training and/or construction experience.

Figure 7 provides a summary of the estimated changes in the construction labour force across the full 2023–2032 forecast period.

LABOUR FORCE DIVERSIFICATION

APPRENTICESHIP

Apprenticeship is a key source of labour for the construction industry. Prior to the pandemic, new registrations in the 17 largest construction trade programs were declining, signalling fewer new journeypersons entering the workforce relative to the levels observed over the past decade. New registrations dipped below 950 in 2019 – the lowest level reported since 1998. Following the trend in new registrations, completions were also trending down leading into 2020, albeit at a slower pace (see Figure 8). New registrations have been declining at a faster rate than trade employment, which poses the risk for an insufficient number of newly certified journeypersons to sustain workforce requirements over the long term. Selected trades, namely Heavy-Duty Equipment Technician and Powerline Technician, have seen an increase in new registrations over the past decade.

Table 4 provides a trade-by-trade breakdown of the anticipated certification requirements to meet the construction industry's share of employment and replacement demand over the forecast period. Based on projected new registrations, several trades are at risk of undersupplying the number of new journeypersons required by 2032. Trades within this group include Insulator (Heat and Frost), Carpenter, Bricklayer, Welder, Boom Truck Operator, Sheet Metal Worker, Steamfitter/Pipefitter, and Construction Electrician.

Figure 7: Changes in the construction labour force, Saskatchewan

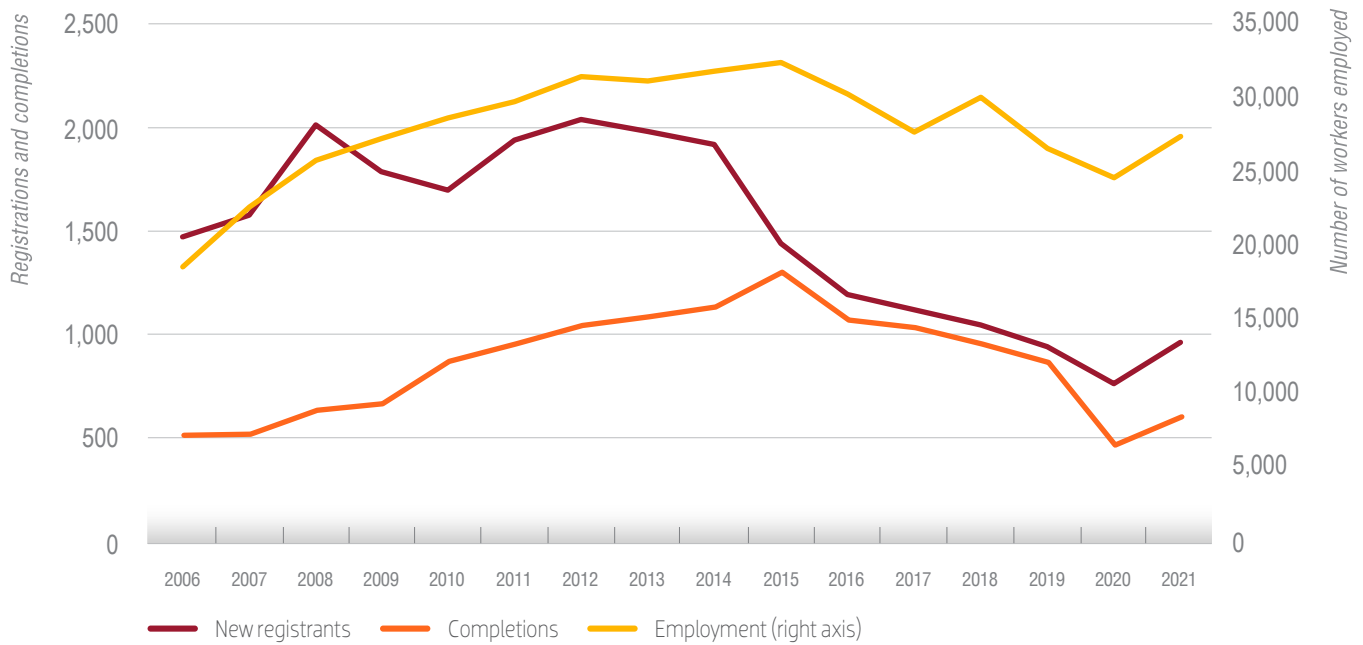


* **Net mobility** refers to the number of workers needed to be brought into the industry from other industries or other provinces to meet rising demands or the number of workers that exit the industry in downturns. Positive net mobility means that industry must attract workers, while negative net mobility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

⁴ 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.

Figure 8: New apprenticeship registrations, completions, and trade employment, Saskatchewan**Table 4: Estimated construction certification demand and projected target of new entrants by trade, Saskatchewan, 2023 to 2032**

Trade	Total certification demand – construction	Target new registrants – construction	Apprentice certification supply risk – all industries
Insulator (heat and frost)	42	97	●
Carpenter	1,616	3,614	●
Bricklayer	98	120	●
Welder	110	205	●
Boom Truck Operator	43	81	●
Sheet Metal Worker	97	268	●
Steamfitter/Pipefitter	87	197	●
Construction Electrician	1,140	2,634	●
Sprinkler System Installer	16	38	●
Refrigeration and Air Conditioning Mechanic	105	173	●
Plumber	523	866	●
Boilermaker	17	33	●
Heavy-Duty Equipment Technician	41	62	●
Industrial Mechanic (Millwright)	25	47	●
Industrial Instrumentation and Control Technician	11	22	●
Powerline Technician	46	61	●
Ironworker (structural/ornamental)	14	26	●

- Certifications required exceed projected completions
- Certifications required in line with projected completions
- Projected completions exceed certifications required

Source: BuildForce Canada

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 6,030 women employed in Saskatchewan's construction industry, of which 40% worked on site, directly on construction projects, while the remaining 60% worked off site, primarily in administrative and management-related occupations. Of the 37,900 tradespeople employed in the industry, women made up 6% (see Figure 9).

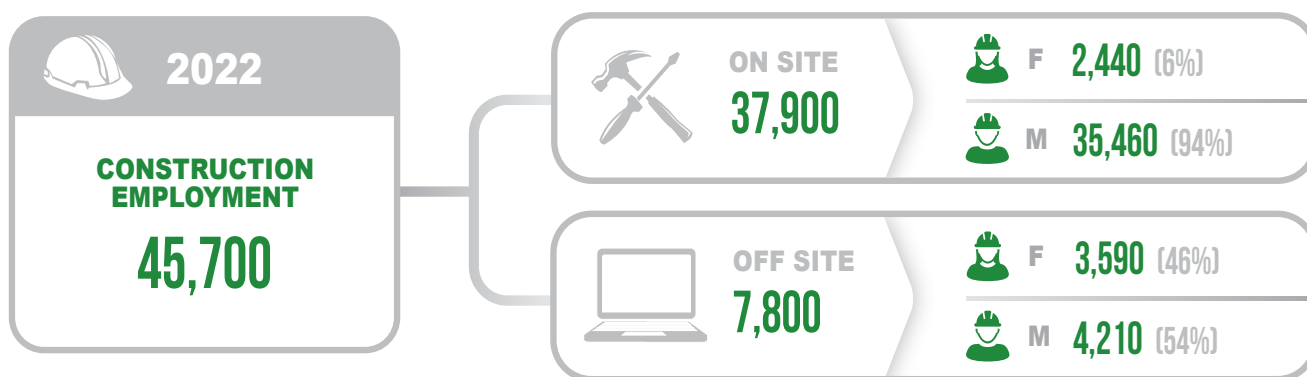
The estimated 2,440 tradeswomen in Saskatchewan are represented across all sectors of construction, but given the nature of construction work in the province, women account for a higher share of total tradespeople (7%) in residential construction. Across sectors, residential maintenance construction has the highest representation of women, accounting for 11.5% of the workforce (see Figure 10). The top five trades and occupations in which women tend to be employed are painters and decorators (22% of all tradeswomen), heavy

equipment operators (21%), electricians (13%), carpenters (11%), and trade helpers and labourers (10%).

The Indigenous population is the fastest growing population in Canada and therefore presents recruitment opportunities for Saskatchewan's construction industry. The province has been successful in increasing the share of Indigenous People in the construction workforce. In 2021, Indigenous workers accounted for approximately 14% of the province's construction labour force, which is an increase from the 13% observed in 2016.⁵ This share is also notably higher than the share of Indigenous People represented in the overall labour force (see Table 5). As the Indigenous population continues to expand, recruitment efforts will need to be dedicated to increasing the industry's share of the population into the labour force.

Saskatchewan's construction industry may also leverage newcomers (immigrants) to Canada over the forecast period to meet labour requirements. Due to the declining natural rate of population growth, immigrants are also a significant source of labour force growth in the province. Immigrants have been playing an increasingly important role in replenishing the workforce, with the share of immigrants in the workforce more than doubling over the past decade, increasing from 7% in 2011 to 16% in 2021. While the province has been successful in attracting and integrating immigrants into the labour force, the province's share of immigrants is notably below the share in Canada overall (see Figure 11). The construction labour force share of immigrants was 10% in 2021, which is notably lower than the share in the overall provincial labour force, and significantly lower than the share in Canada's construction industry.

Figure 9: Detailed construction employment by gender, Saskatchewan, 2022



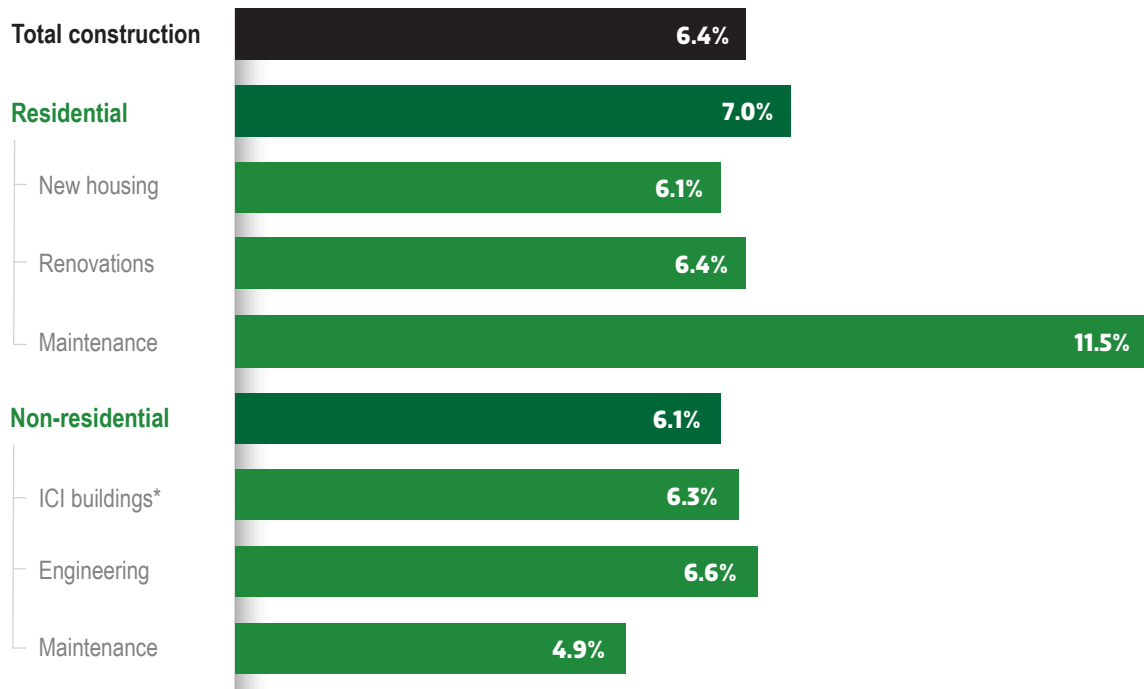
Source: BuildForce Canada calculations based on Statistics Canada's Labour Force Survey (LFS) and Census of the Population.

Table 5: Representation of Indigenous population in provincial construction workforce, Saskatchewan

Industry		Indigenous	Non-Indigenous	Total	Indigenous share of total workforce, %
Construction	2016	6,425	42,885	49,310	13.0%
	2021	6,215	37,915	44,135	14.1%
All industries	2016	61,575	513,740	575,310	10.7%
	2021	64,550	498,955	563,505	11.5%

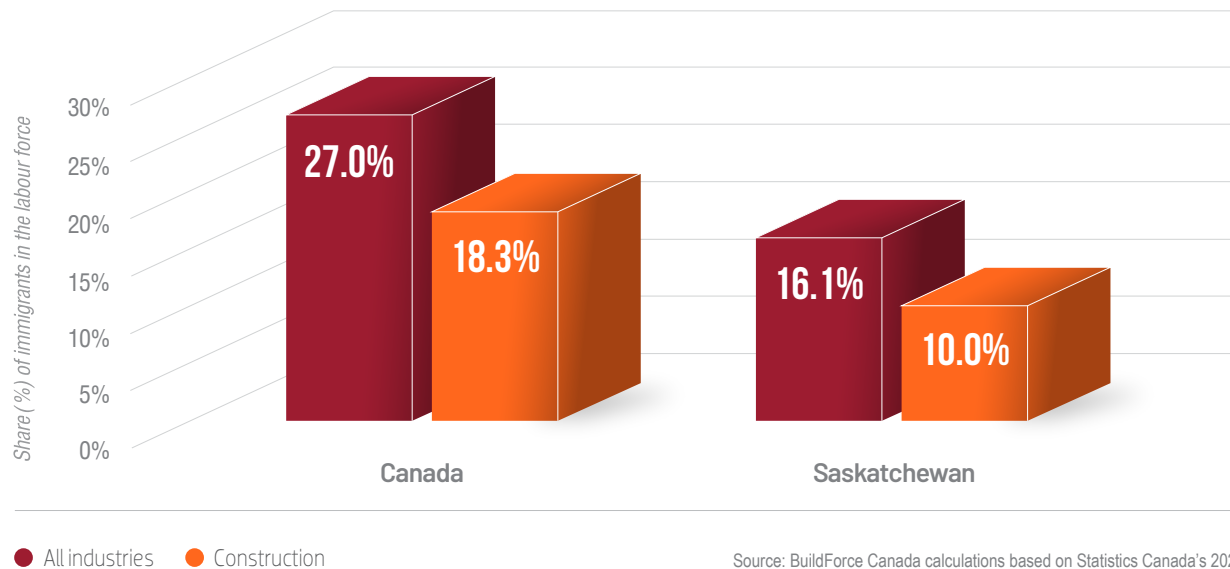
Source: BuildForce Canada calculations based on Statistics Canada's 2021 and 2016 Census of the Population

⁵ Statistics Canada, 2021 Census, custom data request

Figure 10: Women's share of total direct trades and occupations (on site), Saskatchewan

* industrial, commercial, institutional

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

Figure 11: Share (%) of immigrants in the construction labour force, 2021

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

Based on historical settlement trends, the province is expected to welcome 99,120 new international migrants between 2023 and 2032. As these individuals will make up an increasing share of the province'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 *Construction and Maintenance Looking Forward* scenario for Saskatchewan shows the industry continuing a modest period of expansion that began in 2021, and which is being sustained by growth in the residential and non-residential sectors.

After a small contraction in 2023 created by reduced demand for new housing, residential investment is poised to enter a period of significant growth. The sector is expected to add 37% to investment levels between 2024 and 2028 as demand for new-home construction surges. Renovation investment, meanwhile, continues on a slow, steady upward trend across most of the forecast period.

Non-residential construction activity will be driven in the short term by a potash mine expansion, as well as the construction of canola processing plants, water treatment facilities, a natural gas power plant, and on health care and education projects. Investment cycles down slightly in 2025 and 2026 with the conclusion of several major projects.

Adding to market challenges across the forecast period, the industry must address an aging workforce, as an estimated 8,600 workers, or approximately 21% of the current labour force, is expected to retire.

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 assumed timing of proposed major projects in the outlook scenario underpins the labour market conditions anticipated. Any changes in global demands and projected long-term commodity prices may impact the timing of proposed resource development projects and present risks and potentially alter anticipated labour market conditions.

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