BuildForce CANADA

QUEBEC

CONSTRUCTION & MAINTENANCE LOOKING FORWARD

HIGHLIGHTS
2025–2034

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SUMMARY

Construction activity reported gains in Quebec in 2024. Residential construction activity benefitted from easing interest rate pressures to see investment rise in both new-housing construction and residential renovations. The non-residential sector, meanwhile, experienced more modest increases in both engineering construction and in the construction of industrial, commercial, and institutional (ICI) buildings.
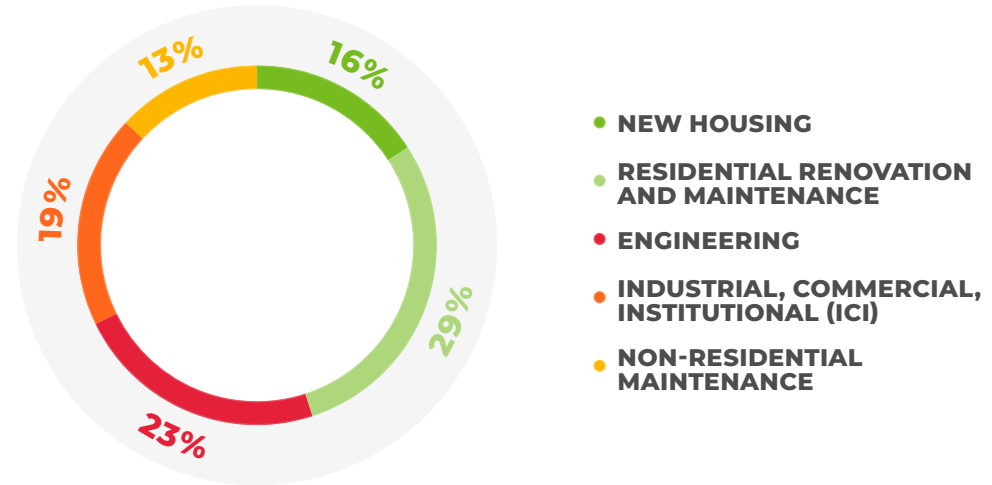
BuildForce Canada's *2025–2034 Construction and Maintenance Looking Forward* scenario for the province sees investment levels stabilize in both the residential and non-residential sectors across the outlook period.

In the residential sector, housing starts are projected to decline across the forecast period, with contractions greatest among multi-unit dwellings. This trend is offset by steady growth in residential renovation activity that is driven by several factors including a need to restore the province's aging housing stock and as home buyers purchasing older homes invest in upgrades to the home to customize it to their preferences.

Investment in the non-residential sector is projected to remain elevated over the near term before generally trending downward into the early 2030s as work is completed or passes peak on several major utility, transit, healthcare, and education sector projects. Although activity ebbs and flows in line with major projects, overall investment remains elevated across the forecast period.

With overall construction employment projected to recede across the forecast period, Quebec's construction labour force may contract by as many as 6,100 workers by 2034. The anticipated retirement of 49,900 workers, or 21% of the 2024 labour force, translates into overall hiring requirements of 43,800 workers.

DISTRIBUTION OF CONSTRUCTION EMPLOYMENT IN 2024, QUEBEC*

- 16%
- 29%
- 23%
- 19%
- 13%

- **NEW HOUSING**
- **RESIDENTIAL RENOVATION AND MAINTENANCE**
- **ENGINEERING**
- **INDUSTRIAL, COMMERCIAL, INSTITUTIONAL (ICI)**
- **NON-RESIDENTIAL MAINTENANCE**

10-YEAR WORKFORCE OUTLOOK FOR QUEBEC

49,900
RETIREMENTS

47,400
NEW ENTRANTS

-4,847
EMPLOYMENT CHANGE (-2.2%)

6.1%
AVERAGE UNEMPLOYMENT RATE

* Due to rounding, numbers may not add up to 100%.

HIGHLIGHTS

- Although housing starts and new-housing investment levels are expected to contract across the forecast period, the province will see steady growth in residential renovations.

- Residential employment is expected to increase in 2025 and 2026 with modest growth. Later years see declines.

- Investment in non-residential construction was elevated in 2024 with ongoing work on major healthcare, education, transit, manufacturing, and utilities projects. Moderate reductions follow as work concludes, but levels remain elevated by historical norms.

- By 2034, non-residential construction employment levels should remain mostly unchanged from the elevated levels reported at the start of the forecast period.

- Expected retirements and slowing construction employment translate into a hiring requirement of as many as 43,800 workers by 2034.

QUEBEC CONSTRUCTION OUTLOOK

NOTE TO READER: The investment trends and employment projections presented in this report were developed with industry input prior to the emergence of potential trade tensions between Canada and the United States. The forecast therefore does not take into account the possible application of tariffs on Canadian exports to and imports from the United States, nor does it account for any resulting changes in trading patterns between Canada and its other key trading partners.

Although the construction industry reported growth in 2024, increases in the non-residential sector were modest.

The residential sector saw an increase in housing starts that was driven by lower interest rates and elevated levels of migration to the province. Starts rose in both single-detached and multi-unit dwellings. Renovations investment also increased.

Investment in the non-residential sector has been on a significant upward trend since 2020 and reached a recent peak in 2024 with ongoing work across all sectors including industrial buildings, healthcare and education, transit systems, electric utilities, and roads, highways and bridges.

Residential construction activity is projected to stabilize across the forecast period. This occurs as housing starts and new-housing investment levels trend generally downward in response to slowing population growth and aging demographics. This trend is offset by growth in residential renovations across the forecast period, which is driven by consumer preferences and the need to restore the province's aging housing stock.

Non-residential construction activity is projected to retreat from peak levels, but remains above historical norms. Levels are projected to cycle in line with the ebb and flow of major projects. After 2026, however, they are expected to contract into 2030 as activity slows with work coming to an end or moving past peak construction for several major utility, transit, healthcare, and education sector projects. Despite this trend, overall investment remains elevated across the forecast period.

Figure 1 shows the outlook for residential and non-residential construction employment in Quebec to 2034. Employment in the residential sector is projected to contract modestly by 4%. Gains in renovations and maintenance employment are not enough to offset a loss in employment related to new-housing construction. Meanwhile, employment in the non-residential sector is projected to remain largely unchanged compared to 2024 levels.

Reduced demands could cause Quebec's construction labour for to contract by 6,100 workers over the forecast period. Combined with the expected retirement of 49,900 workers, the industry's overall hiring requirements is estimated at 43,800 workers. The recruiting of some 47,400 new-entrant workers under the age of 30 may lead to a labour force surplus of 3,600 workers.

To avoid this situation, new-entrant numbers may be curtailed by the *Commission de la Construction du Quebec*, which plays a regulatory role in managing construction labour markets in the province.

FIGURE 1:
CONSTRUCTION EMPLOYMENT GROWTH OUTLOOK, QUEBEC
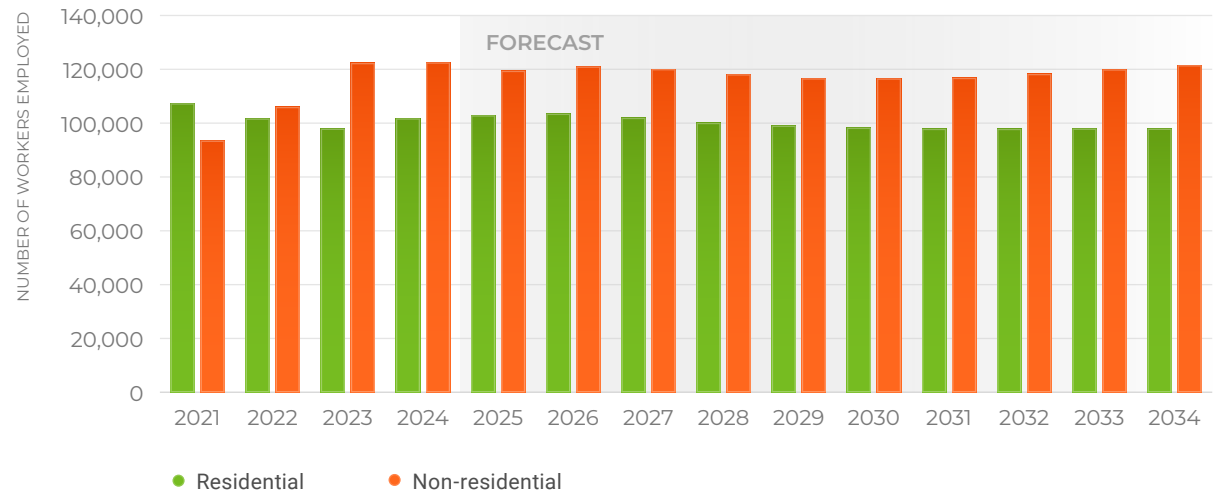
SOURCE: Statistics Canada, BuildForce Canada (2025–2034)

POPULATION GROWTH DRIVEN BY IMMIGRATION

As Figure 2 shows, Quebec's population is slightly older than the national average.

The cohort of people in the province who are aged 65 years or older and is expected to rise to 24% by 2034. In Canada, this cohort accounted for 19% of the total population in 2024, and is expected to increase to 21% by 2034.

Meanwhile, the cohort of people in Quebec who were aged 15 to 24 years, and who are about to enter the labour force, was 11% in 2024, and is expected to rise to 12% by 2034. In Canada, this group accounted for 12% of the population in 2024 and is expected to remain at that level by 2034.

These population shifts could have significant impacts on the province's economy and construction demands, including housing, commercial, and institutional buildings, as well as infrastructure requirements.

Furthermore, the departure of older workers from the labour force can leave experience gaps that cannot easily be replaced in the short term, and which may contribute to productivity challenges.

FIGURE 2:
POPULATION AGE DISTRIBUTION, QUEBEC*

- 0–14
- 15–24
- 25–54
- 55–64
- 65+
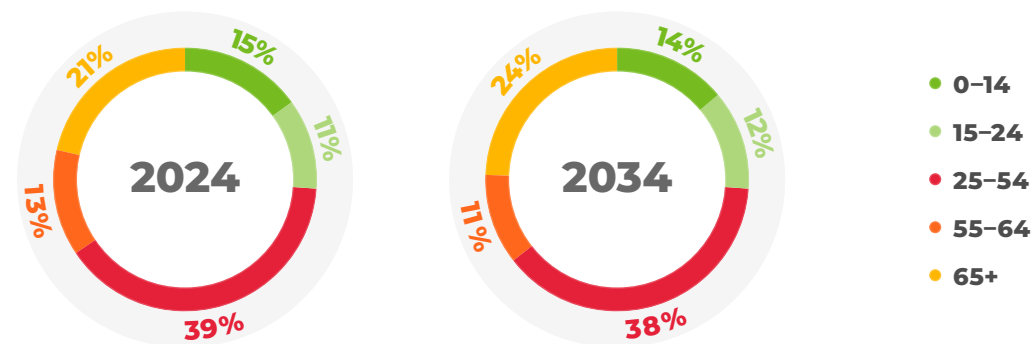
* Due to rounding, numbers may not add up to 100%.

SOURCE: BuildForce Canada

Demographic trends in Quebec are now such that the number of deaths in the province now exceeds the number of births. The province's natural rate of population growth* has been declining for the past decade, and dropped below zero for the first time in 2024.

As such, population growth in Quebec is now entirely dependent on immigration as the province has generally lost individuals to net interprovincial migration. With the exception of the pandemic years of 2020 and 2021, in-migration levels to the province have been elevated in recent years. Quebec benefitted from spikes in immigration in 2023 and 2024, as Canada admitted a large number of permanent and non-permanent residents.

Although changes to the federal immigration levels plan should see these migration numbers curtailed significantly for the period of 2025 to 2027, the longer-run outlook sees immigration return to more typical levels to the end of the forecast period.

Combined, these trends will push population growth in the province to a low of 0.2% by 2027 and average 0.5% between 2028 and 2034.

Figure 3 shows the various factors affecting population growth in Quebec over the forecast period.

FIGURE 3:
SOURCES OF POPULATION GROWTH (%), QUEBEC

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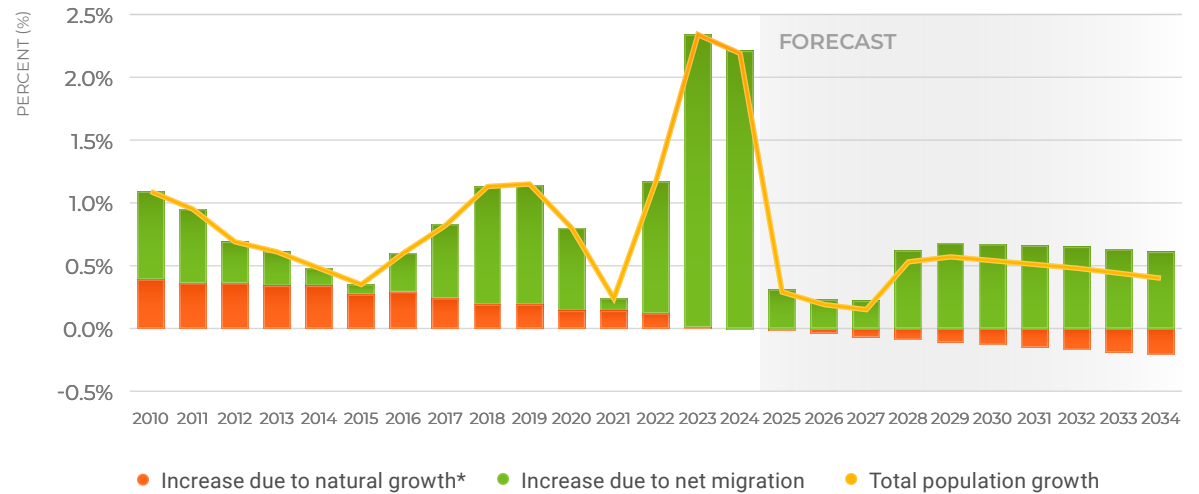
* Natural rate of population growth refers to the growth in the population due to the number of births relative to the number of deaths, which leads to a positive or negative natural rate.

SOURCE: Statistics Canada, BuildForce Canada (2025–2034)

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 entrants[1], and net mobility[2]. For Quebec, rankings are reported for 24 residential and 32 non-residential trades and occupations.

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

[2] **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

Residential construction investment levels reached a recent peak in 2021, driven by high levels of investment in both new-housing and renovation activity, and elevated levels of immigration to the province that were seen in 2018 and 2019. Levels stepped down significantly into 2023 due to the lower immigration levels experienced during the COVID-19 pandemic and as the effects of rising interest rates took hold. Housing starts in particular contracted from a peak of nearly 68,000 units in 2021 to below 40,000 units by 2023.

Investment returned to growth in 2024 as interest rate pressures eased and a surge in immigration increased demands for new housing. This is expected to be generally sustained across the forecast period. Activity in the province's new housing component is elevated in the near-term as demand for single-detached and multi-unit dwellings recovers from the 2023 lows. Later years see housing starts decline as immigration slows and as the population ages. By 2034, housing starts are projected to be 27% below 2024 levels.

Conversely, residential renovations activity is projected to grow across the forecast period, with investment increasing 17% above 2024 levels by 2034. Growth is driven by a number of factors, including the relative affordability of investing in home renovations compared to the purchase of a new home, and required maintenance to the province's existing housing stock.

Figure 4 shows the anticipated renovation and new-housing investment trends for residential construction.

FIGURE 4:
RESIDENTIAL CONSTRUCTION INVESTMENT, QUEBEC
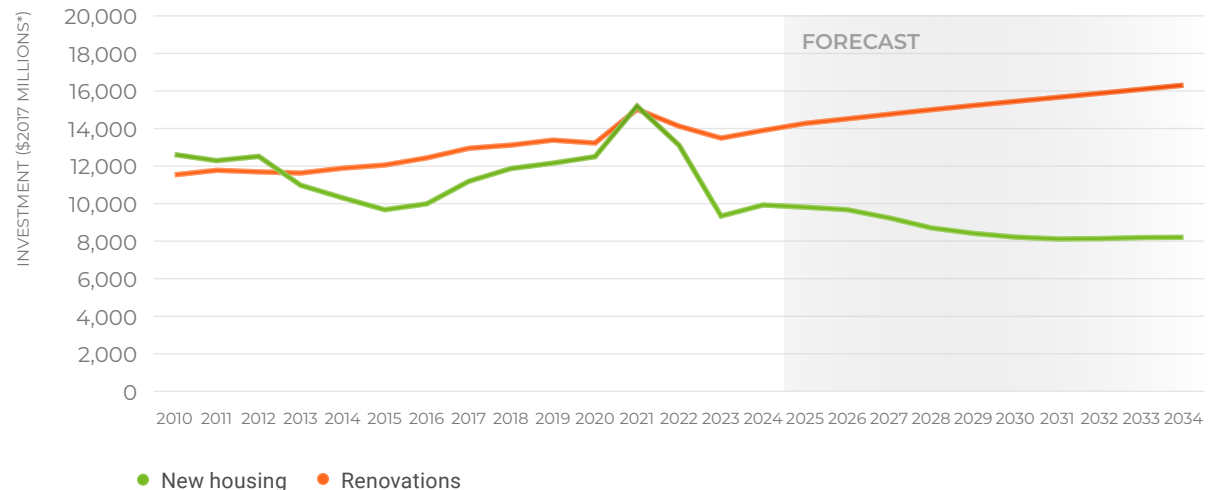
* $2017 millions indicates that the investment values are in year 2017 dollars (base year), that is, adjusted for inflation. This is used to calculate the real physical year-to-year change of the value of construction, factoring out growth (increase in value) due to increases in prices.

SOURCE: Statistics Canada, BuildForce Canada (2025–2034)

The combination of these factors sees residential construction employment rise in 2025 and 2026 before demands recede to the end of the forecast period. Growth in both renovation (8%) and maintenance (4%) employment is not sufficient to fully offset a loss of 24% in employment relating to new housing.

Table 1 summarizes the estimated percent change in residential employment by sector across three periods: the short term (2025–2027), the medium term (2028–2030), and the long term (2031–2034).

Note that this analysis is based on existing trends and market forces and does not take into account aspirational public-sector initiatives to increase the housing supply. Direct government interventions such as tax incentives and subsidies are, however, factored into the forward analysis as they have a more immediate impact on prevailing market forces and consumer behaviour.

TABLE 1:
CHANGES IN RESIDENTIAL EMPLOYMENT BY SECTOR, QUEBEC

SECTOR	% CHANGE 2025–2027	% CHANGE 2028–2030	% CHANGE 2031–2034
Total residential employment	0%	-4%	0%
New housing	-8%	-14%	-4%
Renovations	5%	2%	1%
Residential maintenance	3%	1%	0%

SOURCE: Statistics Canada, BuildForce Canada (2025–2034)

RESIDENTIAL RANKINGS, RISKS, AND MOBILITY

Based on currently known demands, industry recruitment and retirement estimates, the following ranks apply to the 24 covered trades in the province. See Table 2.

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 availablility 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 complete to attact needed workers. Establish patterns of recruiting and mobility are sufficient to meet job requirements.

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

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

TABLE 2:
RESIDENTIAL MARKET RANKINGS, QUEBEC

TRADES AND OCCUPATIONS – RESIDENTIAL	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Bricklayers	4	3	3	3	3	3	3	3	3	3	3
Carpenters	4	3	3	3	3	3	3	3	3	3	3
Concrete finishers	4	3	3	3	3	3	3	3	3	3	3
Construction estimators*	4	4	3	3	3	3	3	3	3	3	3
Construction managers*	4	4	3	2	2	2	3	3	3	3	3
Contractors and supervisors*	4	4	3	3	3	3	3	3	3	3	3
Electricians	4	3	3	3	3	3	3	3	3	3	3
Elevator constructors and mechanics	4	3	3	3	3	3	3	3	3	3	3
Floor covering installers	4	4	3	3	3	3	3	3	3	3	3
Glaziers	3	3	2	2	3	3	3	3	3	3	3
Heavy equipment operators (except crane)	4	4	3	3	3	3	3	3	3	3	3
Heavy-duty equipment mechanics	4	4	3	3	3	3	3	3	3	3	3
Home building and renovation managers*	4	4	4	3	3	3	3	3	3	3	3
Ironworkers and structural metal fabricators	3	3	2	2	3	3	3	3	3	3	3

TRADES AND OCCUPATIONS – RESIDENTIAL	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Other trades and occupations	4	4	3	3	3	3	3	3	3	3	3
Painters and decorators (except interior decorators)	4	3	3	3	3	3	3	3	3	3	3
Plasterers, drywall installers and finishers, and lathers	4	3	3	3	3	3	3	3	3	3	3
Plumbers	4	4	3	3	3	3	3	3	3	3	3
Refrigeration and air conditioning mechanics	4	4	3	3	3	3	3	3	3	3	3
Residential and commercial installers and servicers*	4	3	3	3	3	3	3	3	3	3	3
Roofers and shinglers	4	3	3	3	3	3	3	3	3	3	3
Sheet metal workers	4	4	3	3	3	3	3	3	3	3	3
Tilesetters	4	4	3	3	3	3	3	3	3	3	3
Trades helpers and labourers	3	3	3	2	3	3	3	3	3	3	3
Truck drivers	4	4	3	3	3	3	3	3	3	3	3

Note: although the BuildForce Canada rankings system may indicate conditions outside normal labour market conditions, trades and occupations managed by Commission de la Construction du Quebéc (CCQ) should be balanced as the organization applies the *Act on Labour Relations, Vocational Training, and Workforce Management in the Construction Industry (Act R-20)*.

* Trades and occupations marked with an asterisk fall outside the jurisdiction of the CCQ and will follow ebbs and flows in the labour market

SOURCE: BuildForce Canada

NON-RESIDENTIAL SECTOR

Growth in Quebec's non-residential construction sector has been driven in recent years by heightened investment in transit and utilities projects, healthcare and education buildings. As such, engineering construction and the industrial, commercial, and institutional (ICI) sectors both enter the forecast period at elevated levels, but are anticipated to retreat through to 2030 as activity winds down on major projects. See Figure 5.

On the ICI buildings side, activity is driven initially and to the end of the 2020s by a large volume of work on institutional and government buildings. Key projects include ongoing major healthcare and education projects across the province and new projects such as the Hôpital Maisonneuve-Rosemont modernization and the proposed new university-affiliated hospital in Gatineau. Later years see elevated levels of investment in commercial construction. This is driven by overall economic growth in response to population demands. Key projects include the 40NetZERO industrial campus, renovation work at the Stade Olympique de Montréal, and the construction of the QScale Dataparc.

Engineering construction activity, meanwhile, is projected to step off peak levels into 2030. Investment is driven initially by ongoing work on Montreal's Réseau express métropolitain, Montreal's Blue Line extension, and Quebec City's transit network. Additional growth – in heavy industrial engineering – is driven by work on major mining and utilities projects, while investment in the construction of roads, highways, and bridges slows to the end of the forecast period as key large-scale projects wind down.

FIGURE 5:
NON-RESIDENTIAL CONSTRUCTION INVESTMENT, QUEBEC
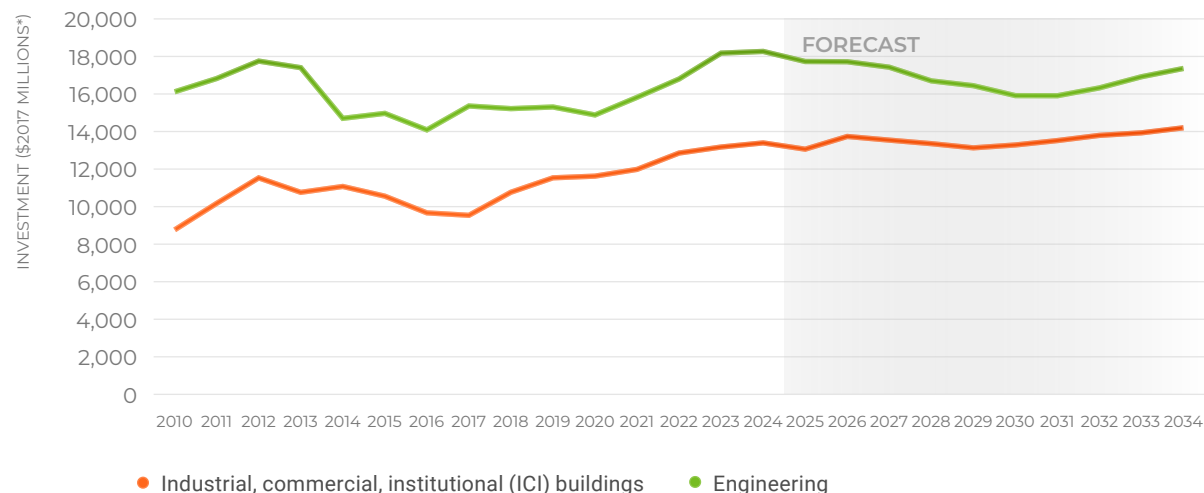
Industrial, commercial, institutional (ICI) buildings   Engineering

* $2017 millions indicates that the investment values are in year 2017 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 (2025–2034)

Employment in the non-residential sector steps down from recent peak levels as tracked major projects complete or pass peak levels of activity. Later years see some growth that is more closely linked to overall economic activity and population demands. By 2034, employment is almost unchanged from 2024 levels (-1%).

Table 3 summarizes the estimated percent change in non-residential employment by sector across three periods: the short term (2025–2027), the medium term (2028–2030), and the long term (2031–2034).

TABLE 3:

CHANGES IN NON-RESIDENTIAL EMPLOYMENT BY SECTOR, QUEBEC

SECTOR	% CHANGE 2025–2027	% CHANGE 2028–2030	% CHANGE 2031–2034
Total non-residential employment	-2%	-3%	4%
Industrial buildings	3%	-10%	8%
Commercial and institutional buildings	3%	2%	6%
Heavy industrial	-1%	2%	14%
Other engineering	3%	-5%	6%
Roads, highways and bridges	-19%	-18%	-16%
Non-residential maintenance	-5%	0%	0%

SOURCE: Statistics Canada, BuildForce Canada (2025–2034)

NON-RESIDENTIAL RANKINGS, RISKS, AND MOBILITY

Based on currently known demands, industry recruitment and retirement estimates, the following ranks apply to the 32 covered trades in the province. See Table 4.

TABLE 4:
NON-RESIDENTIAL MARKET RANKINGS, QUEBEC

TRADES AND OCCUPATIONS – NON-RESIDENTIAL	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Boilermakers	3	3	3	3	3	3	3	3	3	3	3
Bricklayers	4	3	3	3	3	3	3	3	3	3	3
Carpenters	4	3	3	3	3	3	3	3	3	3	3
Concrete finishers	4	3	2	3	2	3	2	3	3	3	3
Construction estimators*	4	3	3	3	3	3	3	3	3	3	3
Construction managers*	4	3	3	3	3	3	3	3	3	4	4
Construction millwrights and industrial mechanics	3	3	2	2	3	3	3	3	3	3	3
Contractors and supervisors*	4	3	3	3	3	3	3	3	3	3	3
Crane operators	4	3	2	3	3	3	2	3	3	3	3
Drillers and blasters	4	3	3	3	3	3	3	3	3	3	3
Electrical power line and cable workers	4	3	2	3	3	3	3	3	4	4	4
Electricians	4	3	3	3	3	3	3	3	3	3	3
Elevator constructors and mechanics	4	3	3	3	3	3	3	3	3	3	3
Floor covering installers	4	3	3	3	3	3	3	3	3	3	3
Glaziers	4	3	3	3	3	3	3	3	3	3	3
Heavy equipment operators (except crane)	3	3	3	3	3	3	3	3	3	3	3

TRADES AND OCCUPATIONS – NON-RESIDENTIAL	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Heavy-duty equipment mechanics	4	3	2	3	3	3	3	3	3	3	3
Industrial instrument technicians and mechanics*	4	3	2	3	2	3	2	3	3	3	3
Insulators	3	3	3	3	3	3	3	3	3	3	3
Ironworkers and structural metal fabricators	4	3	3	3	2	3	2	3	3	3	3
Other trades and occupations	4	3	3	3	3	3	3	3	3	3	3
Painters and decorators (except interior decorators)	4	3	3	3	3	3	3	3	3	3	3
Plasterers, drywall installers and finishers, and lathers	4	3	3	3	3	3	3	3	3	3	3
Plumbers	4	3	3	3	3	3	3	3	3	3	3
Refrigeration and air conditioning mechanics	4	3	3	2	3	3	3	3	3	3	3
Residential and commercial installers and servicers*	4	3	3	3	3	3	3	3	3	3	3
Roofers and shinglers	3	3	3	3	3	3	3	3	3	3	3
Sheet metal workers	4	3	3	3	3	3	3	3	3	3	3
Steamfitters, pipefitters and sprinkler system installers	3	3	3	3	3	3	3	3	3	3	3
Tilesetters	4	3	3	3	3	3	3	3	3	3	3
Trades helpers and labourers	3	3	3	3	3	3	3	3	3	3	3
Truck drivers	4	3	3	3	3	3	3	3	3	3	3
Welders and related machine operators	3	3	3	3	3	3	3	3	3	3	3

Note: although the BuildForce Canada rankings system may indicate conditions outside normal labour market conditions, trades and occupations managed by Commission de la Construction du Québec (CCQ) should be balanced as the organization applies the *Act on Labour Relations, Vocational Training, and Workforce Management in the Construction Industry (Act R-20)*.

* Trades and occupations marked with an asterisk fall outside the jurisdiction of the CCQ and will follow ebbs and flows in the labour market

SOURCE: BuildForce Canada

BUILDING A SUSTAINABLE LABOUR FORCE

THE AVAILABLE LABOUR FORCE

As construction activity is projected to pass peak levels across the next 10 years, Quebec's construction labour force is projected to contract by 6,100 workers by 2034. However, over the same period, as many as 49,900 workers, or 21% of the 2024 labour force, are expected to exit the industry due to retirement. This leaves the industry with a potential hiring requirement of some 43,800 workers.

The expected recruitment of 47,400 new-entrant workers under the age of 30 could create a labour force surplus of 3,600 workers, although this excess supply is likely to be curtailed by the *Commission de la Construction du Quebec*, which manages construction labour markets in the province.

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 6 provides a summary of the estimated changes in the construction labour force across the forecast period.

FIGURE 6:
CHANGES IN THE CONSTRUCTION LABOUR FORCE, QUEBEC

237,700 LABOUR FORCE (2024)

-6,100 WORKERS

231,600 LABOUR FORCE (2034)

HIRING NEEDS -6,100 WORKERS

HIRING NEEDS +49,900 RETIREMENTS

OFFSET BY -47,400 NEW ENTRANTS

-3,600 NET MOBILITY*

* 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

LABOUR FORCE RECRUITMENT

APPRENTICESHIP

The construction industry is dependent on a variety of skilled trades, some voluntary and some compulsory, as well as several skilled trades that fall outside the traditional apprenticeship development systems of the province. As such, while apprenticeship registrations cannot be viewed as a complete measure of industry recruitment, the metric is a useful barometer of industry success in the recruitment of new entrants.

Since 2018, new registrations in Quebec have experienced significant growth, reaching a record high in 2022. (See Figure 7.) This surge aligns with notable gains in trade employment during the same period. However, in 2023, as the construction sector's expansion began to slow and employment levels receded from their peak, new registrations in the 26 largest construction programs saw a decline.

Although completions also dropped in 2023, they remain well above pre-pandemic levels. In the near term, the province is likely to see an increase in the supply of skilled labour, as a large cohort of apprentices who registered in 2021 and 2022 complete their programs.

FIGURE 7:
NEW APPRENTICE REGISTRATIONS, COMPLETIONS, AND TRADE EMPLOYMENT, QUEBEC

● New registrants   ● Completions   ● Employment (right axis)
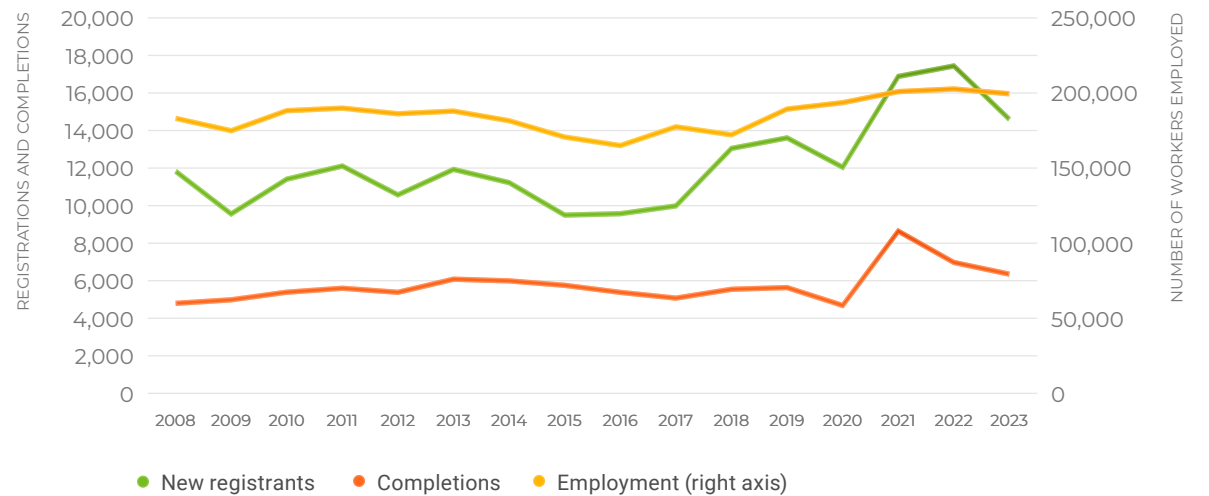
SOURCE: BuildForce Canada

Table 5 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 scenario period. Based on projected new registrations, several trades are at risk of completions not keeping pace with the number of new journeypersons required over the outlook period. Trades within this group include plumber, welder, mobile crane operator, industrial electrician, heavy equipment mechanic, and heavy equipment operator.

TABLE 5:

ESTIMATED CONSTRUCTION CERTIFICATION DEMAND AND PROJECTED COMPLETIONS BY TRADE, QUEBEC, 2025 TO 2034[3]

TRADE	TOTAL CERTIFICATION DEMAND – CONSTRUCTION	TARGET NEW REGISTRANTS – CONSTRUCTION	APPRENTICE CERTIFICATION SUPPLY RISK – ALL INDUSTRIES
Plumber	1,322	83	🔴
Welder	466	105	🔴
Mobile Crane Operator	751	279	🔴
Industrial Electrician	2,704	1,371	🔴
Heavy Equipment Mechanic	242	149	🔴
Heavy Equipment Operator	4,417	3,001	🔴
Boilermaker	104	138	🟢
Industrial Mechanic (Millwright)	32	47	🟢
Bricklayer	1,066	1,766	🟢
Refrigeration and Air Conditioning Mechanic	1,260	2,488	🟢
Drywall Finisher and Plasterer	708	1,581	🟢
Concrete Finisher	624	1,402	🟢

TRADE	TOTAL CERTIFICATION DEMAND – CONSTRUCTION	TARGET NEW REGISTRANTS – CONSTRUCTION	APPRENTICE CERTIFICATION SUPPLY RISK – ALL INDUSTRIES
Roofer	499	1,266	🟢
Lather (Interior Systems Mechanic)	440	1,120	🟢
Tilesetter	360	1,049	🟢
Carpenter	7,435	24,091	🟢
Sheet Metal Worker	628	2,078	🟢
Construction Electrician	2,472	8,330	🟢
Painter and Decorator	914	3,352	🟢
Glazier	254	1,005	🟢
Insulator (Heat and Frost)	156	721	🟢
Power Shovel Operator	491	4,126	🟢
Fitter Welder	71	728	🟢
Steamfitter/Pipefitter	143	3,709	🟢
Ironworker (Structural/Ornamental)	21	590	🟢
Ironworker (Reinforcing)	12	600	🟢

🔴 Certifications required exceed projected completions
🟠 Certifications required in line with projected completions
🟢 Projected completions exceed certifications required

[3] This analysis does not account for an existing skills mismatch at the 2024 starting point.
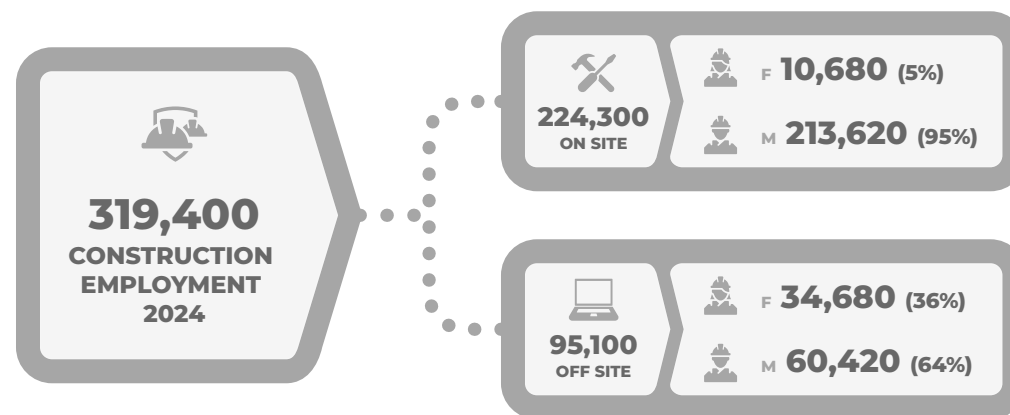
SOURCE: BuildForce Canada

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 boom generation of workers continues retiring throughout the decade, the competition for younger workers will be intense. To help mitigate the impact of this shift in demographics, the construction industry must diversify its recruitment. Specifically, it must increase recruitment of individuals from groups traditionally underrepresented in the current construction labour force, including women, Indigenous People, and immigrants to Canada by raising awareness and working with settlement organizations to promote career opportunities to individuals new to the country.

In 2024, there were approximately 45,360 women employed in Quebec's construction industry, of which 24% worked on site, directly on construction projects, while the remaining 76% worked off site, primarily in administrative and management-related occupations. Of the 224,300 tradespeople employed in the industry, women made up 5% (see Figure 8).

FIGURE 8:
DETAILED CONSTRUCTION EMPLOYMENT BY GENDER, QUEBEC, 2024

319,400
CONSTRUCTION
EMPLOYMENT
2024

224,300
ON SITE

F 10,680 (5%)
M 213,620 (95%)

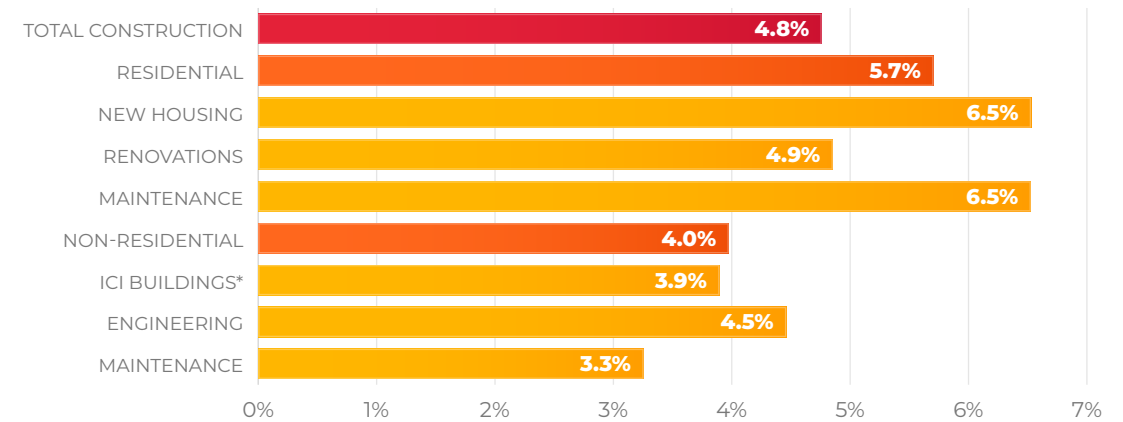95,100
OFF SITE

F 34,680 (36%)
M 60,420 (64%)

SOURCE: BuildForce Canada calculations based on Statistics Canada's Labour Force Survey and 2021 Census of the Population.

The estimated 10,680 tradeswomen in Quebec 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 (5.7%) in residential construction. Across sectors, new housing and residential maintenance construction have the highest representation of women, each accounting for 6.5% of the workforce (see Figure 9). The top five trades and occupations in which women tend to be employed are trade helpers and labourers (15% of all tradeswomen), construction managers (15%), construction estimators (11%), painters and decorators (11%), and carpenters (6%).

FIGURE 9:
WOMEN'S SHARE OF TOTAL DIRECT TRADES AND OCCUPATIONS (ON SITE), QUEBEC

Category	Women's share
TOTAL CONSTRUCTION	4.8%
RESIDENTIAL	5.7%
NEW HOUSING	6.5%
RENOVATIONS	4.9%
MAINTENANCE	6.5%
NON-RESIDENTIAL	4.0%
ICI BUILDINGS*	3.9%
ENGINEERING	4.5%
MAINTENANCE	3.3%

* industrial, commercial, institutional

SOURCE: BuildForce Canada calculations based on Statistics Canada's Labour Force Survey and 2021 Census of the Population.

The Indigenous population is the fastest growing population in Canada and therefore presents recruitment opportunities for Quebec's construction industry. In 2023, Indigenous People made up 3.9% of Canada's overall workforce and 5.2% of the national construction workforce. In Quebec, however, Indigenous People accounted for just 1.7% of the provincial labour force and 3.0% of the construction workforce. While the construction industry has a higher share of Indigenous People compared to the broader provincial labour force, both figures remain below the national average (see Table 6). As the Indigenous population continues to grow, targeted recruitment and retention strategies will be crucial for enhancing the representation of this group within the construction labour force.

TABLE 6:
REPRESENTATION OF INDIGENOUS POPULATION IN QUEBEC'S CONSTRUCTION WORKFORCE

| INDUSTRY	INDIGENOUS	NON-INDIGENOUS	TOTAL	INDIGENOUS SHARE OF TOTAL WORKFORCE, %
Construction				
2014	5,400	280,500	285,900	1.9%
2023	10,000	323,300	333,300	3.0%
All Industries				
2014	59,100	4,313,400	4,372,500	1.4%
2023	81,900	4,634,300	4,716,200	1.7%

SOURCE: Statistics Canada, Labour Force Survey, Custom Data Request 2023

Quebec's construction industry may also leverage newcomers (immigrants) to Canada 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 the province. Immigrants have been playing an increasingly important role in replenishing the workforce, with the share of immigrants in the workforce increasing from 13.9% in 2014 to 18.9% in 2023. 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 10). The construction labour force share of immigrants was just 10% in 2023, which is much lower than the share in the overall labour force and significantly lower than the share in Canada's construction industry.[4]

Based on historic settlement patterns (and factoring in new targets for immigration), Quebec is expected to welcome more than 548,900 new immigrants between 2025 and 2034. 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.

FIGURE 10:
SHARE (%) OF IMMIGRANTS IN THE CONSTRUCTION LABOUR FORCE, 2023

- All industries
- Construction
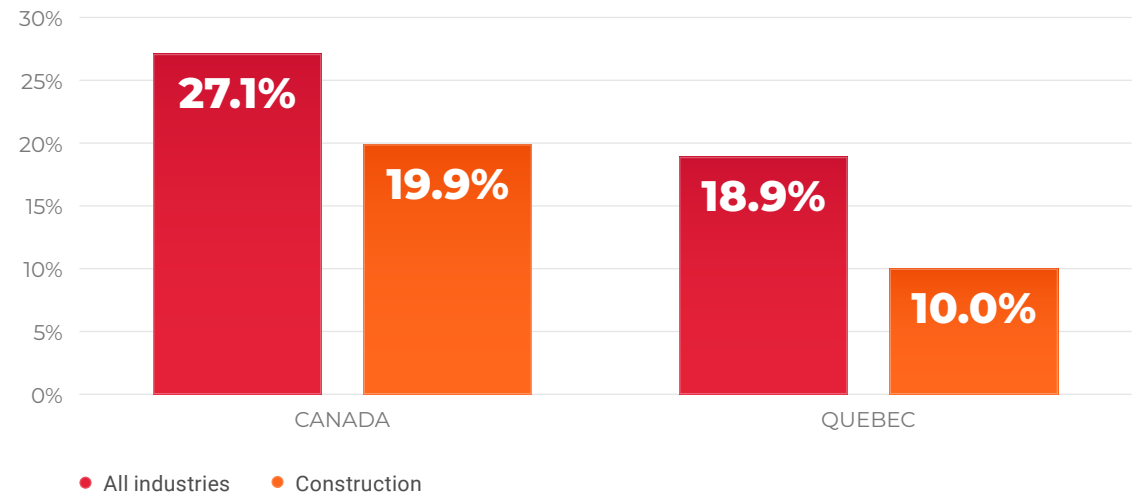
[4] Statistics Canada, Labour Force Survey, Custom Data Request 2023.

SOURCE: Statistics Canada. Table 14-10-0083-01 Labour force characteristics by immigrant status, annual

CONCLUSIONS AND IMPLICATIONS

The *2025–2034 Construction and Maintenance Looking Forward* scenario for Quebec calls for growth to slow in both the residential and non-residential sectors.

Demand for housing in the province has been elevated in the near past, driven by high levels of immigration. As these levels slow, and as the province's population ages, housing starts and new-housing investment levels are projected to contract. Offsetting this decline is steady growth in residential renovations activity.

Activity in the province's non-residential construction sector has been elevated in recent years, and reached a recent peak in 2024 with ongoing work on major healthcare, education, transit, manufacturing, and utilities projects. The outlook calls for moderate reductions to follow into 2030 as work concludes or passes peak on these projects. The final years of the forecast see some growth again in non-residential construction, and which is more closely linked to population demands and overall economic growth.

The challenge for Quebec's construction sector will be managing its labour force in view of reduced construction demands and the expected retirement of 49,900 workers.

Closing this gap will require a combination of strategies that include enhanced local recruitment and training, including the recruitment of permanent residents and newly arrived immigrants, and promoting career opportunities to workers with comparable skill sets who have been displaced from other industries.

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 labour market conditions.

ABOUT THE BUILDFORCE CANADA LABOUR MARKET INFORMATION SYSTEM

BuildForce Canada's labour market information (LMI) system uses the most advanced and detailed industry model available in Canada to produce a forecast scenario that reflects current and future labour demand and supply information for the residential and non-residential construction sectors, by province.

Updated annually, the system is calibrated to the latest information on global, national, and provincial economic conditions derived from various data sources including Statistics Canada, Canadian financial institutions, the World Bank, the International Monetary Fund, the U.S. Energy Information Administration, the Organisation for Economic Co-operation and Development, and federal and provincial budget plans. Key factors driving the outlook scenario include: economic environment measures such as real GDP growth, inflation, interest rates, exchange rates, commodity prices, and international trading partner trends, and population growth and demographic trends.

Unique to the BuildForce system is the integration of a major projects inventory. This is developed in partnership with provincial LMI committees – networks of industry stakeholders that include labour groups, construction associations, owners, and federal/provincial government departments – and identifies key projects that may distort construction investment trends and market conditions.

Information on economics, demographics, and major projects are combined into a dynamic, multi-sector and multi-factor macroeconomic model to generate a 10-year labour market outlook scenario for the residential and non-residential construction sectors in each Canadian province.

The system incorporates coefficients derived from Statistics Canada's input-output tables to determine industry demands and proprietary coefficients developed by BuildForce Canada to translate residential and non-residential investment data into labour demands for the 34 most common on-site trades and occupations in the construction sector. These account for 75% of the total construction labour force.

For labour supply, the system utilizes Statistics Canada's 2021 Census of Population as a starting point. That data is adjusted to reflect current public-policy and demand factors, and is further refined through consultation with the provincial LMI committees to produce measures of provincial economic and population growth, employment growth, retirements, new entrants to the labour force, and interprovincial and international migration patterns.

Provincial residential and non-residential labour market conditions, by trade and occupation, are assessed based on changes in supply and demand and summarized in the form of tables. For each year, conditions are ranked from a low of 1 (in which excess labour supply is apparent, and there is a risk of losing workers to other markets) to a high of 5 (in which there is excess demand, competition is intense, and recruiting extends beyond local labour markets). Ranks are calculated based on annual employment growth, natural or normal unemployment rates, and changes in supply (i.e., retirements, new entrants, and mobility requirements to meet demands).

Rankings for some trades or occupations may be suppressed in some provinces and regions due to the small size of the workforce (i.e., 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 typically do not work in residential construction, nor do homebuilding and renovation managers work in non-residential construction).

Finally, to further improve the robustness of the system, BuildForce Canada's outlook scenario is validated by provincial LMI committees.

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- Key economic indicators, construction investment and labour market conditions by province and/or sector

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