

**2016–2025**
Key Highlights

Construction and Maintenance Looking Forward

National Summary

In the new *Construction and Maintenance Looking Forward* forecast scenario, trends that arose in 2015 translate into slower construction employment growth across the 2016–2025 scenario period. The economic news in 2015 was mostly negative, with slower economic growth expected over the near term. Across Canada, construction weakened as resource prices fell, and project delays and cancellations were common.

Even with slower projected growth, the 2016 forecast scenario continues to identify potential industry challenges related to structural changes and workforce mobility.

Construction was one of the leading sources of employment growth in Canada over the last decade before pausing from 2013 to 2015. Over the scenario period, construction is expected to experience more moderate growth, but there is underlying momentum in some provinces and markets that will carry construction employment up over the medium term from 2016 to 2019. The ebb and flow of conditions will move jobs across markets and provinces, but national employment remains close to current levels by the end of the scenario period.

Across the scenario period, demographic trends add to market challenges, as the construction industry's age profile grows older with the number of youth entering the industry restricted and retirements increasing. Unemployment is rarely a sufficient source for recruiting, often leaving mobility across regions and markets as the focus for market adjustment. Even when provincial markets adjust effectively through mobility and interprovincial migration, the industry may still need immigration to fill jobs and replace retiring workers.

The most important features of the 2016 BuildForce scenario are the periods when big engineering projects start or end, or when market cycles rise and fall. These events trigger recruiting beyond local markets. Tracking

BUILDFORCE'S LMI SYSTEM

BuildForce Canada uses a scenario-based forecasting system to assess future labour market conditions for both residential and non-residential construction. This LMI system tracks measures for 34 trades and occupations. BuildForce consults with industry, including owners, contractors and labour groups, to validate the scenario assumptions and construction project lists, and seeks input from government on related analysis.

the timing, magnitude, occupations and trades affected by these changes defines mobility and sets out potential recruiting challenges.

Across the 2016–2025 scenario, total market requirements for the 34 trades and occupations tracked by BuildForce will grow by 11,400 jobs, with notably different demand profiles for the residential sector, where requirements drop by 24,300 jobs, and the non-residential sector, where requirements rise by 35,700. The distinct patterns in these sectors are a particular focus in the 2016 outlook scenario.

Each year the BuildForce LMI system adds new features to meet industry needs. This year new measures of both supply and demand have been included for each of the residential and non-residential markets. These enhancements create distinct measures of unemployment, workforce mobility and new rankings.

HIGHLIGHTS

Most provinces begin the scenario with a moderate cyclical upswing from 2016 to 2019, centred in non-residential markets:

- A series of resource-related infrastructure projects start, including pipelines and electrical generation and transmission.
- Gains in commercial and industrial building construction add new non-residential jobs in many provinces.

In Alberta and Newfoundland and Labrador, a down cycle in employment from 2016 to 2019 is driven by lower resource prices, the winding down of current major projects and the delay or cancellation of new proposed investments in oil and gas and mining.

New housing cycles unfold in most provinces on a flat or downward trajectory from 2016 to 2019 with the exception of Ontario and Manitoba, which have distinctly stronger housing growth, as housing starts rise from 2016 to 2018 or 2019.

Overall, in most provinces, construction employment is carried to a new high or peak level in 2018 or 2019 with gains in non-residential construction exceeding losses in residential. After 2019, major industrial and engineering investment decelerates and most new housing markets slow, driven by slower population growth.

Fifteen years of construction expansion has added new housing, industrial and resource capacity across Canada that now requires annual renovation and maintenance work. Steady employment gains in these markets are among the largest contributor of new jobs and, in many markets, employment added here helps to partially offset job losses in new housing and resource projects.

Conditions in the 2016 forecast scenario create 11,000 new jobs related to market expansion, while demand to replace retirements is estimated at 250,000 workers. A portion of these opportunities will be drawn from a small pool of unemployed, but more often, employers will rely on an

estimated 221,000 new entrants into the construction workforce¹. After allowing for interprovincial mobility that would partially fill local gaps, the Canadian construction industry will still require 27,000 new recruits from outside the industry and likely outside of Canada.

This overall finding returns attention to the central issue of workforce mobility and immigration. National estimates presented here illustrate how the industry is dependent on a mobile workforce and that any shortfall in interprovincial mobility would ultimately require added international immigration.

RESIDENTIAL CONSTRUCTION

This section highlights key findings in the residential sector. *Construction and Maintenance Looking Forward* for 2016 features new measures of workforce availability, including unemployment, new entrants and replacements (retirement) in residential construction.

Market requirements

The principal source of housing demand is the change in population, through its connection to household formations² and requirements for new housing starts. Each annual update tracks the older age profile of Canada's population and the related slower growth (or decline) in the natural change in the population (births less deaths). In the absence of immigration, these changes not only reduce housing demands, but also limit labour force growth. Higher immigration is a necessary response to any market expansions in Canada's future, with a key driver being the cycles of rising and falling immigration.

Age profiles differ by province with varying effects on markets, but there is a general trend toward fewer housing starts, especially in the later years of the scenario. While this trend is lower, there are distinct cycles in each province, and these are related to past gaps between starts and formation, as well as patterns of immigration.

Overall, the trend toward lower population dominates and residential employment declines across the scenario period:

- A loss of 24,000 jobs in residential building includes both steady gains in renovation activity and larger losses in new housing construction.

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

² Household formation refers to the change in the number of households (persons living under one roof or occupying a separate housing unit) from one year to the next. It is the means by which population growth is transformed into demand for new housing.

Available workforce

The 2016 BuildForce labour market information (LMI) system tracks changes in the supply side of the residential market:

- The labour force declines by 31,000 workers over the scenario period, following the decline in new housing employment demands.
- Replacement demands (retirements) total an estimated 118,000 workers.
- An estimated 94,000 new entrants offset retirement demands.
- Net out-mobility³ is estimated at 7,000, as workers leave the residential workforce for work in other sectors or industries.

There are moderate gains in residential employment from 2016 to 2018, driven partially by a stronger housing market in Ontario. At the national level, losses to the residential workforce begin in 2019 as demographic trends reduce new housing demands. Later in the scenario, the new BuildForce measure of out-mobility, specific to residential, raises interesting questions about labour market adjustments. For example, the residential workforce facing a job loss might consider early retirement or look for work in other markets. These choices involve important implications for workforce planning.

NON-RESIDENTIAL CONSTRUCTION

The BuildForce LMI system tracks the non-residential markets separately and shows common themes at work in most provinces:

- Industrial building construction recovers as investments and exports rise, with construction employment growing across the 2016–2025 scenario, but gains are usually moderate and activity rarely regains peak levels attained in the early 2000s.
- Commercial building construction is on a moderate but steady upward trend, often following general economic growth.
- Institutional building construction was strong over the 2010–2013 interval mostly due to government stimulus, but projected investment is modest or lower from 2016 to 2025, as government spending is restrained.
- Maintenance work is on a steady rising trend and often provides a large share of new jobs in non-residential employment.

- The timing of engineering and civil projects is varied and irregular and these changes drive most of the volatility in non-residential employment:
 - Resource projects in Alberta and Newfoundland and Labrador are on a downward trend to 2018, as lower resource prices prompt project delays or cancellations.
 - Resource infrastructure projects, including electricity generation and transmission, pipelines and LNG (liquefied natural gas) plants, are continuing and adding to employment opportunities.
 - Sustaining capital⁴ and industrial maintenance⁵ work are a growing source of construction jobs.

BuildForce tracks current and proposed major projects and, with a few exceptions, the list of identified projects declines after 2020 with a corresponding drop in employment. Assumed start and end dates for major projects are a critical part of the scenarios for each province, as they often define periods of ramping up or shutting down employment in key trades.

Available workforce

The 2016 BuildForce LMI system tracks changes in the supply side of the non-residential market from 2016 to 2025:

- The labour force is estimated to rise by 30,000 workers.
- An estimated 132,000 workers are lost to retirement and must be replaced.
- An estimated 127,000 new entrants from Canada's younger population are expected to be drawn into the workforce.

To meet overall labour requirements the industry will need to recruit another 35,000 workers from other industries or from outside Canada.

These broad national trends across the coming decade signal potential market challenges. The national workforce that is available now and expected to be trained and recruited may not be enough to meet combined replacement (retirement) and market expansion requirements. In most markets and during most years, construction workers would probably find an opportunity for work in the industry, with most opportunities likely coming from replacing older workers who are retiring. Much would depend on the portability of their experience, skills and qualifications across construction markets and provinces and their willingness to move to find work. Even with this expected mobility, construction will need to recruit internationally.

³ Out-mobility refers to the exit of workers from the residential construction industry to other sectors, industries or provinces.

⁴ Sustaining capital refers to the periodic addition (or replacement) of capital, which is required to maintain operations at existing levels.

⁵ Maintenance refers to the process of maintaining equipment, including routine or on-stream work and turnaround/shutdown work, where an operating unit may be temporarily taken out of production.

PROVINCIAL HIGHLIGHTS

A summary description of the 2016–2025 scenarios for each province follows, highlighting distinct features that drive market conditions outside national trends.

Newfoundland and Labrador

The 2016–2025 construction labour profile for Newfoundland and Labrador stands out among the provinces, along with Alberta, as the remarkable construction expansion that began more than 10 years ago ends with a sharp decline from 2016 to 2019. Lower resource prices are prompting cancellations of current plans and delays in new investments. Many major resource projects are being completed from 2016 to 2019 and, as work winds down, employment declines.

Employment losses across the 2016–2020 period are roughly equal to gains from 2010 to 2015. At that time, resource development drew workers to new projects – swelling the engineering workforce and more than doubling the entire Newfoundland and Labrador construction labour force. The employment decline over the medium term may prompt workers to seek opportunities in other sectors, industries or provinces.

Employment on large-scale engineering projects is expected to recover in 2020 as resource prices rise and projects, now delayed, are started. By the end of the scenario in 2025, losses exceed gains and leave overall provincial construction industry employment near 15,000 jobs – below 2015, but well above longer-term historical levels.

There is a distinctly different cycle in housing and commercial and institutional building construction, where activity began a downward cycle in 2012, with the largest part of the decline completed by 2015. A modest loss of jobs in these markets from 2016 to 2019 will be followed by renewed growth that will add to employment in commercial and institutional building construction, renovation and maintenance in the final years of the scenario.

Labour markets in Newfoundland and Labrador are notably more volatile than in other provinces, with job gains and losses exceeding long-term local retirement demands. But the older age profile of the provincial population also complicates market conditions. A shrinking youth population will limit new entrants into the workforce, which limits unemployment as a source of recruiting. An estimated 6,300 workers are expected to retire over the next decade, equal to 24 percent of the current workforce.

Prince Edward Island

Employment in Prince Edward Island rises above previous high levels in a series of increases and plateaus, following the requirements of planned major projects. The biggest increases are expected in 2017 and 2018, and then again in 2020. Steady growth in non-residential building activity continues to be the primary driver. A residential up cycle starts in 2017 and peaks in 2021. It then recedes in response to slower population growth, but employment remains above the recent historically high levels. Overall construction employment growth slows after 2021, as residential activity declines off a peak and non-residential building construction sustains moderate increases.

Over the 2016–2025 forecast scenario, the labour force in Prince Edward Island rises by 600 workers, or 10 percent. Replacement (retirement) demands raise the total demand requirement to 2,300 workers. New entrants are estimated to meet half the total demand requirement, leaving 1,000 workers that need to be found through net in-mobility⁶ from outside the local market.

Nova Scotia

For 20 years construction employment in Nova Scotia has experienced uneven, but progressive gains, reaching its most recent peak in 2013. Some momentum has been sustained by infrastructure and alternative energy projects, but a housing down cycle and very limited prospects for large-scale non-residential projects limit overall growth.

Current levels of activity sustain employment in 2016, but activity will gradually subside across the remainder of the scenario period from 2017 to 2025. Employment losses are concentrated in residential activity, where a brief revival in new housing in 2015 is followed by a down cycle that carries employment lower until 2019. Non-residential activity rises slowly to higher levels as commercial building activity grows, adding new jobs that fill gaps left as major engineering and institutional projects wind down.

Across the coming decade, construction labour requirements are held above past levels by steady and rising demands in non-residential maintenance and residential renovation work. Activity in these market segments accounts for a significant share of new job opportunities.

Looking across all markets over the coming decade, construction employment falls by 1,000 jobs for the 34 trades and occupations tracked by BuildForce. Losses are concentrated in residential work, where 2,200 jobs are lost,

⁶ In-mobility refers to the arrival of workers from outside the local construction industry.

but partially offset by gains of 1,200 in non-residential. As residential activity slows, some construction workers are expected to leave the local market.

Adding to market challenges is the province's older age profile and the expected retirements of an estimated 8,500 workers. This is a significant loss of skilled workers over the next decade.

New Brunswick

Proposed resource projects carry construction employment in New Brunswick higher from 2017 to 2019, rebuilding the non-residential workforce to the record high levels achieved in 2011. Moderate growth in residential building activity that starts in 2017 restores some jobs lost during a decline in housing activity that ran from 2011 to 2015. Together, labour requirements arising in both sectors deplete the limited provincial workforce and create recruiting challenges. Meeting labour market needs may depend on the mobility of the workforce across provinces and markets, as well as from outside of Canada.

Proposed pipeline, marine terminal and resource development projects bring new opportunities at a time when demographic forces are limiting labour force growth and a portion of the local construction workforce has been drawn to work in other provinces. The ebb and flow of specialized trades working on the big engineering projects exceeds the normal level of unemployment, and balancing markets depend on the movement of workers from other markets.

Employment levels in New Brunswick are sustained at a high level even after the engineering projects have peaked in 2019. At the end of the 2016–2025 forecast scenario, New Brunswick construction employment is expected to grow by more than 1,900 workers, with net in-mobility estimated at 2,500 to meet industry needs. Replacement demands continue to add to long-term market challenges as 8,000 workers are expected to retire, amounting to 27 percent of the current labour force.

Quebec

Construction employment in Quebec has been experiencing modest declines since 2013, largely related to major project completions and a down cycle in new housing. Momentum shifts in 2017 with the start of a modest up cycle in non-residential activity, which peaks in 2019. Residential and non-residential employment diverges as housing continues to track downward.

New housing activity increases in 2016, but a prolonged down cycle begins in 2017, following the downward trend in household formations and slower population growth. Renovation investment rises steadily, partially offsetting employment declines related to new housing. Overall residential employment contracts by more than 8 percent between 2016 and 2025.

Non-residential employment weakens in 2016 as major projects are completed. Growth resumes in 2017, with overall employment increasing by 11,200 jobs, or by 10 percent, by the end of the scenario period in 2025. The list of current and proposed utility, pipeline, highway and bridge projects are expected to drive employment over the medium term.

Replacement demands (retirements) of 47,800 workers, or 23 percent of the current workforce, represent a key source of job opportunities over the scenario period.

Ontario

The housing cycle and non-residential project profiles in Ontario differ from other provinces, with growth continuing from 2016 to 2019 followed by a modest downturn that will bring employment back to current levels by 2025. Residential construction employers face a unique set of challenges as job openings shift across a strong cycle in new housing and longer-term gains in renovation and maintenance. In contrast, non-residential building construction rises more consistently across the 10-year scenario, while major engineering and civil projects create short-term fluctuations.

Gains in Ontario engineering construction include some infrastructure projects in the near term, but are also tied to long-term plans for major refurbishments of nuclear power plants beginning between 2017 and 2020. Overall, the Ontario forecast includes an extended period of moderate gains in employment.

While the pace of growth will be low by past standards, adding to the workforce becomes progressively more difficult as retirements increase and fewer young entrants are available. These market challenges are more apparent early in the scenario period for trades and occupations that are needed for new housing, infrastructure and major engineering construction projects.

Changes are not evenly distributed across the province's five regions and the mobility of the workforce will be a critical factor in balancing supply and demand. From 2016 to 2019, employment gains are strongest in Southwest Ontario and the Greater Toronto Area (GTA), with Eastern

and Central Ontario lagging. The varied strength of the new housing revival and the start of major projects are the main factors separating regional performance.

Adding to market challenges is an aging workforce and the expected retirement of an estimated 85,500 workers, or 21 percent of the current workforce.

Manitoba

New hydro development, transmission lines, pipelines and infrastructure projects will boost employment over the next few years, stretching a 10-year construction expansion to a new peak in 2018.

At the same time, Manitoba's economy continues to diversify activities. An expansion in industrial building activity began in 2010 and, aided by the lower Canadian dollar, will continue to 2017. Commercial and institutional building construction are also rising on a more gradual, but sustainable path that will add new jobs in almost every year across the 2016–2025 scenario.

These steady gains in non-residential building construction combine with the peak in resource and civil projects to sustain overall non-residential employment at record levels. A modest housing cycle raises total employment to a peak in 2018, but then subsides to 2025, leaving residential employment near current levels at the end of the scenario period.

Altogether, the growth in provincial construction markets combines with rising retirements to consistently add to job opportunities across the scenario. Retirements over the next decade are estimated at 8,200 workers, or 21 percent of the current workforce. The largest challenges will emerge in the next few years as current major projects peak.

Saskatchewan

2015 marks a change for Saskatchewan's construction industry, with non-residential activity moving gradually higher to a new peak and residential building construction declining from historically high levels. Overall construction employment had reached a peak in 2014 at the top of a decade-long expansion. By 2021, the non-residential sector increases by almost 4,000 jobs while residential declines by 2,000 jobs.

Non-residential construction growth stalled briefly in 2015, but resumes a decade-long expansion from 2016 to 2021. Growth is driven by major resource and infrastructure projects and by steady gains in maintenance work across

the scenario period. Specialized labour requirements for non-residential projects have been met through an inflow of out-of-province workers and this will need to continue to meet ongoing demands. An estimated 6,200 were recruited to work in non-residential construction from 2012 to 2014 and another 4,000 are needed to meet increased demands from 2016 to 2021. After 2021, employment declines as projects wind down.

Housing starts are expected to continue falling, with total residential employment declining across the scenario period. Starts had slowed with a 17 percent drop in 2013, followed by a moderate decline in 2014 and a further drop in 2015. Between 2012 and 2014, strong residential growth added more than 5,400 jobs, and many in the new workforce were drawn from outside Saskatchewan. New housing investment declined in 2015 and is projected to continue a downward trend across the scenario period. This translates to a loss of jobs and may prompt many out-of-province workers to leave or seek opportunities in other sectors or industries.

Overall, there is little change in total construction employment in Saskatchewan by the end of the scenario period in 2025, but this surface stability conceals significant shifts in individual markets. Industry must also address an aging workforce, with 8,000 workers expected to retire, or 18 percent of the current workforce.

Alberta

Although media reports paint a dark picture as Alberta construction employment and new project investment declines in the shadow of lower oil prices, this only describes part of the changing market dynamics. The sheer size and complex mix of labour requirements create isolated recruiting challenges in the down market. While many projects end, some major construction projects are continuing, and employment, in some key cases, has not yet peaked.

Over the last several years there has been a significant expansion of existing oil sands capacity that leaves a growing commitment to sustaining investment and maintenance. Requirements for this work continue to rise across the scenario period.

Overall, the oil price decline is driving employment lower across all construction sectors. The 2016 forecast scenario projects that total construction employment will fall until the cycle reaches a bottom in 2019 – when overall job losses are limited to 15 percent of the peak workforce in 2014. A steady recovery from 2020 to 2025 restores lost

jobs as overall employment rises by 1,700 from 2016 to 2025. But the current focus is managing complex labour market conditions across the down cycle.

Impacts on the local construction workforce include the loss of thousands of interprovincial workers. While the evidence is incomplete, it is certain that a large proportion of this group is leaving Alberta and returning to their province of residence. These shifts are not limited to resource-related jobs. Most construction labour markets in the province are impacted by an overall decline in economic activity affecting housing, government and business spending. The BuildForce LMI system signals the outward movement of workers as well as rising local unemployment. Much of the employment decline occurs through the exit of interprovincial workers, leaving a relatively small increase in local unemployment.

Across the 2016–2025 scenario, industry must also address an aging workforce with an estimated 36,000 workers expected to retire, or 18 percent of the current local workforce.

British Columbia

As the new scenario begins in 2016, construction in British Columbia starts on a growth path that will carry employment to new record high levels in 2018. These gains will end a period of high, but mostly unchanging employment that began after 2008. New infrastructure and resource-related projects lead this cycle.

The coming expansion is concentrated in non-residential construction. Housing-related building activity is projected to remain largely unchanged, as housing starts drop in 2017 and 2019, while renovation advances slowly.

Labour requirements for the major non-residential projects will create market challenges from 2016 to 2019 for specialized trades. Conditions ease in 2020 and 2021 as projects end, and from 2022 to 2025, markets are largely balanced. There are few market challenges in residential construction across the scenario, except for a brief period of slower growth and employment declines from 2020 to 2022. There is the risk of losing skilled workers to other markets during this period.

These market-driven conditions include important periods of recruiting challenges. Even bigger issues are tied to rising retirements and a declining number of younger residents entering construction across the 2016–2025 scenario period. An estimated 39,500 workers are expected to retire over the next decade, or 23 percent of the current workforce.

WORKFORCE MOBILITY AND IMPLICATIONS

Workforce mobility – the most repeated theme in the provincial highlights – along with an aging workforce and the need for continued investment in training remain key themes emerging from the 2016 forecast scenario, even as overall labour requirements shift lower.

The BuildForce LMI system is designed to signal the flow and timing of provincial labour requirements for trades and occupations across the 2016–2025 scenario. In many cases during peak periods, mobility across construction sectors or provinces is required to meet industry needs. A key driver to mobility is the magnitude and timing of major projects. While the BuildForce LMI system tracks these projects and seeks industry input on assumptions, plans constantly change, leaving uncertainty across the scenario period. Conclusions offered here point to examples of different types of mobility and related industry challenges.

Major projects and interprovincial mobility

Interprovincial mobility, driven by major project activity, has been integrated into workforce planning in many construction markets, but under recent economic events, mobility patterns have changed. One of the largest markets for mobility has been the Alberta oil sands, where regular arrangements for interprovincial workers, including fly-in, fly-out work patterns, are well established.

In the shadow of lower oil prices, new investment and labour demands have declined significantly with many proposed projects delayed or cancelled. The biggest impact of the decline in activity has been to the fly-in, fly-out workforce.

Although new investment has declined, there remains evidence of recruiting challenges in other markets where, over the last several years, there has been a significant expansion of existing oil sands capacity and a growing commitment to sustaining investment and maintenance work. Requirements for this work continue to rise across the scenario period and rely heavily on a mobile, specialized workforce to meet peak demands.

The challenge is that sustaining and maintenance work will not be sufficient to offset the decline in new investment, so that displaced workers will need to move to other jobs. There is also the increased risk that older workers may consider retirement as an option.

Markets where there are emerging job opportunities and increased need for interprovincial mobility include the pipeline and marine terminal work in New Brunswick, utilities work in Manitoba and the proposed LNG projects in British Columbia.

Mobility across sectors

The new supply-side details for trades and occupations working in residential versus non-residential highlight the potential for mobility across these sectors or across market segments within a sector. At various times across the scenario period there are divergent paths for residential employment (often falling) and non-residential commercial building activity (often rising) resulting in the potential for mobility across sectors depending on the portability of skills and experience. Similarly, in residential, there is increased potential for some workers to move from new construction to renovation work, as new housing declines in most provinces while renovation work remains on a steady grow path across the scenario period.

Other industry mobility

When assessing market conditions it is important to recognize the competition for construction trades by other non-construction industries and the opportunities available there. As such, the BuildForce system tracks demands outside construction for the 34 trades and occupations.

Findings here highlight increasing competition by other industries to also replace an aging workforce and this may signal an important loss of skilled construction workers. The demands for skilled trades in the manufacturing industry, for example, warrant attention in most provinces. Expanding industries, such as the shipbuilding industry in Nova Scotia and British Columbia, also create emerging demands for construction trades.

These broad national trends across the coming decade indicate a key workforce management challenge – that the current available national workforce and the new entrants expected to be recruited and trained may not be sufficient to meet combined replacement (retirement) and market expansion requirements.

Each year, as domestic population growth slows, the role of international immigration emerges as an important solution to meeting workforce requirements. In most provinces, total hiring requirements (often dominated by retirements) may not be met locally and out-of-province recruiting is essential. With most provinces facing these same limitations, it can be concluded that – even if the full potential of interprovincial mobility is realized – the industry will likely still need to turn to international immigration to meet long-term needs.

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

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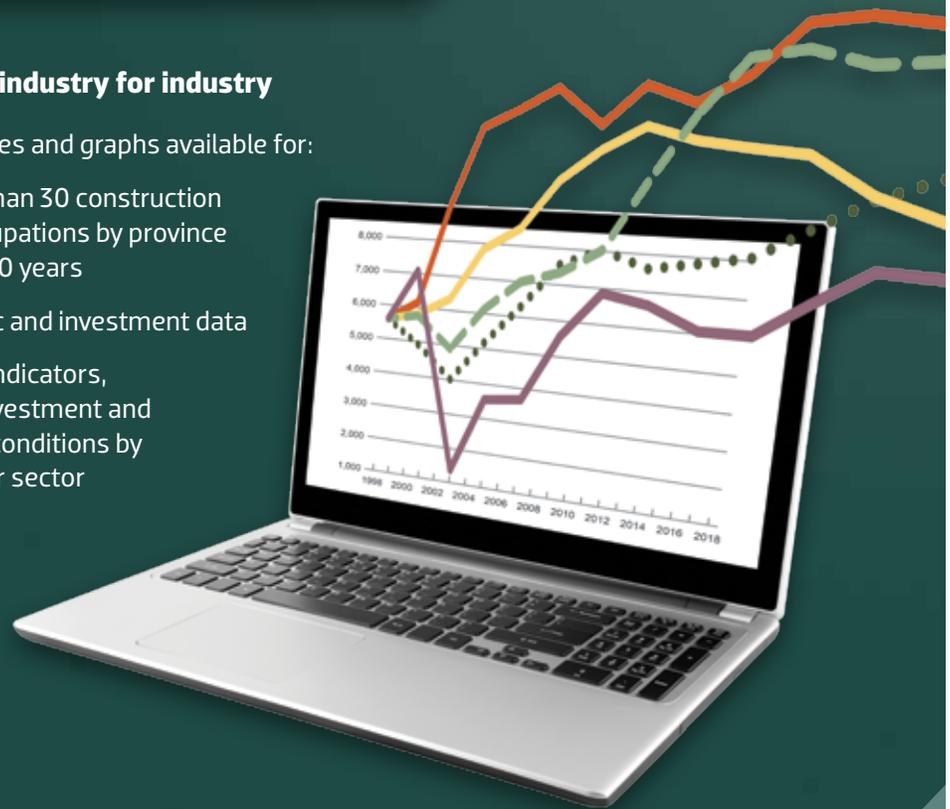
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