

CONSTRUCTION & MAINTENANCE LOOKING FORWARD

MANITOBA

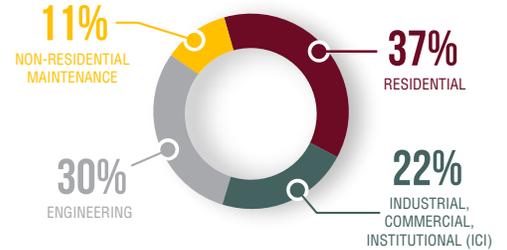
Building to a plateau

HIGHLIGHTS 2017-2026

Construction activity in Manitoba is expected to reach a peak in 2017 following another very strong year of growth. Past the peak, the current non-residential cycle, driven by multiyear major utility and transmission projects, nears the end and a new modest residential cycle begins. The 2017-2026 outlook describes the rise to a plateau at record levels of total construction employment. Maintaining capacity while contending with steadily rising retirements keeps pressure on industry to recruit and train workers.

DISTRIBUTION OF CONSTRUCTION EMPLOYMENT IN 2017, MANITOBA

2017



2017 SECTOR INVESTMENT GROWTH OUTLOOK FOR MANITOBA (% change)

2017

3.9%



RESIDENTIAL INVESTMENT

8.1%



NEW HOUSING

1.1%



RENOVATIONS

2.3%



MAINTENANCE

3.3%



NON-RESIDENTIAL INVESTMENT

2.5%



ICI BUILDING

3.6%



ENGINEERING

3.4%



MAINTENANCE

10-YEAR WORKFORCE OUTLOOK FOR MANITOBA

2026



AVERAGE UNEMPLOYMENT RATE 7.7%

-400 (0.0%) EMPLOYMENT CHANGE

HIGHLIGHTS

- An up-cycle in residential construction is driven by increased housing starts between 2017 and 2020. As population growth slows, a modest housing down-cycle begins in 2021 and continues across the remainder of the scenario period.
- 2017 marks the apex in construction employment in the province. Utility-related projects remain at a peak, while industrial, commercial and institutional (ICI) building, mining, road, highway, bridge and other infrastructure demands continue to rise.
- Following a rise in 2017, overall employment is anticipated to recede modestly through 2022, remaining near current levels over the coming decade.

BuildForce's LMI System

BuildForce Canada uses a scenario-based forecasting system to assess future labour market conditions in both residential and non-residential construction. This labour market information (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 system distills labour market conditions into ranks to provide signals to industry employers.

MANITOBA CONSTRUCTION OUTLOOK

After surmounting several years of strong growth that is expected to peak in 2017, construction demands ease as current major projects wind down, but total employment will remain at record high levels over the next decade.

Construction demands in Manitoba have accelerated over the last two years, propelled by major projects and rising ICI building demands. 2017 marks the anticipated apex of a strong construction expansion, as ongoing major project demands and other non-residential activity coincide with an anticipated rise in new housing construction. Between 2018 and 2022, hydro development project requirements ease, while residential demands continue to edge upward. After 2022, growth trends between the two sectors reverse, with a moderate rise in non-residential, while new residential slows. Overall employment declines modestly, down 2 percent across the 10-year scenario period ending in 2026.

Engineering construction, the dominant source of employment growth in 2015 and 2016, is expected to peak in 2017 and then recede modestly between 2018 and 2022. Over the same period, road, highway and bridge work also slows, but offsetting demands rise with the anticipated starts of planned mining, pipeline and other infrastructure projects.

The brisk pace of non-residential building growth is expected to ease as well, but employment demands are sustained near current levels by a steady, but moderate, rise in government and institutional investment.

The start of a new housing up-cycle in 2017, in response to population growth, alongside modest growth in renovation activity, is expected to lead residential employment to a new peak in 2022. Slowing population growth over the latter half of the scenario period, however, slows new housing demands and returns residential employment to current levels by 2026.

Manitoba’s construction workforce has grown tremendously to meet increased activity over the past decade, attracting new workers and drawing unemployment down to historically low levels. Sustaining the workforce at this level, while contending with the expected exit of 8,200 retiring workers, will maintain pressure on industry to recruit young workers and require ongoing contributions from both interprovincial migration and immigration.

SECTOR INSIGHTS

The following sections provide sector-specific insights into the non-residential and residential labour markets. The 2017 BuildForce LMI system provides an overview of market drivers and detailed occupational demand- and supply-side analysis of labour market conditions in each sector for 34 trades and occupations tracked by BuildForce.

NON-RESIDENTIAL SECTOR

Major hydro development, transmission line, pipeline and infrastructure project demands help sustain momentum in Manitoba’s construction sector, while the expected decline of new resource development projects is anticipated to slow activity in many other parts of the country.

Figure 1 tracks the change in non-residential employment by sector at the start scenario period in 2017 and at the end of the period in 2026.

Looking forward, the completion of major projects currently underway is offset by the start of new projects, modest increases in ICI building and growing maintenance requirements, leaving overall non-residential employment mostly unchanged near record levels at the end of the scenario period in 2026.

Near-term non-residential construction requirements, driven primarily by major hydro and utility projects are expected to peak in 2017, following a long period of expansion. As projects are completed, demand requirements ebb, but employment is sustained near record high levels even at the bottom of the cycle in 2022.

While significant transmission line work is expected to peak in 2017 and road, highway and bridge work is expected to slow, demands related to an ongoing major hydro development project, rising infrastructure investments and planned pipeline and mining projects maintain engineering employment above 2014 levels over the scenario period.

Non-residential building construction also rises in 2017, driven by commercial and industrial activity; both cycle down after 2018. After 2022, overall ICI building construction employment returns to near current levels, as industrial activity strengthens alongside more steady growth in government and institutional investment.

Table 1 summarizes the percent change in employment by sector across two periods: the first captures the lead up to the expected peak in 2020 and the second, across the remainder of the period to 2026.

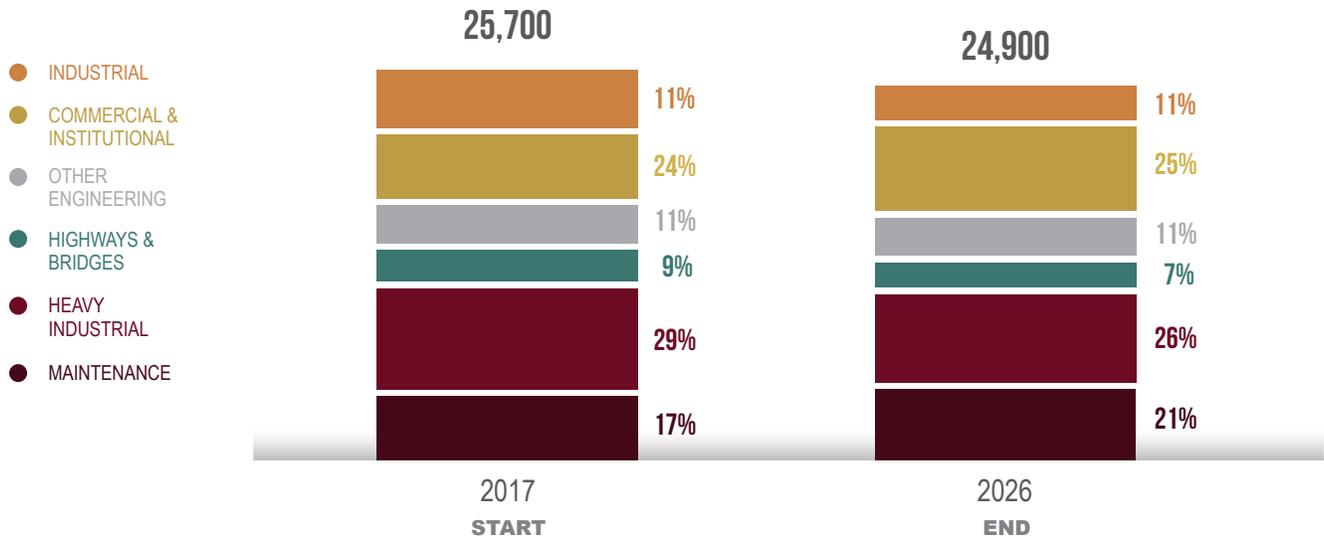
Figure 2 shows the employment trends by sector for non-residential construction.

Table 1: Change in non-residential employment by sector, Manitoba

| SECTOR | | % CHANGE 2017–2021 | % CHANGE 2022–2026 |
|----------------------------------|--|--------------------|--------------------|
| Total non-residential employment | | -3% | 1.8% |
| ICI | Industrial | -6.1% | 6.1% |
| | Commercial, institutional and government | -2.8% | 3.1% |
| Engineering | Highways and bridges | -6.2% | -15% |
| | Heavy industrial | -20.5% | 3.4% |
| | Other engineering | 33.6% | -0.9% |
| Maintenance | | 13.2% | 4.6% |

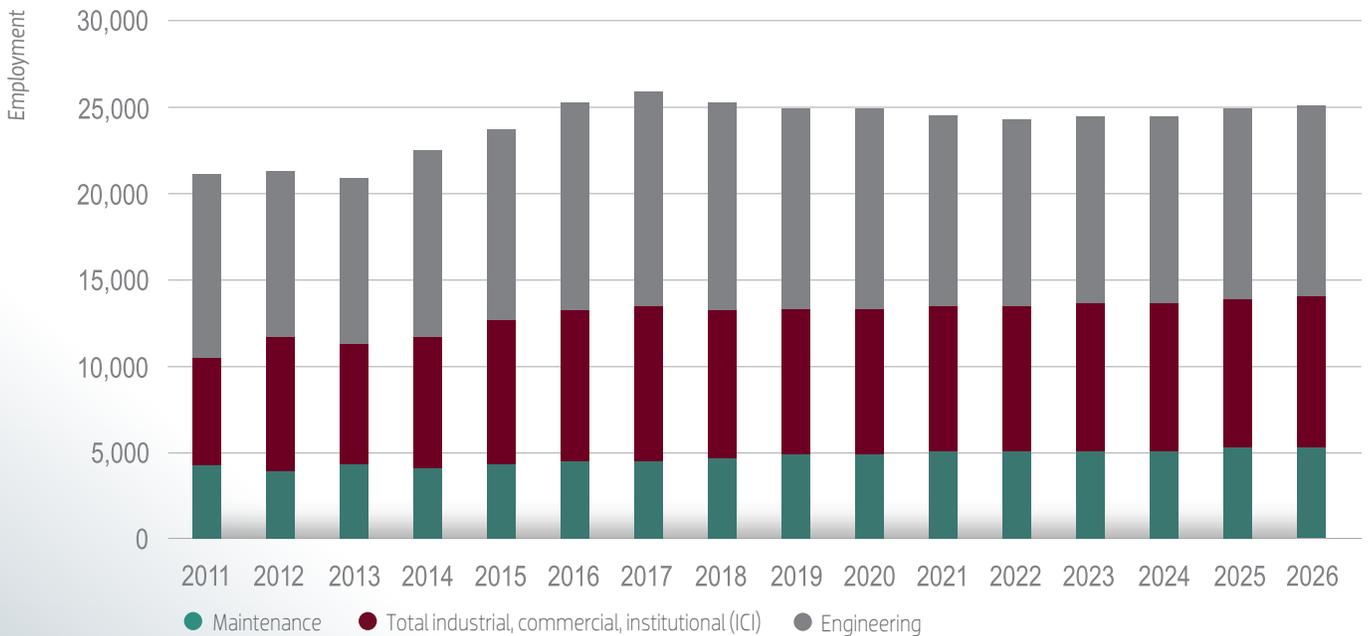
Source: Statistics Canada, BuildForce Canada

Figure 1: Non-residential employment distribution by sector, Manitoba, 2017 and 2026



Source: Statistics Canada, BuildForce Canada

Figure 2: Non-residential construction employment growth outlook, Manitoba



Source: Statistics Canada, BuildForce Canada

THE AVAILABLE WORKFORCE

Meeting current workforce requirements has required training of new workers and attracting large numbers of skilled workers into the province. Recruitment challenges are amplified for specialized trades required for hydro and transmission projects located in remote areas. While the most significant growth has already occurred, changing demographics may make recruiting new workers a challenge.

The BuildForce LMI system tracks supply and accounts for the change in the available labour force, including retirements, new entrants¹ and net in-mobility². BuildForce estimates that 5,000 workers are likely to exit the non-residential workforce over the coming decade. This replacement demand is expected to be met by 5,900 first-time new entrants that may be drawn into the workforce from the local population aged 30 and younger. General population trends to slower growth may pose barriers to attracting young workers. Manitoba's population has a younger age profile than most other provinces, but the pool of youth entering the workforce is declining while retirements rise.

Table 2 provides a summary of changes in the non-residential workforce in 2016, the five-year period between 2017 and 2021 and across the full scenario period.

The BuildForce ranking system isolates market conditions specific to non-residential construction. The results are summarized in Table 3.

NON-RESIDENTIAL RANKINGS, RISKS AND MOBILITY

BuildForce assesses market conditions for 34 construction trades and occupations using a ranking system that combines measures of the change in employment, unemployment, net in-mobility and adjustments based on industry input. The rankings reflect non-residential market conditions unique to Manitoba 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 working in the non-residential sector are suppressed due to the small size of the workforce (<100 workers) and limited statistical reliability when assessing labour market conditions at the sector level. Trades may also be excluded because they typically do not work in the sector being assessed (e.g., home building and renovation managers in non-residential). For Manitoba, non-residential rankings are reported for 28 trades and occupations.

Table 3 provides non-residential rankings for Manitoba, showing persistent recruitment challenges for many trades and occupations in non-residential for 2016 and 2017, reflecting significant increases in major project and ICI building demands. Requirements for several trades with specialized skills and experience for remote locations are being met by highly mobile specialized crews from outside the province. As demands pass the peak, market conditions are expected to return to balance, signalled by a rank of 3. Market conditions for some trades engaged heavily in hydro-related engineering work weaken temporarily once projects are completed before returning to balance.

Table 2: Change in the non-residential workforce, Manitoba

| NON-RESIDENTIAL WORKFORCE ADJUSTMENT | | 2016 | 5 years 2017–2021 | 10 years 2017–2026 |
|--------------------------------------|---------------------|-------|----------------------|-----------------------|
| | Employment | 1,700 | -800 | -300 |
| Demand | Labour force change | 2,000 | -600 | -400 |
| | Retirements | -500 | -2,500 | -5,000 |
| Supply | New entrants | 600 | 3,000 | 5,900 |
| | Net mobility | 1,900 | -1,100 | -1,400 |

Source: BuildForce Canada

² **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.

³ **In-mobility** refers to the arrival of workers from outside the local construction industry. In-mobility includes the interprovincial employee workforce described above. Many members of this group will move quickly out of the province as work declines and this out-mobility, even if it is a very short-term change, signals a weak market.

NON-RESIDENTIAL HIGHLIGHTS

- Total non-residential employment requirements slow off peak between 2017 and 2022 as major engineering construction projects wind down, while rising ICI building demands contribute to new job opportunities over the long term.
- Maintenance work requirements rise over the decade, absorbing some of declines in engineering construction employment.
- Overall non-residential employment cycles down to 2022 followed by a moderate rise across the remainder of the period. By 2026, employment returns back to levels consistent with the start of the scenario period in 2016.

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. |
| N/A | The labour market assessment for some trades is limited by the small size of the workforce (<100 employed). In consultation with the provincial LMI committee, the rank is suppressed because of limited statistical reliability. |

Table 3: Non-residential market rankings, Manitoba

| TRADES AND OCCUPATIONS – NON-RESIDENTIAL | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|---|------|------|------|------|------|------|------|------|------|------|------|
| 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 | 4 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Concrete finishers | 4 | 3 | 2 | 2 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Construction estimators | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Construction managers | 4 | 4 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Construction millwrights and industrial mechanics | 3 | 3 | 4 | 4 | 2 | 2 | 3 | 3 | 3 | 3 | 3 |
| Contractors and supervisors | 4 | 4 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Crane operators | 4 | 3 | 3 | 2 | 2 | 2 | 3 | 3 | 3 | 3 | 3 |
| Electrical power line and cable workers | 5 | 4 | N/A |
| Electricians | 4 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Floor covering installers | 3 | 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) | 4 | 4 | 3 | 3 | 3 | 3 | 2 | 3 | 3 | 3 | 3 |
| Heavy-duty equipment mechanics | 4 | 4 | 3 | 3 | 3 | 3 | 2 | 3 | 3 | 3 | 3 |
| Insulators | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Ironworkers and structural metal fabricators | 4 | 4 | 3 | 2 | 3 | 3 | 2 | 3 | 3 | 3 | 3 |
| Painters and decorators (except interior decorators) | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Plasterers, drywall installers and finishers and lathers | 4 | 3 | 2 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Plumbers | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Refrigeration and air conditioning mechanics | 4 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Residential and commercial installers and servicers | 3 | 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 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Steamfitters, pipefitters and sprinkler system installers | 4 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Trades helpers and labourers | 4 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Truck drivers | 4 | 3 | 3 | 2 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Welders and related machine operators | 3 | 4 | 3 | 3 | 3 | 3 | 2 | 3 | 3 | 3 | 3 |

Source: BuildForce Canada

RESIDENTIAL SECTOR

Residential employment is expected to rise in 2017 with the start of a modest up-cycle anticipated in new housing construction, adding 1,000 jobs at the peak in 2020, but then declines across the remainder of the scenario period. Growing renovation demands help offset expected declines in new housing as overall population growth slows later in the period, leaving total residential employment virtually unchanged at the end of the scenario in 2026 compared to 2016.

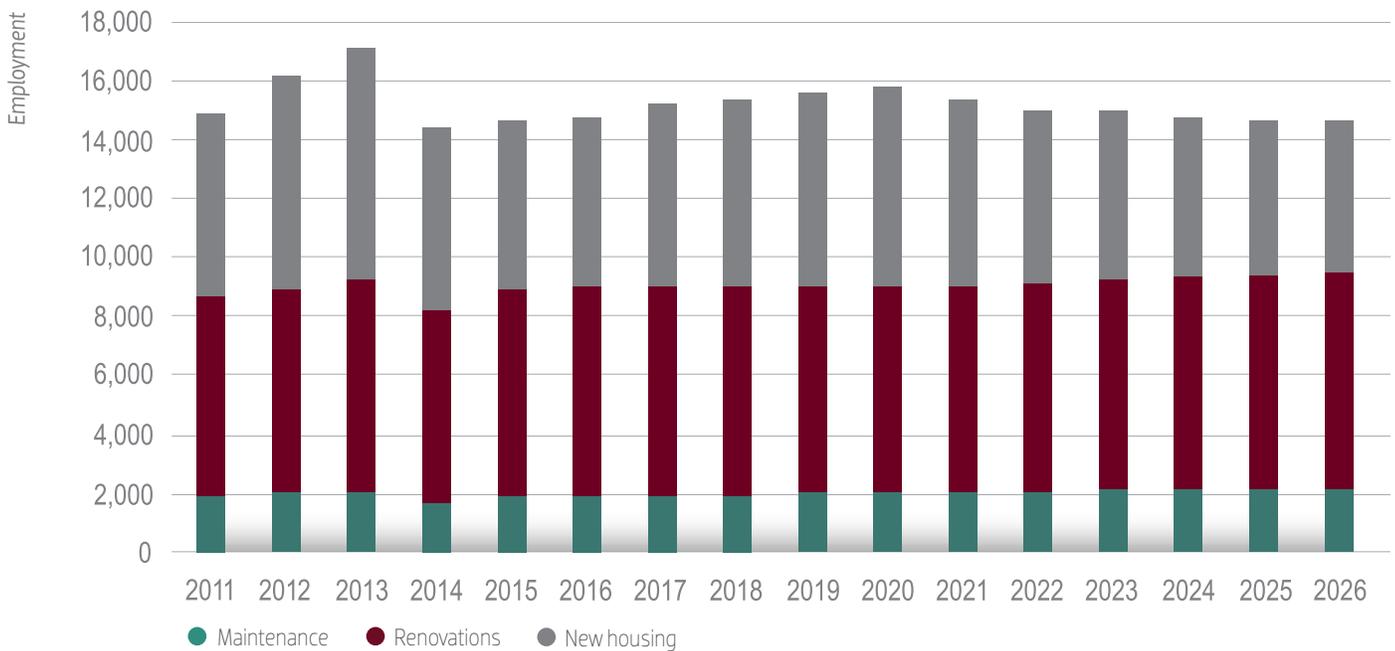
Housing starts rose to peak levels in 2013, driven by strong population growth and rising household formations³. New residential activity then decreased sharply in 2014 and 2015 as housing starts

declined. A recovery is expected in 2017, with housing starts and new housing investment rising at a moderate rate to a peak in 2020. Declining immigration and slower population growth reduce the pace of household formations and housing starts. New housing construction cycles back down after 2020.

Renovations, which account for just over half (55 percent) of total residential investment in Manitoba, rise steadily across the scenario period. By 2026, renovation and maintenance work accounts for nearly two thirds (65 percent) of total residential employment.

Figure 3 shows the employment trends by sector for residential construction.

Figure 3: Residential construction employment growth outlook, Manitoba



Source: Statistics Canada, BuildForce Canada

RESIDENTIAL HIGHLIGHTS

- Housing starts increased to peak at 7,500 units in 2013 and then declined by 25 percent to 5,600 units in 2016. Across the scenario period, starts are expected to cycle up to a peak in 2020 and then back down over the remainder of the period, with starts returning to levels more consistent with 2016 at the start of the scenario.

- Renovation activity grows steadily, but at a moderate rate, across the outlook period and accounts for a growing share of residential demand requirements.
- The expected rise and fall in new housing construction across the period combined with more steady growth in renovation and maintenance work leaves total residential employment virtually unchanged at the end of the scenario in 2026.

³ **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.

THE AVAILABLE WORKFORCE

A sharp decline in new housing construction led to a rapid rise in residential unemployment in 2014. The stabilization in residential demands in 2016 allowed the workforce to adjust, as unemployed workers may have left the province in search of other opportunities. The start of an anticipated up-cycle in 2017 will likely reduce unemployment and draw some workers back as requirements rise.

Though long-term demands are expected to recede, industry must still contend with an aging workforce and the anticipated exit of an estimated 3,200 residential workers over the coming decade. Meeting requirements will depend on industry’s ability to attract a similar number of first-time new entrants expected to be drawn from the local population aged 30 and younger.

Table 4 provides a summary of the estimated changes in the residential workforce in 2016, the five-year period between 2017 and 2021, and across the full 2017–2026 scenario period.

Table 4: Changes in the residential workforce, Manitoba

| RESIDENTIAL WORKFORCE ADJUSTMENT | | 2016 | 5 years 2017–2021 | 10 years 2017–2026 |
|----------------------------------|---------------------|------|----------------------|-----------------------|
| | Employment | 100 | 500 | -100 |
| Demand | Labour force change | 300 | 600 | -200 |
| | Retirements | -300 | -1,600 | -3,200 |
| Supply | New entrants | 300 | 1,600 | 3,200 |
| | Net mobility | 300 | 600 | -200 |

Source: BuildForce Canada

RESIDENTIAL RANKINGS, RISKS AND MOBILITY

Table 5 shows that labour markets in 2016 were mostly more balanced and are expected to remain generally balanced across most of the scenario period. Conditions for trades more heavily involved in new construction weaken with the expected moderate down-cycle starting in 2021 and 2022.

The rankings for some trades working in the residential sector are suppressed due to the small size of the workforce (<100 workers) and limited statistical reliability when assessing labour market conditions at the sector level. Trades may also be excluded because they typically do not work in the sector being assessed (e.g., boiler-makers, millwrights, etc. in residential construction). For Manitoba, residential rankings are reported for 17 trades and occupations.

Table 5: Residential market rankings, Manitoba

| TRADES AND OCCUPATIONS – RESIDENTIAL | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|--|------|------|------|------|------|------|------|------|------|------|------|
| Bricklayers | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Carpenters | 3 | 3 | 3 | 3 | 3 | 2 | 3 | 3 | 3 | 3 | 3 |
| Concrete finishers | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Construction estimators | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Construction managers | 3 | 4 | 3 | 3 | 3 | 2 | 2 | 3 | 3 | 3 | 3 |
| Contractors and supervisors | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Electricians | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Floor covering installers | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Home building and renovation managers | 4 | 3 | 3 | 4 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Painters and decorators (except interior decorators) | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Plasterers, drywall installers and finishers and lathers | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |

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Table 5: Residential market rankings, Manitoba

| TRADES AND OCCUPATIONS – RESIDENTIAL | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|---|------|------|------|------|------|------|------|------|------|------|------|
| Plumbers | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Residential and commercial installers and servicers | 3 | 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 | 3 | 3 | 3 | 3 | 3 | 2 | 3 | 3 | 3 | 3 | 3 |
| Trade helpers and labourers | 3 | 3 | 3 | 3 | 3 | 2 | 2 | 3 | 3 | 3 | 3 |
| Truck drivers | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |

Source: BuildForce Canada

BUILDING A LONG-TERM SUSTAINABLE WORKFORCE

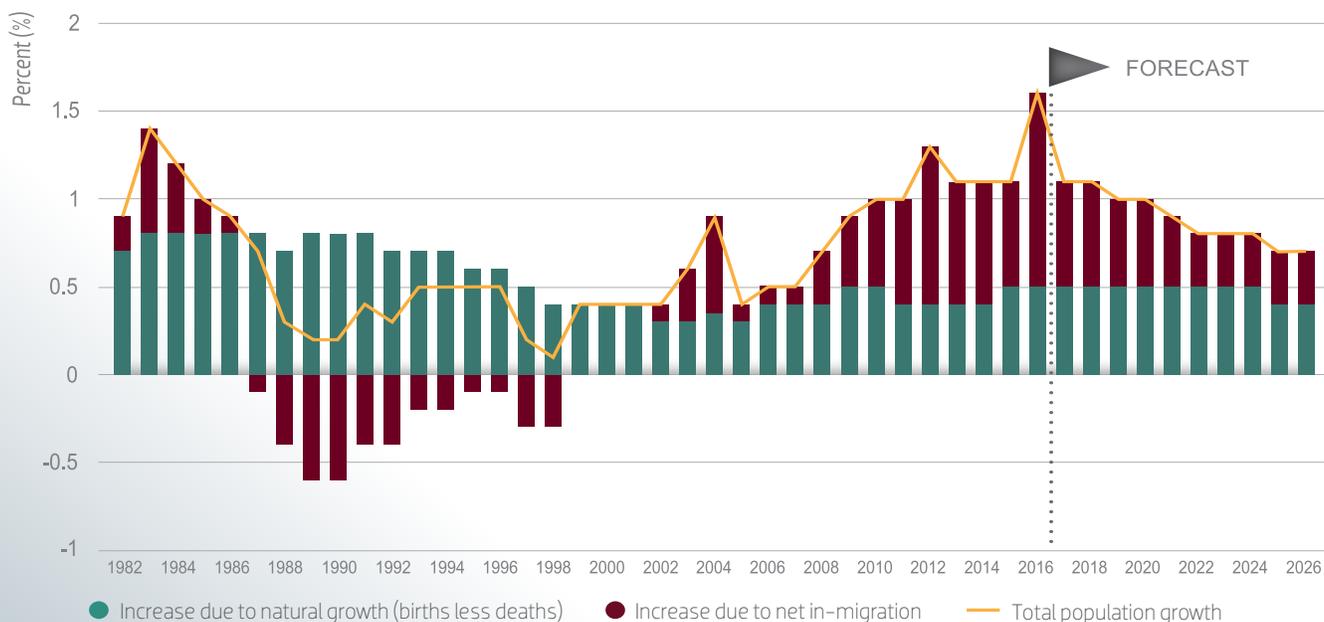
The expansion that began in the early 2000s has led construction employment to nearly double over the 2000–2016 period. Employment is expected to peak in 2017 and then slow across the scenario period, but changing demographics will require industry to remain focused on recruiting new workers to replace an aging workforce. Retirements (including mortality) are expected to draw an estimated 8,200 workers from the province’s construction industry over the next 10 years – 19 percent of the current labour force.

A key strength for Manitoba is that it has one of the youngest populations in Canada, reflecting in-migration of younger workers. Historically, the number of citizens leaving the province had out-

weighed the number of those coming into the province, a trend that reversed in the early 2000s due to stronger economic growth and major construction projects.

Looking forward, Manitoba’s population is projected to grow throughout the scenario period, driven by positive natural growth (births less deaths) and net in-migration. Births are expected to continue exceeding deaths and, combined with positive net in-migration, will lead to an average population growth of 0.9 percent per year. While net migration into the province slows, it remains an important factor of population growth across the scenario period. Figure 4 shows the historical and projected components of population growth.

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



Source: Statistics Canada, BuildForce Canada (2016–2026)

Given strong migration patterns over the past decade and a younger population, Manitoba's portion of the working-age population has remained mostly unchanged, while the share of the population 65 years and older has been rising. This trend is expected to persist across the scenario period.

Table 6 shows that the share of the population that is potentially retiring from the labour force (65 years and older) will continue to increase, while the share of the population that is potentially entering the labour force (15 to 24 years old) declines marginally.

Based on historical trends, the Manitoba construction industry is expected to be able to draw an estimated 9,100 first-time new entrants from the local population, aged 30 and younger, over the next decade to 2026. The number of new entrants is estimated to offset workers expected to retire. Industry, however, will be in competition with other industries facing similar age demographics and will need to increase initiatives to engage underrepresented supply sources, including Indigenous people and women, when targeting new entrants.

Canada's Indigenous population has the country's highest rate of population growth and a higher propensity to choose construction as their career choice. An estimated 12 percent of all Indigenous people in Canada currently reside in Manitoba and account for about 11 percent of the local construction workforce; the highest share in Canada.

Across the scenario period, Manitoba's female population is expected to grow faster than their male counterparts. The province's construction workforce is made up of approximately 9 percent women, of which about 27 percent work directly on construction projects, while the remaining 73 percent work primarily in support or office-related occupations in the construction industry. This translates into women representing 3 percent of the province's direct construction workforce.

Table 6: Population age distribution (%), Manitoba

| AGES | 2016 | 2026 |
|-------|------|------|
| 0–14 | 18.7 | 19.3 |
| 15–24 | 13.6 | 11.9 |
| 25–54 | 40.2 | 39.2 |
| 55–64 | 12.6 | 11.5 |
| 65+ | 15.0 | 18.2 |

Source: Statistics Canada, BuildForce Canada

CONCLUSIONS AND IMPLICATIONS

Manitoba's construction expansion has outlasted many provinces. Demands are expected to rise again in 2017 as demands in the residential sector strengthen and major project demands rise to peak levels. Employment demands are expected to ease as current major projects wind down, but are sustained at historically high levels over the scenario period.

Sustaining employment at record high levels over the decade assumes continued contributions to population growth from immigration and depends on industry's ability to attract new young workers into construction.

The industry scenario-based approach developed by BuildForce Canada to assess future labour market conditions provides a powerful planning tool for industry, government and other stakeholders to better track labour market conditions and identify potential pressure points. The anticipated labour market conditions reflect the current industry expectations of population growth and major project timing. Any changes to these assumptions presents risks and potentially alters anticipated market conditions.

10-YEAR AVERAGE

0.9%



POPULATION GROWTH

18,200



BIRTHS

11,400



DEATHS

5,700



NET MIGRATION

BY 2026

40



AVERAGE AGE OF CONSTRUCTION WORKFORCE

18.8%



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Funded by the Government of Canada's Sectoral Initiatives Program

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JANUARY 2017