

NOVA SCOTIA

Retirements drive rising hiring requirements, despite muted growth outlook

The Nova Scotia construction industry has seen significant expansion over the past decade, with overall employment levels nearly doubling between 2003 and the 2013 peak. Record-high labour market activity has levelled off, partially due to a cooling residential market that employs six in 10 construction workers in the province.

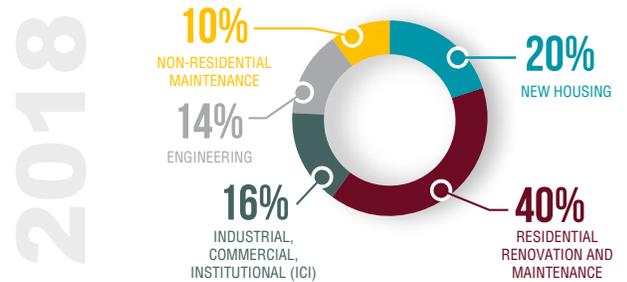
Over the next 10 years, employment requirements are expected to remain near current levels, sustained by steady levels of non-residential building construction and maintenance requirements, and modest growth in residential renovation activity.

Across the 2018–2027 scenario period, total employment in the 34 direct trades and occupations monitored by BuildForce Canada is expected to remain mostly unchanged at just slightly lower levels than the current workforce of 28,800 workers. Despite flat demand, labour markets will be stressed by the retirement of nearly 25 percent of the province's construction workforce. Of the 8,200 workers expected to retire over the next decade, Nova Scotia's construction industry may only be able to draw 5,800 workers from the locally available new entrant workers to backfill positions vacated by retiring workers.

Given the volume of expected retirements, labour force recruitment and training will remain a high priority for construction firms within the province.

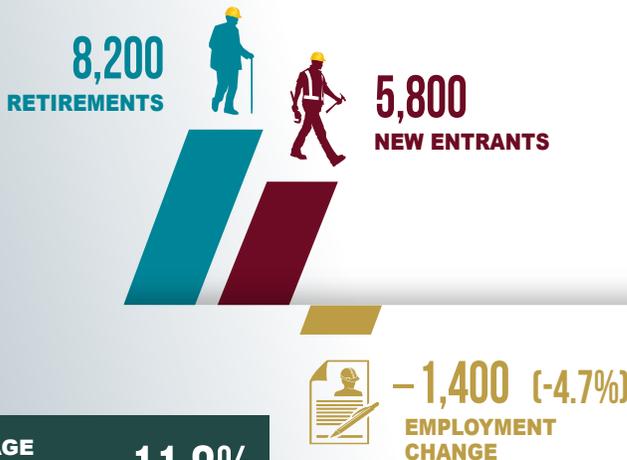
HIGHLIGHTS 2018–2027

DISTRIBUTION OF CONSTRUCTION EMPLOYMENT IN 2018, NOVA SCOTIA



10-YEAR WORKFORCE OUTLOOK FOR NOVA SCOTIA

2027



AVERAGE UNEMPLOYMENT RATE 11.8%

HIGHLIGHTS

- Requirements are expected to remain near current levels across the scenario period, sustained by steady levels of non-residential industrial, commercial and institutional (ICI) building construction and rising maintenance requirements.
- A prolonged new housing down-cycle is expected to resume after 2018 and extend through 2027, but renovation activity, the dominant source of residential construction demand, should rise steadily.
- Labour markets have returned to mostly balanced conditions, with some variation between selected trades in non-residential construction.
- Workforce renewal, rather than new demand, will drive construction human resources in Nova Scotia over the next 10 years as the industry struggles to replace an anticipated 8,200 workers lost to retirement.

BuildForce's LMI System

BuildForce Canada uses a scenario-based forecasting system to assess future construction labour requirements in the heavy industrial, residential, and non-residential construction markets. This labour market information (LMI) system tracks 34 trades and occupations. To further improve the robustness of the system, BuildForce consults with industry stakeholders, including owners, contractors, and labour groups, to validate the scenario assumptions and construction project lists, and seeks input from government on related analysis. The information is then distilled into labour market condition rankings to help industry employers with the management of their respective human resources.

NOVA SCOTIA CONSTRUCTION OUTLOOK

Steady levels of non-residential building investment, rising maintenance requirements, and modest growth in residential renovation activity are expected to sustain Nova Scotia's construction demands near current levels over the scenario period. Completion of current projects, including the Maritime Link transmission line and the Halifax Convention Centre, will contribute to a likely modest decline in overall construction employment in 2018. New residential construction activity, which was bolstered by a rise in housing starts in 2017, should begin declining due to lower demand related to decreased levels of in-migration to the province this year.

Over the long term, new housing construction will continue to trend lower in line with slowing population growth and household formations¹. Related employment requirements are expected to decline by 2,500 jobs as housing starts fall from 4,000 to 2,500 units over the decade. Renovation demand, which presently accounts for 40 percent of total construction employment in the province, is expected to rise steadily between 2018 and 2027, limiting overall residential-sector employment declines to 1,600 jobs – a drop of 9 percent from the 2017 starting point.

Non-residential construction has grown in recent years on the strength of investments made in major engineering, mining, and public infrastructure projects. During this period, institutional building activity declined. With many of these major projects completed in 2017, overall demand for non-residential construction should be lower in 2018, but return to near 2017 levels following a short reprieve.

Looking across all markets over the coming decade, construction employment is expected to decline by a modest 1,400 jobs, as lower residential requirements are expected to be offset by small gains in non-residential employment. A shift from residential to non-residential labour demands may present changing conditions for individual trades and occupations, creating potential mobility issues between construction sub-sectors for workers with transferable skills.

The province's older age demographic will present additional challenges, with the expected retirement of 8,200 workers and fewer available young people to replace them.

SECTOR INSIGHTS

The following sections provide sector-specific insights into the non-residential and residential labour markets. The 2018 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

The non-residential sector emerges as a stable source of construction employment in Nova Scotia over the coming decade. Industrial building and non-residential maintenance requirements are expected to see moderate growth, but overall total employment is expected to be mostly unchanged.

Figure 1 compares non-residential employment by sector for key reference points across the scenario period, including the start in 2018 and then at the end of the period in 2027.

Completion of the Maritime Link transmission line and various engineering and other infrastructure projects lowers related labour requirements in 2018. With the completion of the Halifax Convention Centre, commercial activity should recede in 2018 followed then by more moderate growth over the remainder of the scenario period. Rising manufacturing activity stemming from shipbuilding expansion is expected to support broader economic growth, though the spillover will be limited, raising industrial building activity and maintenance requirements only slightly.

A proposed granite quarry and other heavy industrial projects, as well as anticipated steady levels of highway, bridge, and other infrastructure work should maintain engineering requirements after 2018. Across the 10-year scenario, overall non-residential employment should remain mostly unchanged from the 2017 starting point.

Table 1 summarizes the percent change in employment by sector across two periods: the first captures the expected moderate rise over the next five years to 2022, and the second, the remainder of the period to 2027.

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

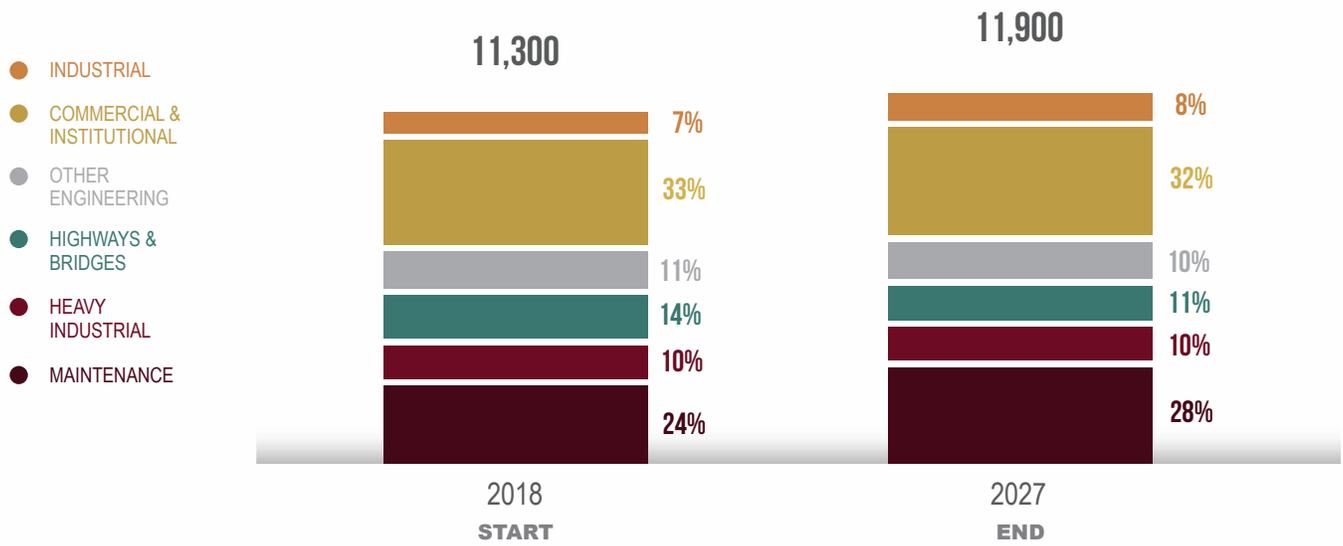
Table 1: Change in non-residential employment by sector, Nova Scotia

SECTOR		% CHANGE 2018–2022	% CHANGE 2023–2027
Total non-residential employment		-3%	5%
ICI	Industrial	27%	6%
	Commercial, institutional and government	-3%	2%
Engineering	Highways and bridges	-4%	-15%
	Heavy industrial	-27%	16%
	Other engineering	-8%	0%
Maintenance		5%	17%

Source: Statistics Canada, BuildForce Canada

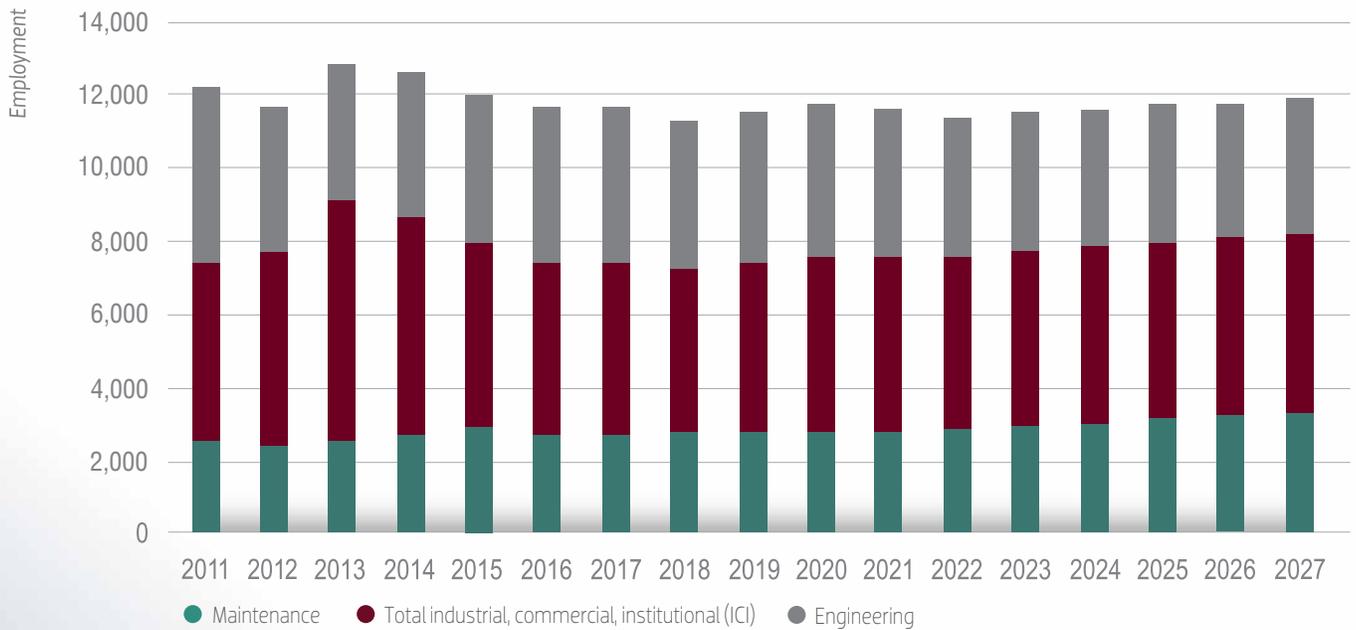
¹ **Household formation** refers to the change in the number of households (persons living under one roof or occupying a separate housing unit) from one year to the next. It is how population growth is transformed into demand for new housing.

Figure 1: Non-residential employment distribution by sector, Nova Scotia, 2018 and 2027



Source: Statistics Canada, BuildForce Canada

Figure 2: Non-residential construction employment growth outlook, Nova Scotia



Source: Statistics Canada, BuildForce Canada

THE AVAILABLE WORKFORCE

Nova Scotia has one of the oldest population age profiles in Canada. Population growth is expected to slow over the next decade, driven by negative natural population growth (births less deaths) and modest levels of in-migration to the province. This implies that the pool of local youth entering the workforce is declining as retirements are rising.

Population demographics are also expected to lower normal rates of unemployment, which will further reduce the pool of available labour to meet peak requirements. Meeting future demands will require planning and the recruitment of workers from outside the local non-residential construction market; however, this may be partially addressed by the divergent trends emerging between residential and non-residential demand, which should incentivize mobility between the two sectors.

Expected growth in the shipbuilding sector and the increased demand for skilled workers may also impact the availability of some construction trades such as boilermakers, welders, and other trades, if the shipbuilding sector extends their labour force recruitment efforts into the construction industry.

The BuildForce LMI system tracks supply and accounts for the change in the available labour force, including retirements, new entrants², and net in-mobility³. Just over 3,400 workers are likely to exit the non-residential workforce over the coming decade due to retirement. This exceeds the estimated 2,500 first-time new entrants expected to be drawn into the construction workforce from the local population aged 30 and younger.

Table 2 provides a summary of changes in the non-residential workforce in 2017, the five-year period between 2018 and 2022, 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 Nova Scotia 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 Nova Scotia, non-residential rankings are reported for 21 trades and occupations.

Table 3 provides non-residential rankings for Nova Scotia showing balanced labour markets, signalled by a rank of 3, across the entire scenario period. The timing of a project requirements tightened labour market conditions for selected trades and occupations in 2017. Completion of the Maritime Link transmission line and other heavy industrial projects, alongside slowing commercial work, is expected to weaken markets in 2018.

Table 2: Change in the non-residential workforce, Nova Scotia

NON-RESIDENTIAL WORKFORCE ADJUSTMENT		2017	5 years 2018–2022	10 years 2018–2027
	Employment	0	-300	200
Demand	Labour force change	-400	-600	-300
	Retirements	400	1,800	3,400
Supply	New entrants	300	1,200	2,500
	Net mobility	-300	-100	700
Excess supply/(demand)		(400)	(300)	(600)

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 can 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

- Completion of the Maritime Link transmission line, Halifax Convention Centre, and various engineering construction projects is expected to lower related labour requirements in 2018.

- Anticipated industrial work stands out as a potential source of near-term growth, as it follows increases in the manufacturing sector, driven in part by increased shipbuilding activity.
- A new granite quarry, other heavy industrial projects, and anticipated steady levels of highway, bridge, and other infrastructure work should sustain engineering requirements after 2018. Overall employment is mostly unchanged from 2017 levels at the end of the scenario period in 2027.

MARKET RANKINGS

1

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

2

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

3

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

4

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

5

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

Table 3: Non-residential market rankings, Nova Scotia

TRADES AND OCCUPATIONS – NON-RESIDENTIAL	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Boilermakers	3	3	3	3	3	3	3	3	3	3	3
Bricklayers	3	3	3	3	3	3	3	3	3	3	3
Carpenters	3	3	3	3	3	3	3	3	3	3	3
Construction managers	3	2	3	3	3	3	3	3	3	3	3
Construction millwrights and industrial mechanics	4	3	3	3	3	2	3	3	3	3	3
Contractors and supervisors	3	3	3	3	3	3	3	3	3	3	3
Crane operators	2	2	3	3	3	3	3	3	3	3	3
Electricians	3	3	3	3	3	3	3	3	3	3	3
Heavy equipment operators (except crane)	3	2	3	3	3	3	3	3	3	3	3
Heavy-duty equipment mechanics	3	3	3	3	3	3	3	3	3	3	3
Insulators	3	3	3	3	3	3	3	3	3	3	3
Ironworkers and structural metal fabricators	3	2	3	3	3	2	3	3	3	3	3
Painters and decorators (except interior decorators)	3	2	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
Plumbers	3	3	3	3	3	3	3	3	3	3	3
Refrigeration and air conditioning mechanics	3	3	3	3	3	3	3	3	3	3	3
Sheet metal workers	3	2	3	3	3	3	3	3	3	3	3
Steamfitters, pipefitters and sprinkler system installers	4	2	3	3	3	2	3	3	3	3	3
Trades helpers and labourers	3	3	3	3	3	3	3	3	3	3	3
Truck drivers	3	3	3	3	3	3	3	3	3	2	3
Welders and related machine operators	3	3	3	3	3	3	3	3	3	3	3

Source: BuildForce Canada

RESIDENTIAL SECTOR

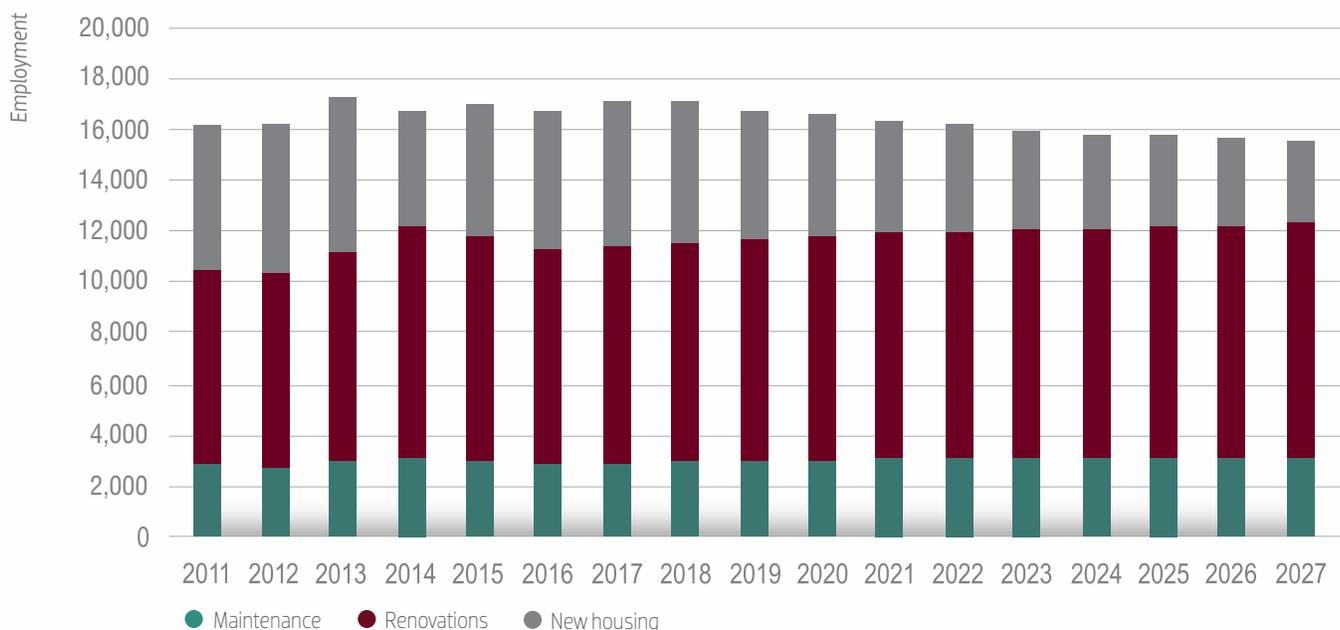
The current, modest housing up-cycle peaked in 2017, but is expected to slow across the decade in line with an expected weakening of population growth and household formation.

Housing starts, which had been cycling down over the last several years, rose to 4,200 units in 2017 propelled by strong growth in the Halifax area. Looking forward, new housing starts are expected to recede, falling steadily to around 2,500 units per year by the end of the scenario period in 2027. Renovation and maintenance

activity, which accounted for two thirds (66 percent) of residential employment in 2017, is expected to rise steadily throughout the decade adding an anticipated 800 related jobs.

At the end of the scenario period, residential employment is projected to decline by as much as 9 percent below 2017 levels, with renovation and maintenance activity accounting for approximately eight in 10 residential jobs.

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

Figure 3: Residential construction employment growth outlook, Nova Scotia

Source: Statistics Canada, BuildForce Canada

THE AVAILABLE WORKFORCE

Replacement demands (retirements and mortality) should sustain positive hiring over the next decade, despite modest declines in employment requirements. The industry will be challenged by an aging workforce and the anticipated exit of 4,800 retiring workers. Consequently, the industry must continue to attract and train new workers to sustain its skilled workforce over the long

term. Accomplishing this task during a period of declining demand and falling population growth rates may be more difficult than in the past.

Table 4 provides a summary of the estimated changes in the residential workforce in 2017, the five-year period between 2018 and 2022, and across the full 2018–2027 scenario period.

Table 4: Changes in the residential workforce, Nova Scotia

RESIDENTIAL WORKFORCE ADJUSTMENT		2017	5 years 2018–2022	10 years 2018–2027
	Employment	500	-1,000	-1,600
Demand	Labour force change	-100	-1,400	-2,500
	Retirements	500	2,500	4,800
Supply	New entrants	400	1,700	3,300
	Net mobility	0	-700	-1,100
Excess supply/(demand)		(500)	(500)	(900)

Source: BuildForce Canada

RESIDENTIAL RANKINGS, RISKS AND MOBILITY

Residential labour markets strengthened in 2017 due to modest increases in both new housing and renovation activity, as shown in Table 5. Moving forward, however, this activity is expected to slow across the scenario period, returning labour markets mostly to balance by 2027.

Weaker labour market conditions are anticipated to emerge for trades and occupations concentrated in new housing construction as early as 2019; however, strengthening renovation demands should help return industry labour markets to balance over the latter half of the scenario period. Over the 2018–2027 scenario period, older age demographics and resulting retirements should

contribute to lower natural rates of unemployment and help to maintain balanced market conditions, but at lower levels of overall employment.

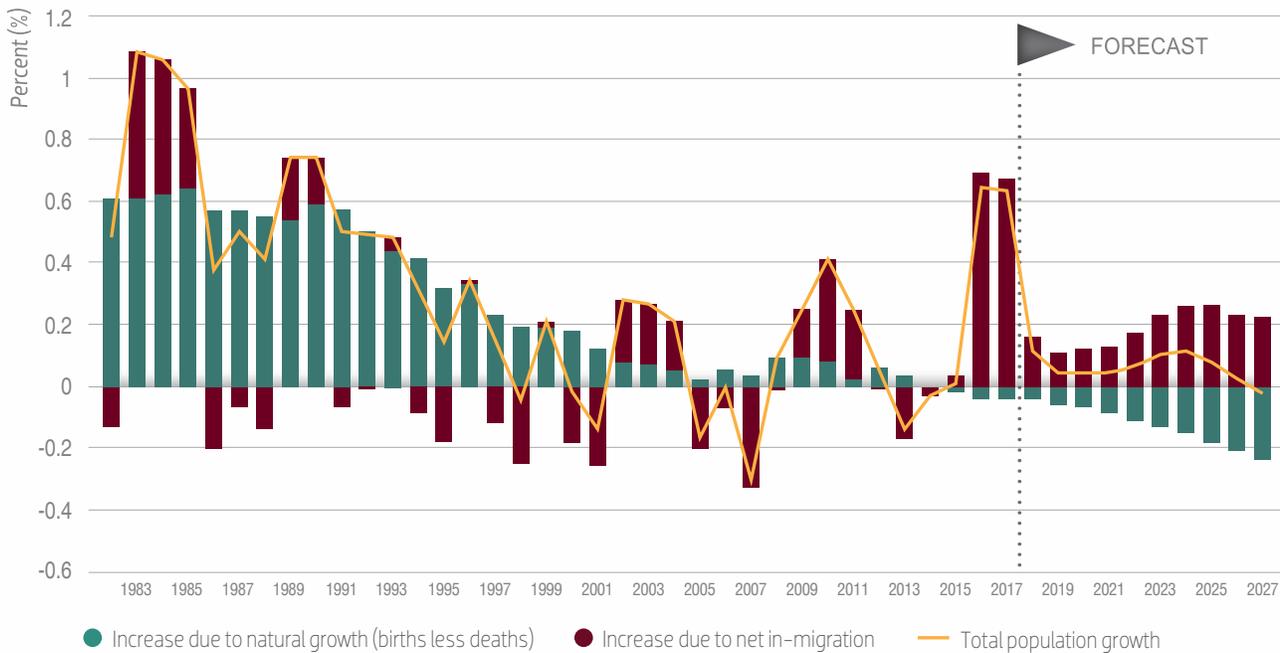
The rankings for some trades working in the residential sector are suppressed due to the small size of the workforce (<100 workers) and limited statistical reliability when assessing labour market conditions at the sector level. Trades may also be excluded because they typically do not work in the sector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

Table 5: Residential market rankings, Nova Scotia

TRADES AND OCCUPATIONS – RESIDENTIAL	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Bricklayers	3	3	3	3	3	3	3	3	3	3	3
Carpenters	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	4	3	2	3	3	3	3	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
Heavy equipment operators (except crane)	3	3	3	3	3	3	3	3	3	3	3
Home building and renovation managers	3	3	3	3	3	3	3	3	3	3	4
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
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	3	3	3	3	3	3
Trades helpers and labourers	3	3	3	3	3	3	3	3	3	3	3
Truck drivers	3	3	3	3	3	3	3	3	3	3	3

Source: BuildForce Canada

Figure 4: Sources of population growth (%), Nova Scotia



Source: Statistics Canada, BuildForce Canada (2018–2027)

GRAPPLING WITH A RETIRING WORKFORCE

A large part of Nova Scotia’s construction labour force is on the verge of retirement. Sustaining the province’s construction workforce over the next decade will require active recruitment and retention strategies to maintain operational effectiveness. Anticipated retirements are expected to reduce the workforce by an estimated 8,200 workers over the next 10 years, which accounts for approximately 25 percent of the current labour force. Recruiting, training, and retaining new workers must remain a high industry priority to prevent a significant skills vacuum from emerging.

Over the next decade, population aging is anticipated to lead to slower population growth and limit labour force growth. Figure 4 shows the components of population growth for the province. In Nova Scotia, as well as New Brunswick and Newfoundland and Labrador, the mortality rate has already outpaced the number of births, leading to a negative natural rate of population growth. Over the next 10 years, this gap is anticipated to widen, leaving net in-migration as the primary factor contributing to future provincial population growth.

Looking forward, the net in-migration level is expected to recede as international migration returns to more normal levels following strong growth in 2016 and 2017. Expected shipbuilding and spin-off economic activity should improve the retention of the local population after 2020; however, net in-migration will not be sufficient to fully offset the effects of negative natural population growth in the long-run, leading to a return to declining provincial population numbers by 2027.

Slower population growth has the potential to tighten construction labour markets in Nova Scotia, despite a weaker employment outlook.

A key driver of employment requirements over the next 10 years will be the aging demographics in Nova Scotia. Over the past decade, the province has seen the share of the population in the older age bracket (65 years and over) increase significantly, while the share of the population in their prime working years (25-54 years old) has been declining. Table 6 shows Nova Scotia’s current and future population age distribution.

Table 6: Population age distribution (%), Nova Scotia

AGES	2017	2027
0–14	14.1	14.0
15–24	11.6	9.6
25–54	38.9	37.0
55–64	15.5	13.5
65+	19.9	25.9

Source: Statistics Canada, BuildForce Canada

Over the next 10 years, the share of the population in the older age group (65 years and over) is expected to increase substantially, and at the same time, the share of the population in their prime working age (25-54 years old) is expected to continue declining. Additionally, the share of the population that is potentially available to enter the workforce (15-24 years old) is expected to decline.

As a considerable share of the population moves into the older age bracket, the labour force participation rate (percent of the population 15 years and older in the labour force) is expected to fall steadily. Replenishing a retiring workforce may become increasingly difficult, as all industries will be drawing new recruits from an ever smaller pool of youth.

Based on historical trends, Nova Scotia's construction industry is expected to draw an estimated 5,800 first-time new entrants from the local population aged 30 and younger over the next decade to 2027. In the scenario period, the retiring workforce will exceed the traditional levels of youth recruitment. This will require the industry to increase its recruitment of workers from other industries, outside the province, or from new segments of the population that have historically been underrepresented in the construction workforce.

Increasing construction's share of new entrants will require improving initiatives to engage underrepresented groups within Nova Scotia's construction industry, including Indigenous people and women.

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 7.5 percent of all Indigenous people in Canada reside in the Atlantic provinces and they currently account for about 2.9 percent of the construction workforce in the region.

Women continue to be underrepresented in Nova Scotia's construction industry despite recent improvements. Women presently account for approximately 10 percent of the provincial industry's workforce, of which about 33 percent work directly on construction projects, while the remaining 67 percent work primarily in administrative and management-related occupations. This translates into an on-site participate rate of only 3.8 percent working in direct trades and occupations.

Nova Scotia's focus on engaging and training youth in construction trades and occupations has led to increasing interest by women. This is evident from a 160 percent increase in apprenticeship enrollment in construction trades and occupations between 2002 and 2015. During the same period, the number of women employed in Nova Scotia's construction industry grew by 71 percent, and the share of women grew from approximately 8.3 to 10.7 percent of total construction employment. Subsequently, Nova Scotia has done relatively well at engaging women in the industry compared to other Atlantic provinces, but it does lag western and central provinces.

Growth in training and employment of women in Nova Scotia's construction industry has also increased the share of women employed in direct trades and occupations. Figure 5 helps illustrate this point. Since the peak in 2014, however, female representation has receded to below 4 percent, driven by weakening activity in commercial and institutional building.

Across the 2018–2027 scenario period, women's share of employment in direct trades and occupations is expected to remain stable. Moderate growth in commercial and institutional building employment is anticipated to be offset by moderate declines in residential activity (sectors where women tend to choose trades and occupations more prominently), leaving female employment mostly unchanged across the scenario period.

Table 7 shows the anticipated employment in direct trades and occupations by gender in Nova Scotia.

10-YEAR AVERAGE

0.1%



POPULATION GROWTH

8,700



BIRTHS

10,000



DEATHS

1,800



NET IN-MIGRATION

BY 2027

43



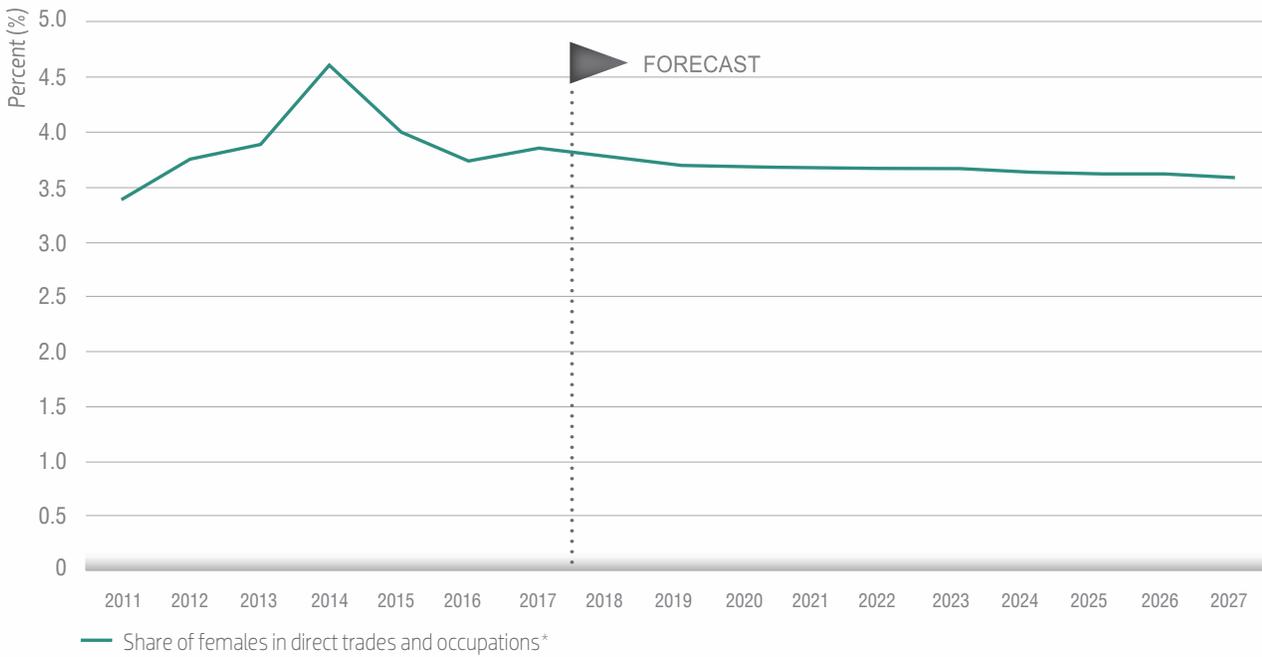
AVERAGE AGE OF CONSTRUCTION WORKFORCE

24.7%



PERCENT OF CURRENT LABOUR FORCE LOST TO RETIREMENT

Figure 5: Share of women in direct trades and occupations, Nova Scotia



* **Direct trades and occupations** refers to the 34 trades and occupations tracked by BuildForce Canada, which excludes administrative-type occupations.

Source: BuildForce Canada calculations based on Statistics Canada’s Labour Force Survey (LFS) and 2011 National Household Survey (NHS)

Table 7: Construction employment by gender, Nova Scotia (total direct trades and occupations)

	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
	27,300	26,900	26,800	26,800	26,500	26,100	26,000	26,000	26,100	26,000	26,000
	1,100	1,100	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000

Source: BuildForce Canada calculations based on Statistics Canada’s Labour Force Survey (LFS) and 2011 National Household Survey (NHS)

CONCLUSIONS AND IMPLICATIONS

The 2018–2027 *Construction and Maintenance Looking Forward* scenario for Nova Scotia anticipates employment requirements to be sustained near current levels over the next decade, but residential and non-residential markets diverge across the scenario period.

Modest growth in non-residential building construction and rising maintenance requirements should emerge as the primary sources of growth, while workforce retirements will continue to present the industry with human resource challenges. The province’s older

population demographics makes recruiting young workers more challenging, requiring the industry to place greater emphasis on mobility, in-migration, and international immigration across the decade to maintain the province’s construction workforce.

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 economic growth and the timing of major projects. Any changes to these assumptions presents risks, and potentially alters anticipated market conditions.

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