



**CONSTRUCTION & MAINTENANCE LOOKING FORWARD**

# SASKATCHEWAN

## HIGHLIGHTS 2018-2027

The pace slows ahead of new opportunities

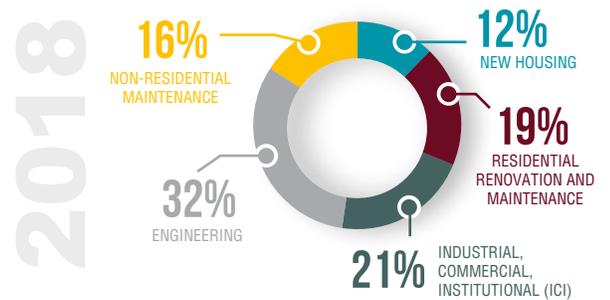
The Saskatchewan construction industry has seen significant expansion over the past decade, with overall employment levels more than doubling between 2002 and the 2014 peak. The collapse in oil and gas and commodity prices led to declines to 2016, but employment levels stabilized in 2017.

In the 34 direct trades and occupations monitored by BuildForce Canada, total industry employment is now 44,600 jobs. Over the coming decade, 9,300 workers are expected to retire, and based on historical trends, Saskatchewan's construction industry should be able to draw 10,100 of the required replacement workers from an anticipated pool of locally available new entrant workers. Overall employment demands are expected to only increase by 1,300 jobs over the decade, leaving the industry in Saskatchewan in the unique position of meeting future employment needs almost exclusively from available provincial labour.

This scenario is based on known scheduled and identified major projects and overall construction trends within the province. Looking out over the next 10 years, uncertainty surrounding commodity prices continues to impede near-term major project investment, leading engineering construction employment lower through 2021. New planned mining projects are anticipated to raise demand between 2022 and 2024, but much depends on the timing of proposed major projects. As new housing demand recovers later in the period, total construction employment is expected to return to near pre-downturn levels by 2025.

Sustaining the workforce to meet planned and other potential major project demands is predicated on industry's ability to continue attracting and training workers during a period of lower growth.

### DISTRIBUTION OF CONSTRUCTION EMPLOYMENT IN 2018, SASKATCHEWAN



### 10-YEAR WORKFORCE OUTLOOK FOR SASKATCHEWAN

2027



**JOB** AVERAGE UNEMPLOYMENT RATE **7.1%**

### HIGHLIGHTS

- Mining project demands peaked early in 2017, while strengthening institutional and industrial building construction bolstered overall non-residential construction employment following two years of declines.
- Non-residential engineering construction is a dominant source of construction employment, with three in 10 construction workers earning a living in the sector, but is expected to fall to less than one quarter by 2027.
- Overall construction employment declines by a further 2,200 jobs over the next four years, before a strong residential recovery and planned new resource development and utility projects require the addition of 3,500 jobs between 2022 and 2027; expected gains are concentrated between 2022 and 2024.

### BuildForce's LMI System

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

## SASKATCHEWAN CONSTRUCTION OUTLOOK

The pace of construction declines slowed in 2017, buoyed by rising industrial building demands and a modest uptick in housing starts. Modest declines are expected in 2018 and 2019 due to continued slowing in new housing construction and major mining project completions. Industrial building construction and rising residential renovation work continue to provide stable employment opportunities over the near term, while planned utility and mining investments and a housing up-cycle are expected to strengthen construction demands between 2021 and 2024.

New housing construction has stabilized, but housing starts through 2020 are expected to remain at half the record levels reached in 2012. Anticipated increased levels of migration and household formations<sup>1</sup> should spur a moderate residential up-cycle after 2021, while renovation demands continue to rise, restoring overall residential employment to previous high levels by 2025. Across the scenario period, residential employment is expected to increase by 26 percent, or by nearly 3,600 jobs.

Non-residential employment is expected to recede over the near term, as further major project completions coincide with weakness in commercial and institutional building demands. Modest growth in institutional and commercial building construction resumes after 2021, contributing to steady growth in industrial, commercial, and institutional (ICI) building demands over the latter half of the scenario period. Engineering-related construction requirements continue on a downward trend from the peak as current major mining, highway and bridge projects are completed. The planned

starts of new major mining and utility projects, however, should drive demand requirements higher, tightening labour markets for numerous trades between 2022 and 2024.

The impact of commodity price declines hit earlier in Saskatchewan compared to most other provinces, but overall employment demands are expected to recover and surpass current levels of employment by 2023. As engineering construction investment cycles across the period depending on project schedules, growth in commercial and institutional construction to meet the needs of a growing population should create new job opportunities. The industry must also address an aging workforce, where an estimated 9,300 workers are expected to retire over the decade.

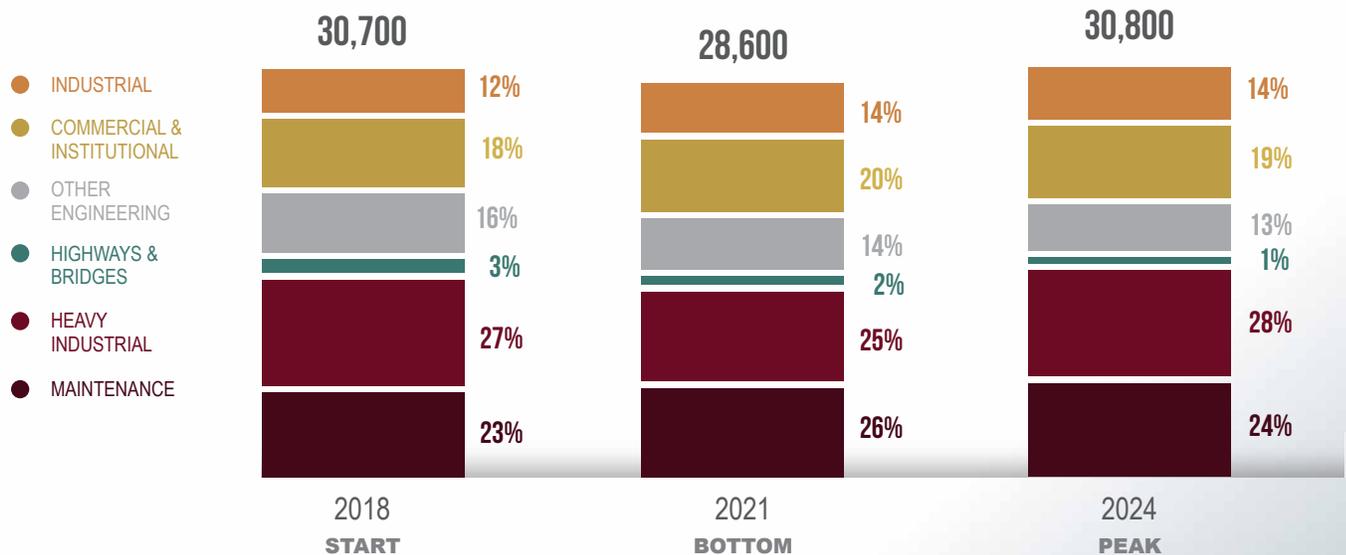
## SECTOR INSIGHTS

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

Non-residential construction employment demands are mostly unchanged in 2018, as increased industrial building and pipeline construction demands offset declining institutional and mining project requirements. Incremental declines follow as current

**Figure 1: Non-residential employment distribution by sector, Saskatchewan, 2018, 2021, and 2024**



Source: Statistics Canada, BuildForce Canada

<sup>1</sup> 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.

projects continue to wind down between 2019 and 2021, before new planned projects are expected to start. Figure 1 tracks the change in employment by sector for key reference points across the scenario period, including the start in 2018, the expected bottom in 2021, and in 2024 as proposed new projects are expected to peak.

Engineering construction employment, which represented about half of the province’s total non-residential employment in 2017, should fluctuate throughout the 2018–2027 scenario period depending on the timing of planned major project starts, but is expected to decline by 4,200 jobs by the end of the scenario. Estimates are that employment will be 29 percent lower in 2027 compared to the 2017 starting point.

Commercial and institutional building construction is expected to cycle down through 2019, but overall ICI building activity should be sustained over the near term, driven by rising industrial investment. A recovery in commercial and institutional investment is also anticipated after 2019, contributing to steady growth in ICI building construction across the remainder of the scenario period.

Overall non-residential employment is expected to recede by 7 percent, or 2,300 jobs over the scenario period, but ICI building construction and maintenance should play a more prominent role as new engineering construction slows. Despite the modest decline, employment is expected to remain at relatively high levels, and age-related exits should maintain pressure on the industry to replace retiring workers.

Table 1 summarizes the percent change in employment by sector across two periods: the first captures the near-term declines to 2022, and the second, across the remainder of the scenario period to 2027. The latter period conceals a 14 percent rise, followed by a 20 percent decline in engineering employment, following the timing and peak of new proposed major projects.

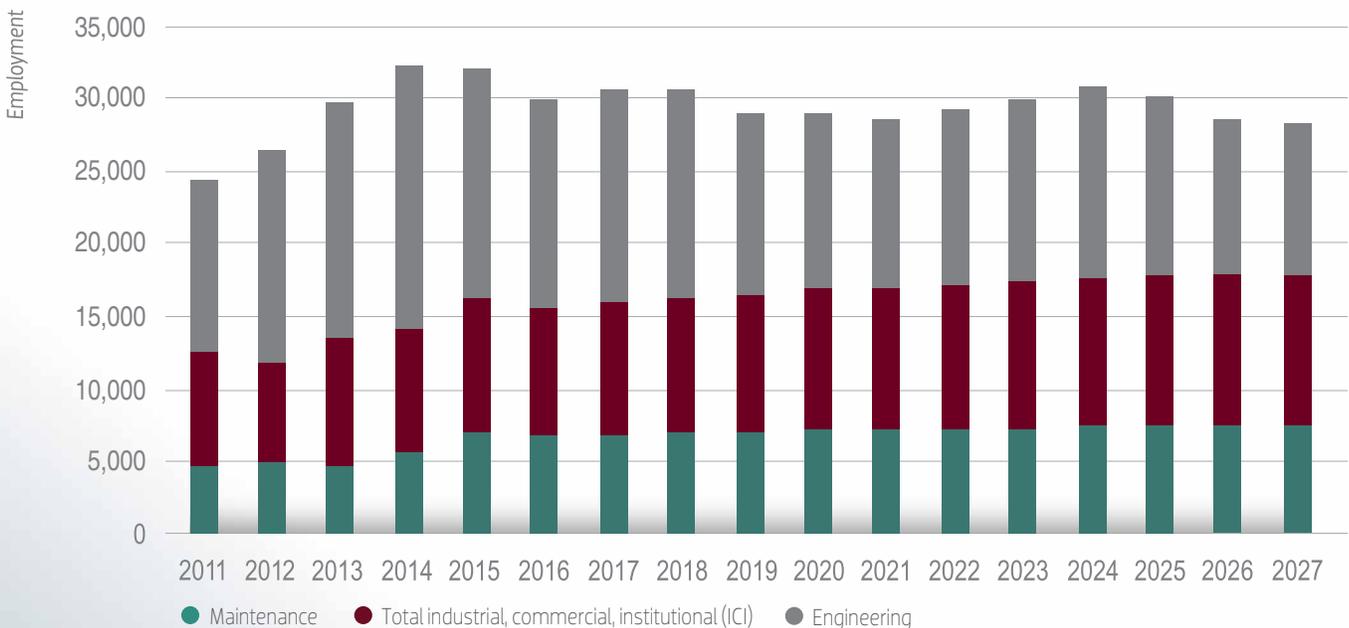
Figure 2 shows the employment trends by sector for non-residential construction.

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

SECTOR		% CHANGE 2018–2022	% CHANGE 2023–2027
Total non-residential employment		-5%	-1%
ICI	Industrial	30%	7%
	Commercial, institutional and government	-3%	7%
Engineering	Highways and bridges	-58%	4%
	Heavy industrial	-17%	-14%
	Other engineering	-12%	-2%
Maintenance		6%	2%

Source: Statistics Canada, BuildForce Canada

**Figure 2: Non-residential construction employment growth outlook, Saskatchewan**



Source: Statistics Canada, BuildForce Canada

<sup>2</sup> **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.

<sup>3</sup> **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

- Non-residential markets are expected to move toward balanced conditions in 2018, with increased industrial building activity maintaining employment near 2017 levels.
- Demands related to mining projects ebb over the first half of the scenario period through 2019, but then rise again between 2022 and 2024 following the timing of proposed new mining projects.
- Overall non-residential employment is expected to recede by 7 percent, or 2,300 jobs over the scenario period.

## THE AVAILABLE WORKFORCE

Saskatchewan's non-residential workforce adjusts to lower resource-sector investment demands following an extraordinary period of expansion, which drew down unemployment rates well below historical norms and attracted workers from out of the province. As non-residential construction investment slows, workers are expected to leave between 2018 and 2021, but the industry will need to attract many of them back by 2022 to meet the expected increase in construction requirements as new proposed major projects start and rise to peak in 2024.

The BuildForce LMI system tracks supply and accounts for the change in the available labour force, including retirements, new entrants<sup>2</sup>, and net in-mobility<sup>3</sup>. An estimated 5,900 workers are anticipated to exit the province's non-residential workforce over the coming decade due to retirements, which are anticipated to be offset by an estimated 7,000 first-time new entrants to 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 Saskatchewan 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 Saskatchewan, non-residential rankings are reported for 28 trades and occupations.

**Table 2: Change in the non-residential workforce, Saskatchewan**

NON-RESIDENTIAL WORKFORCE ADJUSTMENT		2017	5 years 2018–2022	10 years 2018–2027
	Employment	700	-1,400	-2,300
Demand	Labour force change	-200	-1,500	-2,600
	Retirements	600	2,900	5,900
Supply	New entrants	700	3,400	7,000
	Net mobility	-300	-2,100	-3,700
Excess supply/(demand)		(900)	(200)	(300)

Source: BuildForce Canada

Table 3 provides non-residential rankings for Saskatchewan.

Labour market conditions were mixed in 2017. The timing of various major projects raised demands for some trades while lowering requirements for others. Declines in ICI building construction requirements contributed to weaker conditions for many trades in 2017 and should continue in 2018.

The next step down in major project requirements is expected to weaken markets further in 2019. The downward trend is cushioned by rising ICI building construction employment and the potential for new large mining projects, but much depends on project schedules. Under the current scenario, labour market conditions begin to tighten in 2021 and then start to weaken by 2025 as projects wind down. By the end of the scenario period, overall conditions should return to balance. The younger age demographics are expected to help facilitate recruitment to meet replacement demand requirements.

## 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, Saskatchewan**

<b>TRADES AND OCCUPATIONS – NON-RESIDENTIAL</b>	<b>2017</b>	<b>2018</b>	<b>2019</b>	<b>2020</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>	<b>2025</b>	<b>2026</b>	<b>2027</b>
Boilermakers	4	3	3	3	3	3	3	3	3	2	3
Bricklayers	3	3	3	3	3	3	3	3	3	3	3
Carpenters	3	3	2	3	3	3	3	4	3	2	3
Concrete finishers	2	3	2	3	3	4	3	4	2	2	3
Construction estimators	3	3	3	3	3	4	2	3	2	2	3
Construction managers	2	3	2	3	3	3	3	3	2	2	3
Construction millwrights and industrial mechanics	2	2	3	3	3	4	2	4	2	2	3
Contractors and supervisors	4	3	2	3	3	3	4	3	3	2	3
Crane operators	3	3	2	3	2	3	3	3	3	3	3
Electrical power line and cable workers	2	3	2	3	3	3	3	4	2	2	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
Glaziers	3	3	3	3	3	3	3	3	3	3	3
Heavy equipment operators (except crane)	2	3	2	2	2	3	3	4	2	2	3
Heavy-duty equipment mechanics	2	3	2	2	3	3	3	3	2	2	3
Insulators	3	3	3	3	3	3	3	3	3	3	3
Ironworkers and structural metal fabricators	2	3	2	3	3	4	3	4	3	2	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	3	2	3	3	3	3	3	3	3
Plumbers	3	3	2	3	3	3	3	3	3	3	3
Refrigeration and air conditioning mechanics	3	3	3	3	3	3	3	3	3	3	3
Residential and commercial installers and servicers	2	3	3	3	3	3	3	3	3	3	3
Roofers and shinglers	2	3	2	3	3	3	3	3	3	2	3
Sheet metal workers	3	3	2	3	3	3	3	3	3	2	3
Steamfitters, pipefitters and sprinkler system installers	3	2	2	3	4	3	4	2	2	2	3
Trades helpers and labourers	3	3	2	3	2	3	3	3	3	3	3
Truck drivers	3	3	2	2	3	3	3	3	3	2	3
Welders and related machine operators	3	3	2	3	2	3	3	3	3	3	3

Source: BuildForce Canada

## RESIDENTIAL SECTOR

Housing starts edged up in 2017 following a 50 percent decline since the 2012 peak. Overall residential employment has contracted by 20 percent since 2014, contributing to higher levels of unemployment. New housing construction is expected to stabilize between 2018 and 2022, sustained by positive natural population growth (births less deaths) and slowing out-migration. An anticipated up-cycle in new housing construction is expected to take hold by 2023, driven by strengthening economic growth.

Steady growth in residential renovation activity, alongside rising new housing construction, should contribute to an expected 26 percent rise in new residential jobs concentrated over the latter half of the scenario period.

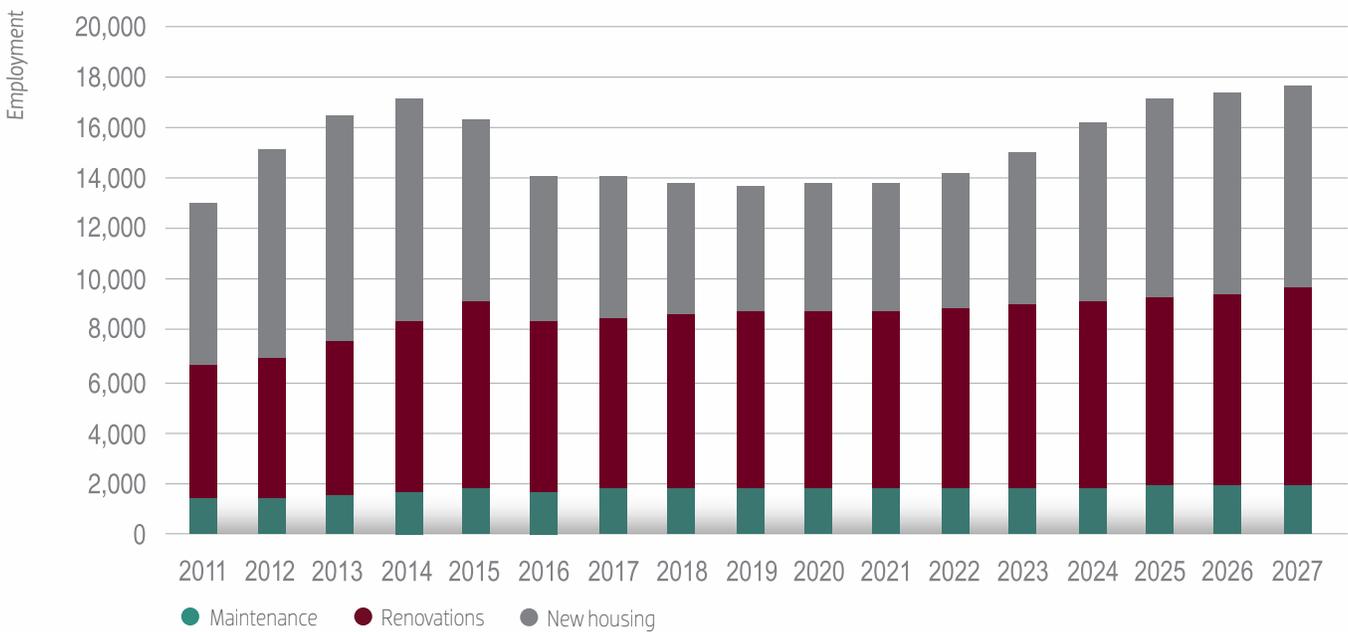
Figure 3 shows the employment trends by sector for residential construction.

## THE AVAILABLE WORKFORCE

Since early 2015, the prolonged slowdown in new housing has contributed to higher levels of unemployment and weak labour market conditions. The small increase in housing starts in 2017 suggests the bottom has been reached, and unemployment will continue to decline as labour markets adjust.

Despite expected slower long-term growth, industry must still contend with an aging workforce and the exit of an estimated 3,500 workers over the coming decade due to expected

**Figure 3: Residential construction employment growth outlook, Saskatchewan**



Source: Statistics Canada, BuildForce Canada

## RESIDENTIAL HIGHLIGHTS

- New housing activity is expected to remain stable in 2018 and 2019, before rising in 2020. An anticipated up-cycle adds 3,900 new residential jobs between 2020 and 2027.
- Housing starts remain near 5,000 units over the near term before rising to 8,000 units by 2025.
- Renovation work remains mostly unchanged across the scenario period, but as new housing slows, renovation and maintenance work may account for more than half of total residential employment.

**Table 4: Changes in the residential workforce, Saskatchewan**

RESIDENTIAL WORKFORCE ADJUSTMENT		2017	5 years 2018–2022	10 years 2018–2027
	Employment	-100	200	3,600
Demand	Labour force change	-400	100	3,700
	Retirements	300	1,700	3,500
Supply	New entrants	300	1,400	3,100
	Net mobility	-300	400	4,000
Excess supply/(demand)		(300)	(100)	100

Source: BuildForce Canada

retirements. Attracting an estimated 3,100 first-time new entrants to the construction workforce from the local population aged 30 and younger may prove challenging during periods of slower growth.

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.

#### RESIDENTIAL RANKINGS, RISKS AND MOBILITY

Table 5 reflects weak labour market conditions for most trades and occupations in 2017 following consecutive years of declines in new housing construction. Market conditions should return to balance in 2018, but tighten between 2023 and 2025 for most trades and occupations as new housing activity increases.

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 Saskatchewan, residential rankings are reported for 16 trades and occupations.

## PLANNING AROUND SLOWER GROWTH

Saskatchewan's construction activity is expected to plateau at well above historical levels, requiring active recruiting of new workers as the industry contends with replacing a retiring workforce. Retirements are expected to draw an estimated 9,300 workers from the province's construction industry over the next 10 years – 19 percent of the current labour force. Such a draw from the labour force may create a significant skills vacuum that requires proactive planning.

Population growth in the province is anticipated to slow compared to the previous decade, limiting labour force growth. Figure 4 shows the components of population growth for Saskatchewan. Although the province enjoys a relatively young population, the gap between birth and death rates is expected to narrow, driving down the rate of natural population growth (births less deaths). Net in-migration, which fuelled Saskatchewan's population growth over the past decade, is anticipated to weaken over the first five years of the scenario period, as weaker economic growth is expected to drive some local workers to potentially leave the province in search of work opportunities. Over the long run, net in-migration is expected to grow, driven primarily by international migration.

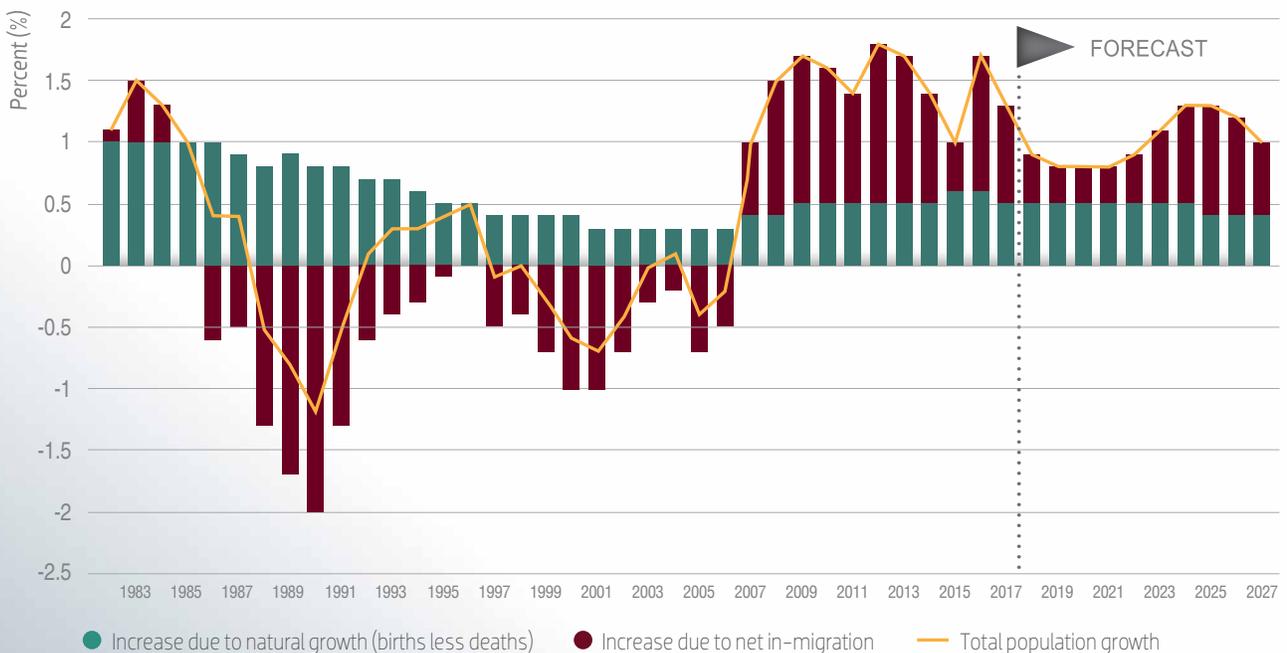
Strong net in-migration into Saskatchewan during the resource boom has left the province with one of the youngest populations in Canada, as migrants tend to be younger. As a result, the proportion of the population in retirement age (65 years and older) and prime working age (25 to 54 years old) has remained relatively stable over the past decade.

**Table 5: Residential market rankings, Saskatchewan**

TRADES AND OCCUPATIONS – RESIDENTIAL	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
Bricklayers	2	3	3	3	3	3	3	4	4	3	3
Carpenters	2	3	3	3	3	3	4	4	4	3	3
Construction managers	2	2	2	3	3	3	4	4	4	3	3
Contractors and supervisors	3	3	3	3	3	3	3	4	3	3	3
Electricians	2	3	3	3	3	3	3	4	4	3	3
Floor covering installers	2	3	3	3	3	3	3	3	3	3	3
Heavy equipment operators (except crane)	2	3	3	3	3	3	3	4	4	3	3
Home building and renovation managers	3	3	3	3	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	2	3	3	3	3	3	3	4	4	3	3
Plumbers	2	2	3	3	3	3	3	4	3	3	3
Residential and commercial installers and servicers	2	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	2	3	3	3	3	3	4	4	4	3	3
Trades helpers and labourers	3	3	3	3	3	3	4	4	4	3	3
Truck drivers	3	3	3	3	3	3	4	4	4	3	3

Source: BuildForce Canada

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



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

**Table 6: Population age distribution (%), Saskatchewan**

AGES	2017	2027
0–14	19.4	19.4
15–24	12.7	12.1
25–54	40.1	39.8
55–64	12.8	10.5
65+	15.0	18.2

Source: Statistics Canada, BuildForce Canada

Across the 2018–2027 scenario period, this trend is not expected to persist, with the share of the population in retirement age increasing and the share of the population in prime working age declining (see Table 6). Simultaneously, the proportion of the population that is potentially available to enter the workforce (15 to 24 years old) is mostly unchanged.

Population aging implies increased competition among Saskatchewan’s industries, as a relatively smaller pool of youth is expected to be available over the coming decade. Attracting youth into the industry may become increasingly difficult during a period of slower growth in construction.

Based on historical trends, the Saskatchewan construction industry is expected to draw an estimated 10,100 first-time new entrants from the local population aged 30 and younger over the next decade to 2027. The number of new entrants is estimated to offset workers expected to retire. The industry, however, will be in competition with other industries facing similar age demographics, and should increase initiatives to engage groups underrepresented in the current construction workforce, such as Indigenous people and women, when targeting new entrants.

Canada’s Indigenous communities have the country’s highest rate of population growth and a higher propensity to choose construction as their career choice. An estimated 9 percent of all Indigenous people in Canada currently reside in Saskatchewan and they account for about 7 percent of the local construction workforce.

Across the scenario period, Saskatchewan’s female population is expected to grow faster than their male counterparts. The province’s construction workforce is made up of approximately 10 percent women, of which about 37 percent work directly on construction projects, while the remaining 63 percent work primarily in administrative and management-related occupations in the construction industry. This translates into women representing just over 4 percent of the province’s direct trades and occupations workforce.

Saskatchewan has been relatively successful at attracting women to work in direct trades and occupations. Nationally, only 25 percent of women work in direct trades and occupations, whereas in Saskatchewan, the percentage is nearly 40 percent.

Figure 5 illustrates the female share of employment in direct trades and occupations in Saskatchewan. Women’s representation in the construction industry increased over the recent past, driven by rapid growth in construction activity, which led to rising wages and positive job prospects. The collapse of commodity and oil and gas prices led to a slowdown in construction activity, discouraging women from construction and bringing the female share of employment down to 4 percent from a peak of 6 percent in 2013.

Across the 2018–2027 scenario period, Saskatchewan’s construction activity is assumed to experience slower growth. Consequently, female participation in direct trades and occupations is expected to remain relatively stable at around 4 percent under current recruitment patterns. Given the low rates of female employment in the industry, increased promotional and recruitment efforts could help the industry overcome its expected future labour challenges.

Table 7 shows construction employment in direct trades and occupations by gender for Saskatchewan.

**10-YEAR AVERAGE**

1%



POPULATION GROWTH

15,800



BIRTHS

10,000



DEATHS

6,700



NET IN-MIGRATION

**BY 2027**

40



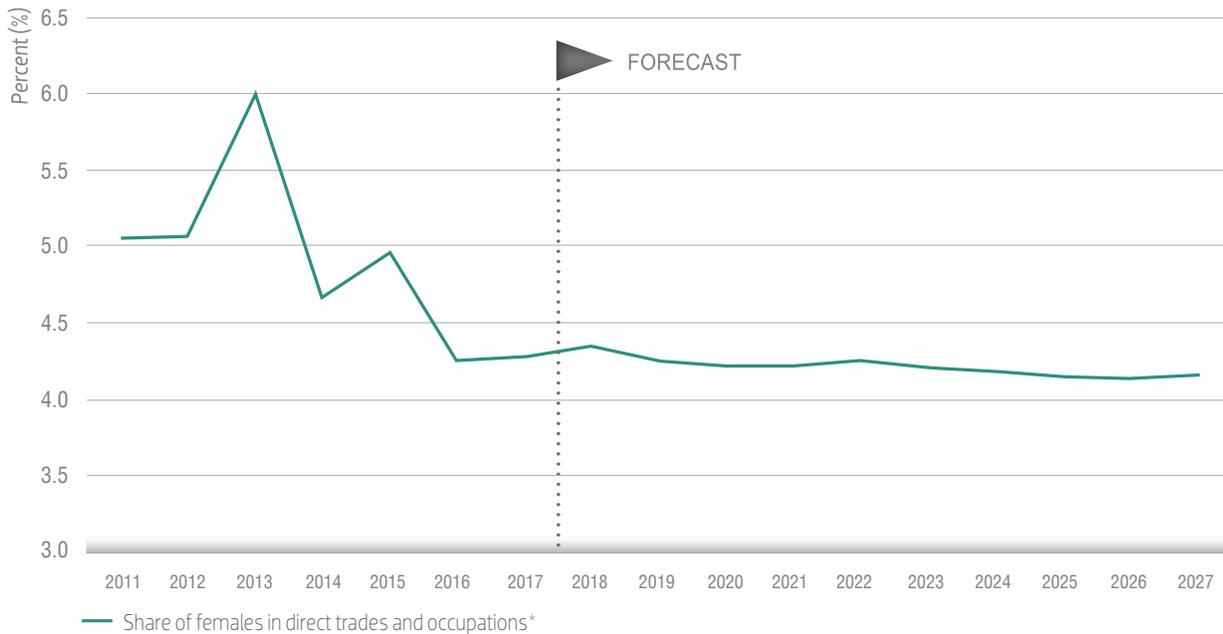
AVERAGE AGE OF CONSTRUCTION WORKFORCE

19%



PERCENT OF CURRENT LABOUR FORCE LOST TO RETIREMENT

**Figure 5: Share of women in direct trades and occupations, Saskatchewan**



— Share of females in direct trades and occupations\*

\* **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, Saskatchewan (total direct trades and occupations)**

	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027
	42,200	42,100	40,300	40,400	40,200	41,100	42,500	44,600	44,700	43,400	43,600
	1,900	1,900	1,800	1,800	1,800	1,800	1,900	1,900	1,900	1,900	1,900

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

## CONCLUSIONS AND IMPLICATIONS

Saskatchewan’s construction employment requirements continue to recede from a very high peak following an extraordinary resource expansion. While construction investment is expected to slow, overall employment levels should remain well above historical levels. The construction industry is in the midst of a transition from a market dominated by large engineering projects to one characterized by long-term residential and ICI building construction required to meet the demands of a young and growing population. New project investments are anticipated, but the transition is likely to accelerate across the scenario period.

Meeting future demand requirements will likely be made more difficult due to the aging of the construction workforce and the need to replace a large percentage of these workers lost to retirement.

Maintaining efforts to attract new entrants during periods of low growth poses challenges, but failing to do so could potentially result in a loss of training capacity. Maintaining a longer-term view will be critical to meeting anticipated labour market demands across the scenario period.

The industry scenario-based approach developed by BuildForce Canada to assess future labour market conditions provides a powerful planning tool for industry, government, and other stakeholders to better track labour market conditions and identify potential pressure points. The assumed timing of proposed major projects in the 2018–2027 outlook underpins the market conditions anticipated. Any changes in global demands and projected long-term commodity prices may impact the timing of proposed resource development projects and present risks to anticipated labour market conditions.

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