BUILDFORCE CANADA

CONSTRUCTION & MAINTENANCE LOOKING FORWARD

MANITOBA

Manufacturing, major projects lift demand in 2019; a period of adjustment to follow

MB

HIGHLIGHTS 2019–2028

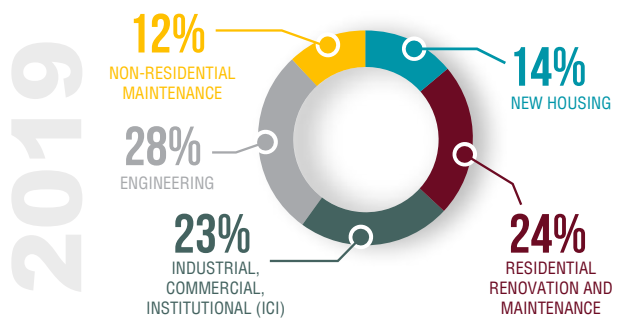
Construction employment requirements in Manitoba are expected to rise in 2019 following a pause in 2018 attributed to a decrease in new homebuilding. Manitoba's manufacturing expansion increased demand for industrial buildings between 2016 and 2018, and further demands for industrial buildings are projected to increase total employment requirements for industrial, commercial, and institutional (ICI) building construction again in 2019.

A slowdown is expected to follow in 2020, as further declines in new homebuilding, the completion of major hydro-related projects, and reduced investment in road and highway infrastructure projects all contribute to lower levels of provincial construction activity. The declines, however, should be modest relative to the scale of the significant expansion over the past decade.

Construction employment over the 2019–2028 scenario period is projected to fall by 1,900 workers (-4.6%) by 2028 from the 2019 anticipated peak. Modest gains in residential and non-residential (ICI) building investment should contribute to a gain of 1,600 jobs over the latter half of the decade, while employment in engineering construction will continue to decline due to lower public- and private-sector investments in infrastructure.

Manitoba's construction industry is coming off a significant period of expansion, with overall employment levels nearly doubling between 2002 and 2017. As requirements recede from peak levels over the coming decade, the industry must still hire, train, and retain almost 6,100 additional workers to replace the 8,000 workers expected to retire during this period. Manitoba's younger population should help to meet hiring needs locally, assuming the industry can attract its historical share of available new entrants.

DISTRIBUTION OF CONSTRUCTION EMPLOYMENT IN 2019, MANITOBA



10-YEAR WORKFORCE OUTLOOK FOR MANITOBA

2028

8,000 RETIREMENTS

8,000 NEW ENTRANTS

AVERAGE UNEMPLOYMENT RATE 8.2%

-1,900 (-4.9%) EMPLOYMENT CHANGE

HIGHLIGHTS

- The non-residential sector accounts for 60% of construction employment in Manitoba, and engineering construction remains the dominant driver of labour demands.
- Engineering investment is projected to decline 30% from 2019 to 2021, in line with the completion of major hydro projects and reduced investment levels in public- and private-sector infrastructure development.
- The construction of new housing continues to recede in 2019 before stabilizing, while renovation activity grows at 2% per year across the scenario period.
- Total industry labour force is projected to decline by a modest 1,900 over the scenario period – a 4.6% decline from around 41,400 in 2018 to 39,500 by 2028.
- The strongest declines are anticipated over the next three years.

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.

MANITOBA CONSTRUCTION OUTLOOK

Manitoba is approaching the peak of an extended construction expansion that has been driven by major hydro-related projects, infrastructure investments, and immigration-driven population growth over the last decade. Between 2006 and 2017, the industry added more than 17,200 new jobs, accounting for a 62% increase over the period. Construction employment was held back in 2018 as new homebuilding recoiled following a strong surge in 2017. New homebuilding is expected to recede further in 2019 and 2020 following lower levels of in-migration and more moderate demands.

Total labour requirements are bolstered in 2019, despite weaker residential requirements, driven by a pronounced increase in concurrent major projects, including ongoing work on Manitoba Hydro's Keeyask hydroelectric dam, Enbridge's Line 3 pipeline replacement, several commercial office and food processing facilities, and major transportation and other infrastructure projects. The expected wind-down and completion of major projects between 2020 and 2021 is expected to release more than 2,300 workers. Coinciding declines in employment requirements related to the construction of ICI buildings culminate in a loss of 3,000 non-residential construction jobs in total – a 13% decline over the two-year period.

Over the latter part of the scenario period, employment requirements return to a period of more moderate growth, driven by rising work in new housing and renovations fuelled by stable population growth, and further expansion of industrial building construction alongside steady levels of institutional building construction. The addition of an estimated 1,600 jobs between 2022 and 2028 leaves overall construction employment lower by close to 1,900 jobs by 2028 – or down 5% from the 2018 starting point. Engineering construction's share of total employment requirements, however, falls from a high of 28% in 2018, to a more modest 21% in 2028 as the current list of major projects are completed. The shift in demands toward ICI building construction and maintenance work will have important implications for the mix of required trades and occupations, skills, and qualifications in Manitoba's construction labour force.

SECTOR INSIGHTS

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

The BuildForce LMI system tracks supply and accounts for the change in the available labour force, including retirements, new entrants[1] and net in-mobility[2].

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 residential and 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 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. Some trades are also excluded because they typically do not work in the sector being assessed (e.g., boilermakers and millwrights in residential construction, and homebuilding and renovation managers in non-residential). For Manitoba, rankings are reported for 17 residential and 28 non-residential trades and occupations.

RESIDENTIAL SECTOR

Activity in new housing surged 40% in 2017, as the introduction of a new growth fee[3] pulled future housing starts forward. Consequently, activity was more muted in 2018, as the industry's focus was on the completion of carry-over work from the previous year.

Immigration, bolstered by Manitoba's provincial nominee program, played a significant role in increasing population growth in recent years. Over the coming decade, stable levels of population growth should help sustain household formations[4] at near current levels.

Employment related to new housing should recede over the coming decade, while moderate growth in renovation work should add nearly 700 jobs, offsetting the declines in new residential construction. Total residential employment is expected to rise a modest 4% over the scenario period for a net gain of 600 jobs.

Figure 1 shows the employment trends by sector for residential construction.

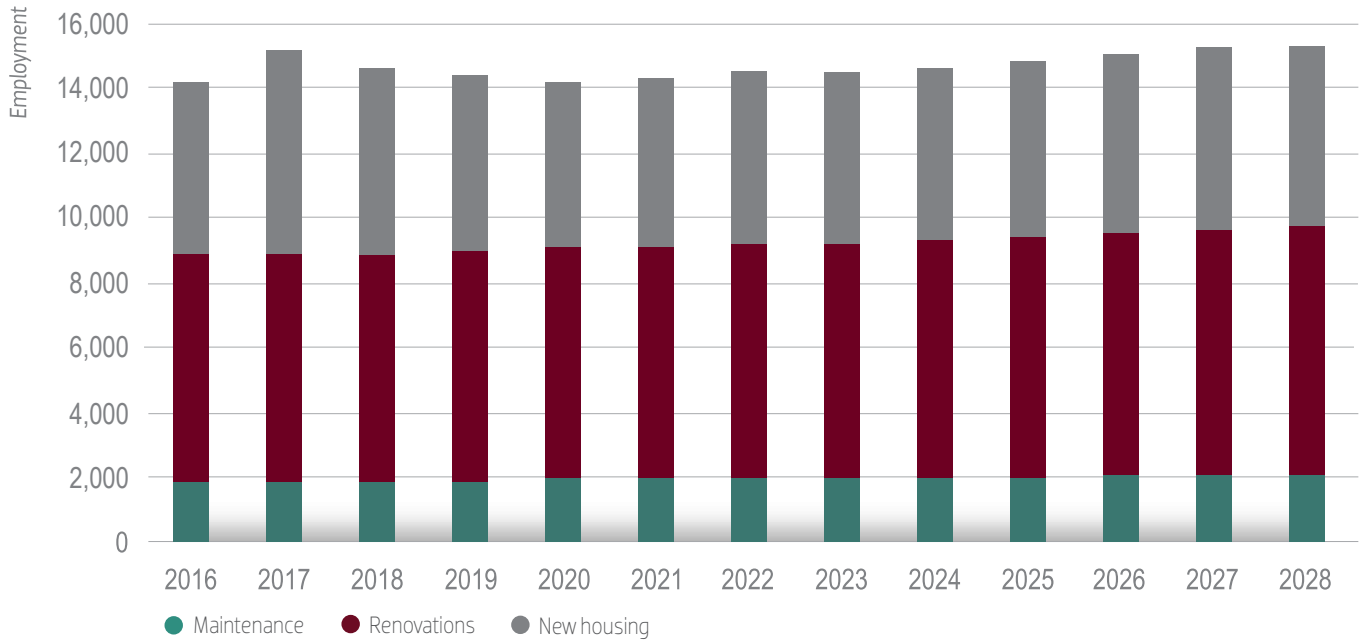
[1] **New entrants** are measured by applying the traditional proportion of the provincial labour force that enters the construction industry. The projected estimate across the scenario period assumes that the construction industry can recruit this group in competition with other industries.

[2] **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.

[3] In 2017, Winnipeg established an "Impact Fee" on new residential construction. The new fee increases building costs by about $500 per 100 square feet. For more information, visit the City of Winnipeg website.

[4] **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: Residential construction employment growth outlook, Manitoba



Source: Statistics Canada, BuildForce Canada

THE AVAILABLE LABOUR FORCE

Though long-term demands are expected to recede, the construction industry will need to contend with an aging labour force and the anticipated retirement of an estimated 3,300 residential workers over the next decade. Meeting these requirements will depend on industry's ability to attract 2,900 first-time new entrants expected to be drawn from the local population aged 30 and younger.

Table 1 provides a summary of the estimated changes in the residential labour force in 2018, the five-year period between 2019 and 2023, and across the full 2019–2028 scenario period.

RESIDENTIAL RANKINGS, RISKS, AND MOBILITY

Table 2 shows residential labour markets were stretched in 2017, but returned to more balanced conditions in 2018. Slowing demand for new homes between 2019 and 2020 weakens market conditions for some trades and occupations more concentrated in new homebuilding. Renovation activity, however, is expected to add to job opportunities and sustain related employment for some trades and occupations across the decade.

Table 1: Changes in the residential labour force, Manitoba

RESIDENTIAL LABOUR FORCE ADJUSTMENT		2018	5 years 2019–2023	10 years 2019–2028
Demand	Labour force change	-100	-100	700
	Retirements	300	1,600	3,300
Supply	New entrants	300	1,400	2,900
	Net mobility	-100	100	1,100

Source: BuildForce Canada

RESIDENTIAL HIGHLIGHTS

- Following a 40% increase in 2017, housing starts declined sharply in 2018 and are expected to decline further to 2021 before stronger growth resumes.
- Single-detached housing starts accounted for only 40% of new homes in 2018 – down from 80% over the past decade.
- Overall, residential employment is expected to rise a modest 4% over the next decade – a net gain of 600 jobs.

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 2: Residential market rankings, Manitoba

TRADES AND OCCUPATIONS – RESIDENTIAL	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Bricklayers	3	3	3	3	3	3	3	3	3	3	3
Carpenters	3	3	3	3	3	3	3	3	3	3	3
Concrete finishers	3	3	3	3	3	3	3	3	3	3	3
Construction estimators	3	2	3	3	3	3	3	3	3	3	3
Construction managers	2	2	2	3	3	3	3	3	3	3	3
Contractors and supervisors	3	3	3	3	3	3	3	3	3	3	3

continued on next page

Table 2: Residential market rankings, Manitoba (continued)

TRADES AND OCCUPATIONS – RESIDENTIAL	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
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
Homebuilding and renovation managers	3	3	3	3	3	3	3	3	4	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
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	2	3	2	3	3	3	3	3	3	3	3
Trades helpers and labourers	2	2	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

NON-RESIDENTIAL SECTOR

Manitoba's construction sector has continued to rise steadily, propelled by major hydro development, transmission, and infrastructure projects. In 2018, a decline in employment requirements at Manitoba Hydro's Keeyask hydroelectric dam was offset by the start of Enbridge's Line 3 replacement and Lake Manitoba and Lake St. Martin Flood Channel projects, as well as stronger growth in the construction of industrial buildings, driven by manufacturing expansion.

Employment requirements are expected to decline after 2019 as major project demands recede and investment in road, highway and bridge infrastructure declines, but total employment is expected to remain above historical levels supported by steady levels of ICI building construction and rising sustaining capital[5] and maintenance[6] requirements across the scenario period.

Figure 2 tracks the change in non-residential employment by sector for key reference points across the scenario period, including the start in 2019, at the expected bottom in 2021, and at the end of the period in 2028.

After 2021, when most major projects are completed, employment requirements are driven by gains in the construction of ICI buildings and overall non-residential maintenance, while engineering-related requirements continue to decline. Industrial building construction is projected to continue leading growth, driven by continued expansion in the manufacturing and agricultural sectors. Overall non-residential employment rises to a record high in 2019, before declining by 3,000 jobs through to 2021 as major projects are completed. Modest gains in ICI building construction add 600 jobs between 2022 and 2028.

Table 3 summarizes the percent change in non-residential employment by sector across two periods: the first captures the decline from the 2019 peak to 2021, and the second, across the remainder of the period to 2028.

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

Table 3: Changes in non-residential employment by sector, Manitoba

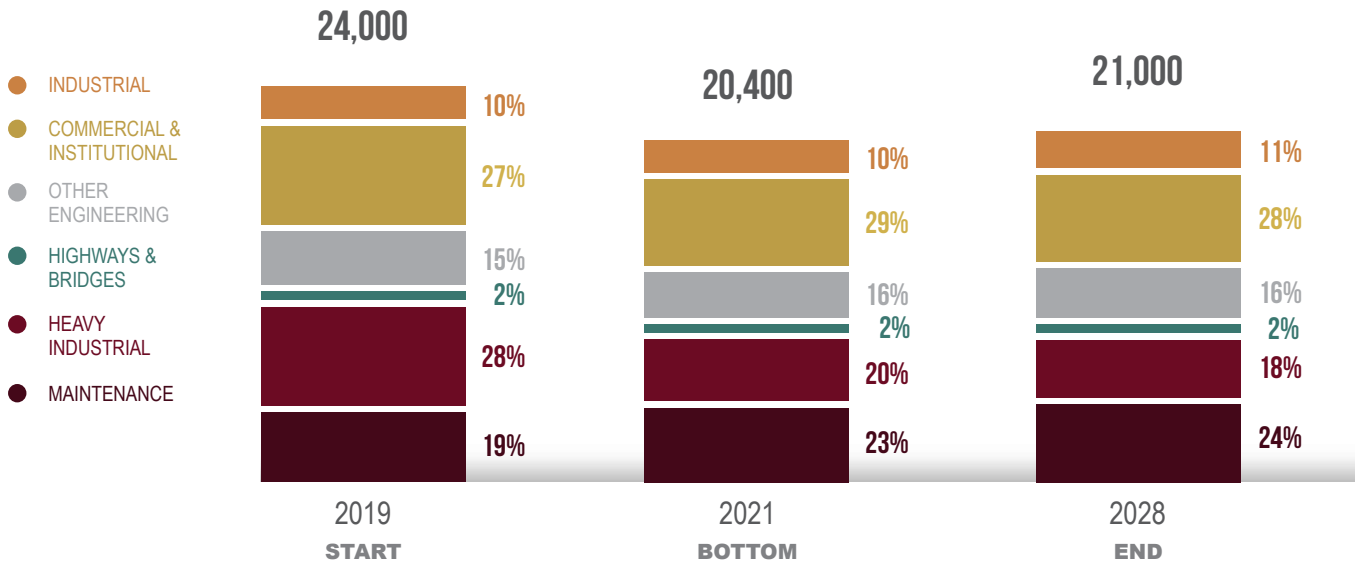
SECTOR		% CHANGE 2019–2021	% CHANGE 2022–2028
Total non-residential employment		-13%	3%
ICI buildings	Industrial	-1%	13%
	Commercial, institutional, and government	-5%	0%
Engineering	Highways and bridges	-32%	2%
	Heavy industrial	-39%	-5%
	Other engineering	-7%	6%
Maintenance		13%	7%

Source: Statistics Canada, BuildForce Canada

[5] **Sustaining capital** refers to the periodic addition (or replacement) of capital that is required to maintain operations at existing levels.

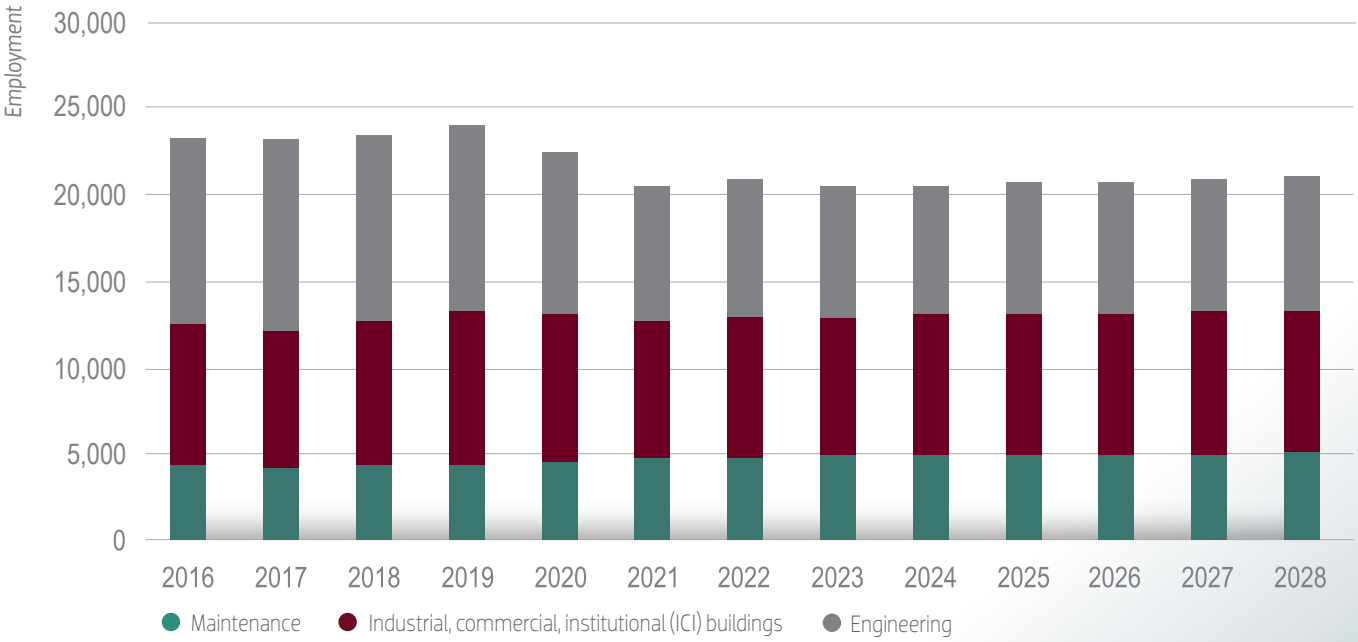
[6] **Maintenance** refers to the process of maintaining equipment, including routine or on-stream work and turnaround/shutdown work, where an operating unit may be temporally taken out of production.

Figure 2: Non-residential employment distribution by sector, Manitoba 2019, 2021 and 2028



Source: Statistics Canada, BuildForce Canada

Figure 3: Non-residential construction employment growth outlook, Manitoba



Source: Statistics Canada, BuildForce Canada

NON-RESIDENTIAL HIGHLIGHTS

- Non-residential employment requirements are projected to peak in 2019 following a long period of expansion.
- Employment demands related to major hydro and other utility projects continue to recede from the high levels reached in 2017.
- Employment related to engineering construction declines by 29% from 2019 to 2021 as current projects are completed and new investment levels decline.
- Total non-residential labour force is expected to contract by 2,600 through to 2028 – a 10.2% decline compared to the 2018 start.

THE AVAILABLE LABOUR FORCE

Manitoba has built up a relatively young labour force by training new entrants and attracting large numbers of skilled workers into the province. While the most significant growth has already occurred, changing demographics and declining employment requirements may make recruiting new workers a challenge.

BuildForce estimates that 4,700 non-residential workers are expected to retire over the coming decade. This replacement demand is expected to be met by 5,100 first-time new entrants aged 30 and younger estimated to be drawn into construction from the local population. Slower growth trends in the general population, however, 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 labour force is declining, while retirements are on the rise.

Table 4 provides a summary of changes in the non-residential labour force in 2018, the five-year period between 2019 and 2023, and across the full scenario period to 2028.

NON-RESIDENTIAL RANKINGS, RISKS, AND MOBILITY

Table 5 shows recruitment challenges persisted for some trades and occupations in 2018, but overall non-residential labour markets returned to balanced conditions. The timing of project completions and starts will likely create mixed market conditions across various trades. High demand continues over the near term for selected trades and occupations, including boilermakers, carpenters/scaffolders, construction millwrights, heavy-duty equipment mechanics, and ironworkers. The completions of major projects should weaken labour market conditions in 2020, as work demands built up over many years come to an end or wind down through to 2021. A large number of workers in key trades and occupations are expected to become available for work elsewhere.

As employment demands pass the peak, market conditions are expected to return to balance, signalled by a rank of 3.

Table 4: Changes in the non-residential labour force, Manitoba

NON-RESIDENTIAL LABOUR FORCE ADJUSTMENT		2018	5 years 2019–2023	10 years 2019–2028
Demand	Labour force change	600	-3,000	-2,600
	Retirements	500	2,400	4,700
Supply	New entrants	600	2,600	5,100
	Net mobility	500	-3,200	-3,000

Source: BuildForce Canada

Table 5: Non-residential market rankings, Manitoba

TRADES AND OCCUPATIONS – NON-RESIDENTIAL	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Boilermakers	3	4	3	2	3	3	3	3	3	3	3
Bricklayers	3	3	2	2	3	3	3	3	3	3	3
Carpenters	4	3	2	2	3	3	3	3	3	3	3
Concrete finishers	3	2	2	2	3	3	3	3	3	3	3
Construction estimators	3	3	2	2	3	3	3	3	3	3	3
Construction managers	3	4	2	2	3	3	3	3	3	3	3
Construction millwrights and industrial mechanics	3	4	3	2	3	3	3	3	3	3	3
Contractors and supervisors	3	3	2	2	3	3	3	3	3	3	3
Crane operators	3	2	2	2	3	2	3	3	3	3	3
Electricians	3	3	2	2	3	3	3	3	3	3	3
Floor covering installers	3	3	3	2	3	3	3	3	3	3	3
Glaziers	3	3	3	2	3	3	3	3	3	3	3
Heavy equipment operators (except crane)	3	3	2	2	3	2	3	3	3	3	3
Heavy-duty equipment mechanics	4	4	3	2	3	2	3	3	3	3	3
Insulators	3	3	3	2	3	3	3	3	3	3	3
Ironworkers and structural metal fabricators	4	3	2	2	3	2	3	3	3	3	3
Painters and decorators (except interior decorators)	3	3	3	2	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	2	3	3	3	3	3	3	3
Refrigeration and air conditioning mechanics	3	3	2	2	3	3	3	3	3	3	3
Residential and commercial installers and servicers	3	3	3	2	3	3	3	3	3	3	3
Roofers and shinglers	4	4	2	2	3	3	3	3	3	3	3
Sheet metal workers	3	3	2	2	3	3	3	3	3	3	3
Steamfitters, pipefitters, and sprinkler system installers	3	4	2	2	3	3	3	3	3	3	3
Tilesetters	3	3	3	2	3	3	3	3	3	3	3
Trades helpers and labourers	3	3	2	2	3	3	3	3	3	3	3
Truck drivers	3	3	2	2	3	2	3	3	3	3	3
Welders and related machine operators	3	4	3	2	3	3	3	3	3	3	3

Source: BuildForce Canada

BUILDING A SUSTAINABLE LABOUR FORCE

Despite receding from previously high employment levels, Manitoba's construction industry must remain proactive in labour market planning, as it is poised to replace 8,000 workers expected to retire over the next decade – or one in five workers currently employed. This presents a significant loss of skills and experience, requiring creative solutions to close potential skills gaps.

Even though Manitoba has built up a young population, its population has been aging over the past decade. Over the next 10 years, Manitoba's share of the population in the older age bracket (65 years and over) is expected to increase, and at the same time, the share of the population that is potentially available to enter the labour force (15-24 years old) is expected to decline (see Figure 4).

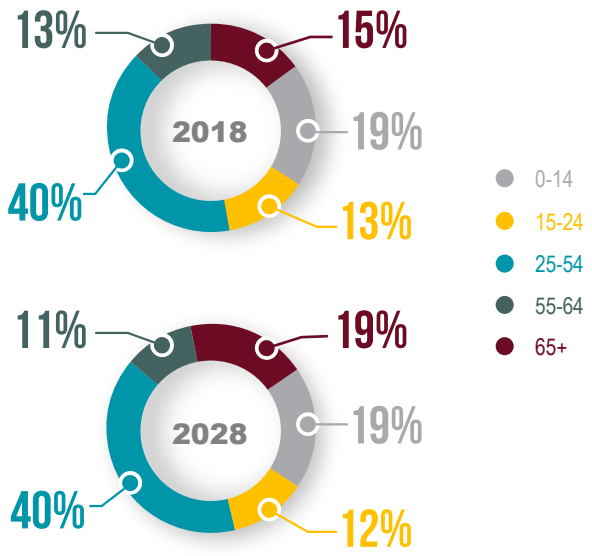
The steady aging of the population is expected to lower the province's labour force participation rate (percent of the population 15 years and older in the labour force) over the coming decade.

The significant increase in Manitoba's intake of immigrants has led to a steady increase in population growth since the early 2000s, with 2016 and 2017 standing out for all provinces, when the country brought in a significant number of Syrian refugees.

Manitoba's population growth is expected to remain relatively stable near one percent per year for most of the scenario period, as strong levels of immigration are expected to outpace the number of people leaving to other provinces, and natural population growth (births less deaths) continues to make steady contributions to population growth. (See Figure 5.)

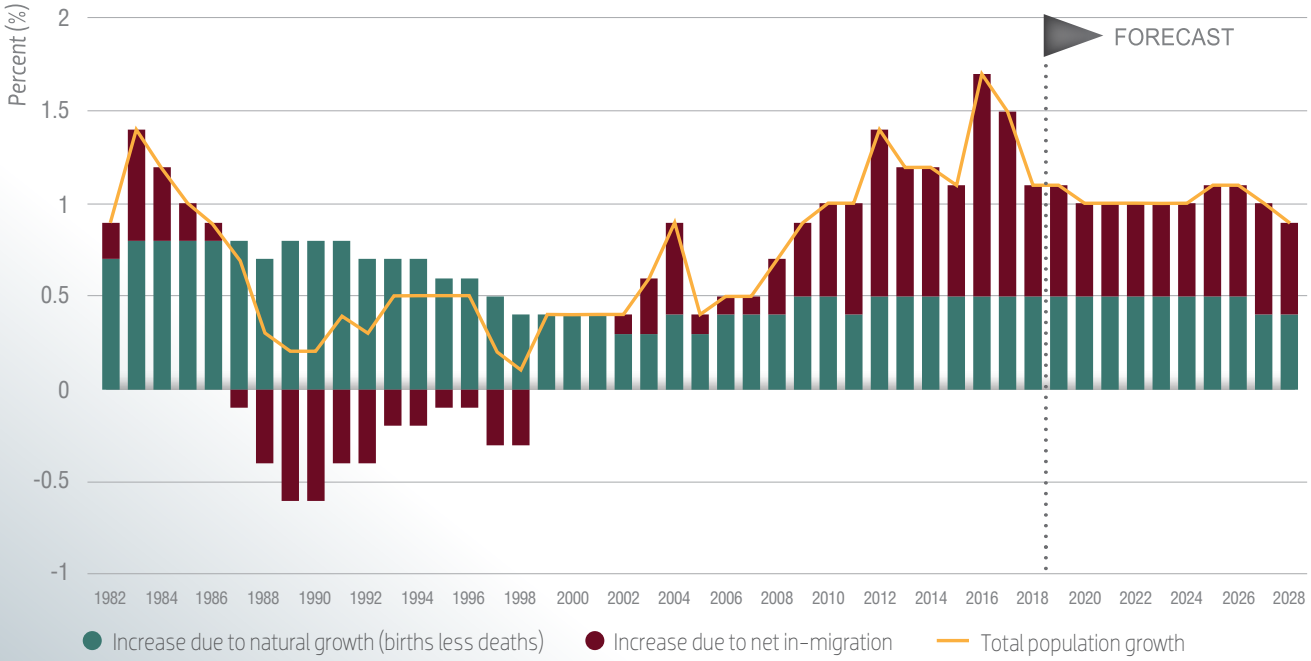
Based on historical trends, Manitoba's construction industry is expected to draw in an estimated 8,000 first-time new entrants aged 30 and younger from the local population over the next decade.

Figure 4: Population age distribution, Manitoba



Source: BuildForce Canada

Figure 5: Sources of population growth (%), Manitoba



Source: Statistics Canada, BuildForce Canada (2019–2028)

APPRENTICESHIP

More than 9,000 apprentices registered in the 15 largest construction programs[7] in Manitoba between 2012 and 2018[8]. Completions totalled 4,500 over the same period. Apprenticeship data from Statistics Canada's Registered Apprenticeship Information System (RAIS) shows annual new registrations have decreased by 19% from 2012 to 2018 – a significant decline compared to construction employment, which decreased by 4% over the same period. New registrations have steadily declined over the observed period, reaching a projected low of 1,180 in 2018, down from 1,461 in 2012. BuildForce Canada is working to better track apprenticeship training information to provide data on industry trends and training needs to ensure there are sufficient numbers of apprentices and newly certified journeypersons to sustain a skilled workforce over the long term.

UNDERREPRESENTED GROUPS OF WORKERS

Building a sustainable workforce will require the construction and maintenance industry to increase recruitment from groups traditionally underrepresented in the current construction labour force, including women, Indigenous Canadians, and new Canadians.

In 2018, an estimated 304,200 women were employed in Manitoba, representing 47% of the province's total labour force. More than half (153,800) of all women were employed in healthcare and social assistance, retail services, and educational services. The construction industry employed 1.8% of the female labour force.

Manitoba's construction industry is made up of approximately 12% women, of which about 25% work directly on construction projects, while the remaining 75% work primarily in administrative and management-related occupations. This translates into women representing 2.9% of employment in direct construction trades and occupations.

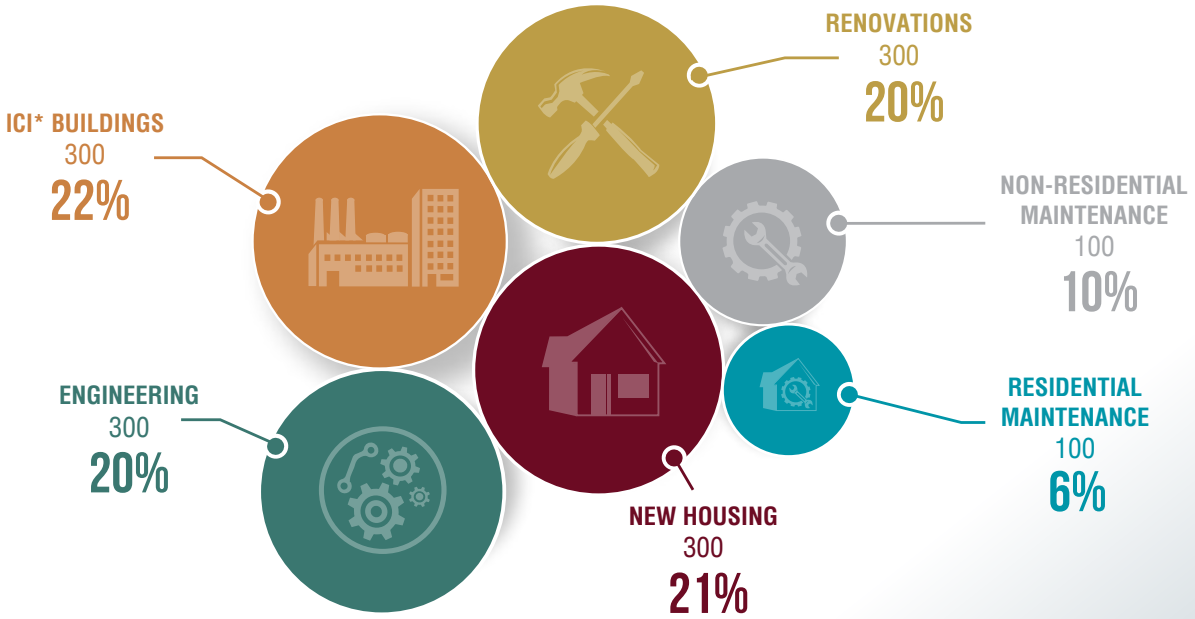
Women working in Manitoba's construction industry are fairly evenly distributed amongst construction sectors. The non-residential sector employs 52% of women while the residential sector employs 47%, as shown in Figure 6.

Female construction employment rose in 2017, but declined in 2018 inline with changes in new homebuilding activity. Over the coming decade, employment is anticipated to return to 2017 levels driven by steady growth in residential and ICI building construction (see Figure 7). The representation of women within the industry is expected to rise modestly over the next four years, but remains within the band of 4-5% of tradespeople.

Women tend to be better represented in the residential sector, as approximately 5% of workers are female. The weakest representation of women occurs in the engineering sector, primarily heavy industrial and other engineering, where women represent 2.9% and 2% of the labour force, respectively.

Another underrepresented group in the construction industry is Indigenous Canadians, of whom 12% reside in Manitoba. The Indigenous population is the fastest growing in Canada and they

Figure 6: Breakdown of female construction employment (2018), Manitoba



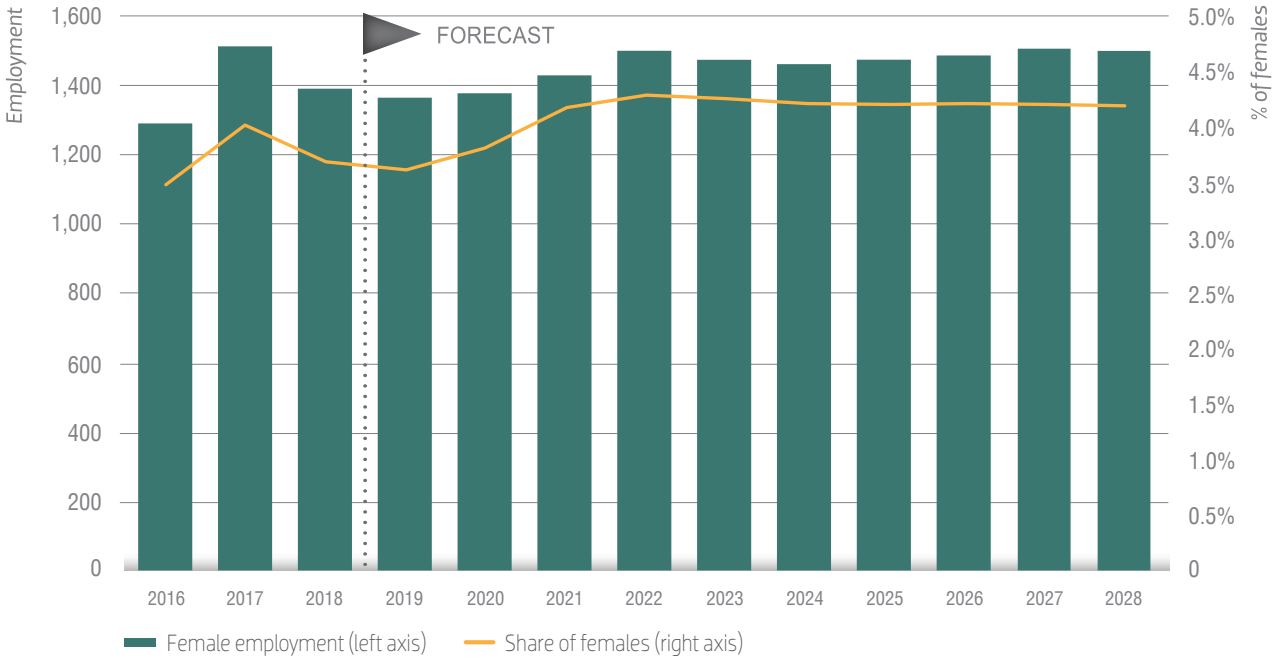
* industrial, commercial, institutional

Source: BuildForce Canada calculations based on Statistics Canada's Labour Force Survey (LFS) and 2016 Census of the Population.

[7] Programs include Sheet Metal Worker, Ironworker (Generalist), Welder, Construction Electrician, Steamfitter/Pipefitter, Carpenter, Bricklayer, Lather (Interior Systems Mechanic), Roofer, Painter and Decorator, Industrial Mechanic (Millwright), Refrigeration and Air Conditioning Mechanic, Mobile Crane Operator, Plumber, and Residential Air Conditioning Systems Mechanic.

[8] Statistics Canada's apprenticeship data is only available to 2016. BuildForce Canada estimated the 2017 and 2018 values.

Figure 7: Female construction employment and share of total direct trades and occupations*, Manitoba



* **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 2016 Census of the Population.

have a higher propensity to choose the construction industry as a career choice. In 2016, an estimated 7.6% of non-Indigenous Canadians were employed in the construction industry, compared to 9.6% for the Indigenous population.

Manitoba has done exceptionally well at attracting Indigenous Canadians into the construction industry, as approximately 16% of the province's construction labour force is made up of Indigenous Canadians – well above the national average of 7%. The Indigenous population is also more likely to choose construction trades and occupations, as about 81% work directly on construction projects, while the remaining 19% work primarily in administrative and management-related occupations.

Meeting the labour force needs of tomorrow may also require Manitoba's construction industry to count on new Canadians (immigrants). Between 2019 and 2028, the province is expected to welcome 146,500 newcomers, making the immigrant population a key driver of labour force growth.

10-YEAR AVERAGE

1.0%
POPULATION GROWTH

18,500
BIRTHS

11,600
DEATHS

7,700
NET MIGRATION

BY 2028

41
AVERAGE AGE OF CONSTRUCTION WORKFORCE

19%
PERCENT OF CURRENT LABOUR FORCE LOST TO RETIREMENT

Manitoba's construction labour force is made up of approximately 15% new Canadians. Historically, a significant share of landed immigrants were European and tended to have a higher inclination for the construction industry. A shift is currently underway that has seen a significant rise in immigrants from Asia (primarily Philippines, India, and China), whose citizens may have a lower tendency to join construction. Approximately 73% of recent immigrants were from Asia, while only 8% were from Europe.

CONCLUSIONS AND IMPLICATIONS

Manitoba's construction expansion has outlasted that of most other provinces. Employment demands diverged in 2018 as activity in new homebuilding retreated, while construction in the non-residential sector increased due to rising industrial and major project demands. Employment demands are expected to strengthen again in 2019, but notable declines not experienced over the last decade are expected to follow as current major projects wind down and the construction of new homes slows. Nevertheless, industry employment is expected to remain at relatively high levels across the scenario period.

Sustaining employment over the next 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 current industry expectations of population growth and the timing of major projects. Any changes to these assumptions presents risks and can potentially alter anticipated labour market conditions.

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

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