

NEW BRUNSWICK

Retirements dominate hiring requirements over the coming decade

HIGHLIGHTS 2020–2029

A rise in the construction of new housing, supported by high levels of immigration-driven population growth and road and highway construction shored up construction activity in New Brunswick in 2019.

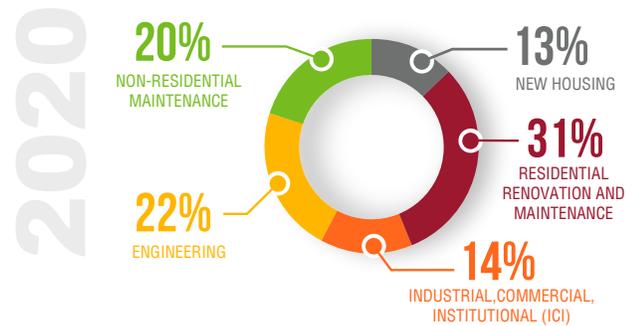
Construction requirements in the province are projected to fluctuate near current levels over the coming decade, supported by rising levels of residential renovation work, moderate industrial expansion, and infrastructure construction projects.

The completion of major road, highway, and bridge infrastructure projects contributes to declines in non-residential employment between 2021 and 2022. With few new major projects planned, the longer-term trends are driven by growing construction of industrial buildings, maintenance work, and the anticipated start of construction on the Mactaquac hydro dam refurbishment project later in the scenario period.

Slowing population growth over the decade limits growth in new-housing construction, but stronger growth is anticipated in urban centres. These offsetting trends translate into only moderate changes in total construction employment across the 2020–2029 scenario period.

While overall employment is mostly unchanged, older age demographics drive the need to replace more than 6,900 workers expected to retire over the next decade. With only 4,200 new entrants aged 30 and younger projected to be drawn from the local population, industry will need to recruit a significant number of additional workers from outside the local market.

DISTRIBUTION OF CONSTRUCTION EMPLOYMENT IN 2020, NEW BRUNSWICK



10-YEAR WORKFORCE OUTLOOK FOR NEW BRUNSWICK



AVERAGE UNEMPLOYMENT RATE 17.1%

HIGHLIGHTS

- Housing starts approached 3,000 units in 2019 – a 60% increase from the low recorded in 2016.
- Construction employment is expected to recede between 2020 and 2022 due to the completion of highway and bridge works and other infrastructure projects.
- Hiring demands are driven primarily by the anticipated retirement of 6,900 workers over the next decade.

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.

NEW BRUNSWICK CONSTRUCTION OUTLOOK

New Brunswick's construction market is expected to maintain stable levels of activity over the 2020-2029 scenario period.

Immigration-driven population growth has risen significantly since 2016, reaching 0.8% in 2019 – a growth rate not achieved since the early 1980s. The net number of international migrants increased from an average of 1,900 people between 2006 and 2015 to more than 6,500 in 2019. The influx of migration has been a driving factor behind falling vacancy rates and a rise in housing starts since 2015, especially in the construction of apartment buildings in urban centres.

Employment in the residential sector, which accounts for just over 40% of construction workers in New Brunswick, is projected to be sustained near 2019 levels across the scenario period, as moderate growth in renovation investment offsets moderate declines expected in the construction of new homes as population growth slows.

Non-residential construction employment has diminished since 2018 following the completion of maintenance and upgrades at Irving Oil's Saint John refinery, as well as the Saint John water treatment facility and the Moncton convention centre. The lack of major resource development projects has been partly filled by federal and provincial government investments in roads, highways, bridges, and other infrastructure in recent years, but many of these projects are anticipated to wind down by 2021.

After 2021, non-residential employment is supported largely by ongoing investments in health and civil infrastructure alongside stable but fluctuating levels of non-residential maintenance requirements, which account for 35% of non-residential employment in the province. The required refurbishment work on the Mactaquac Dam is expected to bolster engineering construction after 2026, returning overall non-residential construction employment to slightly higher than 2019 levels by 2029.

Sustaining labour force capacity at current levels across the next decade will require ongoing recruitment and training of new workers to contend with the projected retirement of 6,900 workers and a shrinking pool of available new entrants as population growth slows and fewer youth are available to enter the labour force.

SECTOR INSIGHTS

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

The BuildForce LMI system tracks supply and accounts for the change in the available labour force, including retirements, new entrants¹ and net mobility².

BuildForce assesses market conditions for 34 construction trades and occupations using a ranking system that combines measures of the change in employment, unemployment, net mobility, and adjustments based on industry input. The rankings reflect residential and non-residential market conditions unique to the province 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 New Brunswick, rankings are reported for 15 residential and 22 non-residential trades and occupations.

RESIDENTIAL SECTOR

Positive in-migration has provided a much-needed lift to household formation³ and housing demand since the province registered a population decline in 2015. Housing starts recovered in 2017 and approached 3,000 units in 2019 – a 60% increase compared to the low recorded in 2016. Despite projected record levels of immigration and in-migration over the coming decade, continued increases in housing starts are limited by an aging population and slowing rates of population growth. Housing starts are expected to resume a modest downward trend in 2020, but employment declines are entirely offset by growth in renovation and maintenance work, which accounts for 70% of residential employment in the province.

Figure 1 shows the employment trends by sector for residential construction. Total residential employment is mostly unchanged across the scenario period.

THE AVAILABLE LABOUR FORCE

The modest anticipated decline in the residential labour force occurs through age-related attrition and, potentially, out-mobility to other labour markets (industries, geographic regions or occupations). Over the next decade, hiring requirements are driven by the expected exit of 2,900 residential workers due to retirement. Replacing these workers assumes that industry can attract an estimated 1,800 first-time new entrants aged 30 and younger from the local population into the construction labour force.

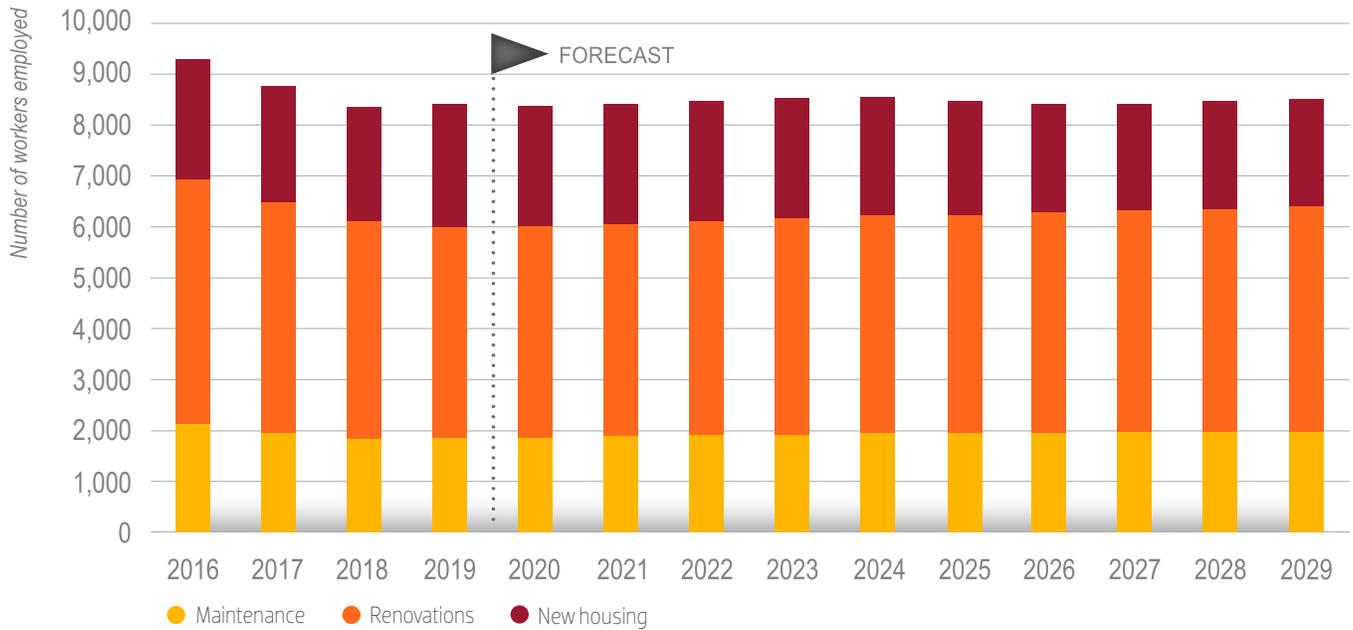
Figure 2 provides a summary of the estimated changes in the residential labour force across the full 2020–2029 scenario period.

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 **Net mobility** refers to the movement of labour in and out of the local construction industry labour force. In-mobility captures the movement into the labour force of out-of-province industry workers and/or workers from outside the industry. Many members of this group will move quickly out of the provincial labour force as work declines, referred to as out-mobility.

³ **Household formation** refers to the change in the number of households (persons living under one roof or occupying a separate housing unit) from one year to the next. It is how population growth is transformed into demand for new housing.

Figure 1: Residential construction employment growth outlook, New Brunswick



Source: Statistics Canada, BuildForce Canada (2020-2029)

Figure 2: Changes in the residential labour force, New Brunswick



* Net mobility refers to the number of workers needed to be brought into the industry from other industries or other provinces to meet rising demands or the number of workers that exit the industry in downturns. Positive net mobility means that industry must attract workers, while negative net mobility arises from an excess supply of workers in the local construction labour force.

Note: Due to rounding, numbers may not add up to the totals indicated.

Source: BuildForce Canada

RESIDENTIAL RANKINGS, RISKS, AND MOBILITY

Higher housing starts returned residential labour markets to balance for most trades in 2019, as shown in Table 1. Labour market conditions are expected to remain generally balanced for the scenario period, as modest declines in new-housing construction are offset by rising levels of renovation and maintenance work.

Older age demographics and resulting retirements contribute to lower natural rates of unemployment⁴, which translate into balanced labour market conditions at lower levels of employment across the decade.

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.

⁴ **Normal unemployment** or **natural unemployment** refers to the unemployment that results from workers moving from one job to another. This unemployment rate exists because some workers are in-between jobs, some workers' skills do not align with employers' needs, or because there is a mismatch in the wage expectations between employers and workers. For New Brunswick, the natural rate of unemployment had been declining since the mid 1980s, but began rising in 2009. It currently stands between 17-20%.

Table 1: Residential market rankings, New Brunswick

TRADES AND OCCUPATIONS – RESIDENTIAL	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029
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	4	3	3	3	3	3	3
Construction managers	4	3	3	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
Homebuilding and renovation managers	3	3	3	3	3	3	3	3	3	3	3
Painters and 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
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

NON-RESIDENTIAL SECTOR

New Brunswick's non-residential employment requirements ebbed in 2019, but were supported by higher levels of highway and bridge work and industrial building construction.

Total employment is expected to decline modestly between 2020 and 2026, as work on major road and other infrastructure projects, including upgrades of the Saint John port and Fredericton airport, recede. Later in the scenario period, the start of construction work at the Mactaquac Dam helps return employment back to levels reported in 2019. The project is likely to increase the demand for selected trades, including carpenters, concrete finishers, crane operators, electricians, labourers, millwrights, and pipefitters.

Rising exports and growth in the manufacturing sector are expected to drive the construction of industrial buildings by 45% between 2020 and 2029, increasing employment requirements by 100 to 150 workers. Over the same period, numerous hospital projects in Bathurst, Moncton, and Fredericton contribute to sustaining institutional construction.

Non-residential maintenance requirements, which account for 35% of non-residential employment in the province, are expected to rise modestly but are susceptible to significant year-to-year and seasonal fluctuations.

Figure 3 tracks the distribution of non-residential employment by sector between 2019 and 2029.

Table 2 summarizes the percent change in non-residential employment by sector across two periods: the first captures the expected rise over the next five years to 2024, and the second from 2025 to 2029.

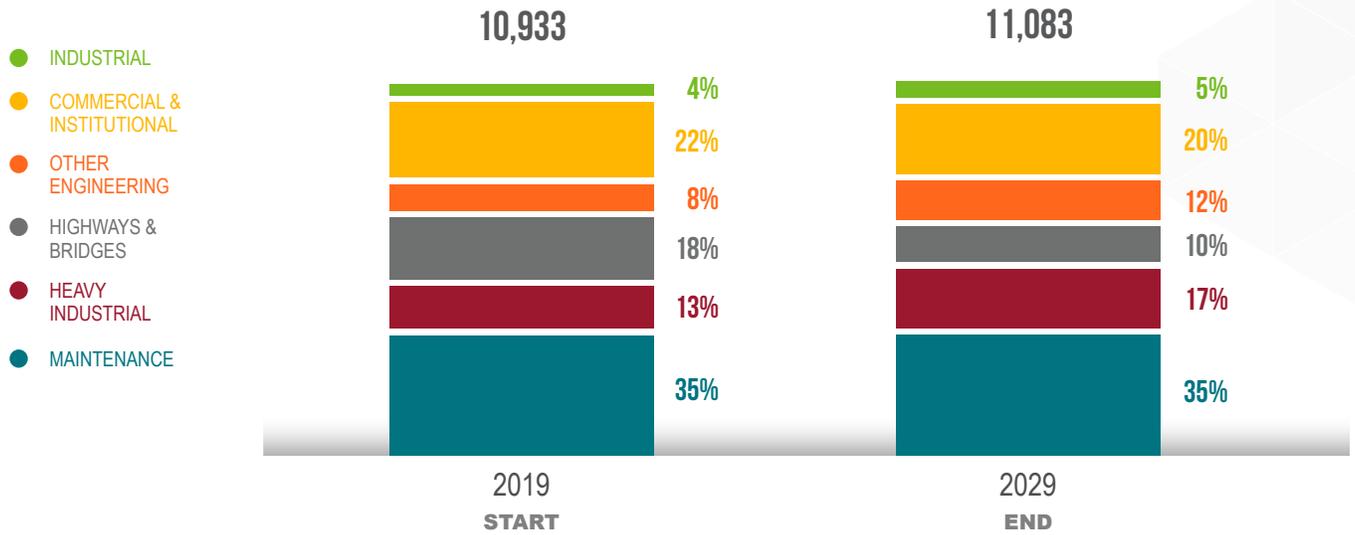
Figure 4 shows the employment trends by sector for non-residential construction.

Table 2: Changes in non-residential employment by sector, New Brunswick

SECTOR		% CHANGE 2020–2024	% CHANGE 2025–2029
Total non-residential employment		-4%	5%
ICI buildings	Industrial	17%	13%
	Commercial, institutional, and government	-3%	-2%
Engineering	Highways and bridges	-37%	-9%
	Heavy and other engineering	17%	20%
Maintenance		-1%	4%

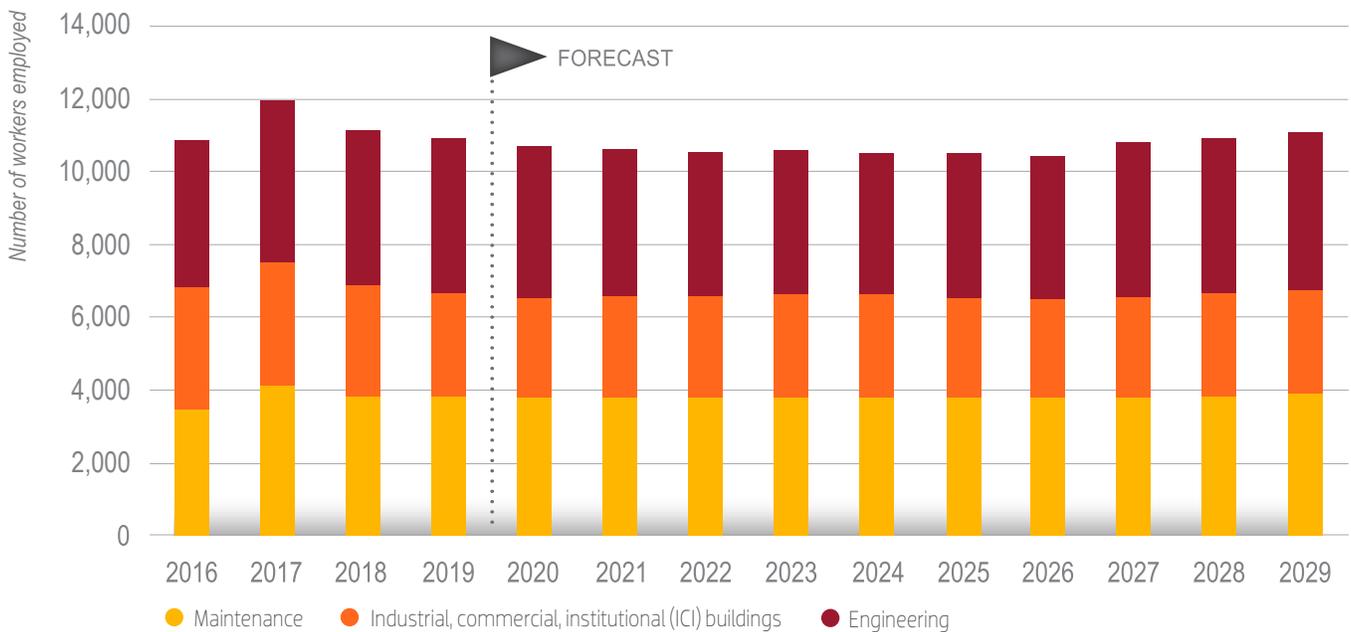
Source: Statistics Canada, BuildForce Canada (2020-2029)

Figure 3: Non-residential employment distribution by sector, New Brunswick, 2019 and 2029



Source: Statistics Canada, BuildForce Canada (2020-2029)

Figure 4: Non-residential construction employment growth outlook, New Brunswick



Source: Statistics Canada, BuildForce Canada (2020-2029)

THE AVAILABLE LABOUR FORCE

An estimated 4,000 workers are expected to exit the non-residential labour force due to retirements over the coming decade. This exceeds the estimated 2,400 first-time new entrants aged 30 and younger expected to be drawn into the construction labour force from the local population.

Figure 5 provides a summary of the estimated changes in the non-residential labour force across the full 2020–2029 scenario period.

NON-RESIDENTIAL RANKINGS, RISKS, AND MOBILITY

Table 3 shows that at the start of the scenario period in 2020, New Brunswick's non-residential labour markets are generally balanced, signalled by a rank of 3. By 2021–2022, when much of the

current major highway and bridge projects approach completion, demand weakens for trades more directly involved in engineering construction before rising again as work begins on the hydro dam refurbishment in 2027.

An annual ranking system does not accurately capture the peak employment demand driven by seasonal maintenance shutdown work, where the demand for workers is concentrated for a brief period within a year and then declines rapidly as the work ends. Major refinery and other industrial shutdowns can pose recruiting challenges for several trades and occupations, including boilermakers, refractory workers, carpenters/scaffolders, electricians, instrumentation technicians, insulators, millwrights, labourers, pipefitters, and supervisors.

Figure 5: Changes in the non-residential labour force, New Brunswick



* **Net mobility** refers to the number of workers needed to be brought into the industry from other industries or other provinces to meet rising demands or the number of workers that exit the industry in downturns. Positive net mobility means that industry must attract workers, while negative net mobility arises from an excess supply of workers in the local construction labour force.

Note: Due to rounding, numbers may not add up to the totals indicated.

Source: BuildForce Canada

Table 3: Non-residential market rankings, New Brunswick

TRADES AND OCCUPATIONS – NON-RESIDENTIAL	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029
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	3	2	3	3	3	3	3	3	3	3
Construction millwrights and industrial mechanics	3	3	3	3	3	3	3	3	4	3	3
Contractors and supervisors	3	3	3	3	4	3	3	3	3	3	3
Crane operators	3	3	3	3	3	3	3	3	4	3	3
Electricians	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
Heavy-duty equipment mechanics	4	3	2	2	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	3	3	3	3	3	3	3	4	3	3
Painters and decorators	2	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	2	3	3	3	3	3	3	3	3	3	3
Residential and commercial installers and servicers	2	2	3	3	3	3	3	3	3	3	3
Roofers and shinglers	3	3	3	3	3	3	3	3	3	3	3
Sheet metal workers	3	3	3	3	3	3	3	3	3	3	3
Steamfitters, pipefitters, and sprinkler system installers	3	3	4	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	4	3	2	3	3	3	3	3	3	3	3
Welders and related machine operators	3	3	3	3	3	3	3	3	3	3	3

Source: BuildForce Canada

BUILDING A SUSTAINABLE LABOUR FORCE

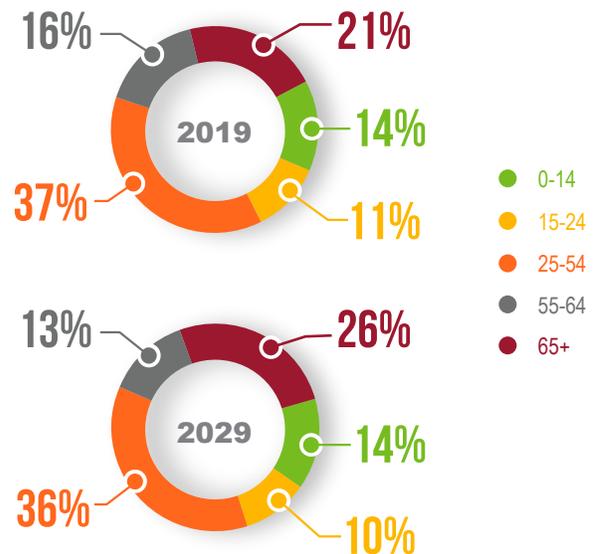
Even as employment growth stagnates over the coming decade, New Brunswick may face recruitment challenges due to an aging labour force and rising retirements. Over the scenario period, an estimated 6,900 workers are expected to retire, creating a skills vacuum that will require proactive planning. Building a sustainable labour force must remain top of mind for industry leaders to mitigate the risks of a skills shortage in the province.

A steady aging of the province's population will create similar retirement and recruitment pressures for most industries in New Brunswick, which will likely increase competition for qualified workers and add to labour market pressures. Over the next 10 years, the 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 youth population (15-24 years old) is expected to decline (see Figure 6). These demographic shifts have the potential to tighten labour markets, as labour force participation by older workers is much lower than that of their younger counterparts.

New Brunswick's population growth was boosted to 0.8% in 2019 – a level not experienced since the early 1980s due to improved international migration, which more than offset natural population (births less deaths) declines. Over the coming decade, although net in-migration remains at historically high levels, overall population growth is expected to retreat, as the gap between the number of deaths and births widens to become a larger drag on overall growth. Components of population growth for New Brunswick are presented in Figure 7.

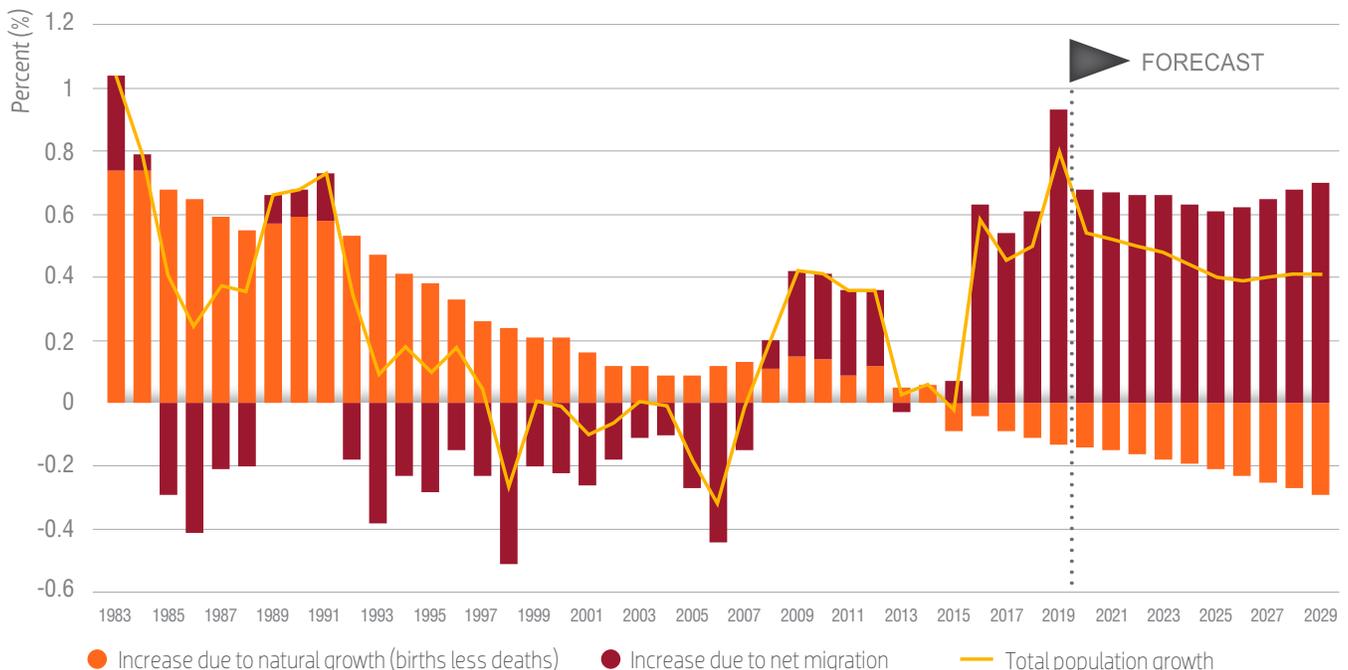
Based on historical trends, New Brunswick's construction industry is expected to draw an estimated 4,200 first-time new entrants aged 30 and younger from the local population over the next decade. In the scenario period, the pace of retirements far exceeds the number of youth coming into construction, forcing the industry to look to other industries, other provinces, and other countries for additional new workers to augment the available pool of local new entrants.

Figure 6: Population age distribution, New Brunswick



Source: BuildForce Canada

Figure 7: Sources of population growth (%), New Brunswick



Source: Statistics Canada, BuildForce Canada (2020–2029)

APPRENTICESHIP

More than 5,520 apprentices registered in the 17 largest construction trade programs (see Table 5) in New Brunswick between 2013 and 2019⁵, with 3,120 completions registered during this period. Apprenticeship data from Statistics Canada's Registered Apprenticeship Information System (RAIS) shows annual new registrations increased by 7% from 2013 to 2019; a significantly higher rate of growth than construction employment, which declined 29%. Following a decline in 2016, new registrations increased 20%; nearly equal to the peak registration levels observed in 2014. New Brunswick is projected to require more than 4,300 newly certified journeypersons to sustain the current workforce share of certifications and keep pace with employment and replacement demand across all industries over the scenario period.

Table 4 provides an overview of the anticipated certification requirements for the 17 largest construction trade programs in all industries and in construction. The table also provides the target number of new entrants required to fulfill demand requirements over the scenario period, taking into account trends in program completion rates.

Table 5 provides a trade-by-trade breakdown of the anticipated certification requirements to meet the construction industry's share of employment and replacement demand over the scenario period and the likely targeted number of new registrants required. Based on projected new registrations, several trades are at risk of undersupplying the number of new journeypersons required by 2029. Trades within this group include Boilermaker, Bricklayer,

Table 4: Estimated construction certification demand and projected target of new entrants, New Brunswick, 2020 to 2029

	2020	2021	2022	2023	2024	Total 2020–2024	Total 2025–2029
Total certification demand – all industries	352	488	467	460	403	2,171	2,150
Total certification demand – construction	184	290	268	262	225	1,229	1,259
Construction certification share (%)	52%	59%	57%	57%	56%	57%	59%
Target new registrants – construction	477	436	403	616	520	2,452	2,699

Source: BuildForce Canada

Table 5: Estimated construction certification demand and projected target of new entrants by trade, New Brunswick, 2020 to 2029

Trade	Total certification demand – construction	Target new registrants – construction	Apprentice certification supply risk – all industries
Boilermaker	219	349	At-risk supply
Bricklayer	73	191	At-risk supply
Carpenter	776	2,027	At-risk supply
Construction Electrician	702	1,298	Balanced supply
Heavy-Duty Equipment Technician	29	51	Ample supply
Hoist Operator (Boom Truck)	22	24	Ample supply
Hoist Operator (Tower Crane)	22	35	Ample supply
Industrial Electrician	54	68	Ample supply
Industrial Mechanic (Millwright)	47	59	Ample supply
Metal Fabricator (Fitter)	6	16	At-risk supply
Plumber	169	361	Ample supply
Powerline Technician	7	8	Ample supply
Refrigeration and Air Conditioning Mechanic	106	151	Ample supply
Sheet Metal Worker	62	107	At-risk supply
Sprinkler System Installer	28	68	Balanced supply
Steamfitter/Pipefitter	64	113	Ample supply
Welder	103	225	At-risk supply
Total	2,488	5,151	

Source: BuildForce Canada

⁵ 2018 and 2019 are estimated.

Figure 8: Detailed construction employment by gender, New Brunswick, 2019



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

Carpenter, Metal Fabricator (Fitter), Sheet Metal Worker, and Welder. It is important to note that the analysis compares the projected supply of new journeypersons and certification requirements across all industries. It does not account for exiting imbalances at the 2019 starting point.

UNDERREPRESENTED GROUPS OF WORKERS

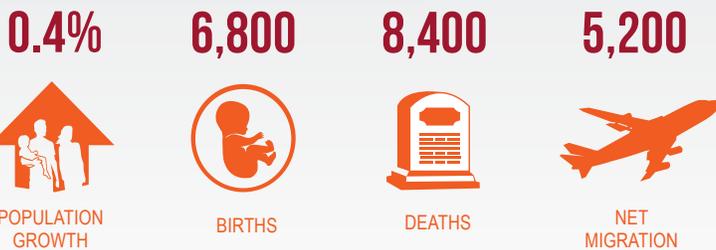
Building a sustainable labour force will require the construction and maintenance industry to increase recruitment from groups traditionally underrepresented in the current construction labour force, including women, Indigenous people, and new Canadians.

In 2019, there were approximately 2,000 women employed in New Brunswick's construction industry, of which 30% worked on-site, directly on construction projects, while the remaining 70% worked off-site, primarily in administrative and management-related occupations. Of the 19,300 tradespeople employed in the industry, women made up only 3.1% (see Figure 8).

The estimated 600 tradeswomen in New Brunswick are represented across all sectors of construction, but a higher proportion are employed in the non-residential sector, with more than a quarter of all tradeswomen working in engineering construction. Moreover, the representation of women is higher in engineering construction, with women accounting for 3.7% of tradespeople in the sector (see Figure 9). The top five trades in which women tend to be employed are trades helpers and labourers (41% of all tradeswomen), contractors and supervisors (13%), construction managers (10%), electricians (8%), and truck drivers (5%).

The Indigenous population is another underrepresented group that presents opportunities for New Brunswick's construction industry. In 2017, approximately 7% of all Indigenous people resided in Atlantic Canada. The Indigenous population is the fastest growing in Canada and has 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.

10-YEAR AVERAGE



BY 2029

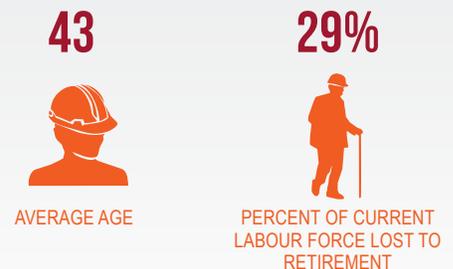
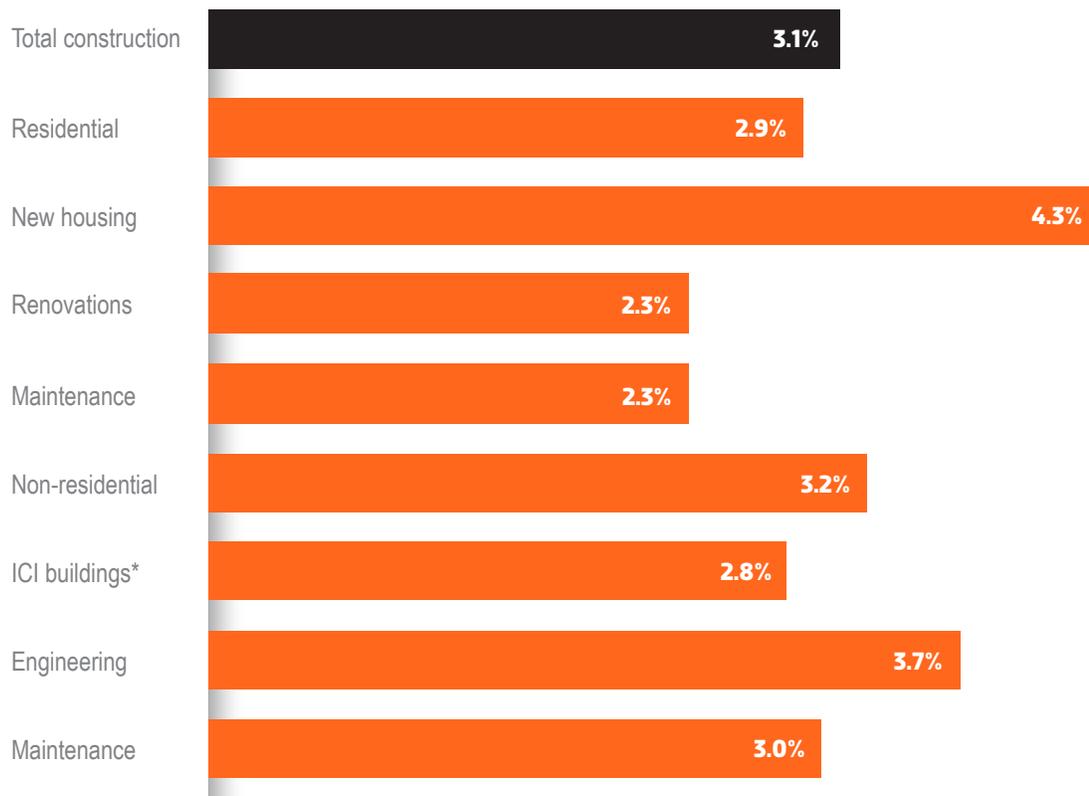


Figure 9: Women's share of total direct trades and occupations (on-site), New Brunswick



* industrial, commercial, institutional

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

Approximately 2.7% of New Brunswick's construction labour force is made up of Indigenous peoples, of which about 79% work directly on construction projects, while the remaining 21% work primarily in administrative and management-related occupations.

New Brunswick's construction industry may also leverage new Canadians (immigrants) over the coming decade to meet labour requirements. The province is expected to welcome a net of 56,000 new international migrants between 2020 and 2029, making the immigrant population a key driver of labour force growth.

Approximately 2% of New Brunswick's construction labour force is made up of new Canadians. Historically, key sources of immigrants to the province were from Europe and the Americas (primarily the United States), whose citizens tend to have a higher propensity to choose the construction industry. A shift is currently underway, whereby most new immigrants (65%) are from Asia (primarily China, Syria, the Philippines, and South Korea), whose citizens may have a lower tendency to join construction.

CONCLUSIONS AND IMPLICATIONS

The 2020–2029 *Construction and Maintenance Looking Forward* scenario for New Brunswick anticipates modest, though stable, residential and non-residential employment demands that sustain total construction employment across the scenario period.

The province's older population demographics contribute to long-term hiring needs and make recruiting new young workers into the industry a priority. Meeting the significant replacement demands of an already old and aging labour force will likely place greater emphasis on mobility, in-migration, and international immigration.

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 based on proposed major project schedules. Any changes to these assumptions present risks and potentially alter anticipated market conditions.

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Funded by the Government of Canada's Sectoral Initiatives Program

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FEBRUARY 2020