

SASKATCHEWAN

Modest long-term growth foreseen as residential and non-residential markets diverge

HIGHLIGHTS 2020–2029

Labour force demand in Saskatchewan's construction and maintenance industry is poised to increase modestly by 2029, as the residential sector picks up the pace following completion of non-residential projects.

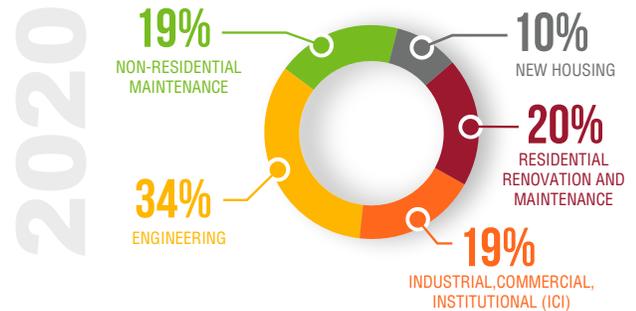
Lower levels of residential construction and receding major project demands led to employment declines in 2019, although those declines were partly offset by stronger gains in employment related to the construction of industrial, commercial, and institutional (ICI) buildings.

Saskatchewan's residential and non-residential markets are expected to diverge as the pace of employment declines stabilizes in 2020–2021, with stronger exports supporting moderate economic growth and an anticipated recovery in the construction of new housing and ICI buildings. Moderate growth is expected to follow, with new resource-sector investments anticipated after 2021, alongside a continued recovery in new-housing construction driven by stronger population growth.

Total construction requirements are expected to rise and fall following the timing of anticipated major projects and a recovery in housing construction. Overall, construction employment is modestly higher by the end of the 2020–2029 scenario period, with larger gains concentrated in residential and ICI building construction.

The anticipated retirement of just over 9,100 workers dominates hiring requirements over the next decade. Given the younger age demographic of the province, a slightly larger number of new-entrant workers is projected to be available locally. Saskatchewan's ability to meet future hiring requirements of nearly 12,000 workers from the local population is dependent on limiting the outflow of skilled workers during periods of weaker growth while ensuring that they can make the transition between non-residential and residential markets.

DISTRIBUTION OF CONSTRUCTION EMPLOYMENT IN 2020, SASKATCHEWAN



HIGHLIGHTS

- The proposed start of mining and utility projects is expected to raise non-residential requirements by 2,400 workers (+8.6%) between 2022 and 2024.
- Housing starts recover from a record low 2,400 units in 2019 to 5,800 units by 2029.
- The outlook for Saskatchewan anticipates that hiring needs will be driven primarily by the expected retirement of 9,100 workers over the coming decade.

10-YEAR WORKFORCE OUTLOOK FOR SASKATCHEWAN



AVERAGE UNEMPLOYMENT RATE 7.1%

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

Beginning in 2020, trends in Saskatchewan's residential and non-residential markets are expected to diverge, with a recovery in new residential housing construction offsetting declines in the non-residential sector as major projects, including pipeline and highway infrastructure projects, wind down.

While strengthening economic conditions and population growth are expected to support a recovery in new-housing construction, the 2020–2029 *Construction and Maintenance Looking Forward* outlook scenario projects the pace of growth to accelerate after 2021, driven in part by the anticipated start of proposed major mining and gas plant projects, including the second phase of the Jansen mine expansion. Moderate declines in employment are anticipated once projects are completed by 2025. Non-residential employment will rise and then fall, coinciding with the timing of tracked major projects, leaving employment near current levels by the end of the scenario period.

New-housing construction should recover over the scenario period, driven by a younger age demographic and higher levels of net migration. An anticipated up-cycle is expected to accelerate in 2021–2022, driven by new mining expansion, stronger overall economic growth, and rising household formations¹. Moderate growth in renovation investment should cushion further losses in residential employment over the near term.

The outlook for Saskatchewan anticipates that hiring needs will be driven primarily by the expected retirement of 9,100 workers over the coming decade. Under the current outlook scenario based on tracked major projects and overall construction trends, industry is expected to meet hiring requirements by recruiting and training new entrants aged 30 and younger from the local population. The potential loss of workers during periods of slower growth early in the scenario period, however, could limit industry's capacity to recruit new entrants. Sustaining recruitment and training during periods of slower growth poses a potential risk to Saskatchewan's construction and maintenance industry.

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 entrants² and net mobility³.

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 Saskatchewan, rankings are reported for 15 residential and 29 non-residential trades and occupations.

RESIDENTIAL SECTOR

Housing starts fell to 2,400 units in 2019 – their lowest level since the late 1990s and down 76% from the 2012 peak. Construction of new housing is expected to strengthen after 2020 and continue to rise steadily across the scenario period.

Strengthening economic conditions and the slowing of migration to other provinces (out-migration) are anticipated to spur a housing up-cycle starting in 2021, restoring housing starts to 5,800 units by 2029. Modest gains in renovation and maintenance activity, alongside labour demands related to new-home construction, contribute to an estimated 2,300 new residential workers over the coming decade.

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

THE AVAILABLE LABOUR FORCE

Despite a younger population, Saskatchewan's residential construction sector must contend with an aging labour force and the exit of close to 2,800 workers over the coming decade due to expected retirements. Just over 2,500 first-time new entrants aged 30 and younger from the local population are estimated to join the residential construction labour force and partly offset expected retirements. Attracting new entrants may prove challenging during periods of slower growth early in the scenario period.

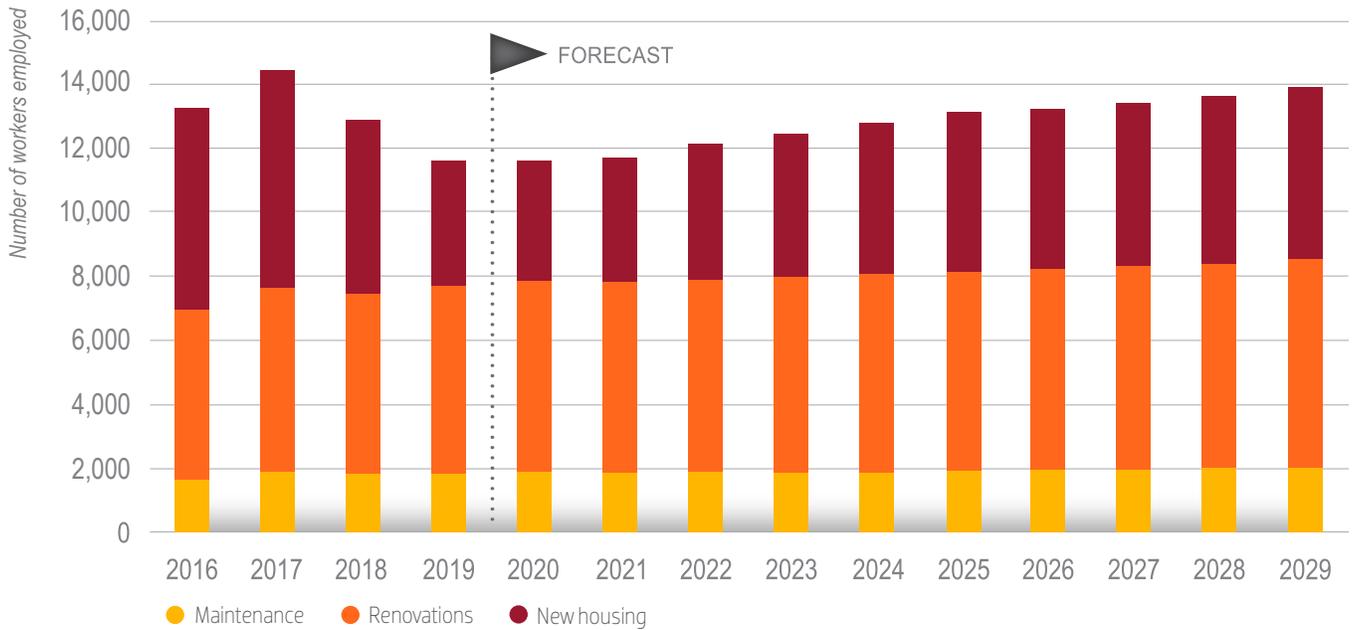
Figure 2 provides a summary of the estimated changes in the residential labour force across the full 2012–2029 scenario period.

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

² **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.

³ **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.

Figure 1: Residential construction employment growth outlook, Saskatchewan



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

Figure 2: Changes in the residential labour force, Saskatchewan



* 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

Table 1 shows weak residential labour market conditions in 2019 for most trades and occupations, caused by the decline in demand for new housing. Market conditions return to balance by 2020, but tighten between 2022 and 2025 for most trades and occupations, driven by an anticipated housing up-cycle.

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 1: Residential market rankings, Saskatchewan

TRADES AND OCCUPATIONS – RESIDENTIAL	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029
Bricklayers	2	3	3	4	4	3	3	3	3	3	3
Carpenters	2	3	3	4	4	4	4	3	3	3	3
Construction estimators	2	3	3	4	4	4	3	3	3	3	3
Construction managers	2	3	4	4	4	4	4	3	3	4	4
Contractors and supervisors	2	3	3	4	4	4	3	3	3	3	3
Electricians	2	3	3	4	3	3	3	3	3	3	3
Floor covering installers	2	3	3	3	3	3	3	3	3	3	3
Homebuilding and renovation managers	3	4	4	4	4	4	4	4	4	4	4
Painters and decorators	2	3	3	3	3	3	3	3	3	3	3
Plasterers, drywall installers and finishers, and lathers	2	3	3	4	4	4	4	3	3	3	3
Plumbers	2	3	3	3	3	4	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	3	3	3	3	3	3	3	3	3
Sheet metal workers	2	3	3	4	4	3	3	3	3	3	3
Trades helpers and labourers	2	3	3	4	3	3	3	3	3	3	3

Source: BuildForce Canada

NON-RESIDENTIAL SECTOR

Employment in non-residential construction is projected to moderate in 2020 following slight increases in 2018 and 2019. Incremental declines in major project requirements related to the completion of the Enbridge Line 3 pipeline and a decline in highway and bridge work should contribute to a modest decline in employment between 2020 and 2021. The proposed start of major mining and utility-sector projects is expected to lift total non-residential requirements by 2,400 workers between 2022 and 2024.

Non-residential employment demands will increasingly be driven by the construction of ICI buildings and maintenance work as employment related to major engineering construction projects continues to fade from previous peak levels. Figure 3 tracks the distribution of non-residential employment by sector between 2019 and 2029.

As requirements related to engineering construction recede, moderate growth in industrial and institutional investment contribute to sustaining overall non-residential labour demands across the latter half of the scenario period. Non-residential employment is projected to rise and fall during the mid 2020s, driven primarily by a proposed major potash mine, and finishes the scenario period with an additional 600 workers compared to 2019.

Table 2 summarizes the percent change in non-residential employment by sector across two periods: the first captures the near-term trends to 2024, and the second, across the remainder of the scenario period.

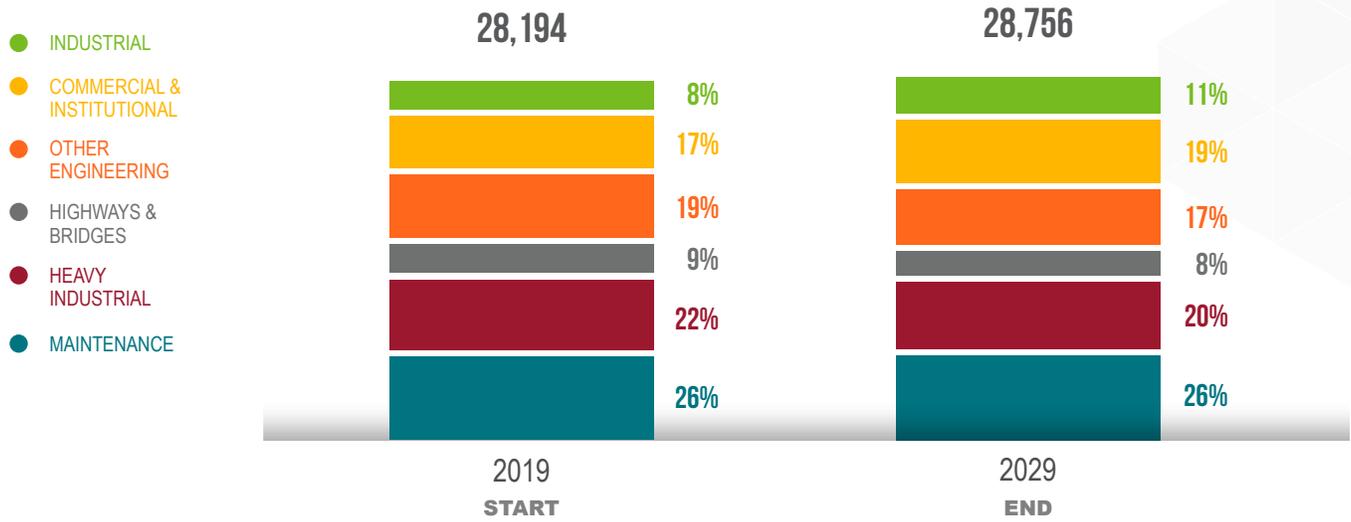
Figure 4 shows the employment trends by sector for non-residential construction.

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

SECTOR		% CHANGE 2020–2024	% CHANGE 2025–2029
Total non-residential employment		7%	-5%
ICI buildings	Industrial	25%	7%
	Commercial, institutional, and government	15%	2%
Engineering	Highways and bridges	-10%	0%
	Heavy and other engineering	7%	-15%
Maintenance		3%	1%

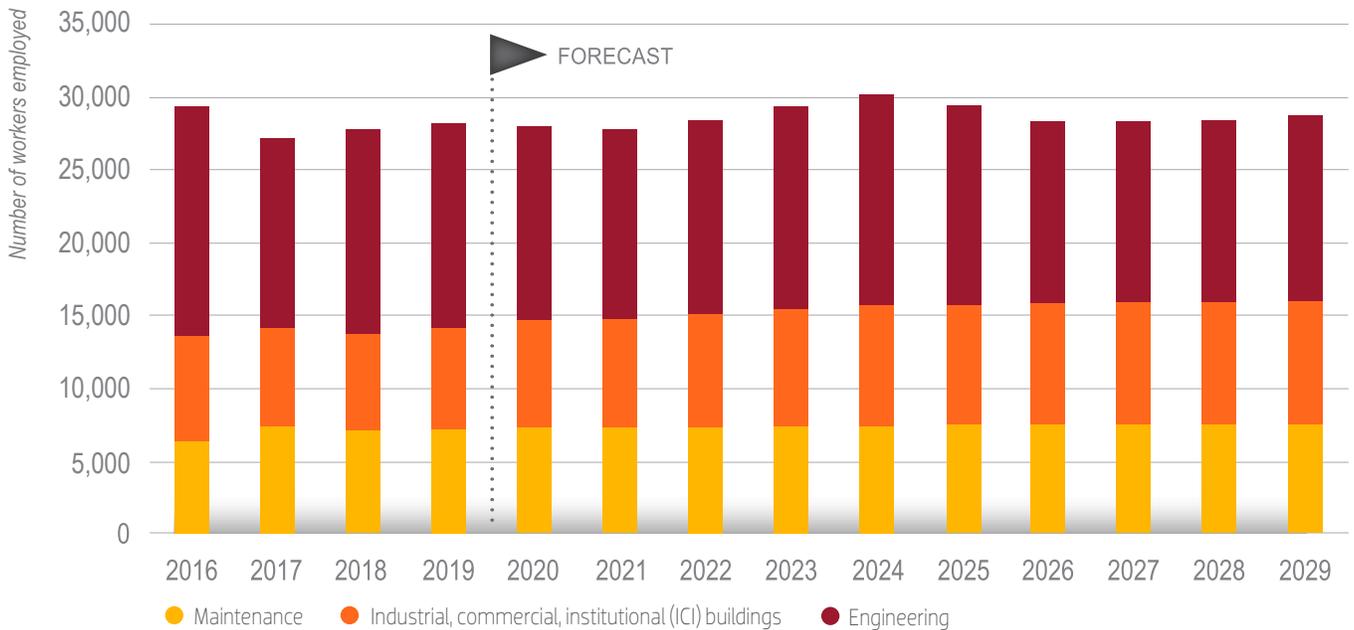
Source: Statistics Canada, BuildForce Canada (2020-2029)

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



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

Figure 4: Non-residential construction employment growth outlook, Saskatchewan



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

THE AVAILABLE LABOUR FORCE

Saskatchewan has one of the youngest population's in Canada, but faces a potential risk of losing youth to other provinces as economic growth slows. Declines in non-residential construction investment are likely to lead some workers to leave the industry or province in 2020 and 2021. Many workers, however, will need to be attracted back by 2022 to meet the expected increase in employment demands related to proposed major projects.

An estimated 6,400 workers are anticipated to exit the province's non-residential labour force over the coming decade due to retirements, which are anticipated to be offset by an estimated 6,900 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 non-residential labour market conditions were generally balanced in 2019. Conditions weakened for some trades and occupations more concentrated in engineering construction due to modest declines in major project demands in 2020 and 2021. The ramping up of a proposed major potash mine is expected to tighten labour markets for some trades and occupations between 2022 and 2024, as reflected by ranks of 4, but then weaken as tracked projects wind down. The decline is cushioned by rising requirements related to the construction of ICI buildings.

By the end of the scenario period, overall conditions return to balance. The younger age demographics are expected to help facilitate recruitment to meet employment requirements due to age-related attrition.

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



* 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, Saskatchewan

TRADES AND OCCUPATIONS – NON-RESIDENTIAL	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029
Boilermakers	3	3	3	4	3	3	2	3	3	3	3
Bricklayers	3	3	3	3	3	3	3	3	3	3	3
Carpenters	3	3	3	3	3	4	3	2	3	3	3
Concrete finishers	2	2	3	4	3	4	2	2	3	3	3
Construction estimators	3	3	3	4	3	4	2	2	3	3	3
Construction managers	3	3	3	4	4	4	3	3	3	3	4
Construction millwrights and industrial mechanics	3	3	3	4	4	4	2	3	3	3	3
Contractors and supervisors	3	3	3	3	4	3	3	3	3	3	3
Crane operators	3	3	3	3	3	3	2	3	3	3	3
Electrical power line and cable workers	3	3	3	3	3	4	3	2	3	3	3
Electricians	3	3	3	3	3	3	3	3	3	3	3
Elevator constructors and mechanics	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)	3	2	3	3	3	3	3	2	3	3	3
Heavy-duty equipment mechanics	3	3	3	3	3	4	2	2	3	3	3
Insulators	3	3	3	3	3	3	3	3	3	3	3
Ironworkers and structural metal fabricators	2	2	3	4	3	4	2	2	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	4	3	3	2	3	3	3	3
Plumbers	3	3	3	3	3	3	3	3	3	3	3
Refrigeration and air conditioning mechanics	3	3	3	3	3	3	3	3	3	3	3
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	4	2	2	3	3	3
Sheet metal workers	3	3	3	3	3	4	3	2	3	3	3
Steamfitters, pipefitters, and sprinkler system installers	3	3	3	3	3	2	3	2	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
Welders and related machine operators	3	3	3	3	3	3	3	3	3	3	3

Source: BuildForce Canada

BUILDING A SUSTAINABLE LABOUR FORCE

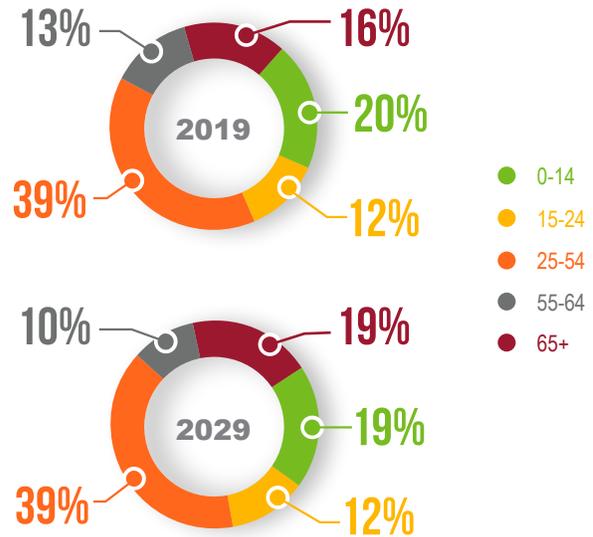
Despite enjoying a relatively younger labour force, Saskatchewan's construction and maintenance industry will need to replace 9,100 workers expected to retire over the coming decade, which represents a significant loss of workers and skills. Meeting replacement demands and modest expansion will require the industry to remain focused on building a sustainable labour force, which includes efforts to attract, train, and retain new workers.

The commodity boom of the previous decade helped Saskatchewan build a relatively young population base, but like all provinces, aging is imminent. Over the next decade, the share of the population in the older age bracket (65 years and over) is expected to increase steadily and lead to increased competition for labour across all industries (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.

Population growth in Saskatchewan is expected to remain relatively stable over most of the scenario period but begins receding over the latter half of the decade as aging dynamics take hold. The natural rate of population growth (births less deaths), which currently accounts for nearly 60% of total population growth, is expected to recede steadily over the scenario period. Net in-migration levels are expected to improve over the mid 2020s, as recovering economic conditions reduce out-of-province mobility. Over the long term, net international migration will recede from peak levels but remain well above the historical average. Components of population growth for Saskatchewan are presented in Figure 7.

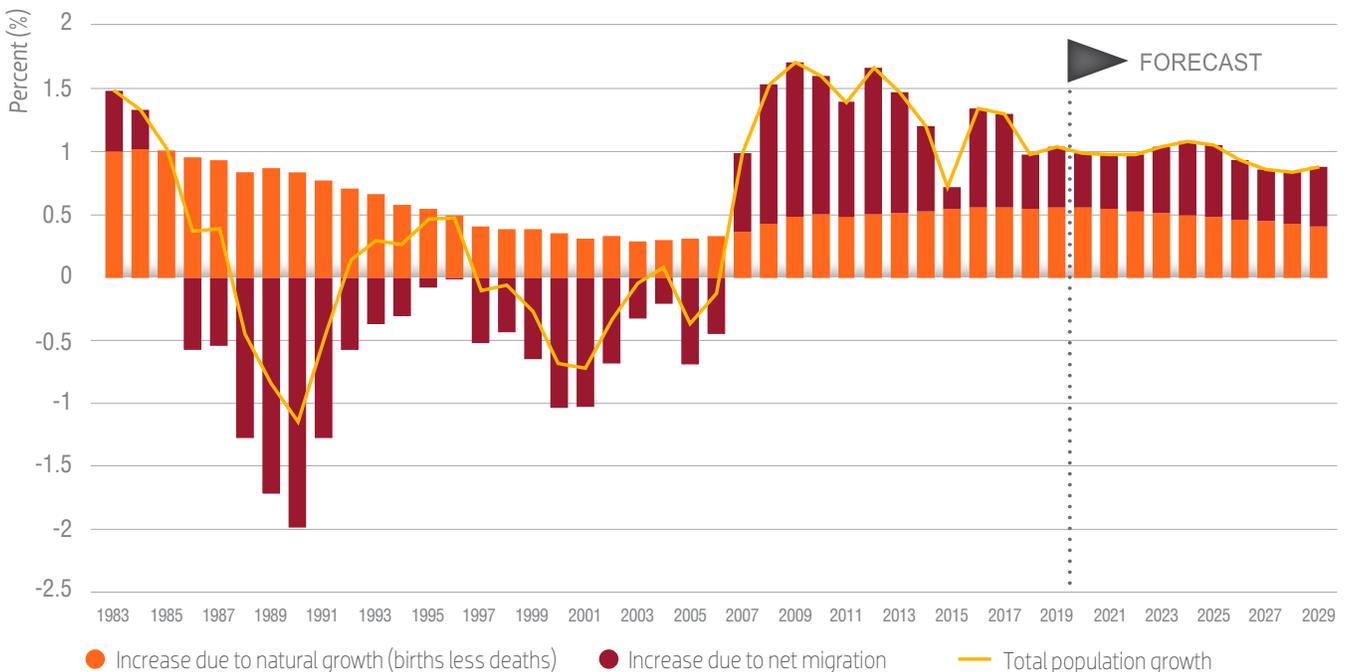
Based on historical trends, Saskatchewan's construction industry is expected to draw an estimated 9,400 first-time new entrants aged 30 and younger from the local population over the next decade. This rapid pace of retirements will require the industry to look to other industries, other provinces, and other countries for additional new workers to augment the available pool of new hires.

Figure 6: Population age distribution, Saskatchewan



Source: BuildForce Canada

Figure 7: Sources of population growth (%), Saskatchewan



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

APPRENTICESHIP

More than 10,400 apprentices registered in the 16 largest construction trade programs (see Table 5) in Saskatchewan between 2013 and 2019⁴, with nearly 7,400 completions registered during this period. Apprenticeship data from Statistics Canada's Registered Apprenticeship Information System (RAIS) show annual new registrations decreased by 44% from 2013 to 2019, while construction employment decreased by 18% over the same period. Saskatchewan is projected to require more than 6,500 newly certified journeypersons to sustain current workforce shares of certification 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 16 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 projected number of new registrants required. Based on the current pace of new registrations, several trades are at risk of not keeping pace with retirement levels, suggesting a potential undersupply of new journeypersons could exist by 2029. Trades within this group include Boilermaker, Carpenter, Refrigeration and Air Conditioning Mechanic, Scaffolder, 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 existing imbalances at the 2019 starting point.

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

	2020	2021	2022	2023	2024	Total 2020–2024	Total 2025–2029
Total certification demand – all industries	673	632	846	979	816	3,947	2,620
Total certification demand – construction	375	342	505	618	499	2,338	1,549
Construction certification share (%)	56%	54%	60%	63%	61%	59%	59%
Target new registrants – construction	842	605	343	525	704	3,020	3,149

Source: BuildForce Canada

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

Trade	Total certification demand – construction	Target new registrants – construction	Apprentice certification supply risk – all industries
Boilermaker	113	146	At-risk supply
Boom Truck	47	98	Balanced supply
Carpenter	985	2,286	At-risk supply
Construction Electrician	1,151	1,194	Ample supply
Heavy-Duty Equipment Technician	41	45	Ample supply
Industrial Instrumentation and Control Technician	27	14	Ample supply
Industrial Mechanic (Millwright)	50	60	Balanced supply
Insulator (Heat and Frost)	43	63	Ample supply
Ironworker (Structural/Ornamental)	43	61	Ample supply
Plumber	646	960	Ample supply
Powerline Technician	43	46	Ample supply
Refrigeration and Air Conditioning Mechanic	148	260	At-risk supply
Scaffolder	109	299	At-risk supply
Sheet Metal Worker	205	343	At-risk supply
Steamfitter/Pipefitter	119	81	Balanced supply
Welder	117	214	At-risk supply
Total	3,887	6,169	

Source: BuildForce Canada

Figure 8: Detailed construction employment by gender, Saskatchewan, 2019



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

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 people, and new Canadians.

In 2019, there were approximately 6,300 women employed in Saskatchewan's construction industry, of which nearly 37% worked on-site, directly on construction projects, while the remaining 63% worked off-site, primarily in administrative and management-related occupations. Of the 39,800 tradespeople employed in the industry, women accounted for only 5.7% of all on-site employment (see Figure 8).

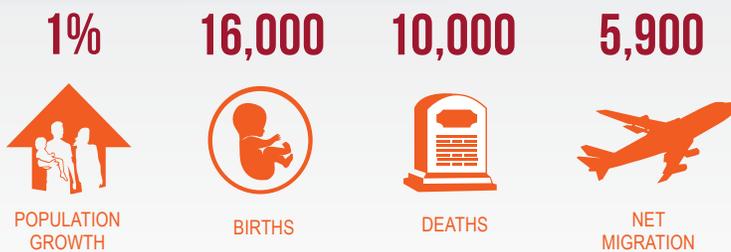
The estimated 2,300 tradeswomen in Saskatchewan are employed across all sectors of construction, but given the industrial nature of Saskatchewan's construction labour force, a significant share of women work in engineering construction (43%). Moreover, women's representation is slightly higher in the engineering construction

sector, with women accounting for 7% of tradespeople in this sector (see Figure 9). For the province, the top five trades in which women tend to be employed are heavy equipment operators (20% of all tradeswomen), trades helpers and labourers (16%), carpenters (14%), contractors and supervisors (9%), and construction managers (7%).

Indigenous peoples comprise another underrepresented group that presents opportunities for Saskatchewan's construction industry, as 9% of all Indigenous people reside in the province. 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.

Approximately 12% of Saskatchewan's construction labour force is made up of Indigenous people, of which about 85% work directly on construction projects, while the remaining 15% work primarily in administrative and management-related occupations.

10-YEAR AVERAGE



BY 2029

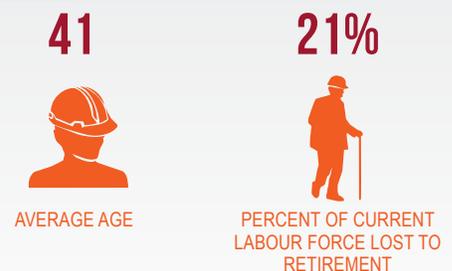
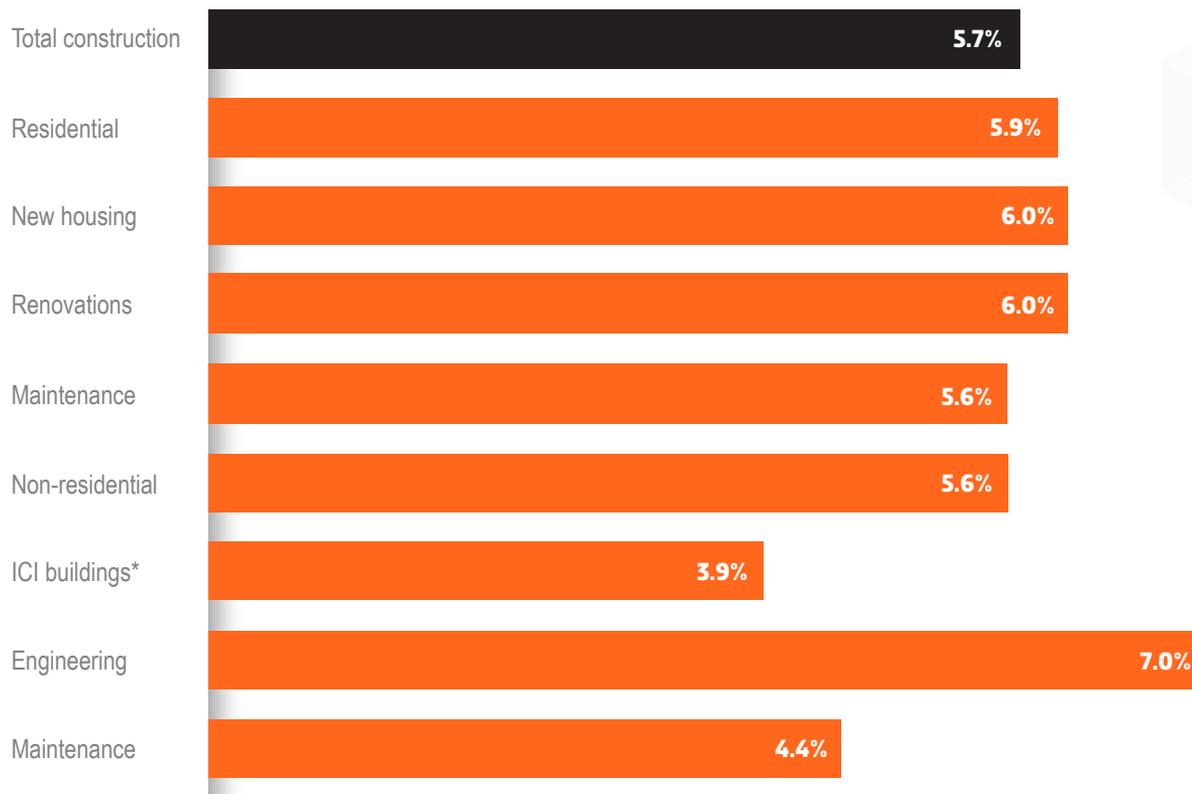


Figure 9: Women's share of total direct trades and occupations (on-site), Saskatchewan

* industrial, commercial, institutional

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

Meeting future labour market needs may also require Saskatchewan's construction industry to recruit more new Canadians (immigrants). Between 2020 and 2029, the province is expected to welcome more than 132,000 newcomers, making the immigrant population a key driver of labour force growth.

Saskatchewan's construction labour force is made up of approximately 8% new Canadians. Historically, a key source of immigrants to the province was Europeans, who have a higher propensity to choose construction. With immigration patterns shifting toward Asia, new immigrants may be less inclined to pursue careers in construction trades and occupations. Asian immigrants (primarily those from the Philippines, India, and China) account for approximately 76% of recent immigrants.

CONCLUSIONS AND IMPLICATIONS

Employment is expected to stabilize in 2020 with no further substantial declines in new-housing construction anticipated and with the start of a proposed potash mine expansion in 2021, which should translate into additional employment opportunities. Non-residential construction is also supported by a moderate rise in ICI building construction across the scenario period.

Adding to market challenges is the need to replace more than 9,100 workers expected to retire over the next decade. Maintaining efforts to attract new entrants during the expected periods of slower growth early in the scenario period and later as the proposed major projects peak and wind down, will be critical to avoid a loss of industry capacity and the creation of possible skills gaps within the labour force. Maintaining this longer-term view will be important to sustain a skilled provincial labour force capable of 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 2020–2029 outlook scenario underpins the labour 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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