BUILDFORCE CANADA

2014–2023
Key Highlights

Construction and Maintenance Looking Forward

National Summary

Construction remains among the fastest growing Canadian industries, but momentum has been slowing and the scope of activity has narrowed. Economic and demographic forces are altering market conditions. Labour requirements are shifting into Western resource projects and infrastructure markets and there is a need to address the challenges of an aging workforce as more baby boomers retire. These are not new trends, but they are growing more intense.

Construction is moving into a situation where, in some key markets, special skills and experience are in short supply, while other regions are experiencing employment losses as major projects peak and wind down, or markets slow. Mobility will be critical to meet industry's needs over the next five years, but movement may be limited by the willingness to work in remote locations, by the portability of skills, and by the start up and wind down of major projects. In 2013, some resource developments were delayed, others started and many continued as planned. Near-term pressures continued to build in Newfoundland and Labrador as big projects approached peaks, while work in Alberta, British Columbia and parts of Ontario started to pick up. For some regions, housing continued to rise over the near term, but by the end of the 2014–2023 scenario period, residential markets will slow, with employment declining slightly below 2013. Altogether, this results in recruiting challenges as markets rise and fall across the provinces.

Across the new 2014 scenario, the common theme is mobility, as retirements will rise across all provinces and sectors while labour requirements shift back and forth across different markets. Balancing markets will require a mix of short- and long-term mobility that includes fly-in, fly-out movement into remote northern locations and more long-term additions of young and permanent workers to each provincial labour market.

Expanding construction activity adds 64,000 jobs overall, with 52,000 jobs gained in the non-residential sector and another 12,000 gained in residential construction by 2023.

The full national report highlights the distinct local market cycles and structural changes. More detailed descriptions of each market are available in the provincial highlights reports. In this 2014 annual update of the BuildForce Canada *Construction and Maintenance Looking Forward* report, the pattern of job growth shifts, but retains the same three paths that have distinguished the provincial scenarios in the past:

1. Recovery and expansion in Alberta, Ontario, British Columbia and Manitoba
2. Peaks and valleys in Saskatchewan and Newfoundland and Labrador
3. Sustained levels of employment in Quebec, New Brunswick, Nova Scotia and Prince Edward Island

Non-residential construction leads the expansion, with steady growth in the commercial and industrial sectors and a series of resource and utility/infrastructure projects providing cyclical demands in many provinces. Residential construction lags. Several provincial housing markets experienced a brief downturn in 2013, but will see a moderate recovery to 2015 or 2016. Residential employment remains below the 2007 peak until 2023 in some provinces. Ontario, Alberta and

British Columbia are moderately stronger and contribute to a small gain in residential employment from 2014 to 2023.

As each year passes, the demographic patterns that limit Canada's growth potential grow a bit more severe. Retirements rise each year while the number of new entrants from the local population declines. Under these conditions, the local workforce is not able to meet requirements and pressures continue to grow around immigration and recruiting youth.

Matching the right trades and skills to cyclical or demographic needs will continue to be the industry's main challenge. Across the 2014–2023 scenario, replacement demands due to retirements reach 235,000 – well in excess of the 64,000 workers needed to fill new jobs. Estimated first-time new entrants of 167,000 from the population aged 30 and younger are not sufficient to meet demand requirements. Around 132,000 new workers will have to be attracted from other Canadian industries or other countries. Recruiting from other countries has already begun and will continue across the scenario period.

BuildForce Canada uses a scenario-based model to assess future labour market conditions. This labour market information (LMI) system tracks conditions for 33 trades and occupations.[1] BuildForce consults with industry, including owners, contractors and labour groups, to validate the scenario assumptions and construction project lists, and seeks input from government on related analysis. This approach provides current information and first-hand assessments of labour markets for individual construction trades and occupations.

RESIDENTIAL LABOUR REQUIREMENTS

While a short-term housing downturn in 2013 limited new employment opportunities in most markets, a modest recovery carries housing starts higher from 2014 to 2017, where they peak and then remain largely unchanged. Low population growth and migration cycles limit gains in housing activity later in the scenario period. As much as half of residential employment occurs in renovation-related work that tends to be a stable proportion of the growing housing stock.

The key structural driver is the gap between new housing starts and household formations[2]. Over the long term these two trends will balance out. Strong housing activity early in the last decade pushed starts well above formations, but from 2008 to 2011 this situation was abruptly reversed by the recession, driving new housing down. Limited population growth from 2014 to 2023 restrains both the level and growth in new household formations below the peak levels achieved from 2001 to 2007.

NON-RESIDENTIAL LABOUR REQUIREMENTS

For more than 15 years, employment growth in non-residential construction has consistently exceeded other Canadian industries. Recovery and expansion since the recession have continued this trend with some 56,000 new jobs added in this industry from 2010 to 2013. Slower growth is projected for the scenario period, with an expansion from 2014 to 2019 and then little change across a high and uneven plateau. Growth accumulates to 52,000 new jobs across the 10-year scenario from 2014 to 2023.

Across the 2014–2023 scenario, most construction markets expand. Institutional and commercial sectors provide steady year-by-year growth until 2019, after which employment plateaus in most provinces. Big projects drive more volatile activity in industrial and utility construction. The only non-residential market to consistently lag is roads, highways and bridges compared to previous peaks that were boosted by the government stimulus package in 2009 and 2010. Government fiscal restraint will hold back spending in some of these markets, as well as in other non-residential activity, including infrastructure projects. The BuildForce LMI system allocates this pattern of work across the 33 trades and occupations it tracks.

The following trades find relatively more work in commercial, institutional and government projects, with a corresponding steady rise in employment:

- carpenters
- commercial installers
- electricians
- painters and decorators
- plasterers and drywall installers
- plumbers
- refrigeration and air conditioning mechanics
- sheet metal workers
- tilesetters

---

[1] *The BuildForce labour market information model is designed to assess markets for the 33 trades and occupations that are most directly involved with building activity. A large group of office, administrative and other support workers are not included in this list. In general, the 33 BuildForce trades and occupations represent two thirds to three quarters of the total construction workforce.*

[2] *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 the means by which population growth is transformed into demand for new housing.*

These trades add half of the jobs created across the scenario period, where employment follows a moderate cycle, with steady gains from 2013 to 2019.

In contrast, there will be lower employment requirements for the following selected trades with a specialization in highways, bridges and other civil work:

- drillers and blasters
- trades helpers and labourers
- truck drivers

The remaining – and most volatile – non-residential markets are concentrated in LNG[3] plants, electrical generation and transmission, mining, oil and gas, pipelines and major transit projects. This is not a new pattern. *Construction and Maintenance Looking Forward* has focused attention on a set of trades and occupations in these markets for many years.

The BuildForce LMI committees are asked to contribute to and validate lists and the timing of major projects in these categories. This results in a detailed accounting of major projects, with a consistent validation, that are included in the 2014 scenario. There is a very long list of major industrial and engineering projects, reflecting strong commodity prices, Canada's resource wealth and a significant infrastructure deficit. The majority of the projects on these lists are unchanged from last year.

There are three distinct cycles across regions and sectors.

The first cycle consists of resource (often mining) projects in Saskatchewan, Newfoundland and Labrador and Northern Ontario that are driving a surge in labour requirements that began in 2011 and will continue to 2014 or 2015. Many of these projects are approaching or have passed their peak employment levels.

A second cycle of labour requirements is concentrated in major resource projects in Alberta and British Columbia. Oil sands and supporting infrastructure projects that started in 2011 and 2012 are reaching peak labour requirements in the 2013–2014 period. Announcements during 2013 prompted the addition of a cross-Canada pipeline and the start of large oils sands mining projects. A further round of oil sands expansion is expected to start in 2016 and it will expand capacity by 50 percent when these projects begin production after 2019.

At the same time, a series of LNG plants planned for British Columbia have been announced with related pipelines and roads. Some of this work coincides with mining and utilities projects in Northern B.C., creating another surge in labour requirements.

A third cycle of non-residential building is expected to ramp up in Ontario (mostly in the Greater Toronto Area) from 2015 to 2020, and this includes large investments to refurbish nuclear power facilities and expand transit systems. These demands drive key labour markets up farther out in the scenario, with a peak in 2018.

These three cycles of non-residential construction create a distinct profile, with the resource work in Western Canada steadily building to a peak in 2018 and then the Ontario projects filling in to sustain and then push employment to an even higher peak.

A rising proportion of these industrial and engineering projects are in remote northern locations, referred to by BuildForce as "centres of resource construction." Canada's recent history of labour requirements for these projects has created a corresponding and growing specialized workforce.

These projects can be sorted into four types: oil and gas, electrical generation and transmission, pipelines and mining. Half of this work will occur in the oil and gas sector in Alberta. Indeed, Fort McMurray might be seen as the largest of these centres of resource construction, with the other projects competing for resources at different times and places. But the proportion of this work outside of Alberta has increased, creating a new dimension for mobility across specialized labour markets. The scale of this work makes it a powerful draw for specialized and experienced labour.

Market assessments in centres of resource construction track peaks and troughs for the following trades and occupations:

- boilermakers
- bricklayers
- carpenters
- construction estimators
- construction millwrights and industrial mechanics
- crane operators
- electricians
- gasfitters

[3] *Liquefied natural gas*

- heavy equipment operators and mechanics
- ironworkers
- plumbers
- sheet metal workers
- steamfitters and pipefitters
- trades helpers and labourers
- welders

These projects and the related labour demands are identified in the *Construction and Maintenance Looking Forward* provincial highlights reports, where the findings typically show that numbers required exceed the local workforce. In many cases, the requirements extend to specialized skills and experience within each trade.

Studying the rise and fall of the workforce in the centres of resource construction can focus attention on the behaviour of the workforce *leaving* completed projects. If the workforce is recruited from outside the local area, it is likely that many of the arriving workers will leave – perhaps returning to residences in other provinces and adding to the pool of skilled workers there. From the perspective of the centres of resource construction, many are well qualified and will find work on other resource jobs.

A large proportion of the workforce will be non-resident workers, including temporary foreign workers and the growing interprovincial workforce that consists of Canadians with a residence in one province and work in another.[4]

The BuildForce LMI system retains the departing workforce in local unemployment for a short period as the projects wind down. If several projects end in quick succession, there can be an extended period of weak markets. These episodes may signal the potential for mobility and recruiting in other centres of resource construction.

THE AVAILABLE WORKFORCE

From 2010 to 2013, improving conditions brought construction unemployment back down below the long-term trend levels, and these conditions suggest that unemployment will not be a reliable source of recruiting across much of the scenario period.

Longer-term prospects for adding to the construction workforce focus on broader demographic trends and workforce mobility. To better track long-term demographic trends, the BuildForce LMI system breaks down the annual change in the labour supply into key components: retirements, new entrants and in-mobility[5]. Retirements measure permanent losses to the workforce and this replacement demand is partially offset by first-time new entrants to the labour force from the Canadian population aged 30 and younger. Nationally, the number of new entrants is already below annual retirements, and additions from outside the industry are required to meet total demands. The reliance on additions from outside the local market will increase as the age profile of the workforce grows older.

The 2014 scenario highlights the relative gains in labour requirements in Alberta and British Columbia. Peak requirements in Newfoundland and Labrador and Saskatchewan have passed, leading to the potential outflow of their workforce to other provinces over the near term as the major mining and electrical projects wind down.

The westward shift in labour requirements and the related in-mobility of both interprovincial and international workers has grown more dramatic in the 2014 scenario.

PROVINCIAL SUMMARIES

Provincial summaries highlight a key finding in the 2014, and earlier editions, of *Construction and Maintenance Looking Forward* – activity is shifting to the West. This pattern is intensified in the 2014 update, with more jobs created in the West and fewer in the East. In the East, the dominant forces driving markets limit new jobs related to economic expansion and focus on aging demographics and the risk of out-migration to jobs in the West. In parts of Ontario and Western Canada, these forces strengthen, providing new jobs and drawing the available workforce. There are, of course, exceptions to this pattern, and forces move in cycles across the years. But across the 2014–2023 scenario, Alberta and British Columbia provide the most new construction jobs (33,000 and 18,000, respectively). These provinces provide the majority of new construction jobs in Canada.

[4] *BuildForce research is seeking to improve measures of the interprovincial workforce and is encouraged by new research at Statistics Canada that is tracking this group. See "Inter-provincial Employees in Canada" by Christine Laporte and Yuqian Lu, Analytical Studies Branch, Social Analysis Division, Statistics Canada, 2013, 11-626, No. 29.*

[5] *In-mobility refers to the arrival of workers from outside the local construction industry.*

Newfoundland and Labrador

In 2014, as Newfoundland and Labrador reaches an all-time peak in construction employment, owners and contractors face complex labour market challenges. The first challenge is related to the movement of skilled workers into and then out of several large and remote resource and infrastructure projects that have dominated the province's construction industry since 2007. The second is planning for the replacement of a large number of older workers who will retire between 2014 and 2023.

The increased activity across all sectors has translated into significant employment gains. Between 2007 and 2012, total employment increased by 70 percent (6,000 workers), with as much as 75 percent of this growth driven by the major resource projects. In the later years of the scenario, construction employment settles down to between 11,000 and 12,000 workers – below the 17,000 peak estimated for 2014, but well above the historical level of 8,000 to 10,000.

Between 2015 and 2018, when the projects are winding down, a large, skilled workforce is released from mining and infrastructure work at a time when similar projects are starting in New Brunswick, Alberta, British Columbia and Ontario. Many workers will move on to projects in these other provinces, but some will need to stay to meet continuing engineering construction requirements and to replace a large number of local workers who will be retiring.

The resource boom contributed to a rise in housing activity from 2007 to 2012, when residential employment increased by almost 30 percent. The housing cycle turned down in 2013, and housing starts are expected to fall to 2,600 units in 2015 – close to the 2007 level at the start of the cycle. Starts are expected to remain at the 2015 level until the end of the scenario period in 2023. Residential employment in 2023 will be very close to 2007 levels as the cycle runs its course and the long-term effects of very limited population growth dominate.

Prince Edward Island

From 2007 to 2012, virtually all construction activity rose to propel construction employment in Prince Edward Island to a new peak, but major projects are reaching completion and housing is turning down to end the expansion. The 2014–2023 scenario is characterized by a brief downturn in residential activity followed by increased activity over the medium term that brings investment back to current levels. Non-residential investment cycles around current levels as engineering projects (e.g., utilities) start up and wind down.

Nova Scotia

Commercial, industrial and utility construction will support current levels of employment in Nova Scotia from 2014 to 2023. A construction cycle in the province rose to a peak from 2008 to 2010 and both residential and non-residential building sustained this activity to 2013. Employment levels grow only modestly over the scenario period, as equal gains and losses balance activity in most years to 2023. Annual changes in employment remain in a narrow band averaging plus/minus 2 percent.

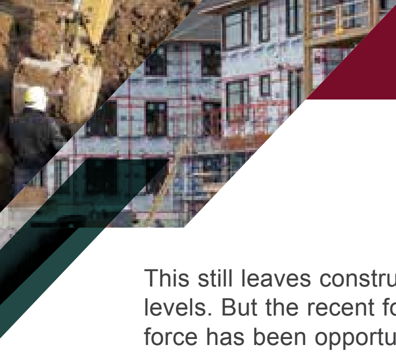
Work patterns shift across the scenario period:

- A steady gain in residential renovation balances a moderate down cycle in new housing.
- A series of industrial and utilities projects shift employment across non-residential occupations.
- The older than average age profile adds to the pace of retirement, creating recruiting challenges later in the scenario period.

For the construction industry in Nova Scotia, there are several possible sources of competition for a skilled and experienced workforce – especially where local workers have left the province in earlier years to find work. Resource projects in Western Canada will remain an attraction, with new projects in British Columbia and Alberta starting in 2015 and later. Opportunities closer to home include projects underway and proposed in Newfoundland and Labrador and an increase in oil-related work in New Brunswick. There is the added challenge of skilled labour requirements for the new shipbuilding industry.

New Brunswick

In 2010, major infrastructure projects combined with the peak of the housing cycle to create record construction employment in New Brunswick, but economic and demographic trends have weakened since that time and employment has declined by 10 percent, or 2,000 jobs.



This still leaves construction employment above historical levels. But the recent focus for New Brunswick's labour force has been opportunities for work in other provinces or plans for retirement. Altogether, local opportunities were limited in 2013.

Current, stable conditions will prevail until 2016, when major mining and pipeline projects are scheduled to begin. A modest but steady decline in employment will shrink the pool of skilled trades in the next few years. Retirements grow as the workforce ages, and out-migration will continue as job opportunities appear in other provinces. New Brunswick will need to retain or rebuild the current workforce to cope with future demands. Plans for sustained recruiting and training, as well as a mobile workforce, are needed to be certain that future skilled labour requirements can be met.

In the short term, from 2014 to 2015, job losses in non-residential construction will be offset by ongoing gains in commercial and industrial sustaining capital and maintenance work. Federal and provincial governments will reduce capital expenditures in an effort to eliminate deficits. Another round of mining and infrastructure projects are expected to start in 2016, with particular emphasis on a major pipeline project, which will bring Western Canadian crude and bitumen to a new marine loading facility to be built in Saint John.

A modest residential boom in the last decade raised housing starts well above household formation as the stock of houses was expanded and improved. The new housing cycle turned down after 2010, resulting in a reduction of close to 400 jobs when compared to the peak. The large and aging housing stock supports a rising demand for renovation activity and this adds to labour requirements in the residential workforce.

Quebec

Construction employment in Quebec passed through a record high peak in 2012 and has started a slow decline that will reduce activity to 2015. Weakness is most apparent in industrial and engineering work – the markets that led the boom – and in residential work. Several projects, including major utilities and institutional work, have passed peak activity and are approaching completion. This represents a pause or modest slowdown at the top of a remarkable boom. A limited recovery starts in 2016.

Quebec has an aging construction workforce that will prompt a steady rise in retirements. At the same time, the population under 30 is declining, leaving the construction industry to compete with other industries for the new entrants who will learn the trades and carry on the traditions.

Ontario

Construction employment in Ontario will continue to grow across the 2014–2023 scenario, with investments in resources and infrastructure leading growth. Across the province, two big forces drive markets. First, lower population growth limits housing formations and raises retirements. Second, major projects are planned for mining, utilities, transportation and transit.

Gains will be unevenly distributed across markets and time. Strength in Southwest and Northern Ontario will be concentrated between 2014 and 2017. In these markets, cyclical demands will exceed the local workforce and require in-mobility that peaks in 2015, with conditions reversing later in the scenario period. There are only a few other instances of significant labour market challenges related to major projects and cycles. Several markets – notably commercial and industrial work in the GTA[7] – will provide a steady and moderate increase in jobs. Increased activity in the GTA is also tied to major infrastructure projects.

Eastern Ontario

Construction labour markets are generally weak in Eastern Ontario, with year-to-year changes averaging just 1 percent. Housing starts follow formations downward to a low point below the average levels in the last decade. Slower growth translates into a moderate decline in residential employment. The region was a focus for government spending during the counter-cyclical infrastructure investments in 2009 and 2010. All of this activity has since passed and government restraint is holding institutional, road, bridge and other spending to new and lower levels. Persistent weak employment growth may make Eastern Ontario a source of labour for other regions.

The Greater Toronto Area

The GTA is the third-largest construction labour market identified in the BuildForce system – only Quebec and Alberta are larger. This region is notable for growth prospects in most markets, with residential employment

7 *GTA refers to the Greater Toronto Area*

holding its own. Non-residential building is expected to grow steadily and the region has plans for some of the largest infrastructure projects in Canada, including a major expansion of the transit system and refurbishment of the nuclear power generation system.

Central Ontario

This large market is characterized with steady growth in most sectors. There are few major projects that will disrupt markets in Central Ontario, and annual changes in labour requirements rarely fluctuate more than 2 percent in either direction. A sharp improvement in residential markets in 2015 provides a brief jump in recruiting and tight labour markets for selected trades and occupations that specialize in housing-related work.

Southwest Ontario

The Southwest suffered during the 2009 recession and industrial losses held back most construction activity until 2011. Residential and commercial markets are currently weak, while engineering projects are hiring some trades from other markets. From 2014 to 2017, major project activity and a revival in housing help to fuel more jobs and the arrival of construction trades. Labour requirements for large infrastructure projects provide peaks in 2015 and 2016, and these demands will exceed the local workforce. These projects coincide with other engineering work, and competition for key trades will create brief periods of tight markets.

Northern Ontario

The construction workforce in the North will change dramatically in the coming decade. Mining and infrastructure projects will create new jobs until 2015, bringing in a wave of new, often non-resident workers that will equal almost half of the resident labour force in 2007. Further, the age profile of the original workforce is older than the rest of the province. Replacement requirements are thus higher and this will take away another large group of workers by 2023.

Manitoba

From 2014 to 2023, the decade-old pattern of balanced and steady growth will continue in Manitoba, at a more moderate pace. Weaker markets during 2014 and 2015 will create a gap in job openings before a new round of projects are scheduled to ramp up employment in 2016 and beyond. Growth in construction employment will resume in 2016 and advance in a stop-start pattern for the duration of the scenario period. With labour requirements rising at a slower pace, recruiting and workforce planning can be more easily managed by the industry. Government restraint will slow construction on roads, highways and bridges and on some building work. Some cyclical demands are related to the electricity generation and transmission projects in the North, where schedules will draw in large numbers of specialists building to a first peak in 2016 and then again in 2019 and 2020.

Saskatchewan

Construction employment in Saskatchewan reached an historical peak in 2013 as the resource and housing boom that began over a decade ago matured. For most of the *Construction and Maintenance Looking Forward* 2014 scenario, Saskatchewan arrives at a higher and more stable level of activity.

The surge in non-residential construction jobs over the past 10 years was centred in the major resource, engineering and industrial projects that added significant new production capacity. As the province brings these investments into operation, employment shifts to the commercial and infrastructure building that will serve the new production workforce. Residential has been one of the fastest growing markets in Canada over the last few years, but the housing boom that provided accommodation for the arriving project workforce has also run its course, leaving future requirements for a stable workforce to maintain and renovate the housing stock.

As the current projects wind down, competition from those in other provinces will attract some of the workforce. This includes resource projects in Newfoundland and Labrador in the short term and new projects in Alberta and British Columbia starting in 2014 and later that may draw workers away from Saskatchewan.

Alberta

Across the 2014–2023 scenario, Alberta continues to lead Canada's construction industry, adding jobs and building the productive capacity of the provincial economy to new heights. Employment had more than doubled from 1997 to 2012, and expansion continues.

Residential activity will plateau in 2014 and then move down and up in a mild cycle to 2023. At its peak in 2007, housing starts in Alberta were running well above levels needed to meet household formation. Driven initially by the economic downturn, the gap closed from 2008 to 2011, but starts were strong again in 2012 and 2013 as overall economic conditions improved.

While the 6,600 jobs added to the residential workforce from 2014 to 2023 are less than the gains in non-residential (almost 26,000 jobs), the challenges will be significant. This includes the rising number of retirements among experienced and skilled home builders and competition from other construction markets.

Construction employment growth continues, with the number of jobs added each year often approaching the scale of the boom years of the last decade. At least two countervailing forces will create barriers to the expected expansion: As the workforce ages, the number of retirements will rise and fewer young people will join the industry. Additionally, a series of major resource, infrastructure and engineering projects in other provinces will compete at different times for the key trades needed in Alberta.

Employers will continue to bring in residents from outside the province (both out-of-province and temporary foreign workers) to work on big and often remote projects.[8] Given the steady increase in demands and the weak or variable requirements in other provinces, Alberta will likely draw labour from most provinces at some point between 2014 and 2023.

In addition, as the oil sands industry matures and capacity grows larger, employment shifts from new capital projects to increased ongoing maintenance work and sustaining capital projects as large oil sands developments move into operation phase. Later in the scenario period, maintenance and sustaining capital projects will provide more jobs than construction. Sustaining production from the oil sands deposits requires regular and large-scale shutdowns for maintenance and equipment replacement.

British Columbia

The 2014 scenario for British Columbia predicts that new activity will raise employment to a new record level by 2017 – passing the last peak in 2007.

Most of the non-residential construction markets are leaders in this growth spurt, but investments in the major resource and infrastructure projects in the North are the biggest contributors. B.C. employers will need to ramp up recruiting campaigns to draw the needed workers to the remote projects in the North.

A brief surge in new housing in 2016 and 2017 coincides with the peak in non-residential projects and adds to the potential labour market challenges. Through the rest of the scenario period, a gradual increase in housing stock results in steady gains in renovation and new housing construction jobs.

Filling the large complement of short-term jobs is just one of the challenges facing the B.C. construction industry across the 2014–2023 scenario. Another challenge is replacing the rising number of retiring construction workers. While these recruiting needs are spread out more evenly across the scenario, they grow steadily to a much larger number.

CONCLUSIONS AND IMPLICATIONS FOR MOBILITY

For more than 15 years, economic demands have been driving construction employment higher. The 2009 recession now appears to have been a brief interruption, as the expansion resumed and new record levels were achieved from 2010 to 2012. Momentum driving construction in the East eased notably in 2013 and a majority of the job growth will be in West.

Construction needs to recruit almost 300,000 new workers to meet expansion and replacement demands between 2014 and 2023. The industry is estimated to attract 167,000 first-time entrants to the workforce. This effort depends on strong appeals to youth and continuing investments in the programs that attract women and Aboriginal people. At the same time, retiring workers will take specialized skills and experience with them as they leave. Programs to draw in youth must be built on apprenticeship, health and safety and industry training programs. Additions to these programs need to anticipate the patterns of retirements and build the ranks of future specialists, foremen, supervisors and contractors.

Even as the industry succeeds in sustaining or increasing its share of the new entrants, there is still a need to reach outside the industry and attract 132,000 workers to meet

[8] *See “Inter-provincial Employees in Canada” by Christine Laporte and Yuqian Lu, Analytical Studies Branch, Social Analysis Division, Statistics Canada, 2013, 11-626, No. 29.*

these needs. Finding the needed workers from within Canada is a natural priority, and new data helps to estimate the role of interprovincial employment as non-resident workers respond to market imbalances.

This national review points to several possibilities for mobility – especially in the markets where large industrial and engineering projects create peaks and troughs. For example:

- Strong peaks in resource projects in Newfoundland and Labrador during 2014 will require recruiting from other centres of resource construction.
- Major shipbuilding contracts in Nova Scotia and British Columbia later in the scenario period have the potential to draw construction trades out of the industry.
- Mining projects in Northern Ontario during 2014 and 2015 will draw workers from Ontario and other centres of resource construction.
- Mining projects in Northern and rural Saskatchewan will draw from Southern Saskatchewan and other centres of resource construction.
- Oil sands and related infrastructure projects across Northern Alberta, with the strongest growth of any Canadian market, will draw from other centres of resource construction. New project schedules track demands rising from 2014, pausing in 2016, and then resuming a strong rise in 2018 and 2019.
- Mining and utility projects in Northern British Columbia will draw from the Lower Mainland and other centres of resource construction.

The long list of current and proposed major projects includes many opportunities for training and sharing human resources, but much of the needed additions to the workforce will come from international sources. The dominant change predicted in the 2014 update is that the construction workforce is moving West. But the size and the timing of the projects make it clear that inter- and intra-provincial mobility will only fill some of the needs, and the available workforce – after taking account of the long-term needs of the eastern regions – is not adequate to meet the projected needs in the West.

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

For more information, contact:

BuildForce Canada
Phone: 613-569-5552
info@buildforce.ca

February 2014

Funded by the Government of Canada

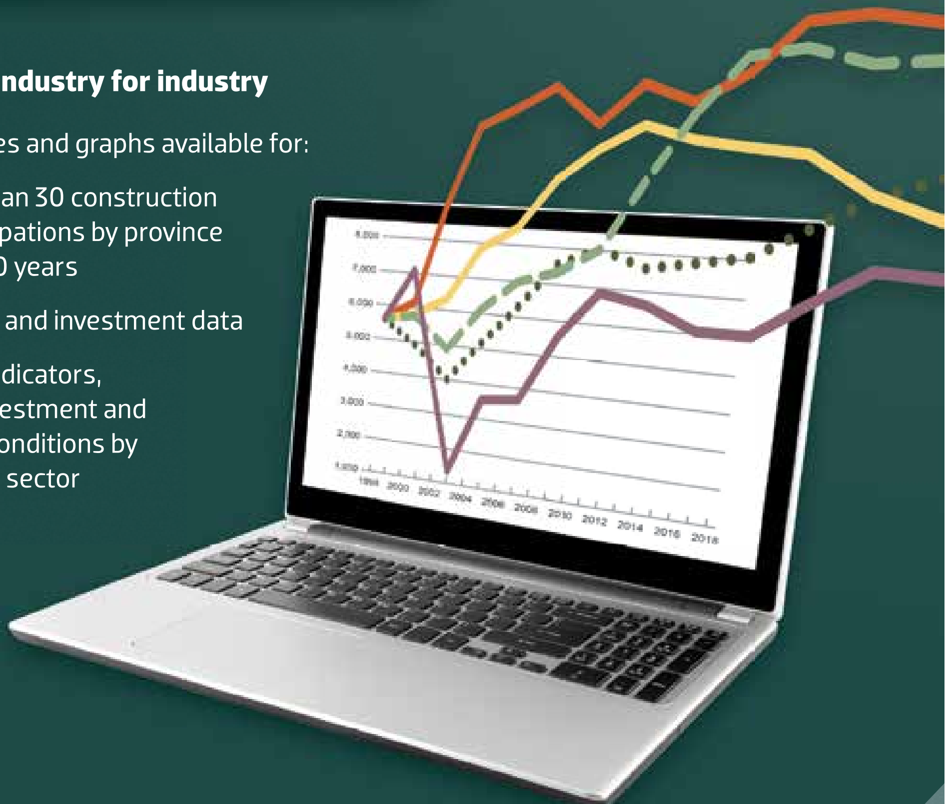
For the most detailed and comprehensive construction labour market data in Canada, visit

www.constructionforecasts.ca

Developed with industry for industry

Customizable tables and graphs available for:

- Data on more than 30 construction trades and occupations by province looking ahead 10 years
- Macroeconomic and investment data
- Key economic indicators, construction investment and labour market conditions by province and/or sector



Also check out the Construction Map App for major resource construction projects mapped across Canada.

www.constructionmapapp.ca

BUILDFORCE CANADA

Best viewed on tablets (or computers)