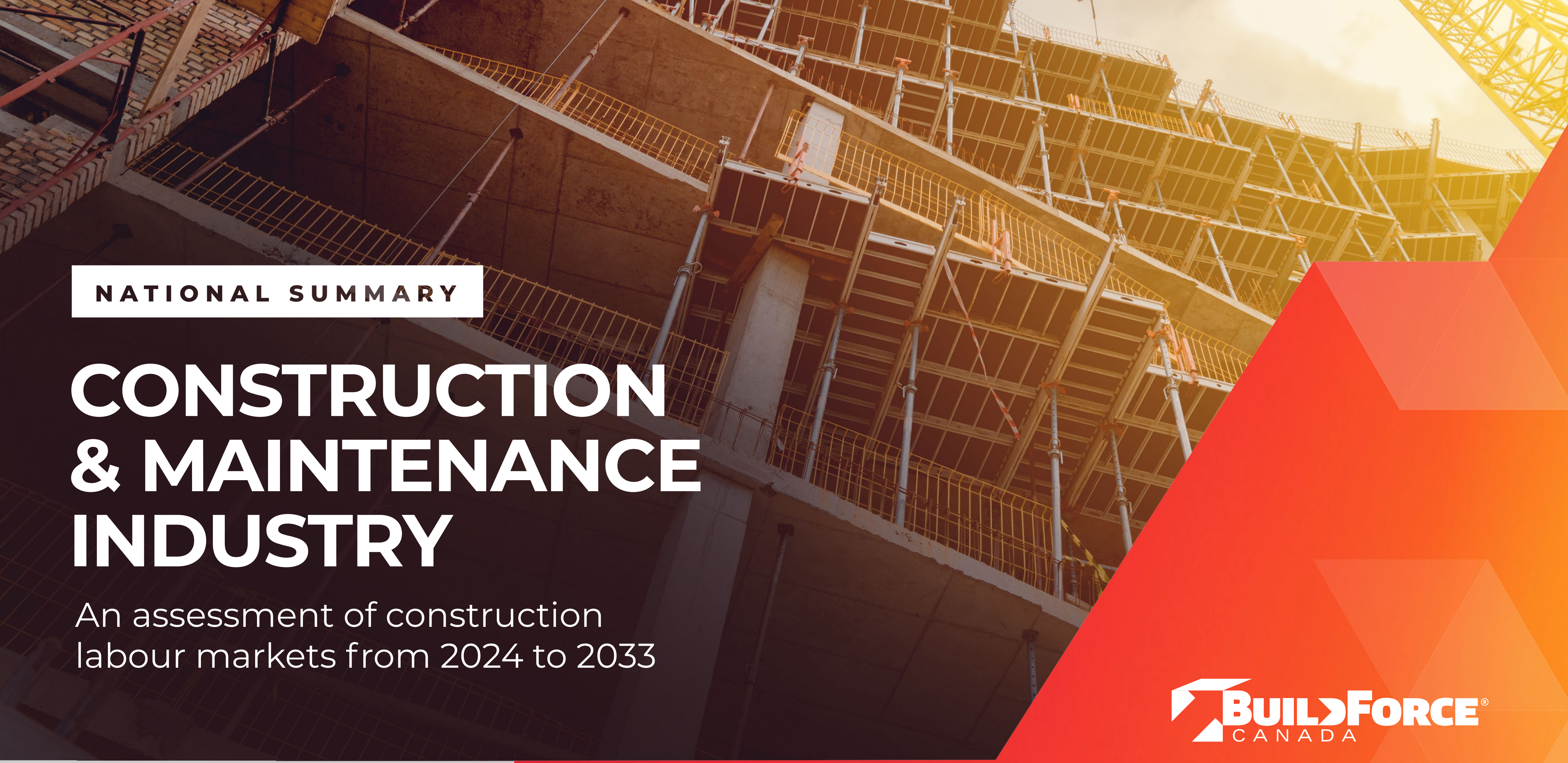

NATIONAL SUMMARY

CONSTRUCTION & MAINTENANCE INDUSTRY

An assessment of construction labour markets from 2024 to 2033

CA

MARCH 2024

BUILDFORCE CANADA

Funded in part by the Government of Canada's Sectoral Workforce Solutions Program

Canada

ABOUT BUILDFORCE CANADA

Originally created in 2001 as the Construction Sector Council, BuildForce Canada is a national industry-led organization committed to working with the construction industry to provide information and resources to assist with its management of workforce requirements.

The mandate of BuildForce Canada is to provide accurate and timely labour market information (LMI) to advance the needs of the entire construction industry in order to develop a highly skilled labour force that will support the future needs of Canada's construction industry.

ACKNOWLEDGEMENTS

BuildForce Canada wishes to acknowledge the participation and input of the numerous industry volunteers for their dedication and contributions to the development of this annual forecast. Please see the appendix for a full list of the committee participants.

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NATIONAL

Canada's construction industry

Construction is among Canada's largest industrial sectors. In 2023, total construction industry employment exceeded 1.5 million people, which amounts to approximately one out of every 13 working Canadians. As a whole, the industry accounts for 7% of Canada's GDP. It is made up mostly of small businesses, with approximately 61% of industry firms classified as micro businesses consisting of fewer than five employees.

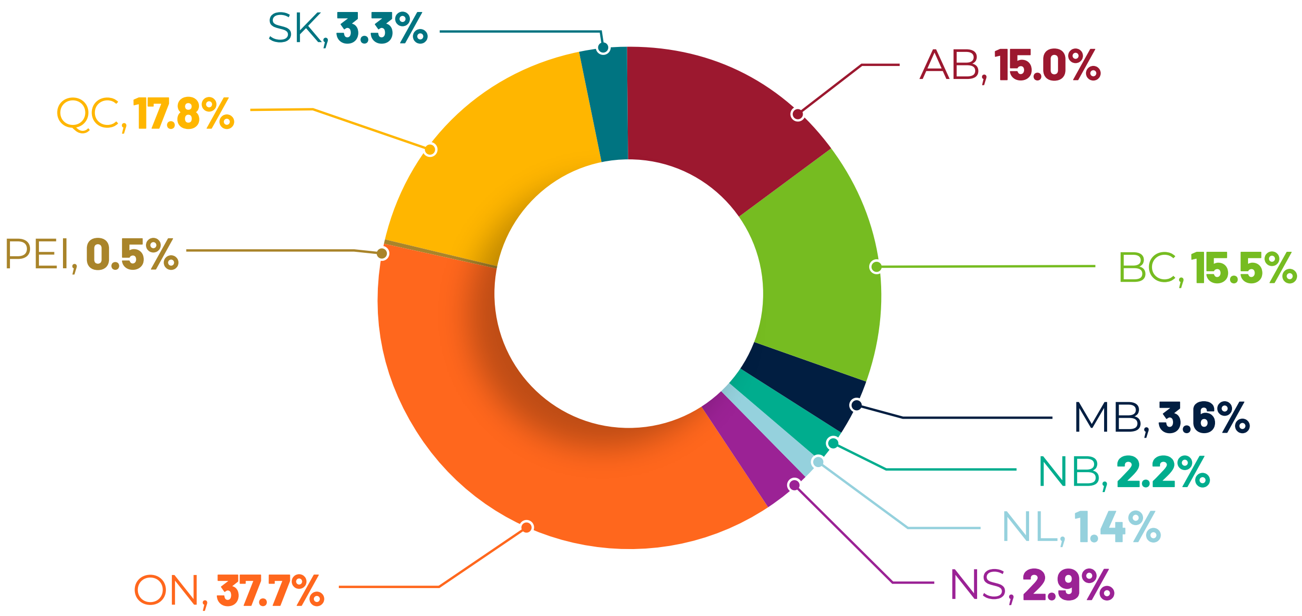
Labour Force Survey[1] data from Statistics Canada shows that construction employment has increased in Canada in almost every year since 2002, growing by more than 690,000 workers, or 80%. Growth has been especially pronounced in recent years, given the rapid increase in demand for residential and non-residential construction in almost every region of the country. Between 2020 and 2022, employment growth significantly outpaced growth in the labour force, bringing the national construction unemployment rate to a new low of 4.6%.

Unemployment rose slightly in 2023, however, as growth in the construction labour force slightly outpaced the rise in employment. This brought the sector's average annual unemployment rate to 5.1%.

A notable trend throughout 2023 was the increasing employment of women in the construction sector. Among women aged 15 years and over, employment rose by 8.2% for the year. Notably, the employment of women 15 to 24 years of age surged by 32% year-over-year, increasing from 12,200 in 2022 to 16,100 in 2023. This rise aligns with the significant federal support for apprenticeship development and the industry's ongoing labour force challenges.

Figure 1 provides a breakdown of the share of total construction industry employment by province.

Figure 1: Share of total construction industry employment by province, 2023



[1] Statistics Canada's Labour Force Survey captures the labour force status of all workers within the industry, including those in occupations outside the direct trades and occupations tracked by BuildForce Canada.

Total construction industry employment was virtually unchanged in 2023, with the industry's residential and non-residential sectors charting different courses. Employment in the non-residential sector continued to be driven by construction of major projects including public-sector institutional buildings, public-transit systems, and roads, highways, and bridges. In 2023, employment for non-residential construction workers working directly on job sites rose by 4% as a result. Residential construction, on the other hand, saw activity contract in 2023, as rising interest rates and consumer concerns over affordability eroded demand for new-housing construction in particular. Residential employment contracted by 4% in 2023.

The changing demand patterns have had varying effects on provincial and regional labour markets. In most cases, labour pressures eased across discrete residential sectors. This was mostly the case among trades and occupations concentrated in new-home construction, and on single-detached homes in particular. In some cases, labour demands increased for those trades and occupations building more affordable multi-family units. This trend is expected to continue into 2024 before wages and incomes adjust to inflation, and a rebound in the residential sector is created by a combination of pent-up demand and strong population growth that is driven by immigration.

In the non-residential sector, labour market demands are unlikely to ease until the middle years of the forecast period, given the high volume of large projects underway in most regions of the country.

National construction forecast overview (2024 to 2033)

Residential and non-residential construction investment levels enter the 2024 to 2033 BuildForce Canada forecast period charting different courses.

Residential investment reached a peak in 2021 as interest rates reached a record low, and demand for housing was pronounced. Housing starts reached a record high of nearly 272,000 units that year. Investment dropped slightly in 2022, as the lifting of restrictions relating to the COVID-19 pandemic helped to bolster immigration, and protected investment levels somewhat from the effects of rising interest rates later in the year. The sector reported a further contraction – of 10% – in 2023 as rising interest rates curbed both new-housing construction and renovation activity. Levels are forecast to contract again in 2024, but by a more modest 2%, as interest rates are expected to stabilize.

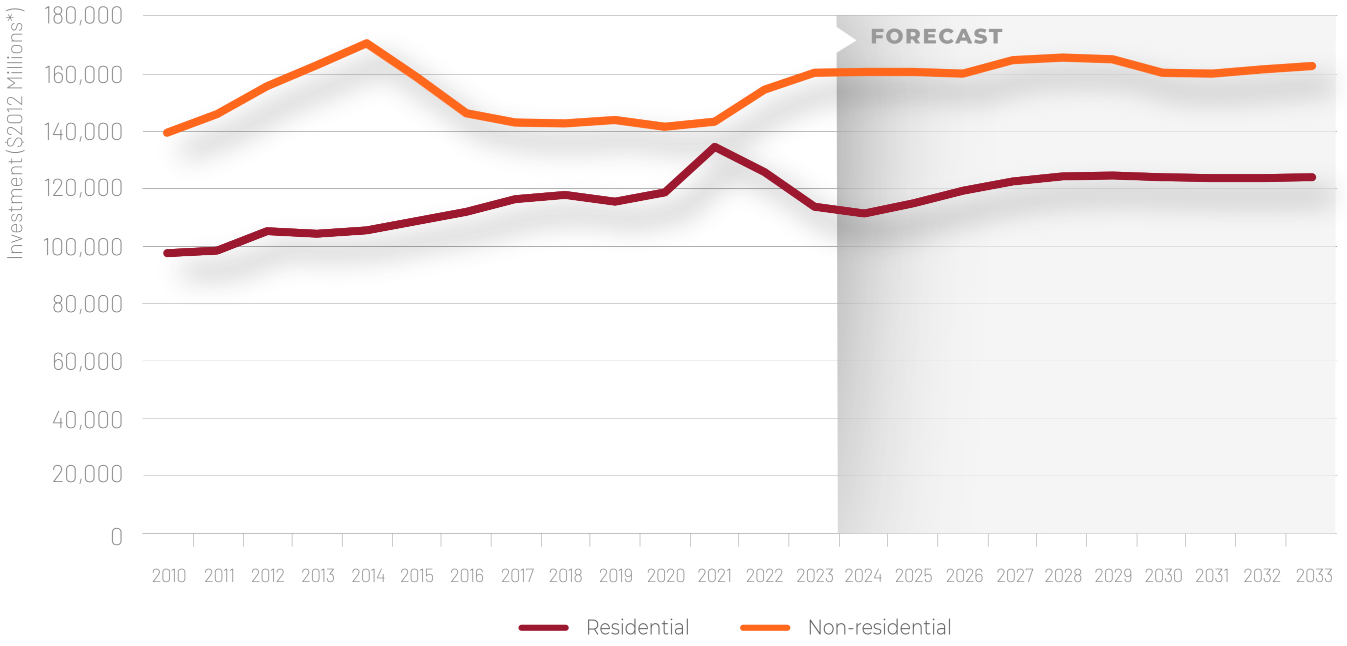
As Figure 2 shows, residential investment is projected to return to growth in 2025 and beyond. Initially, growth is driven by the construction of new housing and carries through to 2028. This occurs in most regions of the country and as interest rate pressures ease and wages and incomes adjust. Renovation activity, meanwhile, grows across the forecast period in response to an aging housing stock, surpassing new housing as the principal driver of growth in the sector by 2031. Overall residential investment levels end the forecast period 9% above 2023 levels.

Investment in the non-residential sector enters the forecast period on a steady upward trend that has been driven by public-sector investment in health care, utilities, transportation, and public transit, as well as robust levels of private-sector investment.

The outlook calls for levels to remain elevated across the forecast period, given the high volume of large projects planned and underway in most regions of the country. Engineering construction demands are projected to cycle lower in the short term before rebounding in middle years, in line with the schedule of planned transit projects in Ontario and British Columbia, as well as utility projects in New Brunswick, Nova Scotia, and British Columbia.

Meanwhile, investment in industrial, commercial, and institutional building projects is anticipated to see a steady upward curve through the decade. Part of this is due to high levels of investment in the construction of institutional and government buildings; part is also due to a rebound in commercial building construction as the economy returns to growth. By 2033, non-residential investment is projected to grow by nearly 2% above 2023 levels.

Figure 2: Total construction investment, Canada



* $2012 millions indicates that the investment values are in year 2012 dollars (base year), that is, adjusted for inflation. This is used to calculate the real physical year-to-year change of the value of construction, factoring out growth (increase in value) due to increases in prices.

Source: Statistics Canada, BuildForce Canada (2024-2033)

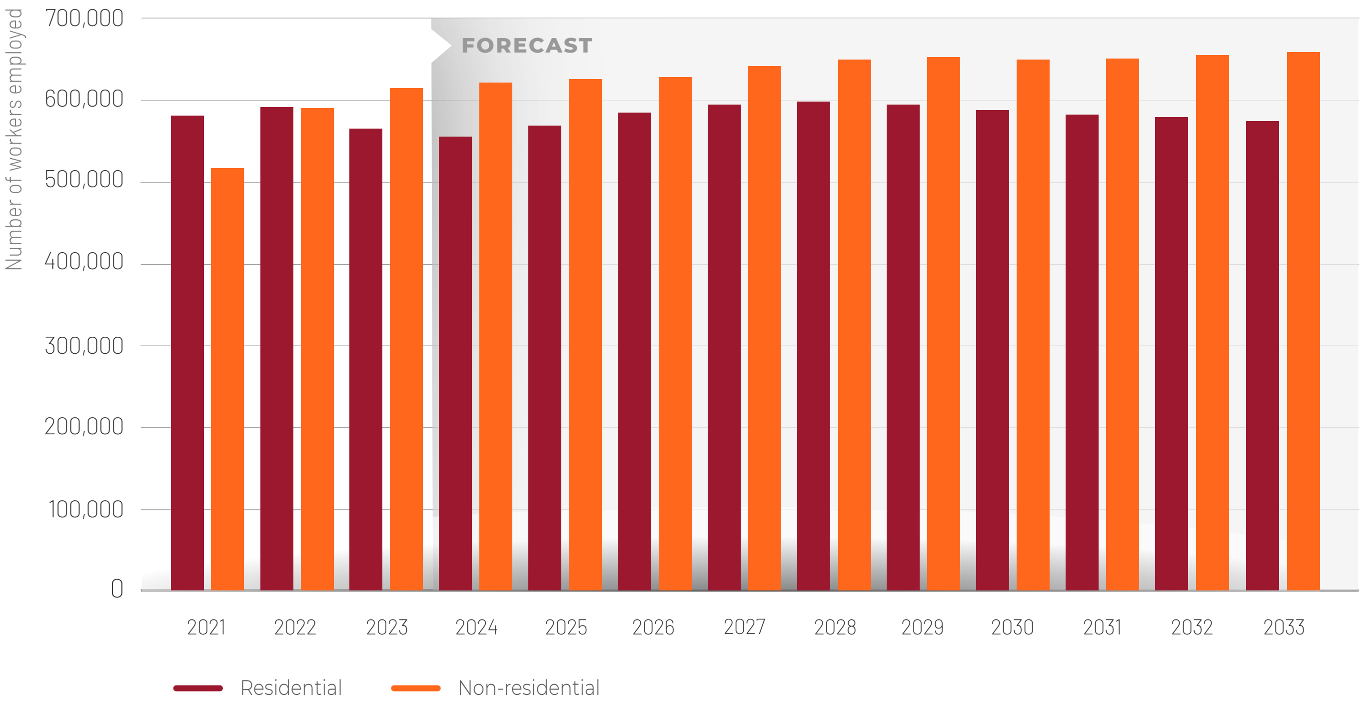
Employment

Employment among the 34 trades and occupations tracked in the BuildForce Canada LMI model was estimated at above 1.18 million workers in 2023. Although that figure was virtually unchanged from the total employment reported in 2022, its composition was different.

In 2022, employment in the residential and non-residential sectors was virtually identical, with both reaching levels of more than 590,000 workers. Residential construction employment contracted by 4% in 2023, while non-residential employment rose by 4%. These trends continue into 2024 before growth resumes in both sectors into the medium term. The later years see residential employment contract again as population growth slows, while non-residential employment continues to grow. By 2033, non-residential employment is projected to increase by 7% above 2023 levels, while residential employment is projected to grow by just under 2%.

Figure 3 tracks employment over the forecast period.

Figure 3: Construction employment growth outlook, Canada



Source: Statistics Canada, BuildForce Canada (2024-2033)

Labour force

As construction employment is anticipated to increase over the forecast period, labour force management may be challenging. Industry retirements are expected to consistently count between 25,000 and 28,000 workers annually over the duration of the forecast period as many in the baby boomer generation exit the industry.

Construction demands over the same period will require the labour force to expand by some 88,400 workers. When this demand growth is added to the 263,400 total individuals who are expected to retire over the same time frame – approximately 21% of the current labour force – the industry's overall hiring requirement rises to 351,800 workers by 2033. Although the industry is expected to recruit approximately 266,300 new entrants under the age of 30 during this period to help offset some of this requirement, even at these heightened levels of recruitment, the industry is likely to be short 85,500 workers by 2033.

Figure 4 shows estimated changes in the construction labour force over the forecast period.

Figure 4: Changes in the construction labour force, Canada

* **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

SECTOR INSIGHTS

SECTOR INSIGHTS

Residential investment

Investment in Canada's residential sector has been driven in recent years by strong levels of activity in new-home construction. Housing starts rose to a peak of nearly 272,000 units in 2021, driven by historically low interest rates, strong levels of household formation, and high levels of disposable consumer income accumulated during the COVID-19 pandemic. Renovation activity also rose to a peak in 2021, as a result of many of the same factors.

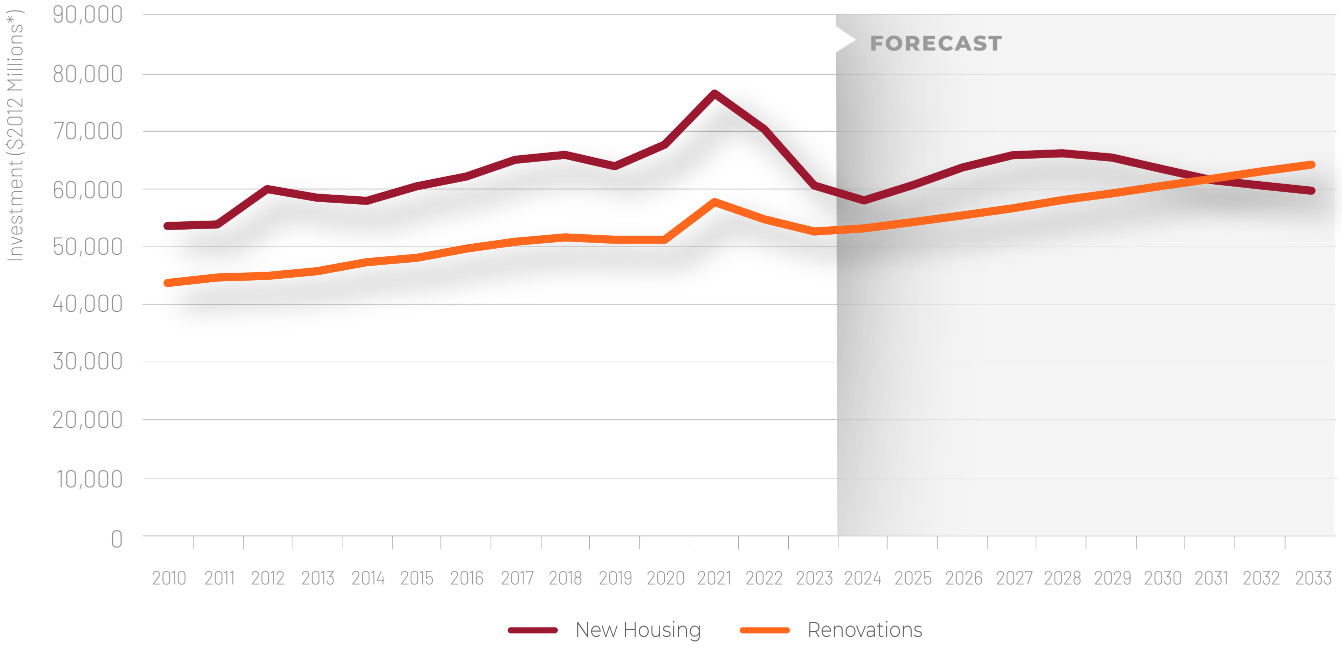
Investment levels in both have stepped down since, with contractions driven by rising interest rates seen in the second half of 2022 and throughout 2023. Housing starts in particular contracted by 11% in 2023, compared to 2022 levels. They are expected to contract again in 2024, given similar pressures around interest rates and affordability.

Of note, many of the near-term contractions in new-housing construction are expected to occur among more expensive single-detached[2] units. The initial outlook for multi-unit residential starts calls for more muted contractions, given their relative affordability, and given relatively tight rental vacancy rates in most major urban centres – some of which are below 2%.

As Figure 5 shows, investment related to the construction of new housing is projected to return to growth between 2025 and 2028 as interest rate pressures ease and as wages and incomes adjust to higher prices. In the later years of the forecast period, housing starts, and new-housing investment levels are projected to contract in response to slowing levels of population growth.

Renovation activity, meanwhile, is projected to chart a course of uninterrupted growth starting in 2024. This occurs due to several factors, including stabilizing construction costs, the aging of the housing stock, and a general preference by consumers to age in place[3] during their later years.

Figure 5: Residential construction investment, Canada



* $2012 millions indicates that the investment values are in year 2012 dollars (base year), that is, adjusted for inflation. This is used to calculate the real physical year-to-year change of the value of construction, factoring out growth (increase in value) due to increases in prices.

Source: Statistics Canada, BuildForce Canada (2024-2033)

[2] **Single-detached (single)** refers to a building containing only one dwelling unit that is completely separated on all sides from any other dwelling or structure.
[3] **Age in place** is defined as required renovations and modifications to enable individuals to continue to live independently and safely in their residence as they age.

By 2033, residential construction investment is projected to increase by 9% above 2023 levels. Compared to 2023 levels, by 2033 investment in new housing construction is 2% lower. However, this end-point comparison misses an anticipated housing up-cycle, which is estimated to raise investment by 9% to a peak in 2028. Renovation investment, on the other hand, increases steadily – by nearly 22% – to become the principal driver of activity in the sector after 2031.

It is important to note that this analysis is based on currently known demands. It does not take into account public-sector initiatives to address housing affordability challenges.

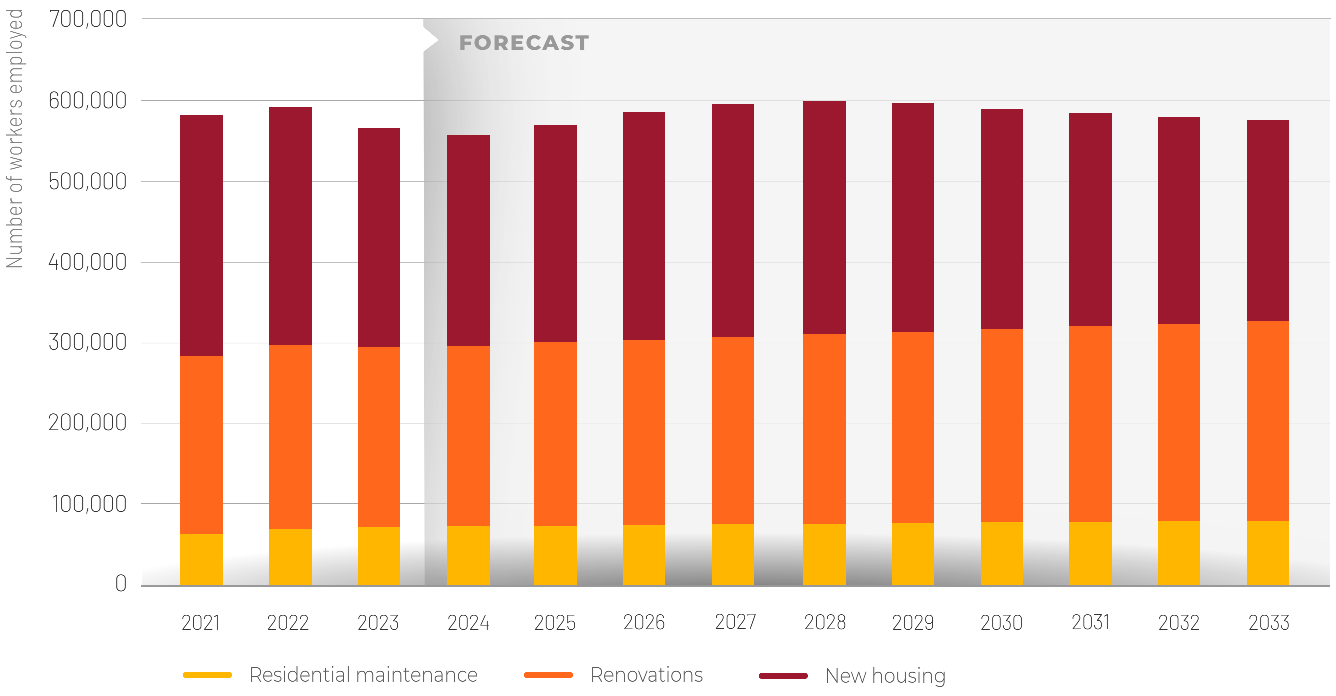
Residential employment

Residential employment stepped down in 2023. It is projected to contract again in 2024, although more modestly, before returning to growth in most regions of the country between 2025 and 2029. This occurs as new-housing construction returns to growth across the period. In the later years of the forecast period, employment levels contract as demand for new housing decreases with slowing population growth and lower levels of immigration. Meanwhile, employment in the renovation and maintenance components see continuous increases across the forecast period.

As Figure 6 shows, overall residential employment is projected to increase by 6% to a forecast peak in 2028. Employment levels retreat thereafter. By 2033, gains of 11% and 10% in renovation and maintenance employment, respectively, more than offset a contraction of 8% in new-housing employment.

Table 1 shows the anticipated changes in residential employment by province across three periods: the short term (2024–2026), the medium term (2027–2029), and the long term (2030–2033).

Figure 6: Residential construction employment growth outlook, Canada



Source: Statistics Canada, BuildForce Canada (2024-2033)

Table 1: Changes in residential employment, by province

REGION	% CHANGE 2024-2026	% CHANGE 2027-2029	% CHANGE 2030-2033
Canada	**3%**	**2%**	**-3%**
Newfoundland and Labrador	-2%	0%	-7%
Nova Scotia	-2%	3%	1%
New Brunswick	3%	5%	0%
Prince Edward Island	8%	4%	0%
Quebec	-3%	-4%	-2%
Ontario	6%	4%	-3%
Manitoba	-4%	-3%	2%
Saskatchewan	16%	12%	-10%
Alberta	9%	-2%	-8%
British Columbia	1%	4%	-2%

Source: BuildForce Canada

Residential labour force

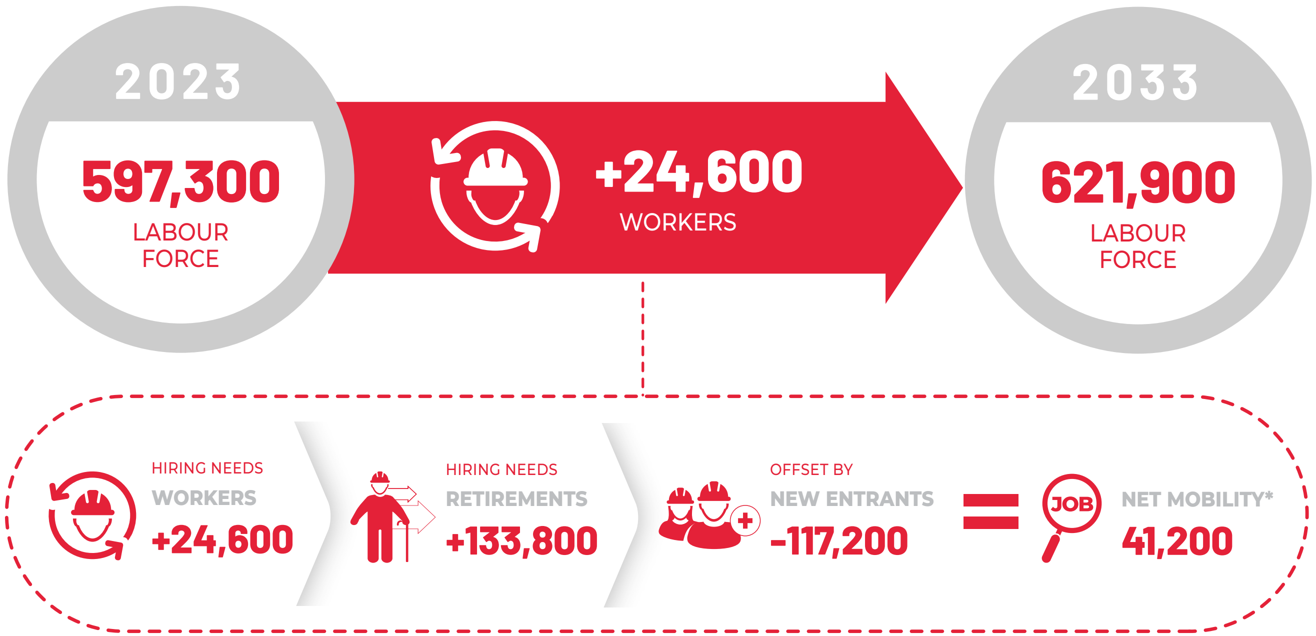
The anticipated rise in overall residential employment is expected to require the labour force to increase by some 24,600 workers over the forecast period. Complicating this trend will be the retirement of 133,800 workers, or 22% of the 2023 labour force. Combined, these figures create a hiring requirement of 158,400 workers.

Historical recruitment levels suggest the industry could add 117,200 new entrants under the age of 30 from local recruitment efforts, but unless anticipated recruitment is increased, the sector may be short as many as 41,200 workers by 2033.

Figure 7 shows the anticipated labour force changes in the residential sector over the forecast period.

"The anticipated rise in overall residential employment is expected to require the labour force to increase by some 24,600 workers over the forecast period."

Figure 7: Changes in the residential construction labour force, Canada



* **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

Non-residential construction investment

Non-residential construction investment levels have increased significantly since 2021, in part as a tool to stimulate the national economy in the wake of the COVID-19 pandemic, and in part in response to significant levels of population growth. Major projects have been deployed across the engineering construction and the construction of industrial, commercial, and institutional (ICI) buildings in nearly every region of the country. Combined, these helped to increase non-residential investment levels by just under 4% in 2023, following an 8% increase in 2022.

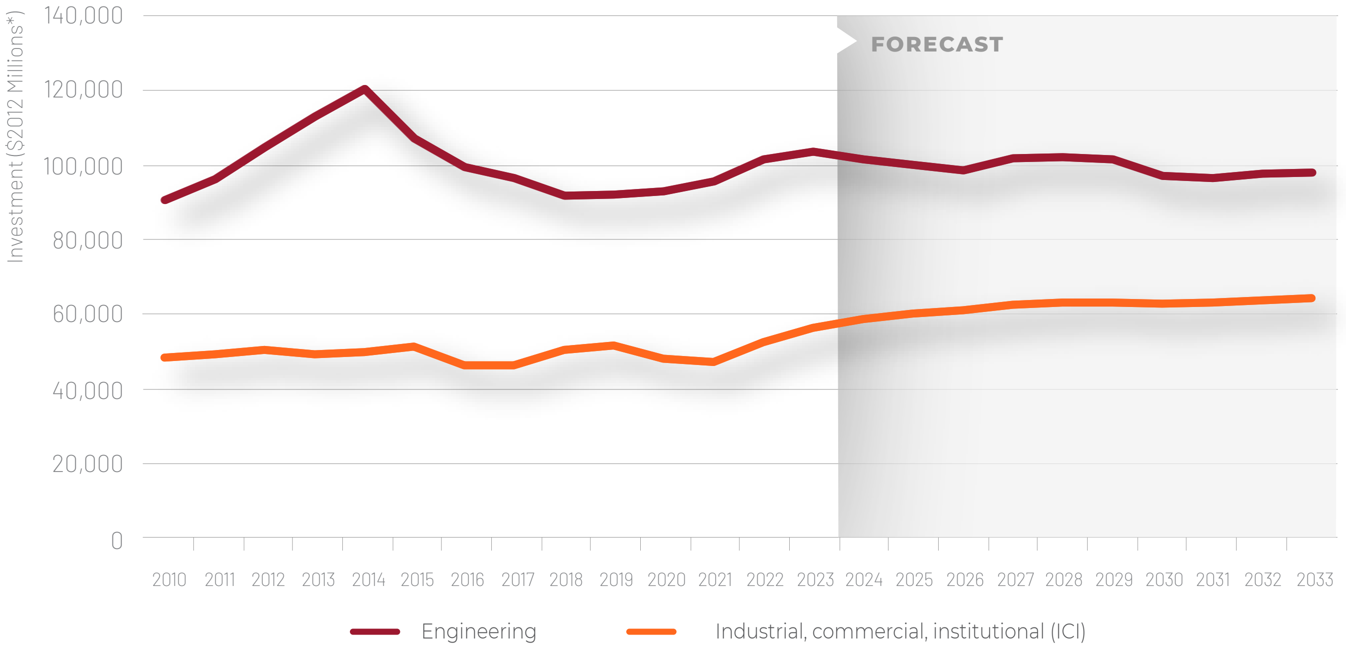
In the short term, non-residential investment levels are projected to stabilize. This occurs as activity remains constant on a series of major projects, while others begin to wind down. Investment levels are projected to rise between 2026 and 2028 as global markets return to growth, and remain historically high to the end of the forecast period, given the large number of known major projects planned and underway. By 2033, overall non-residential investment grows by 2% above 2023 levels.

Figure 8 shows the varying trends in investment activity in engineering construction and the construction of ICI buildings. The former has seen strong growth since 2020, supported by a series of major transit, utility, and roads, highways, and bridges projects in Ontario, British Columbia, Nova Scotia, Quebec, and Prince Edward Island.

Although engineering construction investment levels moderate across the forecast period, in line with the completion of many of these projects, they remain elevated by historical standards and are supported across the forecast period by the large volume of major projects underway in Ontario, as well as renewed growth in Alberta's oil and gas sector.

ICI buildings investment levels have trended up in all provinces, supported by demand for major education and health care projects, as well as across the commercial and industrial sectors. Investment is expected to record steady increases across the forecast period, supported in particular by strong growth in commercial buildings, and high demand for government and institutional projects, including in the healthcare, education, and public-administration sectors, and across federal government holdings in Ottawa.

Figure 8: Non-residential construction investment, Canada



* $2012 millions indicates that the investment values are in year 2012 dollars (base year), that is, adjusted for inflation. This is used to calculate the real physical year-to-year change of the value of construction, factoring out growth (increase in value) due to increases in prices.

Source: Statistics Canada, BuildForce Canada (2024-2033)

Non-residential employment

Non-residential construction employment has been rising steadily since the post-COVID building boom began in 2021. Levels rose by 4% in 2023. Employment is projected to grow in almost every year of the forecast period, rising to a peak in 2033. By the end of the forecast period, non-residential employment is projected to grow by 7% above 2023 levels.

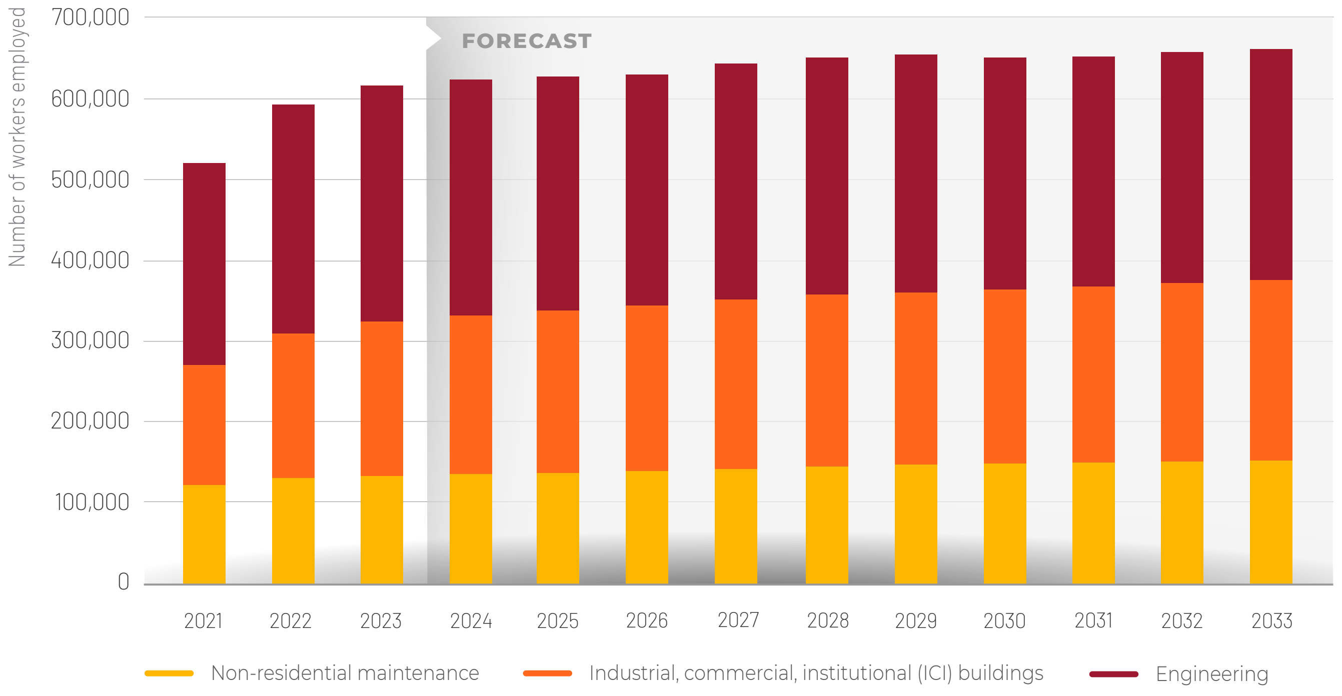
Employment in engineering construction is expected to experience the largest fluctuations over this period, as is common due to the nature of major capital investment projects. It rises to a peak in 2028 in line with demands created by major projects, before contracting to 2033, and ending the forecast period 2% below 2023 levels. ICI buildings employment, meanwhile, grows continuously, finishing the decade 17% above 2023 levels, and maintenance employment increases by 14%.

Note that the widespread conversion of ICI buildings to the greater use of electricity for heating and cooling is excluded from this report, as these efforts are still in their early phases and have had only minor impacts on overall construction labour markets. As these efforts accelerate, they will be added to future BuildForce Canada outlook reports.

Figure 9 shows anticipated non-residential employment changes over the forecast period.

Table 2 shows the anticipated changes in non-residential employment by province across three periods: the short term (2024–2026), the medium term (2027–2029), and the long term (2030–2033).

Figure 9: Non-residential construction employment growth outlook, Canada



Source: Statistics Canada, BuildForce Canada (2024-2033)

Table 2: Changes in non-residential employment, by province

REGION	% CHANGE 2024-2026	% CHANGE 2027-2029	% CHANGE 2030-2033
Canada	**2%**	**4%**	**1%**
Newfoundland and Labrador	2%	6%	-1%
Nova Scotia	10%	-4%	3%
New Brunswick	-4%	10%	4%
Prince Edward Island	-16%	-4%	6%
Quebec	-2%	-3%	4%
Ontario	5%	5%	0%
Manitoba	2%	9%	4%
Saskatchewan	0%	3%	-2%
Alberta	2%	8%	3%
British Columbia	1%	4%	-3%

Source: BuildForce Canada

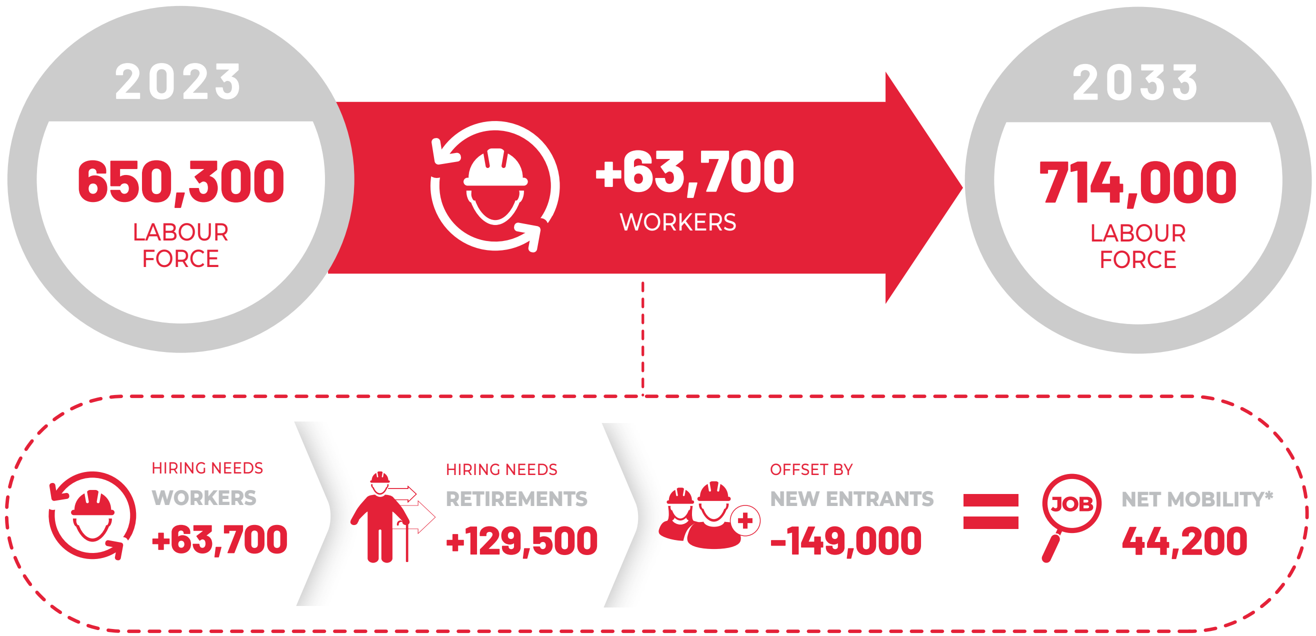
Non-residential labour force

Rising employment demands will require the non-residential construction labour force to increase by 63,700 workers across the forecast period. Over the same period, an estimated 129,500 workers are expected to retire, bringing hiring requirements to 193,200. Based on historical trends, and supplemented by the industry's ongoing career-promotion efforts, an estimated 149,000 workers under the age of 30 are expected to join the non-residential construction sector. However, without additional recruitment efforts, the industry may be short as many as 44,200 workers by 2033.

Figure 10 shows the anticipated labour force changes in the non-residential sector over the forecast period.

Addressing peak demands through interprovincial mobility may be challenging. With many provinces reporting higher or sustained levels of construction activity, in the non-residential sector in particular, there may not be strong incentive for workers to relocate. Competition for workers will be most intense in British Columbia and Ontario, where many major projects are planned and underway, and where labour markets are already tight. Seasonal demands relating to industrial shutdown/turnaround maintenance work in Alberta, Ontario, Quebec, and New Brunswick may exacerbate these short-term pressures further.

Figure 10: Changes in the non-residential construction labour force, Canada



* **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

PROVINCIAL INSIGHTS

PROVINCIAL INSIGHTS

Newfoundland and Labrador

The construction sector in Newfoundland and Labrador enters the BuildForce Canada forecast period with residential investment levels down slightly from 2022. This is contrasted against continued growth in the non-residential sector.

Across the forecast period, the outlook calls for growth to cycle moderately across the residential sector. Investment levels are expected to end 2033 almost unchanged from 2023 levels, although some growth is anticipated between the mid- to late-2020s. After contracting in 2023 and 2024, new housing construction is forecast to return to growth between 2025 and 2028. Demand for multi-family units leads the way, spurred by high levels of immigration, comparatively low rental vacancy rates, and persistent affordability concerns. The longer-term outlook sees housing starts contract as the population ages.

The non-residential sector, meanwhile, is generally expected to chart growth across the decade. Investment is expected to moderate slightly in 2024 with the conclusion of several large mining and hospital projects; however, the decline is moderated by the proposed start of a major hydrogen development project in 2025 and a large provincial road-improvement program. The anticipated start of work on the Bay du Nord project in 2028 elevates levels to the end of the forecast period.

By 2033, the industry will likely need to recruit and retain as many as 6,400 additional workers to keep pace with expansion and retirements, as an estimated 5,900 workers, or 28% of the 2023 construction labour force, are expected to retire.

Prince Edward Island

Activity across construction sectors in Prince Edward Island recorded mixed results in 2023. While investment in the residential sector stepped down from a peak in 2022, investment in the non-residential sector continued a steady upward climb that began in 2021.

The short-term outlook calls for growth in both sectors. Housing starts are expected to increase in 2024, and to the end of the decade as interest rates stabilize and as the population grows. Growth in renovations activity resumes in 2025 and makes significant gains to 2033. In line with the timing of currently known projects, activity in the non-residential sector is projected to reach a distinct peak in 2024, after which it generally moderates to 2029 but remains well above historical levels of activity. Contractions are caused by the conclusion of several major projects, but should be viewed in context: the peak reported in 2024 is almost 50% higher than previous highs reported in 2020 and 2021. Investment levels end the decade above historical levels.

With an estimated 1,570 workers, or 23% of its 2023 labour force, expected to retire by 2033, the construction industry must remain focused on hiring and training workers.

Nova Scotia

After reporting growth in 2022, Nova Scotia’s construction sector experienced a small contraction in 2023. A further gain in the non-residential sector was insufficient to offset a decline in residential-sector activity.

Residential investment is projected to step down again in 2024 with a further contraction in housing starts. Labour market conditions are projected to weaken for trades and occupations more concentrated in low-rise single-family construction, but recruiting challenges are expected to persist for trades and occupations more involved in the construction of high-rise apartment buildings. In 2025 and beyond, residential investment returns to growth on the strength of rebounding housing starts and strong growth in renovation activity.

The non-residential sector, meanwhile, is projected to continue to rise to a peak in 2025, as activity is strong in both engineering construction and in the construction of industrial, commercial, and institutional buildings. In line with currently known major project schedules, however, investment levels recede into 2030 as projects wind down. If the industry struggles to keep pace with bringing in additional workers to build new capacity and replace retiring workers over the next few years, recruiting challenges could be extended beyond the anticipated 2025 peak.

By 2033, the industry will likely need to recruit and retain as many as 10,600 additional workers to keep pace with expansion and replacement demands, as an estimated 8,200 workers, or 22% of the 2023 construction labour force, are expected to retire.

New Brunswick

Construction investment levels increased slightly in New Brunswick in 2023 as growth in the non-residential sector offset a slight contraction in the residential sector.

The outlook calls for relatively muted growth through the short term. Residential investment levels are expected to step back again in 2024 before returning to growth in 2025 and beyond. Interest rates continue to slow demand for new housing construction. As these stabilize and consumer spending rebounds, housing starts are expected to return to growth, supported by strong levels of immigration.

Non-residential investment is also expected to experience a slight pullback in the short term as work concludes on several major engineering construction and government building projects. Investment rises swiftly and sharply in 2026 and beyond as several major projects, including the Mactaquac Dam, commence and ramp up.

By 2033, the industry will likely need to recruit and retain as many as 9,200 additional workers to keep pace with expansion and retirements, as an estimated 6,100 workers, or 21% of the 2023 construction labour force, are expected to retire.

Quebec

Quebec's construction sector enters the forecast period with its residential and non-residential components tracking in different directions.

Residential construction investment levels reached a peak in 2021, supported by strong demand for single-family homes, apartment units, and renovation activity. Interest rate pressures have contracted levels significantly since. Non-residential construction activity, meanwhile, has charted a significant upward trend since 2021. An increase in investment has been driven by major projects across all sectors including industrial buildings, healthcare and education, transit systems, electric utilities, and roads, highways, and bridges.

The outlook across the forecast period calls for residential investment levels to remain stable. Housing starts and investment relating to new construction are projected to decline into 2033. This trend is expected to be offset by continuous growth in renovation expenditures. By the end of the forecast period, residential employment is projected to contract by 8%.

The outlook for the non-residential sector calls for investment levels to peak in 2024 before experiencing moderate reductions to 2030 in line with the completion of major healthcare, education, transit, manufacturing, and utilities projects. Employment ends the forecast period relatively unchanged from 2023 levels.

By 2033, the industry will likely need to recruit and retain as many as 39,000 additional workers to address its overall hiring requirements. An estimated 48,100 workers, or 22% of the 2023 construction labour force, are expected to retire.

Ontario

Although residential markets slowed in 2023 as higher borrowing and construction costs weakened demand from the historic levels reported in 2021 and 2022, construction activity remained elevated in most regions of Ontario – and will be through most of the forecast period.

Non-residential construction investment is being driven by a long list of major projects, including public transportation, healthcare, utilities, manufacturing, and other infrastructure. Both industrial, commercial, and institutional building and engineering construction investment levels are expected to peak in 2027 and then recede later in the forecast period as current projects wind down.

The outlook in the residential sector is more muted in the short term as interest rate levels and inflation continue to contract housing starts – and single-family homes in particular – in 2024. These declines should be viewed in context, with levels stepping down from previous highs reported in 2021 and 2022. Even with the projected contractions, housing starts remain above historical averages. Residential investment is expected to resume an upward trend commencing in 2025 as housing costs ease and population growth drives demand for additional housing.

With employment projected to reach peak levels in the residential and non-residential sectors in 2028 and 2029, many trades and occupations across the provincial labour force could experience strained conditions. Opportunities for interregional mobility will be limited by high levels of demand across most regional markets.

By 2033, the industry will need to add approximately 51,900 additional workers to keep pace with construction demands. The retirement of more than 89,300 workers – 19% of the current labour force – will increase the hiring requirements for the industry to approximately 141,200 workers over the forecast period. Recent heightened promotional and recruitment activities are bearing fruit. The industry is expected to add 105,700 new entrants aged 30 years and younger by 2033, creating a projected recruitment gap of some 35,500 workers that will need to be filled from outside the province's existing construction labour force to keep pace with provincial demand requirements.

The following sections provide region-specific outlook highlights and labour market conditions for Ontario's five regions: Central, Eastern, Greater Toronto Area, Northern, and Southwestern.

CENTRAL ONTARIO

Ontario's Central region[4] has benefitted in recent years from an out-flow of residents from the neighbouring, and comparatively more expensive, Greater Toronto Area. This trend, combined with historically low interest rates, drove residential construction activity to high levels in 2021. Housing starts in the region grew by nearly 50% compared to the year previous, and renovation activity saw strong gains.

New housing construction has contracted since, as rising interest rates have cooled demand in both components. Residential investment levels dropped by 13% in 2023 and are forecast to drop again in 2024. Investment levels are projected to return to growth in 2025 and through to the end of the decade, supported by more stable interest rates and strong population growth.

The region's non-residential construction market has been growing steadily since 2016, with strong activity underway in both engineering construction and construction of industrial, commercial, and institutional (ICI) buildings. The former has benefitted from work on the Central region's portion of the Barrie Go Rail corridor, while the latter has been supported by strong levels of activity in manufacturing, healthcare, and education projects. Investment is projected to reach a peak in 2029, with work on light-rail transit, roads, highways, and bridges, and major healthcare projects.

The combination of these trends is projected to create an overall employment peak in 2029, with both components adding approximately 12% employment above 2023 levels. Labour market requirements are generally balanced after 2024, although tighter labour market conditions could arise in the residential sector between 2025 and 2027.

EASTERN ONTARIO

Eastern Ontario's[5] construction sector has been supported in recent years by a combination of peak levels of residential activity and sustained growth across the non-residential sector. The residential sector has been propelled by demand created by historically low interest rates and historically high levels of immigration. These combined to bring residential investment levels to a peak in 2021. They have stepped down since. Rising interest rates in 2022 and 2023 have curbed housing affordability and contracted housing starts considerably. The outlook across the forecast period calls for investment levels to cycle down further into 2024 before returning to growth between 2025 and 2028.

Activity in the non-residential sector, meanwhile, has been driven by peak levels of activity in both engineering construction and the construction of industrial, commercial, and institutional (ICI) buildings. Key projects underway include the light rail line in Ottawa, high levels of investment in roads, highways, and bridges, and an extensive portfolio of work being driven by the federal government. Engineering construction is expected to remain elevated across the forecast period, while the construction of ICI buildings grows further with the addition of major hospital projects in Ottawa and Kingston.

By 2033, construction employment is projected to grow modestly compared to 2023 levels, with both sectors adding 2% to their respective employment bases. The projected rise in overall employment alongside an estimated 12,500 retirements (or 21% of the 2023 labour force) could leave the industry with a gap of as many as 2,300 workers to fill.

[4] **Central Ontario** includes the economic regions of Muskoka-Kawarthas, Kitchener-Waterloo-Barrie, and Hamilton-Niagara Peninsula as defined by Statistics Canada, which includes the census metropolitan areas (CMAs) of St. Catharines-Niagara, Hamilton, and Kitchener-Waterloo. The region includes such cities as Peterborough, Orangeville, Guelph, Barrie, and Brantford.

[5] **Eastern Ontario** includes the economic regions of both Ottawa and Kingston-Pembroke, including the census metropolitan areas of Ottawa and Kingston. Cities include Cornwall, Brockville, Belleville, and Petawawa.

GREATER TORONTO AREA

Construction activity in the Greater Toronto Area (GTA)[6] continues to be dominated by a series of large-scale public-transportation, nuclear refurbishment, new hospital, and other government building-restoration projects. Non-residential construction investment is forecast to rise to a peak in 2027 – increasing by 18% above 2023 levels – as these key projects culminate. Labour market conditions across most non-residential trades and occupations are strained as a result. Investment remains elevated to 2029 before slowing in 2030 and 2031.

The region's residential sector, meanwhile, has experienced a couple of years of declining investment levels. Rising interest rates in the latter part of 2022 and 2023 contracted demand for single-family homes and, combined with elevated levels of immigration, bolstered demand for multi-family units. The outlook calls for residential investment to contract into 2024 before returning to growth between 2025 and 2028.

Construction employment in the GTA peaks in 2028 at levels 8% higher than those recorded in 2023. Thereafter, employment retreats slightly and levels off in the latter years of the forecast. Over the forecast period, residential employment increases by 4%. Non-residential employment peaks a year later, with the sector rising to 14% above 2023 levels in 2029. It is mostly sustained thereafter.

In addition to keeping pace with construction demands, the GTA's construction sector will have to contend with the retirement of a projected 39,600 workers, or 22% of the current labour force, over the forecast period. These trends are expected to create hiring needs of approximately 59,800 workers.

NORTHERN ONTARIO

Construction activity in Northern Ontario[7] has been generally declining since residential investment levels peaked in 2021, and investment in the non-residential sector peaked a year later.

The outlook calls for residential activity to moderate further into 2024 before returning to an upcycle between 2025 and 2028. Housing starts in particular reach a peak during this period as interest rate pressures ease. Renovation activity, meanwhile, is projected to decline across the forecast period.

The outlook for the non-residential sector calls for a decline into 2024 before investment rebounds quickly between 2025 and 2027 with the start of new engineering construction projects. ICI building investment is also projected to grow on the strength of new investments in manufacturing and healthcare facilities.

Total construction employment is projected to contract across the forecast period, with non-residential employment growing by 8% above 2023 levels by 2027 and contracting in later years to finish the decade almost unchanged. Employment in the residential sector, meanwhile, is expected to contract by 12% compared to 2023 levels.

Northern Ontario will compete with other regions for skilled labour over the near term, and must replace a large number of retiring workers across the forecast period. Approximately 4,900 workers are expected to exit the industry during the 10-year forecast period, which equates to 19% of the 2023 labour force.

SOUTHWESTERN ONTARIO

Despite strong levels of population growth, residential construction investment in Southwestern Ontario[8] has trended downward in recent years, and is projected to reach its lowest level since 2015 in 2024. Meanwhile, the region's non-residential construction sector has been growing strongly since 2016. Ongoing work on key projects such as the Bruce Power nuclear refurbishment, the Gordie Howe International Bridge, as well as auto plant retooling projects and the construction of electric-vehicle battery plant projects elevated activity to a peak in 2023.

The outlook calls for a decline in both sectors in 2024. The residential sector continues to be constrained by high interest rates, but is projected to return to growth in 2025 and beyond as these pressures ease. The non-residential sector, meanwhile, will be constrained in the short term by the conclusion of work on the Gordie Howe International Bridge and the Stellantis and LG electric-vehicle battery plant. Investment accelerates between 2025 and 2027 before being largely sustained to the end of the decade.

[6] The **Greater Toronto Area (GTA)** includes the municipalities of Ajax, Aurora, Bradford West Gwillimbury, Brampton, Brock, Caledon, Clarington, East Gwillimbury, Georgina, Georgina Island, Halton Hills, King, Markham, Milton, Mississauga, Newmarket, Oakville, Oshawa, Pickering, Richmond Hill, Scugog, Toronto, Uxbridge, Vaughan, Whitby, and Whitchurch-Stouffville.

[7] **Northern Ontario** includes the economic regions of the Northeast and Northwest as defined by Statistics Canada, including the census metropolitan areas of Thunder Bay and Sudbury. Cities include Sault Ste. Marie, Timmins, Kirkland Lake, Dryden, Kenora, and Fort Frances.

[8] **Southwestern Ontario** includes the economic regions of London, Windsor-Sarnia and Stratford-Bruce Peninsula as defined by Statistics Canada, including the census metropolitan areas of London and Windsor. Cities include Chatham, Ingersoll, Sarnia, Stratford, Goderich, and Owen Sound.

These trends combine to elevate construction employment across the forecast period. Non-residential construction employment is projected to grow continuously after 2024, and end the decade at 12% above 2023 levels. Employment in the residential sector is also expected to reach a peak in 2029 – rising by 22% above 2023 levels – before slowing in later years.

The combination of these employment growth projections and the anticipated retirement of 13,900 workers, or 19% of the 2023 labour force, could create a hiring gap of as many as 25,700 workers that will need to be addressed by a combination of recruitment strategies.

Manitoba

The components of Manitoba's construction and maintenance sector experienced mixed fortunes in 2023. Activity in the non-residential sector saw a slight rise as strong growth in the province's service sector helped sustain rising levels of investment in industrial, commercial, and institutional (ICI) buildings construction. Residential-sector investment levels, meanwhile, contracted as rising interest rates curbed activity in new-housing construction.

These trends combined to increase construction employment slightly in 2023. The outlook across the remainder of the forecast period calls for a similar pattern. A gain of approximately 15% in non-residential employment should more than offset a loss of just below 6% in the residential sector.

The losses in the residential sector will be driven by a decline in demand for new-home construction. Housing starts, which peaked in 2022, are expected to contract almost continuously across the forecast period, driving new-housing-related employment down by nearly 16%. Although renovation and maintenance activity is expected to see a steady increase to the end of the decade, gains in both segments are not enough to offset the loss in new-housing employment.

Non-residential employment, meanwhile, is expected to chart a series of gains through to 2033.

Growth will be strongest in ICI building, where employment adds more than 30% over 2023 levels. Gains in maintenance (+3%) and engineering construction (+11%) are more muted.

The construction industry must remain focused on hiring and training workers to replace the estimated 9,100 workers, or 20% of the current labour force, that is expected to retire by 2033.

Saskatchewan

As was the case in several provinces, the components of Saskatchewan's construction sector reported mixed outcomes in 2023. Residential construction investment levels declined as a result of rising interest rates, while investment in non-residential construction was bolstered by strong activity in transportation, manufacturing, resource, and public infrastructure projects.

The outlook across the remainder of the forecast period calls for mixed fortunes. After contracting again in 2024, residential-construction activity is expected to grow strongly between 2025 and 2028, and remain elevated to 2033. At its peak in 2028 total residential employment will increase by 31% above 2023 levels.

In contrast, non-residential activity is projected to see little change through most of the forecast period before contracting in later years of the outlook. Activity in the engineering construction segment slows over the medium term as several key mining and utility projects conclude. Industrial, commercial, and institutional building construction, meanwhile, follows a general upward trend. Compared to 2023 levels, non-residential employment is projected to remain relatively unchanged by 2033.

As these trends develop, the construction industry must remain focused on hiring and training workers to replace the estimated 9,500 workers, or 23% of the current labour force, that is expected to retire by 2033.

Alberta

The outlook for Alberta shows a slight contraction in construction employment in 2023, as a slight gain in non-residential employment is not sufficient to offset declining activity in the residential sector. The sectors diverge across the forecast period. Non-residential employment is anticipated to chart a steady trend up to the end of the decade, adding 14% above 2023 levels on the strength of growth in both the engineering construction and industrial, commercial, and institutional buildings.

Residential employment is anticipated to cycle up in the short term, driven by renewed growth in both the new-housing and renovation markets. After 2027, however, the long-run projection calls for reductions in new-housing investment. Employment contracts marginally (-1%) by the end of the decade.

Alberta's construction labour force is expected to increase by 20,600 workers over the forecast period. Combined with the projected retirement of 42,500 workers (or 23% of the 2023 labour force), the industry will need to recruit and train 63,100 additional workers.

British Columbia

Residential and non-residential construction activity in British Columbia charted differing courses in 2023. Investment levels in the residential sector contracted under the pressure of rising interest rates, while investment in non-residential construction was buoyed by strong activity in engineering construction and the construction of industrial, commercial, and institutional (ICI) buildings.

The short-term outlook calls for non-residential activity to step down as several major projects reach conclusion or pass peak activity levels. Investment is then sustained into 2026 before work begins on a number of major engineering construction projects that carry through to 2029. Residential sector investment, meanwhile, is expected to remain unchanged in 2024 and 2025 before the market sees a moderate up-cycle to 2029. Of note is strong growth in renovation investment, which is projected to increase by nearly 56% across the forecast period, and surpass new-housing construction as the key driver of residential demands.

Labour market challenges will be sharpest in the near term, as employment demands increase. In the longer run, the industry will be challenged with the expected retirement of 43,200 workers, or 23% of the current labour force by 2033.

To keep pace with construction demands, the industry will need to recruit and train an estimated 54,000 workers throughout the forecast period.

LOWER MAINLAND

The Lower Mainland[9] construction market, which accounts for close to 60% of the province's construction employment, reported another year of growth in 2023 as a slight contraction in residential investment was offset by increasing activity in non-residential construction.

The outlook calls for investment levels in both sectors to rise in 2024. Thereafter, they chart differing courses. Activity in the residential sector is projected to slow to 2027 as the projected growth in renovation activity is insufficient to fully offset declining new-housing construction. Later years see investment levels stabilize. Non-residential investment levels are projected to rise through 2027 on the strength of new wastewater, public transit, and roads, highways, and bridges projects, and continued growth in industrial, commercial, and institutional buildings projects. Later years see growth decline as projects conclude, but overall investment levels are expected to remain well above historical levels.

Following these investment trends, residential and non-residential employment track diverging courses over the forecast period. By 2033, a projected increase in non-residential employment of 8% above 2023 levels is anticipated, while a contraction of more than 13% is estimated in the residential sector.

[9] The **Lower Mainland** region is defined by the economic regions of Greater Vancouver, Fraser Valley, Sunshine Coast, Squamish, and Lillooet.

Over the same period, the industry will need to replace 22,500 workers that are expected to retire. That loss will be partially offset by the recruitment of new-entrant workers under the age of 30 from the local population. Even so, the industry may face a potential recruitment gap of 3,100 workers by 2033.

VANCOUVER ISLAND

The construction outlook in the Vancouver Island region[10], which accounts for close to 20% of the province's construction employment, calls for both the residential and non-residential sectors to grow to 2033, with levels cycling across the forecast period.

Residential investment levels are projected to decline in the short term as interest rate increases curb new-home construction. Levels then rise to the end of the forecast period as growth in renovation activity offsets declines in new housing. Non-residential construction investment cycles with the timing of major projects, including the John Hart Dam seismic upgrades, but generally trends up across the forecast period.

Employment is projected to grow modestly across the forecast period, as a gain of just under 6% in non-residential employment offsets a contraction of less than 2% in the residential sector.

Over the same period, the industry will need to replace a total of 9,500 workers, including 7,700 workers that are expected to retire. An estimated 6,200 new-entrant workers under the age of 30 from the local population may join the industry during this period, but unless recruitment is increased, a potential recruitment gap of almost 3,300 workers may need to be recruited from outside the local construction industry to meet future labour force needs.

[10] The **Vancouver Island & Coast Economic Region** includes a number of regional districts, including the Capital Region, Cowichan Valley, Nanaimo, Alberni-Clayoquot, Strathcona, Comox Valley, Powell River, Mount Waddington, and Central Coast.

BUILDING A SUSTAINABLE LABOUR FORCE

BUILDING A SUSTAINABLE LABOUR FORCE

Construction employment has shown strong growth in almost every year since 2002, adding more than 690,000 workers over that period. The slight contraction in residential construction in 2023 should be no cause for alarm, and has helped to bring the industry's unemployment rate slightly closer to historical norms.

Also encouraging is the increasing trend toward youth employment in the sector. In 2023, the number of young women employed in the industry – i.e., those between 15 and 24 years of age – surged by 32% over the previous year. The number of women in general employed in the construction sector also rose over the year, adding 8.2%. Both trends suggest that the significant federal support for apprenticeship development and the industry's ongoing efforts to address labour force challenges are bearing fruit.

These efforts will be increasingly important over the forecast period, particularly as Canada's population ages and the youth population declines. These demographic shifts will contribute to tighter labour markets, as labour force participation by older workers is much lower than that of their younger counterparts.

Labour force diversification

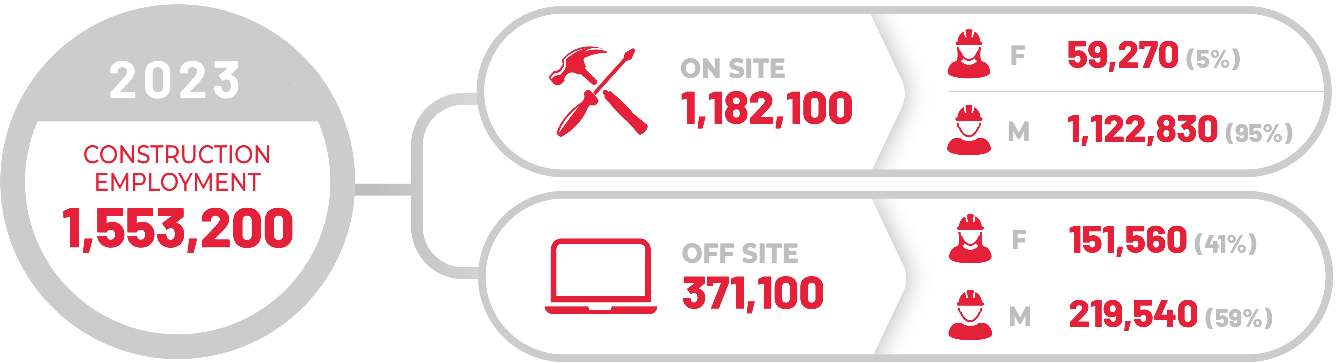
Under-represented groups of workers

Due in part to lower fertility rates and smaller family sizes in Canada for more than three decades, the share of younger Canadians available to enter the labour force has been in decline for several years. As the baby boomer generation of workers retire over the next decade, the competition for younger workers will be intense. To help mitigate the impact of this shift in demographics, the construction industry must diversify its recruitment. In order to succeed, the industry must increase recruitment of individuals from groups traditionally underrepresented in the current construction labour force, including women, Indigenous People, and newcomers.

In 2023, there were approximately 210,800 women employed in Canada's construction industry, of which 28% worked on site, directly on construction projects, while the remaining 72% worked off site, primarily in administrative and management-related occupations. Of the 1,182,100 tradespeople employed in the industry, women made up 5% (see Figure 11).

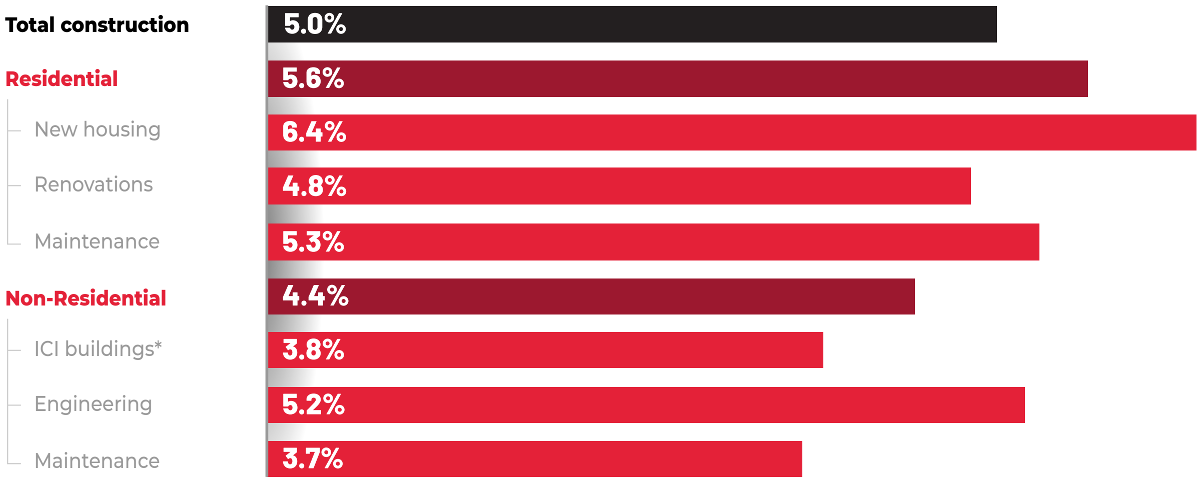
The estimated 59,270 tradeswomen in Canada are represented across all sectors of construction, but given the nature of construction work in the country, women account for a higher share of total tradespeople (5.6%) in residential construction. Across sectors, new housing construction has the highest representation of women, accounting for 6.4% of the workforce (see Figure 12). The top five trades and occupations in which women tend to be employed are trade helpers and labourers (20% of all tradeswomen), construction managers (17%), painters and decorators (9%), contractors and supervisors (9%), and home building and renovation managers (7%).

Figure 11: Detailed construction employment by gender, Canada, 2023



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

Figure 12: Women's share of total direct trades and occupations (on site), Canada



*industrial, commercial, institutional

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

The Indigenous population is the fastest growing population in Canada and therefore presents recruitment opportunities for Canada's construction industry. In 2021, Indigenous People accounted for 5.1% of Canada's construction labour force, which is a slight decline from the share of 5.2% observed in 2016.[11] This share is notably higher than the share of Indigenous People represented in the overall labour force (see Table 3). However, the share of Indigenous People in the labour force across all industries has been growing at a faster pace than construction over the past five years. As the number of Indigenous youth entering the labour force continues to rise, additional recruitment efforts will be required to encourage them to consider careers in the construction industry.

Canada's construction industry may also leverage newcomers (immigrants) over the forecast period to meet labour requirements. Due to the declining natural rates of population growth, immigrants are the primary source of labour force growth in Canada. Immigrants have been playing an increasingly important role in replenishing the workforce, with the share of immigrants in the workforce increasing from 21% in 2011 to 27% in 2021. Canada has been successful in attracting and integrating immigrants into the labour force; however, immigrants remain under-represented in the construction industry. The construction labour force share of immigrants was 18% in 2021, which is notably lower than the share in the overall labour force. (See Figure 13).[12]

The share of newcomers working in onsite professions, however, is slightly lower than for all construction professions. Onsite professions account for more than 70% of total industry employment, while newcomers make up just 18% of the onsite workforce.

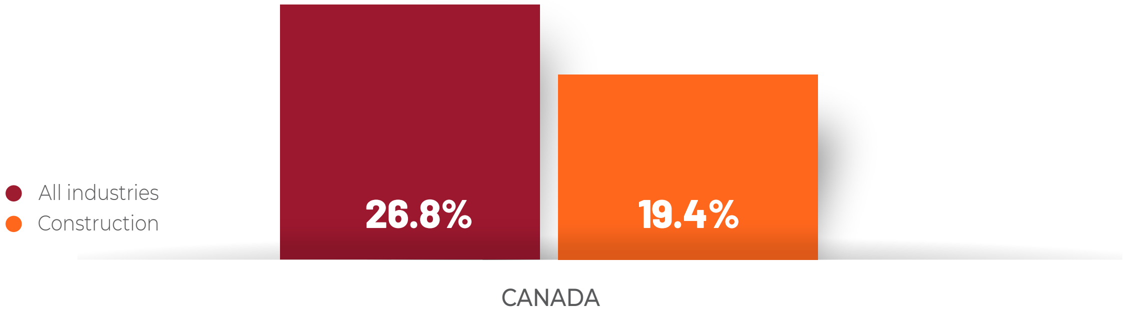
Based on historical settlement patterns, Canada is expected to welcome more than 4,965,000 new permanent and non-permanent residents between 2024 and 2033. As these individuals will make up an increasing share of the country's core working-age population, additional recruitment efforts will be required to ensure the construction industry recruits its share of newcomers into the labour force.

Table 3: Representation of Indigenous population in the construction workforce, Canada

SECTOR	YEAR	INDIGENOUS	NON-INDIGENOUS	TOTAL	INDIGENOUS SHARE OF TOTAL WORKFORCE, %
Construction	2016	71,150	1,293,860	1,365,010	**5.2%**
	2021	74,385	1,394,680	1,469,085	**5.1%**
All Industries	2016	716,605	17,551,520	18,268,120	**3.9%**
	2021	764,075	18,059,405	18,823,480	**4.1%**

Source: BuildForce Canada calculations based on Statistics Canada's 2021 and 2016 Census of the Population

Figure 13: Share (%) of newcomers in the construction labour force, 2022, Canada



Source: Statistics Canada. Table 14-10-0083-01 Labour force characteristics by immigrant status, annual

[11] Statistics Canada, 2021 Census. Custom Data Request.
[12] Statistics Canada, Labour Force Survey, Custom Data Request 2022.

CONCLUSIONS AND IMPLICATIONS

CONCLUSIONS AND IMPLICATIONS

The *2024–2033 BuildForce Canada Construction and Maintenance Looking Forward* forecast sees construction activity across Canada's residential and non-residential sectors chart growth through to 2033.

Activity in the residential sector has stepped down from the peaks recorded in 2021, and is anticipated to contract again in 2024, although not as sharply as in the two years prior. A period of growth follows across most of the country, with new housing construction returning to growth during the period of 2025 to 2028. Later years see the segment contract as Canada's population growth trends down. Meanwhile, growth in renovations activity is forecast to record a steady series of increases in 2024 and beyond. This occurs given the relative affordability of this activity compared to new-home purchasing, and due to the fact that older Canadians may choose to remain in their homes as they age.

Non-residential construction activity has been rising steadily since the pandemic years, and is projected to record a general upward trend through 2028. Major projects are underway in many regions, including transit projects in Ontario and British Columbia, utility projects in New Brunswick, Nova Scotia, and British Columbia, and high levels of investment in institutional and government buildings construction across the country and, in later years, a strong rebound in commercial building construction. Non-residential construction activity is expected to fluctuate with the timing of planned major projects but remains elevated throughout the entire forecast period.

Meeting peak demands will be challenged by limited provincial mobility. Many provinces are already experiencing high or sustained levels of construction activity, giving workers no strong incentives to relocate in the near term. Labour market challenges are complicated by the retirement of an estimated 263,400 workers, or 21% of the 2023 labour force. This represents a significant loss of skills and experience that is unmatched by new workers entering the labour force.

The task of attracting new workers to construction may become further complicated, as other industries face similar challenges related to replacing an aging labour force. Meeting near- and long-term demand requirements will require a combination of industry strategies that include increased recruitment and training of youth, looking to traditionally under-represented groups, such as women, Indigenous People, and newcomers to Canada, or to other industries to augment the available pool of local workers.

The industry scenario-based approach developed by BuildForce Canada to assess future labour market conditions provides a powerful planning tool for industry, government, and other stakeholders to better track labour market conditions and identify potential pressure points. The anticipated labour market conditions reflect current industry expectations of population growth and the timing of major projects. Any changes to these assumptions present risks and potentially alter anticipated market conditions.

ABOUT THE BUILDFORCE CANADA LABOUR MARKET INFORMATION SYSTEM

BuildForce Canada's labour market information (LMI) system uses the most advanced and detailed industry model available in Canada to produce a forecast scenario that reflects current and future labour demand and supply information for the residential and non-residential construction sectors, by province.

Updated annually, the system is calibrated to the latest information on global, national, and provincial economic conditions derived from various data sources including Statistics Canada, Canadian financial institutions, the World Bank, the International Monetary Fund, the U.S. Energy Information Administration, the Organisation for Economic Co-operation and Development, and federal and provincial budget plans. Key factors driving the outlook scenario include: economic environment measures such as real GDP growth, inflation, interest rates, exchange rates, commodity prices, and international trading partner trends, and population growth and demographic trends.

Unique to the BuildForce system is the integration of a major projects inventory. This is developed in partnership with provincial LMI committees – networks of industry stakeholders that include labour groups, construction associations, owners, and federal/provincial government departments – and identifies key projects that may distort construction investment trends and market conditions.

Information on economics, demographics, and major projects are combined into a dynamic, multi-sector and multi-factor macroeconomic model to generate a 10-year labour market outlook scenario for the residential and non-residential construction sectors in each Canadian province.

The system incorporates coefficients derived from Statistics Canada's input-output tables to determine industry demands and proprietary coefficients developed by BuildForce Canada to translate residential and non-residential investment data into labour demands for the 34 most common on-site trades and occupations in the construction sector. These account for 75% of the total construction labour force.

For labour supply, the system utilizes Statistics Canada's 2021 Census of Population as a starting point. That data is adjusted to reflect current public-policy and demand factors, and is further refined through consultation with the provincial LMI committees to produce measures of provincial economic and population growth, employment growth, retirements, new entrants to the labour force, and interprovincial and international migration patterns.

Provincial residential and non-residential labour market conditions, by trade and occupation, are assessed based on changes in supply and demand and summarized in the form of tables. For each year, conditions are ranked from a low of 1 (in which excess labour supply is apparent, and there is a risk of losing workers to other markets) to a high of 5 (in which there is excess demand, competition is intense, and recruiting extends beyond local labour markets). Ranks are calculated based on annual employment growth, natural or normal unemployment rates, and changes in supply (i.e., retirements, new entrants, and mobility requirements to meet demands).

Rankings for some trades or occupations may be suppressed in some provinces and regions due to the small size of the workforce (i.e., fewer than 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 typically do not work in residential construction, nor do homebuilding and renovation managers work in non-residential construction).

Finally, to further improve the robustness of the system, BuildForce Canada's outlook scenario is validated by provincial LMI committees.

APPENDIX: COMMITTEE PARTICIPANTS

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The production of *Construction and Maintenance Looking Forward 2024–2033* would not have been possible without the valuable input from the following organizations:

Newfoundland and Labrador

- Canada's Building Trades Unions
- Canadian Construction Association
- Canadian Home Builders' Association – Newfoundland and Labrador
- College of the North Atlantic
- Construction Labour Relations Association of Newfoundland and Labrador
- Defence Construction Canada
- Heavy Civil Association of Newfoundland and Labrador
- Infrastructure Canada
- Newfoundland and Labrador Construction Association
- Newfoundland and Labrador Department of Finance
- Newfoundland and Labrador Department of Immigration, Population Growth and Skills
- Service Canada
- Trades NL

Prince Edward Island

- Canada's Building Trades Unions
- Canadian Construction Association
- Canadian Home Builders' Association – Prince Edward Island
- Construction Association of Prince Edward Island
- Defence Construction Canada
- Infrastructure Canada
- PEI Road Builders and Heavy Construction Association
- Prince Edward Island Department of Finance
- Prince Edward Island Workforce, Advanced Learning and Population
- Service Canada – Atlantic
- Timber Mart

Nova Scotia

- Atlantic Home Building and Renovation Sector Council
- Canada's Building Trades Unions
- Canadian Construction Association
- Canadian Home Builders' Association – Nova Scotia
- Construction Association of Nova Scotia
- Defence Construction Canada
- Infrastructure Canada
- Nova Scotia Construction Labour Relations Association Limited
- Nova Scotia Construction Sector Council
- Nova Scotia Department of Finance
- Nova Scotia Road Builders Association
- Service Canada – Atlantic

New Brunswick

- Canada's Building Trades Unions
- Canadian Construction Association
- Canadian Home Builders' Association of New Brunswick
- Construction Association of New Brunswick
- Defence Construction Canada
- Infrastructure Canada
- Irving Oil
- Moncton Northeast Construction Association and Mechanical Contractors Association of New Brunswick
- New Brunswick Building Trades Unions
- New Brunswick Finance and Treasury Board
- New Brunswick Post-Secondary Education, Training and Labour
- New Brunswick Road Builders and Heavy Construction Association
- Saint John Construction Association
- Service Canada – New Brunswick

Quebec

- Not applicable

Ontario

- Black & McDonald
- Bruce Power
- Canada Mortgage and Housing Corporation
- Canada's Building Trades Unions
- Canadian Construction Association
- Canadian Home Builders' Association
- Central Ontario Building Trades
- CLAC
- Construction Association of Thunder Bay
- Construction Employers Coordinating Council of Ontario
- Construction Labour Relations Association of Ontario
- Council of Ontario Construction Associations
- Crosslinx Transit Solutions
- Defence Construction Canada
- Eastern Ontario and Western Quebec Building Trades Council
- Electrical Power Systems Construction Association
- Employment and Social Development Canada
- Essex and Kent Building Trades Council
- Fluor Canada
- General Contractors' Association of Toronto
- General Presidents' Maintenance Committee for Canada
- Grand Valley Construction Association
- Hamilton-Brantford Building & Construction Trades Council
- Hamilton-Halton Construction Association
- Hydro One
- IBEW Local 303
- Infrastructure Canada
- Infrastructure Ontario
- Ironworkers Local 759
- J-AAR Excavating/AAROC Aggregates
- Kingston Construction Association
- Ledcor Group
- LiUNA Ontario Provincial District Council
- London and District Construction Association
- Mechanical Contractors Association of Ontario
- Millwright Regional Council of Ontario
- Niagara Construction Association
- Niagara-Haldimand Building and Construction Trades Council
- Northeastern Ontario Construction Association
- Ontario Construction Secretariat
- Ontario Formwork Association
- Ontario General Contractors Association
- Ontario Home Builders' Association
- Ontario Masonry Contractors' Association

- Ontario Ministry of Colleges and Universities
- Ontario Ministry of Labour, Immigration, Training and Skills Development
- Ontario Power Generation
- Ontario Road Builders' Association
- Ontario Sewer and Watermain Construction Association
- Ottawa Construction Association
- Progressive Contractors Association of Canada
- Provincial Building and Construction Trades Council of Ontario
- Public Services and Procurement Canada
- RESCON
- Sarnia Construction Association
- Sarnia-Lambton Building & Construction Trades Council
- Sault Ste. Marie Construction Association
- Service Canada
- Sheet Metal Workers Local 47
- Toronto Construction Association
- UA Local 71
- UA Local 527
- UA Local 628
- UA Local 800
- Waterloo, Wellington, Dufferin and Grey Building Trades Council
- Windsor Construction Association
- Workforce Planning for Sudbury & Manitoulin

Manitoba

- Apprenticeship Manitoba
- Canada's Building Trades Unions
- Canadian Construction Association
- Construction Association of Rural Manitoba
- Construction Labour Relations Association of Manitoba
- Defence Construction Canada
- Infrastructure Canada
- Manitoba Building & Construction Trades Council
- Manitoba Construction Sector Council
- Manitoba Economic Development and Training
- Manitoba Finance
- Manitoba Heavy Construction Association
- Manitoba Home Builders' Association
- Manitoba Hydro
- Mechanical Contractors Association of Manitoba
- Merit Contractors Association of Manitoba
- Northern Manitoba Sector Council
- Service Canada
- Winnipeg Construction Association

Saskatchewan

- Canada's Building Trades Unions
- Canadian Construction Association
- Canadian Home Builders' Association – Regina
- Canadian Home Builders' Association – Saskatoon
- CLAC
- Construction Labour Relations Association of Saskatchewan
- Defence Construction Canada
- Infrastructure Canada
- Mechanical Contractors Association of Saskatchewan
- Saskatchewan Apprenticeship and Trade Certification Commission
- Saskatchewan Building Trades
- Saskatchewan Construction Association
- Saskatchewan Heavy Construction Association
- Saskatchewan Ministry of Finance
- Saskatchewan Ministry of Immigration and Career Training
- Ministry of SaskBuilds and Procurement
- Saskatchewan Public Safety Agency
- Saskatchewan Construction Safety Association
- SaskPower
- Service Canada – Saskatchewan
- Women in Trades and Technology

Alberta

- Alberta Advanced Education
- Alberta Construction Association
- Alberta Council of Turnaround Industry Maintenance Stakeholders
- Alberta Jobs, Economy and Trade
- Alberta Roadbuilders and Heavy Construction Association
- Association of Maintenance Contractors of Canada
- Building Trades of Alberta
- Canada Mortgage and Housing Corporation
- Canada’s Building Trades Unions
- Canadian Construction Association
- Canadian Home Builders' Association
- Canadian Home Builders’ Association – Alberta
- Cenovus Energy
- CLAC
- Construction Labour Relations – Alberta
- Defence Construction Canada
- Enbridge Inc.
- Energy Safety Canada
- Fluor Canada Ltd.
- Infrastructure Canada
- National Construction Council
- OpenCircle
- PCL Constructors Inc.
- Progressive Contractors Association of Canada
- Regional Oil Sands Operating Alliance
- Service Canada
- Shell Canada
- Suncor Energy Inc.
- Syncrude Canada Ltd.

British Columbia

- BC Building Trades Council
- BC Hydro
- BC Ministry of Post-Secondary Education and Future Skills
- BC Regional Council of Carpenters
- BC Road Builders and Heavy Construction Association
- British Columbia Construction Association
- British Columbia Insulation Contractors Association
- Canada’s Building Trades Unions
- Canadian Construction Association
- Canadian Home Builders' Association
- Canadian Home Builders' Association – British Columbia
- CLAC
- Construction Foundation of British Columbia
- Construction Labour Relations Association of BC
- Defence Construction Canada
- Fluor Canada Ltd.
- Industry Training Authority
- Infrastructure Canada
- LNG Canada
- Mechanical Contractors Association of BC
- National Construction Council
- Northern Regional Construction Association
- PCL Constructors Inc.
- Progressive Contractors Association of Canada
- Roofing Contractors Association of British Columbia
- Service Canada – BC
- Southern Interior Construction Association
- Urban Development Institute
- Vancouver Island Construction Association
- Vancouver Regional Construction Association

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