

CONSTRUCTION & MAINTENANCE INDUSTRY

CANADA'S TERRITORIES

HIGHLIGHTS 2024 - 2033

Construction trades outlook for major projects
in Canada's territories



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Canada's construction sector has experienced a period of significant growth in recent years. The sector enters the 2024 to 2033 BuildForce Canada forecast period, however, with investment levels in the residential and non-residential sectors charting different courses.

Residential construction investment reached a peak in 2021 as interest rates reached a record low, and housing starts reached a record high. Investment slowed in 2022 and 2023 as interest rates increased. It is forecast to contract again in 2024 before returning to growth in 2025 and beyond as interest rates moderate and pent-up demand drives increased new housing construction.

Non-residential construction investment, meanwhile, has charted a steady upward curve in recent years 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.

Although the timing of work on these major projects varies, meeting peak labour demands may be challenged by limited provincial mobility and short supplies of workers. Many provinces are already experiencing high levels of activity that are expected to be sustained over the medium term.

Construction employment in the territories, and particularly the non-residential component that is focused on engineering construction, is typically supplemented by the workforces of neighbouring provinces. This makes employment conditions across the provinces a significant factor governing the ability of the territories to meet their labour force needs.

Historically, British Columbia and Alberta have contributed construction labour to Yukon and the Northwest Territories, whereas Quebec, Ontario, and Newfoundland and Labrador have supported projects in Nunavut and the eastern parts of the Northwest Territories. The following factors and major projects in these provinces will therefore influence the construction trades outlook for major projects in the territories.

- In British Columbia, current and new projects that sustain high labour demands include the Iona Island Wastewater Treatment Plant, John Hart Dam Seismic Upgrade, LNG Canada expansion, Robert Banks Terminal, and the Massey Tunnel Replacement Program. These are combined with strong growth in institutional and government building projects.
- In Alberta, demands are expected to be supported by projects such as the Air Products Net Zero Hydrogen Energy Complex, the Imperial Oil Strathcona refinery expansion, and the start of work at the Dow Chemicals' Path2Zero expansion. Scheduled heavy-industrial maintenance work (turnaround and shutdowns) may also add to market challenges, with significant seasonal demands concentrated in the spring and fall of most years.
- In Saskatchewan, non-residential construction demands are anticipated to slow into 2026 as a number of projects including several canola facilities, gas power plants, and the BHP Jansen Stage 1 potash mine winds down. The start of the Jansen Stage 2 expansion in 2027 is projected to sustain activity – and employment – to 2031.
- In Ontario, non-residential construction activity is expected to remain elevated over the forecast period propelled by a long list of major projects, including public transportation, health care, utilities, manufacturing, and other infrastructure.

The BuildForce Canada labour market information system tracks these developments and assesses their impacts on labour markets for 34 construction trades and occupations in each province. Large construction projects regularly drive up labour requirements, creating peak demands and recruiting challenges for skilled trades and occupations.

The lack of detailed historical labour market information for Canada's territories makes it difficult to provide similar outlooks for these regions. Nevertheless, there are several major construction projects proposed for the territories, mainly in the mining sector, that will draw on the same skilled labour pool needed for other major resource projects underway and proposed across Canada.

The opinions and interpretations in this publication are those of the author and do not necessarily reflect those of the Government of Canada.

The next section of this report provides some background on the economies in the three territories. The third identifies the major projects currently being tracked, and the fourth provides estimates of the trades requirements for the projects.

Economic output in Canada's territories

The Northwest Territories has the largest economy in the North. Its mining industry accounted for 29% of total GDP in 2022. The territory hosts three diamond mines which account for roughly 90% of the mining sector's output, the rest largely consists of oil and gas production.

Under new ownership, the Ekati mine reopened in early 2021. Its closure, combined with weaker demand due to the COVID-19 pandemic, was the main cause of a nearly 45% reduction in mining GDP between 2018 and 2020. Burgundy Diamond Mines purchased the property for close to \$200 million in July 2023 and intends to extend the mine's life. An extension would provide upside to jobs, royalties, and tax revenues in the Northwest Territories.

The territory's other mines are also expected to close in the coming years.

Although mining output in the **Yukon** is generally lower than in the other territories, the sector has played an important role in the territory's economic growth in recent years. The Yukon's economy slowed to 3.3% in 2022, down from 10% the year prior as the kickoff to production at Victoria Gold Corp.'s Eagle Gold boosted economic growth. Since 2017, the construction of the Eagle Gold project has supported economic growth while waning metal mining production has acted as a hindrance. Mining's share of the Yukon's GDP fell from 10% in 2016 to about 5% in 2019. It has more than doubled since, reaching 13% in 2022. Projects like the Resource Gateway may boost investment further in later years.

Growth in the mining sector has brought economic output in **Nunavut** to new heights in recent years. The sector's output reached \$1.3 billion (or 37% of Nunavut's total GDP) in 2022. As construction on several mining projects has concluded and most have transitioned to production, exports have surged and construction activity has declined.

Table 1 shows the level and percent change in real GDP by region for the period from 2014 to 2023.

Table 1: Real GDP of the territories (millions of 2012 dollars*)

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Yukon	2,614	2,409	2,588	2,634	2,702	2,667	2,769	3,045	3,146	3,313
	0.7%	-7.8%	7.4%	1.8%	2.6%	-1.3%	3.8%	-10.0%	3.3%	5.3%
Northwest Territories	4,735	4,779	4,712	4,873	4,941	4,750	4,265	4,475	4,540	4,718
	4.7%	0.9%	-1.3%	3.4%	1.4%	-3.9%	-10.2%	4.9%	1.5%	3.9%
Nunavut	2,379	2,372	2,492	2,821	2,953	3,175	3,211	3,467	3,522	3,575
	-1.3%	-0.3%	5.1%	13.2%	4.7%	7.5%	1.1%	8.0%	1.6%	1.5%

* \$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 year-to-year change of the value of production, factoring out growth (increased value) due to increases in prices.

Source: Statistics Canada

Diverging growth patterns among the territories over this period are primarily due to the differing development paths of their respective mining industries.

In the Northwest Territories, for example, the diamond mining sector has reached maturity and production declines can be expected in the future. The Diavik mine is expected to shut down mid-decade; the Ekati mine may also be shuttered before the end of the outlook period, absent an expansion. Although the new Gahcho Kué mine will add to production, its output will not be a sufficient offset.

In partnership with the federal government, the Government of the Northwest Territories is working on developing new road, electrical, and telecommunications infrastructure to the mineral-rich northeastern region. These plans are expected to occur over decades.

In the Yukon, exploration has seen an uptick as prices for many base metals remain strong. Various mining projects remain in the assessment stage, however. As the territorial and federal governments work with companies to develop new road infrastructure to access resources, it is expected that some of these projects will commence. Timing, however, is uncertain. Meanwhile, the ramping up of production at Eagle Gold and the construction of Kudz Ze Kayah mine will help spur economic growth.

Finally, sustained output at the Meadowbank Complex, production at the Meliadine Gold mine, and the possible expansion of road infrastructure all provide encouragement for Nunavut's mining industry in the coming years. Some downside may occur with the recent decision by the Nunavut Impact Review Board to recommend against a proposal to extend the life of the Meliadine mine beyond its current 2032 end date.



PLANNED MAJOR CONSTRUCTION PROJECTS IN THE TERRITORIES

PLANNED MAJOR CONSTRUCTION PROJECTS IN THE TERRITORIES

This section provides brief overviews of the proposed major construction projects across Canada's territories.

Table 2 lists the major current and proposed projects for the territories, including their estimated capital construction costs and their anticipated start and end dates, where available. The capital construction costs are used to estimate trades requirements. Several known projects have not made final investment decisions. Their start and end dates are therefore unknown.

Of note, several exploration projects are also being tracked, however, these are included in this analysis as there is limited information available on their estimated capital costs or anticipated construction schedules.

Table 2: Major projects and capital costs

	PROJECTS	START YEAR	END YEAR	CAPITAL COST (\$MILLIONS)
Northwest Territories	Giant Mine Remediation Project	2021	2038	\$4,380
	Great Bear River Bridge	2025	2029	\$140
	Mackenzie Valley Highway	---	---	\$700
	Nechalacho (Thor Lake) Project	---	---	\$-
	NICO Project	---	---	\$210
	Pine Point Mine	---	---	\$653
	Prairie Creek	2024	2025	\$278
	Prairie Creek All-Season Road	2022	2024	\$89
	Slave Geological Province Corridor	---	---	\$1,300
	Taltson Hydro Expansion	---	---	\$-
	TOTAL			\$7,750
Yukon	Brewery Creek	---	---	\$105
	Carmacks Copper	---	---	\$220
	Casino Mine	---	---	\$3,600
	Coffee Gold	---	---	\$317
	Faro Mine Remediation Project	---	---	\$-
	Kudz Ze Kayah	2025	2028	\$321
	Macmillan Pass Project	---	---	\$404
	Resource Gateway Project	2021	2026	\$468
		TOTAL		
Nunavut	Back River Project	2023	2025	\$550
	Back River Project - Alternative Energy Centre	---	---	\$-
	Grays Bay Road Project	---	---	\$550
	Mary River Phases 2 & 3	---	---	\$1,300
		TOTAL		

Source: Yukon Economic Development, NWT Bureau of Statistics, Nunavut Bureau of Statistics and company websites

Planned major construction projects: Northwest Territories

Giant Mine Remediation

The Giant Mine was a large gold mine located on the Ingraham Trail outside Yellowknife. Remediation work, which began in July 2021, will remove material contaminated with arsenic and asbestos. While the work will involve ground stabilization and the construction of a landfill for non-hazardous waste, the larger focus of the project is permanently freezing toxic waste underground.

The project was initially estimated to take up to 10 years to complete at a capital cost of \$1 billion. It has since been revised, with the total cost increased to \$4.38 billion during its 2005 to 2038 project life. As of late 2022, \$710 million had been spent.

Great Bear River Bridge

The Great Bear River Bridge will support the Mackenzie Valley Winter Road and future highway (see below). The project is expected to begin in 2025 and be completed by 2029 at a cost of \$140 million.

Mackenzie Valley Highway Project

The Mackenzie Valley Highway project is a proposed 321-kilometre, two-lane gravel highway connecting Norman Wells and Wrigley. The project is estimated to cost \$700 million and will replace the current Mackenzie Valley Winter Road.

In October 2023, the Government of the Northwest Territories submitted a developer's assessment report for the project to the Mackenzie Valley Environmental Impact Review Board. The next step in the environmental assessment will see the board post the document for review to its public registry. The project is likely at least a decade from completion.

Nechalacho (Thor Lake) Project

The Nechalacho rare earth deposit is located at Thor Lake, about 100 kilometres southeast of Yellowknife. Operations began in 2021 as part of a three-year demonstration project. In 2023, Vital Metals indicated that the project would not be profitable at the current scale of operations, which focused on the North T deposit. The company is now waiting for drilling results to assess the quality of the ore at its larger Tardiff deposit. Rising costs have also halted construction of the processing facility in Saskatchewan, providing further hurdles to the mine's development.

NICO Project

The NICO deposit is located 150 kilometres northwest of Yellowknife. The cobalt-gold-bismuth-copper deposit has proven mineral reserves totaling 33 million tonnes. Developer Fortune Minerals plans to build a 50-kilometre spur road to connect with the Tlicho All-Season Road, after which concentrate can be shipped to a planned refinery in Alberta. Estimated capital costs are currently \$210 million for the mine, however, Fortune plans to update a 2014 feasibility study.

Due to economic and capital market volatility, Fortune further extended its purchase option on the Alberta site where it plans to develop a hydrometallurgical facility. Announced in December 2023, the federal and Alberta governments will provide funding to support the planned cobalt sulphate process pilot and further metallurgical test work. The company holds significant debt, and an extension with creditors until the end of 2024 has been announced.

Pine Point Mine

The Pine Point Mine is located west of Fort Resolution on the south shore of Great Slave Lake. Osisko Metals acquired the lead-zinc project in December 2017. An update to Osisko's 2020 preliminary economic assessment projects an average of 329 million pounds of zinc and 141 million pounds of lead annually over a 12-year lifespan. The total capital cost of construction is estimated at \$653 million.

In November 2023, the company announced it plans to have a developer's assessment report finalized and submitted to the Mackenzie Valley Environmental Impact Review Board by April 2025. The company expects to begin construction in 2028, with the mine entering operation in 2029.

Prairie Creek Mine

Prairie Creek is an advanced-stage zinc, lead, and silver mine located 250 kilometres west of Fort Simpson. The project's 2021 preliminary economic assessment indicated a 20-year mine based on a throughput rate of 2,400 tonnes per day. Average annual payable zinc equivalent production is estimated at 261 million pounds. The permitting process for the mine was completed in 2022, with construction expected to begin in 2024 at a capital cost of \$278 million. Production at the mine is expected at the end of 2025.

Prairie Creek All-Season Road

The 170-kilometre road will connect the Prairie Creek Mine with Highway 7. Construction on the first phase of the project was completed in the spring of 2023. This allowed access to complete geotechnical studies

ahead of phase two, which will be the completion of an all-season road. The project will have a capital cost of \$89 million and will be completed in 2024.

Slave Geological Province Corridor

The Slave Geological Province Corridor consists of a 413-kilometre, two-lane gravel infrastructure corridor. The road would serve as a transportation, hydro, and communications corridor, while connecting the northeastern part of the territory and its vast mineral deposits to the south. Preliminary estimates on the cost of road construction and infrastructure total \$1.3 billion.

The Government of the Northwest Territories will begin geotechnical investigations in the winter of 2024 for the construction of the Lockhart all-season road, which is the first portion of a larger gravel road that will span the area. The territory is still awaiting the results of a separate regional assessment, which was announced in spring 2023.

Taltson Hydro Expansion Project

The proposed project looks to expand generation capacity by 60 megawatts and link power grids north and south of Great Slave Lake. The project is in its feasibility stage.

Planned major construction projects: Yukon

Brewery Creek

The Brewery Creek Property is located within the foothills of the Ogilvie Mountains along the northeastern boundary of the Tintina Trench. It is a past-producing heap leach gold mine. Then-developers Sabre Gold filed an independent technical report in January 2022 in support of the preliminary economic assessment. Pre-construction capital costs are estimated at \$105 million, with an additional \$18 million over the life of the mine.

Victoria Gold Corp purchased the project from Sabre Gold in September 2023.

Carmacks Copper

Granite Creek Copper Ltd. is the sole owner of the Carmacks Copper project located 198 kilometres north of Whitehorse. The proposed project claims significant gold, copper, and silver deposits. The 2023 preliminary economic assessment indicates a capital cost of

\$220 million and an operating life of nine years. The assessment also outlines opportunities for additional mine life expansion.

The proximity of infrastructure including grid power, all-season roads, and existing deep-sea ports are also reported to provide upside for the project.

Casino mine

Casino Mining Corporation is developing the Casino Project, a copper, gold, molybdenum, and silver deposit, located about 300 kilometres northwest of Whitehorse. It is among the largest copper-gold deposits in Canada. The project is expected to produce gold, silver, copper, and molybdenum over a 22-year mine-life. The estimated capital cost is in the range of \$3.6 billion according to a 2022 feasibility study. Work is underway towards submitting an environmental and socio-economic effects statement. An update is expected in 2024.

Coffee Gold Project

Newmont's Coffee Gold project is a proposed open-pit gold mine, located approximately 130 kilometres south of Dawson City. It is expected to produce roughly 200,000 ounces of gold per year for about 10 years, followed by an 11-year closure period. Construction of the mine is expected to take 30 months. In early 2022, the federal and territorial governments issued a decision to allow the project to proceed. There remain hurdles, such as a water license, to overcome before the project can begin construction.

Faro Mine Remediation Project

The Faro Mine closed when it was abandoned in 1998. Between 2006 and 2020, the federal government spent more than \$600 million on remediation work at the site. In 2023, it renewed the contract of the U.S.-based Parsons Inc. to oversee care and maintenance work. That contract was valued at \$108 million over two years. Although the expected cost of remediation is expected to increase, further details on total cost and project timeline are still unknown.

Kudz Ze Kayah Project

The Kudz Ze Kayah Project is a predominantly open pit operation in southeast Yukon within the Traditional Territory of the Kaska First Nation. The project owner, BMC Minerals, reports a mine life of 10 years, producing copper, zinc, and lead. Development costs are expected to total \$320.8 million with construction between 2025 and 2028. The mine will employ 250 workers at peak production. BMC recently completed an economic review of the project.

Macmillan Pass

A January 2018 report puts Macmillan Pass among the world's most significant zinc resources. Fireweed's Macmillan Pass Project includes the large Tom and Jason zinc-lead-silver deposits. Significant mineral deposits have been proven on the site for decades with exploration ongoing. The project benefits from having established road access. The appreciation in zinc prices since mid-2020 is positive for the development outlook of this mine. The company began a 16,000-metre drill program in 2023.

Resource Gateway Project

The Government of Canada, the Government of Yukon, and the mining industry have committed to contributing more than \$468 million in infrastructure investment for the Resource Gateway Project. The aim is to increase access to the resource-rich territory and promote private investment. The project is divided into 11 components, some of which have already begun construction.

Planned major construction projects: Nunavut

Back River Project

The Back River Project was owned by Sabina Gold & Silver Corp., which was acquired by B2Gold in April 2023. The project holds proven resources of 1.34 million ounces of gold. The company will employ both shovel-and-truck open pit and underground mining methods. The mine is expected to yield 250,000 ounces of gold over 10 years of production. Pre-production capital expenditures are expected to total \$550 million between 2023 and 2025, with first gold in 2025. Further exploration in other areas of the Back River Project is ongoing.

Back River Project – Alternative Energy Centre

The proposed project would allow Sabina Gold & Silver Corp. to install 13 wind turbines, solar panels, and a battery storage system. The project would reduce the amount of fuel required at the Back River mine and cut down on emissions at the project by 50%.

Grays Bay Road and Port Project

The project consists of a 227-kilometre all-season road linking the northern terminus of the Tibbitt-to-Contwoyto winter road to a deep-water port at Grays Bay on the Northwest Passage. The road will encourage the development of resource projects by increasing the ease with which companies can export products from remote locations in the territory. Previous funding received through Transport Canada's National Corridor Fund along with a recently agreed-upon loan from Nunavut Tunngavik Inc. will allow new project owners West Kitikmeot Gold Corp. to carry out pre-construction work and get the project shovel ready.

Capital expenditures were expected to total around \$500 million, however costs have increased over the last two years. West Kitikmeot Gold plans to release a project design to the Nunavut Impact Review Board in 2024.

Mary River Expansion Project (Phases 2 & 3)

Phase 1 of the Mary River Mine, which produces 6 million tonnes of iron ore per year, was completed in 2016. The expansion proposes to raise production by an additional 6 million tonnes in each of phases 2 and 3, for a total of 18 million tonnes. The project would involve the construction of a railway from the Mary River Mine Site to the Port Site, along with a second ore dock at the port.

In late 2022, it was announced that the Phase 2 expansion proposal had been rejected due to environmental concerns. Baffinland Iron Mines is seeking approval to increase the tonnage of iron ore it is allowed to ship from its Mary River mine to 6 million metric tons for both 2023 and 2024.

TRADE REQUIREMENTS

TRADE REQUIREMENTS

The construction and operation of a mine often faces challenges in attracting and training skilled workers. This is especially problematic for mines located in remote locations. Companies are reporting that skilled workers are becoming increasingly difficult to find. This problem is being accentuated by an aging workforce and a wave of retirements from the industry.

Balancing labour requirements therefore requires a mix of short- and long-term mobility strategies that include fly-in, fly-out movement to remote locations, and more long-term additions of young and permanent workers to each regional labour market.

The development of the mining sector in the territories will require key construction trades and occupations that are common to engineering and industrial work in other industries and provinces. The demand for these construction trades has grown dramatically and steadily for at least a decade and, while growth is expected to slow with some projects postponed, industry groups and governments will need to remain focused on recruiting and training plans.

The BuildForce LMI tracking system is limited to broad occupational classifications. The requirements of mine construction and related resource projects have traditionally focused on the following trades and occupations:

- boilermakers
- carpenters
- construction estimators
- construction managers
- contractors and supervisors
- drillers and blasters
- electricians
- heavy equipment operators
- heavy-duty equipment mechanics
- ironworkers and structural metal platework fabricators and fitters
- pipefitters
- trades helpers and labourers
- truck drivers
- welders



The estimated capital cost for each project and additional information on occupation requirements associated with heavy construction inform our estimate of trades requirements. Importantly, it is assumed that all announced projects will proceed as scheduled.

Tables 3 and 4 provide estimates of trades requirements that are generated by the construction of the various projects from 2024 to 2028. The total number of workers required for all projects by territory is shown in Table 3. The time pattern for the projects in the territories as a whole is shown in Table 4.

The total number of trades tracked by BuildForce¹ required for these projects in this time period is 3,061 workers. The largest number of requirements is for heavy equipment operators at 1,069 followed by construction trades helpers and labourers at 696.

Table 3: Construction trades demand by territory

	NORTHWEST TERRITORIES	YUKON	NUNAVUT	TOTAL
Construction managers	88	112	15	215
Construction estimators	47	27	23	97
Contractors and supervisors	85	75	29	189
Steamfitters, pipefitters and sprinkler system installers	6	2	4	12
Electricians	24	30	4	58
Sheet metal workers	2	0	1	3
Boilermakers	19	6	12	37
Ironworkers, Structural metal and platework fabricators and fitters	35	19	18	72
Welders and related machine operators	41	11	26	78
Construction millwrights and industrial mechanics (except textile)	6	3	4	13
Heavy-duty equipment mechanics	51	39	21	111
Heavy equipment operators (except crane)	540	222	307	1,069
Crane operators	57	15	36	108
Drillers and blasters - Surface mining, quarrying and construction	59	23	34	117
Truck drivers	97	30	60	186
Construction trades helpers and labourers	313	273	110	696
TOTAL	1,470	887	704	3,061

Source: Yukon Economic Development, NWT Bureau of Statistics, Nunavut Bureau of Statistics, company websites, and BuildForce Canada

¹ The BuildForce LMI system tracks labour market conditions for 34 trades and occupations. This group includes on-site workers and accounts for approximately 75 percent of the full construction workforce. Excluded from this group are office workers, engineers, office managers, etc.

Table 4: Construction trades demand (all projects)

ALL PROJECTS	2024	2025	2026	2027	2028
Construction managers	78	62	36	22	16
Construction estimators	32	29	13	14	8
Contractors and supervisors	65	56	29	24	15
Steamfitters, pipefitters and sprinkler system installers	4	4	2	2	1
Electricians	21	17	10	6	4
Sheet metal workers	1	1	0	1	0
Boilermakers	12	12	5	6	3
Ironworkers, Structural metal and platework fabricators and fitters	24	22	10	11	6
Welders and related machine operators	24	24	9	14	7
Construction millwrights and industrial mechanics (except textile)	4	4	2	2	1
Heavy-duty equipment mechanics	38	33	16	15	9
Heavy equipment operators (except crane)	343	328	137	173	88
Crane operators	34	34	13	19	9
Drillers and blasters - Surface mining, quarrying and construction	37	36	15	19	10
Truck drivers	59	58	23	32	15
Construction trades helpers and labourers	241	206	106	88	55
TOTAL	1,017	923	426	448	247

Source: Yukon Economic Development, NWT Bureau of Statistics, Nunavut Bureau of Statistics, company websites, and BuildForce Canada

CONCLUSIONS

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The labour requirements for projects in the Northwest Territories, Yukon, and Nunavut add to the complexity of demand requirements for construction trades and occupations across Canada.

Meeting labour demands for ongoing resource projects and replacing an aging workforce will require a mix of short- and long-term mobility options that include both the movement of workers into remote locations and more long-term additions of young and permanent workers to address an aging workforce. Some new workers may be drawn from the populations of the Northwest Territories, the Yukon, and Nunavut; others will have to be drawn from outside the local construction industry. The development of additional major projects would increase labour demands and enhance the need for the territories to attract more 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 the current long-term economic outlook and industry major project assumptions. Any changes to these assumptions present risks and potentially alters anticipated market conditions.



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Phone 613.569.5552
info@buildforce.ca

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