



Sectoral Profile

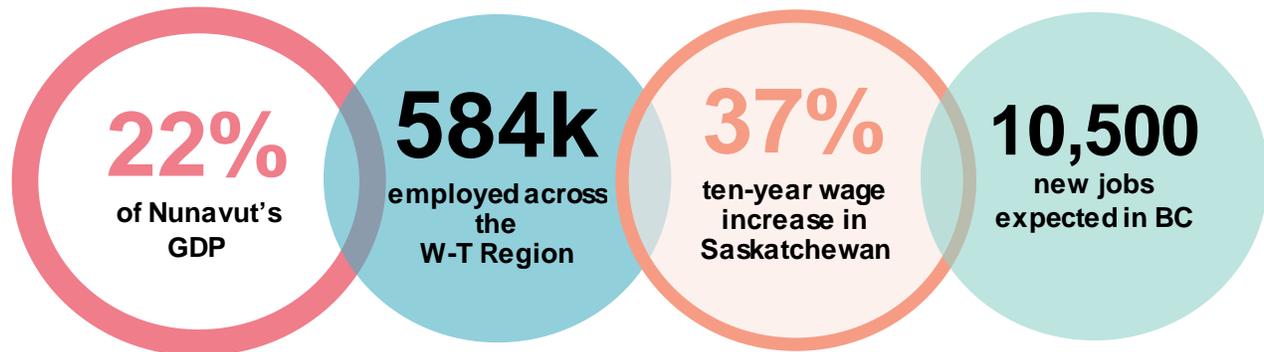
Construction

Region of Western Canada and the Territories

2019-2021



EXECUTIVE SUMMARY



Construction is a significant industry in all western Canadian provinces and territories. In 2018, the industry accounted for between 7% and 22% of provincial/territorial gross domestic product (GDP)¹, and it employed approximately 584,000 workers across W-T Region. ²

The regional outlook for the construction sector through 2021 is mixed, with larger employment gains forecast for British Columbia (+10,500) and Alberta (+7,200), and a downturn expected in Saskatchewan (-900) and more significantly in Manitoba (-4,200). In the North, employment is forecast to rise both in Yukon (+100) and in Northwest Territories(+300), while Nunavut will likely see a decline (-100) over the forecast period.

KEY DRIVERS

- Continued population growth from immigration (particularly in British Columbia and Alberta³), as well as a rebound of interprovincial migration in some jurisdictions, will help to support residential construction.
- Many consumers are finding it difficult to borrow for a new home or renovation, which can be connected to increasing personal debt and the federal government's new stress test mortgage requirements. In

addition, ongoing economic uncertainty may further contribute to consumer caution around major purchase decisions like homes or large-scale renovations.⁴

- Business confidence and investment intentions are significant drivers in the construction sector, particularly in non-residential and heavy and civil engineering construction. Similar to the residential sector, economic uncertainty could affect investor decisions and apply downward pressure on growth.
- Federal infrastructure spending, including the development of community centres and recreation facilities, will encourage growth in the institutional segment.⁵ In addition, provincial government spending on new schools and hospitals will also support growth in some provinces.

BACKGROUND

The construction industry has three main segments: **construction of residential and non-residential buildings** (industrial, commercial, and institutional); **heavy and civil engineering construction** (highways, bridges, mining, oil and gas facilities, and utilities); and **specialty trade contractors** (including electrical work, masonry, and painting).⁶ Activity within all parts of the construction industry depends on investment, which is sensitive to any changes in the national or global economy as well as demographic trends.⁷ Further, the sector faces complexities from government policy and regulations, which can either bolster or diminish growth depending on the rules put in place.

In 2018, the sector employed approximately 584,000 people in W-T-Region, mainly concentrated in Alberta (42%) and British Columbia (41%). In the same period, construction in the region generated \$60.4 billion, representing 8% of total GDP. The main sources of revenue in the region come from the construction of residential buildings (31%), followed by oil and gas engineering (25%).⁸

In British Columbia, around 238,400 people worked in construction in 2018, representing 10% of all employment in the province. The residential segment is driving construction in B.C., with the building of homes making up almost half (44%) of the sector's \$21 billion in GDP for 2018. In recent years, the federal government's mortgage stress test policy has applied downward pressure on housing demand by making it harder to obtain a mortgage. However, for province's construction industry, which has already been dealing with recruiting challenges, a cooling residential sector may be somewhat welcome. There are a number of new non-residential projects on the horizon, including the Site C and the LNG Canada projects, and the industry is facing the prospect of 13,000 workers retiring over the next few years.⁹

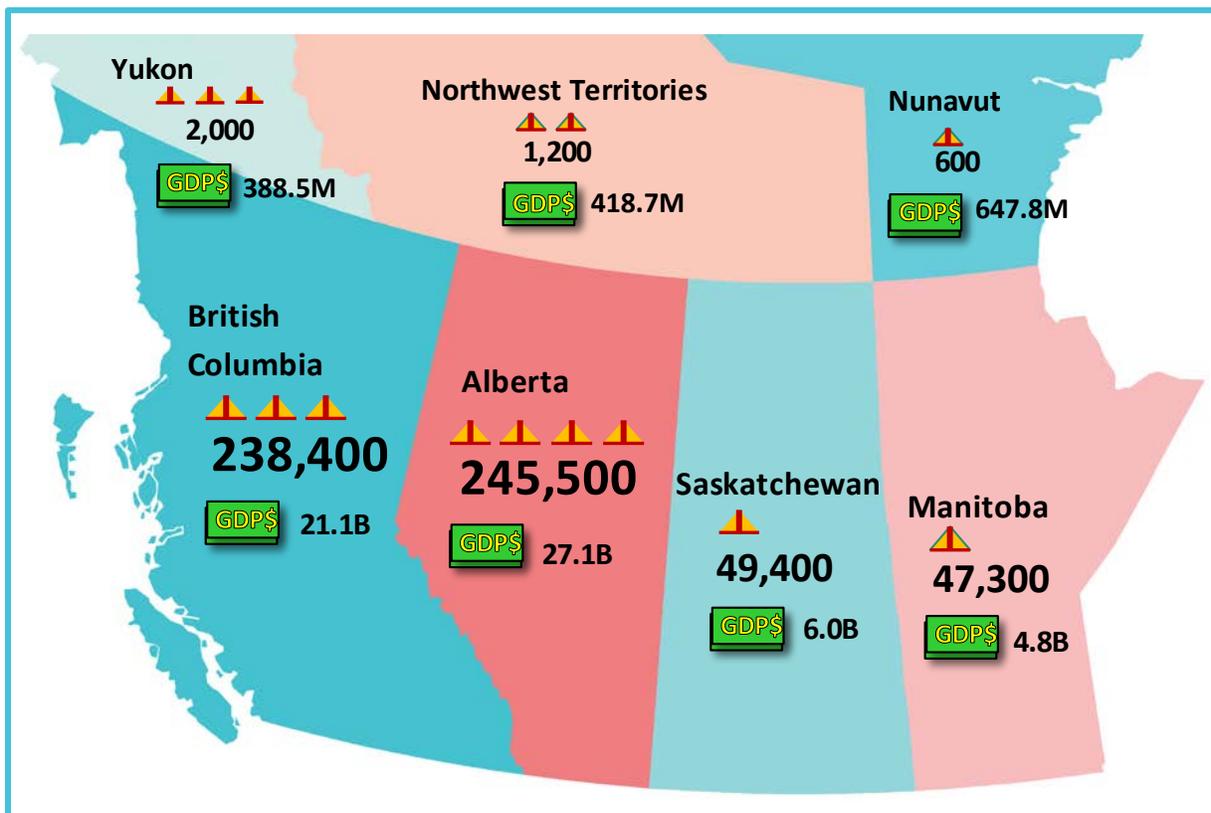
For Alberta, 2018 saw approximately 245,500 people work in the construction industry, making up 11% of all employment in the province. Oil and gas engineering construction is significant in Alberta, generating close to \$10 billion in GDP in 2018 and representing more than a third of the economic output from Alberta's construction industry.¹⁰ However, growth in oil and gas construction has slowed since resource expansion topped out in 2014.¹¹ Now – with Fort Hills becoming operational at the beginning of 2018 – some speculate the province has seen the last of major oil sands expansion projects and that the focus has shifted to maintenance of projects¹². Overall, construction employment in the province was supported in 2018 by an upswing in housing starts and infrastructure projects.

In 2018, Saskatchewan had around 49,500 people working in construction – almost nine percent of all employment in the province. Similar to Alberta, Saskatchewan is dealing with a construction slow-down related to a decelerating activity in the oil and gas sector. However, unlike its western neighbor, the province saw a significant drop in housing starts in 2018. Slowing activity in residential housing detracted from gains made by the replacement of Enbridge’s Line 3, as well as work on mining, highway and utility projects.¹³

In Manitoba, the construction sector had approximately 47,200 jobs in 2018, reaching just over seven percent of all employment in the province. Driven by major hydro-related developments, such as Manitoba Hydro’s Keeyask project, as well as construction of infrastructure, commercial offices, and food manufacturing facilities, the province’s construction industry has expanded significantly over the last fifteen years. Overall, construction employment levels nearly doubled between 2002 and 2017.¹⁴ However, similar to Saskatchewan, Manitoba saw a significant decline in new home building in 2018, after a bit of a spike in 2017. Furthermore, the province faces the end of some major projects over the next three years¹⁵.

Across the territories, 2018 figures reveal that construction played the largest role in Yukon with 2,000 jobs, or just over nine percent of all employment. In the N.W.T, construction employment was around 1,200 in 2018, making up over five percent of all jobs. Nunavut had just around 600 positions in construction, topping just over four percent of total employment. The main driver for construction in the North is mining, as the majority of major projects are either new mines or projects involving mining reclamation or remediation.¹⁶

Construction Employment and Gross Domestic Product by Province and Territory -- 2018



Source: Statistics Canada. Table 14-10-0027-01 Employment by class of worker, annual; Territory data: Labour Force Survey Custom Table; Table 36-10-0402-01 Gross domestic product (GDP) at basic prices, by industry, provinces and territories

Sub-industry Highlights^{17,18,19}

Residential



Description

Building, and or renovation, of single-family and multi-family residential buildings.

Common Occupations

Bricklayer, Carpenter, Concrete finisher, Electrician, Floor covering installer, Plumber...



Employed



Weekly Wage

British Columbia	66,800	\$1,042
Alberta	46,800	\$1,170
Manitoba	9,900	\$950
Saskatchewan	8,900	\$966

Non Residential



Description

Construction of industrial, commercial, and institutional buildings

Common Occupations

Boilermaker, Carpenter, Millwright, Driller and blaster
Electrical power line and cable...



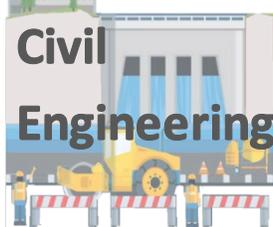
Employed



Weekly Wage

Alberta	15,600	\$1,562
British Columbia	13,700	\$1,346
Manitoba	4,100	\$1,320
Saskatchewan	4,100	\$1,301

Heavy and Civil Engineering



Description

Construction of engineering projects, including new, or modification and repair of existing structures

Common Occupations

Civil Engineer, Estimator, Heavy Equipment Operator, Pipe Layer, Surveyor...



Employed



Weekly Wage

Alberta	41,300	\$1,766
British Columbia	25,200	\$1,586
Manitoba	6,400	\$1,739
Saskatchewan	8,500	\$1,589

Specialty Trade Contractors



Description

Trades working under general contractors to carry out a component of an overall project

Common Occupations

Crane Operator, Dry Waller, Excavator, Scaffolder, Painter, Tank lining...



Employed



Weekly Wage

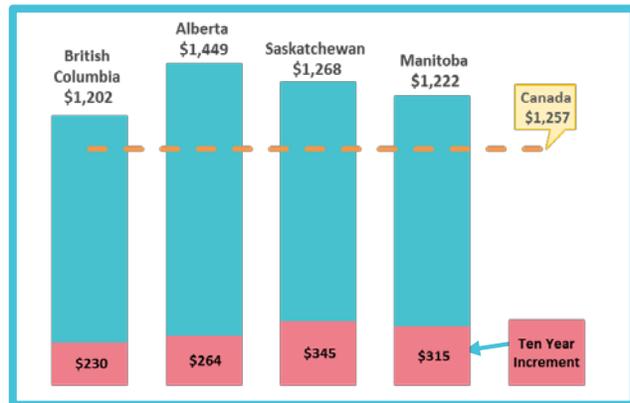
Alberta	141,800	\$1,345
British Columbia	132,700	\$1,139
Manitoba	26,900	\$1,085
Saskatchewan	28,000	\$1,216

Wages

Construction wages are comparatively higher than other industries, only falling below industries such as Oil and Gas, Utilities, and Professional services.²⁰

In 2018, Alberta (\$1,423 per week) held the second highest construction wages among all provinces in the country, just below Newfoundland (\$1,463 per week).²¹ British Columbia had the lowest wage in the west; however, this is likely due to the larger number of lower paying residential construction jobs in the province. Overall, the construction wage gap has narrowed between the western provinces over the last few years, following the decline in Alberta construction wages for three straight years from 2015 to 2017.

Average Weekly Construction Wages - 2018



Source: Statistics Canada. Table 14-10-0204-01 Average weekly earnings by industry, annual

In the territories, where the cost of living is greater, construction wages in 2018 were over \$1,500 a week both in Northwest Territories and in Nunavut. However, the weekly wage in Yukon was right around the national average (\$1,257) at \$1,238.²²

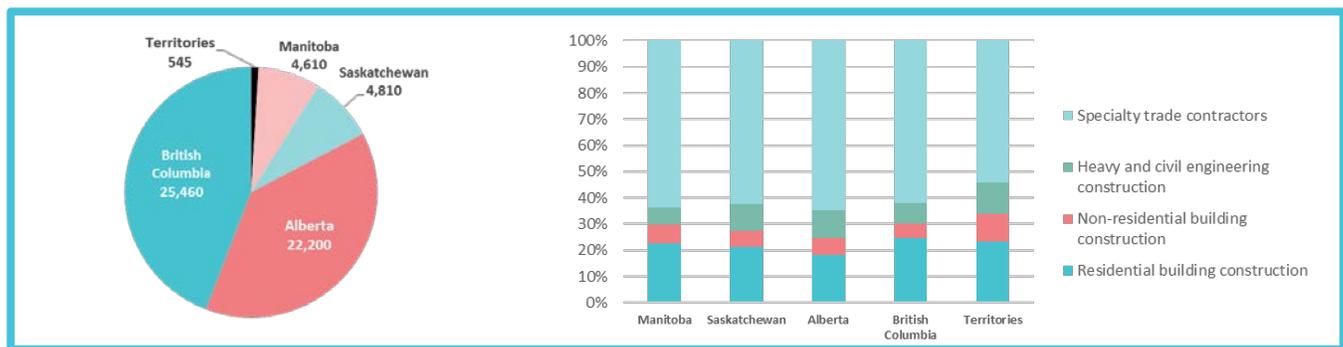
Businesses

In western Canada, as in the rest of the country, construction firms make up approximately 12% of all businesses. The majority of construction businesses are small. Over 80% of firms have less than 10 employees, with the bulk of them being specialty trade contractors.²³

British Columbia had the largest number of construction businesses (25,460) in the west during 2018, with a quarter being residential builders. While Alberta (22,200) has a smaller percentage of homebuilders (18%) than British Columbia, it has a higher number of non-residential construction firms as well as companies working in heavy and civil engineering. In fact, nearly a quarter of all heavy and civil engineering construction companies in Canada operated in Alberta during 2018.

In the North, non-residential builders (11%) and heavy and civil engineering construction (12%) firms play a more significant role than in the western provinces.

Construction Business Counts



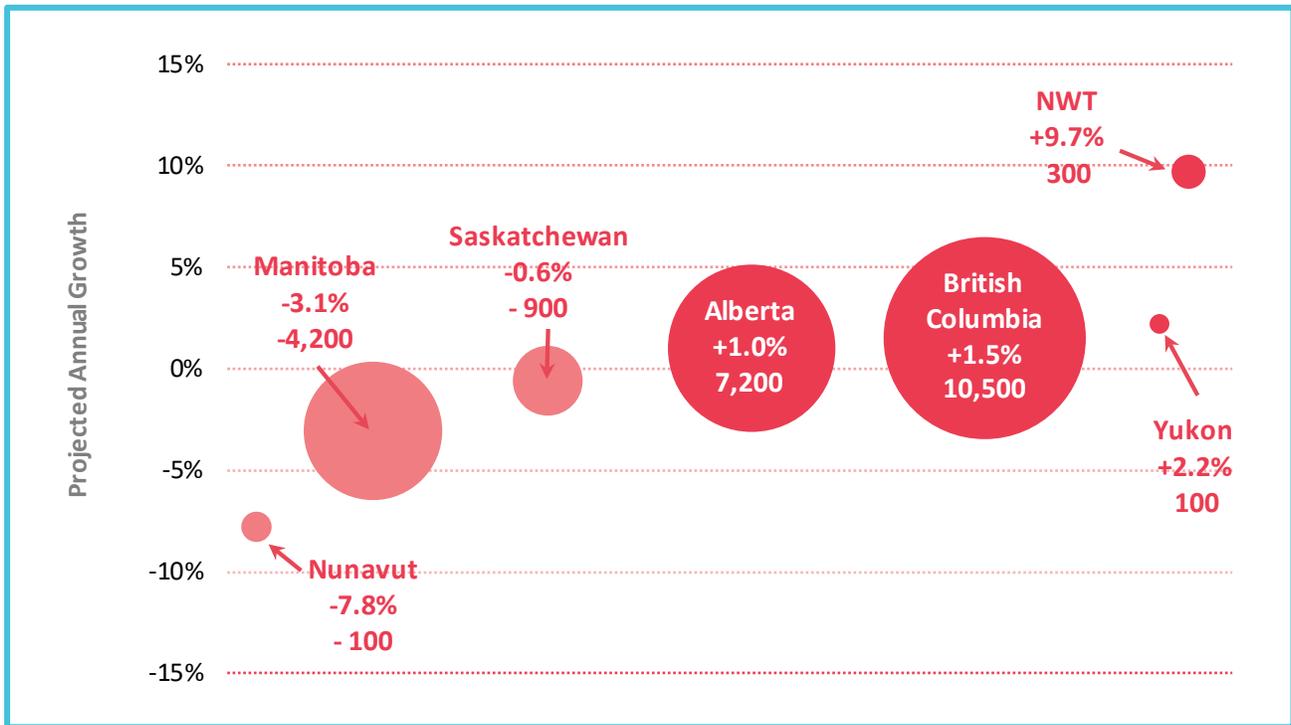
Source: Statistics Canada. Table 33-10-0105-01 Canadian Business Counts, with employees, December 2018

EMPLOYMENT OUTLOOK

During the forecast period (2019 through 2021), BC is expected to add approximately 10,500 jobs, while Alberta should see employment increase 7,200. Manitoba and Saskatchewan are expected to see a downturn in construction, with losses of around 900 and 4,200 jobs respectively by 2021.

Among the territories, it is anticipated that Yukon (+100) and Northwest Territories (+300) will experience a boost in employment, while Nunavut will see a decline in employment (-100) over the forecast period.

Projected employment change for the construction sector during the 2019-2021 forecast period



Source: Service Canada Regional Occupational Outlooks in Canada, 2019 - 2021

REGIONAL OVERVIEW

Alberta

- In 2018, the Government of Alberta started work on more than 500 road, bridge and water management projects planned for the next five years with a budget over \$6B. The government estimates that this work will support 18,000 jobs.²⁴
- The Governments of Canada and Alberta, and the City of Calgary have each committed \$1.53B to the first stage of the Green Line, which is the expansion of the **Calgary's** light rail system. The first stage is scheduled to be complete by 2026.^{25 26}

- TransAlta plans to build a \$175M wind farm in **Fort Macleod** with 43 turbines and enough capacity to power 88,000 homes. The Windrise project is expected to begin in June 2020 and create 300 jobs during construction.²⁷
- The Samson Cree Nation has broken ground on a \$32.5M project to upgrade its wastewater facilities in **Maskwacis**. The funding covers construction, project management and First Nation administration. Project completion is scheduled for the winter of 2020²⁸.

British Columbia

- LNG Canada is spending \$40B to build a new liquefied natural gas processing terminal in **Kitimat** and a pipeline linking the terminal to **northeast** British Columbia. The project is expected to create up to 10,000 jobs during construction.²⁹
- In April 2018, the British Columbia government announced it is spending \$1.9B over ten years to build 14,000 new rental units across the province. Since then, the federal, provincial, and Capital Regional District governments have unveiled plans for a combined \$90M to build 2,010 new rental units in **Victoria**. In addition, the City of **Vancouver** and the Government of British Columbia are partnering to build a \$30M rental housing building that will be available by early 2021.³⁰³¹³²
- Construction on a number of new schools, as well as seismic upgrades to existing schools, is occurring in the **Lower Mainland** area. Projects include the \$106.5M New Westminster Secondary school, expected to open in September 2020³³; \$79.3M to replace Eric Hamber Secondary³⁴ in Vancouver; and \$79.2M to build a new seismically safer Burnaby North Secondary School.³⁵
- Construction began in June 2018 on **Vancouver International Airport**, which is undergoing a \$9.1B 20-year expansion. The first phase includes a four-gate addition to the international flight area, a geothermal heating system, and a new parkade.³⁶

Manitoba

- In June 2018, the federal and provincial governments signed a bilateral agreement that will provide more than \$1.1 billion in federal funding over the next decade for infrastructure projects. This funding supports the construction of recreational, cultural, and community infrastructure.³⁷
- The federal and provincial governments are cost sharing up to \$540 million in new infrastructure for the **Lake Manitoba** and **Lake St. Martin** outlet channels in order to achieve better flood management. Construction began in 2017 and is scheduled to run through to 2020.³⁸³⁹
- In November 2018, the federal government announced \$248M in funding to build four new schools in First Nation communities in **northern Manitoba**.⁴⁰
- Construction started on a \$95M Innovation Centre in 2018 at the Red River College in **Winnipeg**. The project is slated for completion by fall 2020.⁴¹

Saskatchewan

- Through the Investing in Canada plan, the Government of Canada is granting more than \$896M over the next decade for infrastructure in Saskatchewan, including public transit, green infrastructure, recreational, cultural, and community infrastructure projects.⁴²

- Work began in August 2019 on the \$325M Golden South Wind Energy Facility near **Assiniboia**. The project is expected to employ 200 workers during the construction phase and be complete by 2021.⁴³
- In September 2018, the Government of Canada and the Government of Saskatchewan announced that, through combined federal, provincial and local recipient funding, more than \$80.9M is being provided for 46 projects to modernize local infrastructure across the province.⁴⁴
- In January 2019, the Government of Canada announced it is providing \$25.6M to DEEP Earth Energy Production Corporation to build a five-megawatt geothermal power plant in Estevan. The project is expected to create 100 jobs during construction.⁴⁵
- Construction began in September 2018 on the \$38M Dakota Dunes hotel and conference centre in the **Whitecap Dakota First Nation** community, located south of Saskatoon. The project is expected to create approximately 230 construction jobs until it is complete in 2020.⁴⁶

Territories

- The Government of Northwest Territories has an agreement with North Star Infrastructure GP to oversee the construction, operation and maintenance of the \$411.8M **Tlicho** all-season road. The project is set to begin this fall and finish by 2022.⁴⁷
- Announced in November 2018, the Government of Canada is dedicating up to \$400 million over 11 years to strengthen transportation infrastructure in Yukon, Northwest Territories and Nunavut.⁴⁸
- The federal and NWT governments are spending \$140M to construct and repair social and community housing in the territory. The 10-year agreement is expected to start April 1, 2019.⁴⁹
- In Yukon, work to reconstruct, replace, and resurface a 100 kilometre critical section of the North Klondike Highway connecting **Whitehorse** to **Dawson City** is set to begin in 2020. The Government of Canada is providing \$118 million and the territorial government is contributing \$39 million.⁵⁰
- Whitehorse-based Ketz Construction has been awarded a \$29M contract to build a French First Language Secondary School and community spaces. The project is set to begin in the spring of 2019 and be completed by early 2021.⁵¹

APPENDIX

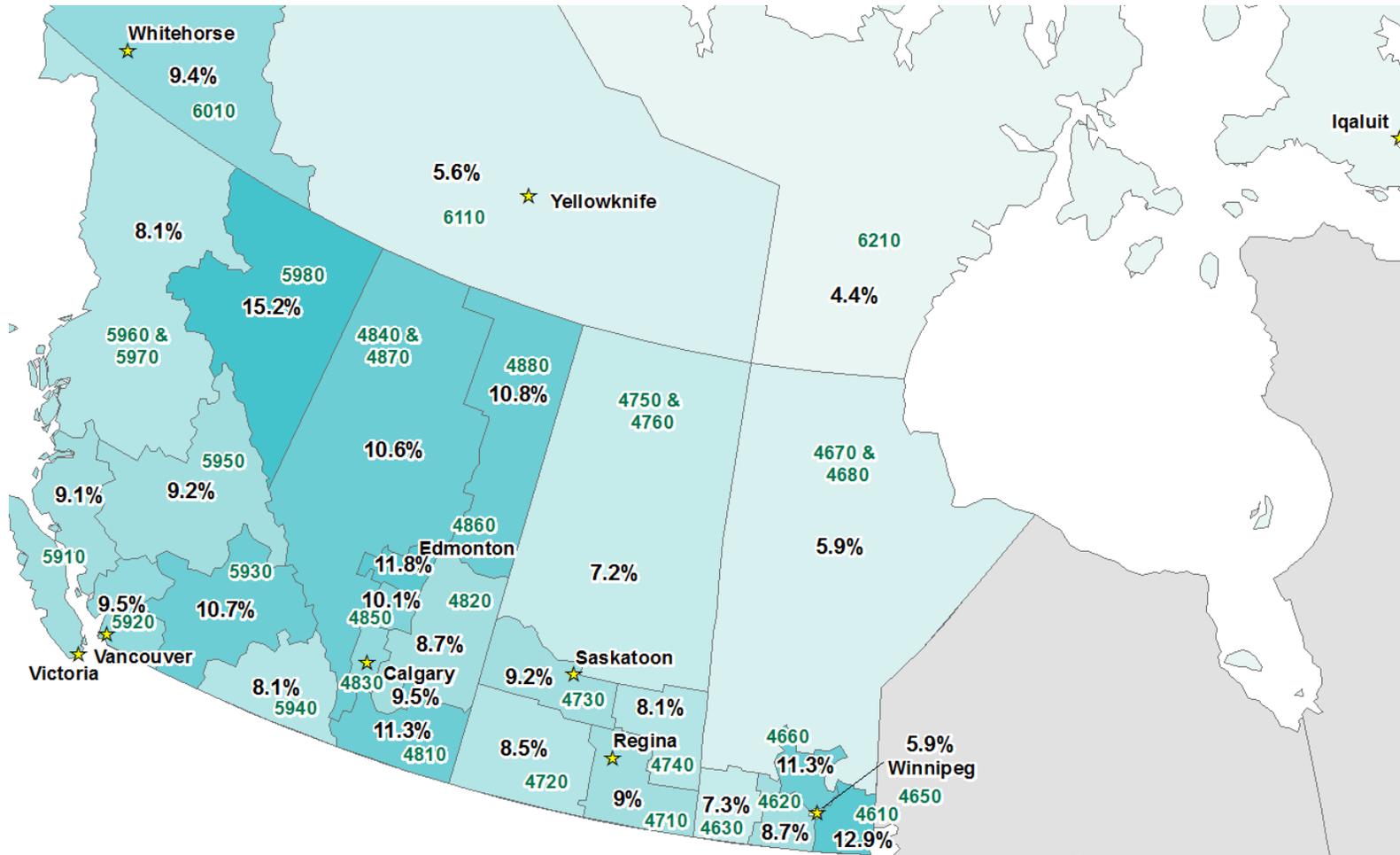
Construction Employment by Economic Region – 2018

(see [Map](#) on page 10)

Region	2018	% of Total Employment
4610 - Southeast	8,000	12.9%
4620, 4640 - South Central and North Central	4,800	8.7%
4630 - Southwest	4,100	7.3%
4650 - Winnipeg	23,300	5.9%
4660 - Interlake	5,100	11.3%
4670 & 4680 - Parklands & North	2,000	5.9%
4710 - Regina - Moose Mountain	16,600	9.0%
4720 - Swift Current - Moose Jaw	4,300	8.5%
4730 - Saskatoon - Biggar	18,500	9.2%
4740 - Yorkton - Melville	2,900	8.1%
4750 & 4760 - Prince Albert & Northern	7,100	7.2%
4810 - Lethbridge - Medicine Hat	16,200	11.3%
4820 - Camrose - Drumheller	8,900	8.7%
4830 - Calgary	84,700	9.5%
4840, 4870 - Banff - Jasper - Rocky Mountain House et Athabasca - Grande Prairie - Peace River	20,100	10.6%
4850 - Red Deer	12,100	10.1%
4860 - Edmonton	94,500	11.8%
4880 - Wood Buffalo - Cold Lake	9,000	10.8%
5910 - Vancouver Island and Coast	36,100	9.1%
5920 - Lower Mainland - Southwest	152,300	9.5%
5930 - Thompson - Okanagan	27,300	10.7%
5940 - Kootenay	5,800	8.1%
5950 - Cariboo	7,400	9.2%
5960 & 5970 - North Coast & Nechako	3,500	8.1%
5980 - Northeast	6,000	15.2%
6010 - Yukon	2,000	9.4%
6110 - NWT	1,200	5.6%
6210 - Nunavut	600	4.4%

Sources: 1. Statistics Canada. Table 14-10-0092-01 Employment by industry, annual, provinces, and economic regions
 2 Statistics Canada Labour Force Survey, custom table for Employment and Social Development Canada (6010, 6110, & 6210)

Map - Construction Employment by Economic Region – 2018



Data for areas in grey is suppressed to meet the confidentiality requirements of the Statistics Act.

Sources: 1. Statistics Canada. Table 14-10-0092-01 Employment by industry, annual, provinces, and economic regions

2. Territory data: Statistics Canada Labour Force Survey, custom table for Employment and Social Development Canada

Note: In preparing this document, the authors have taken care to provide clients with labour market information that is timely and accurate at the time of publication. Since labour market conditions are dynamic, some of the information presented here may have changed since this document was published. Users are encouraged to also refer to other sources for additional information on the local economy and labour market. Information contained in this document does not necessarily reflect official policies of Employment and Social Development Canada.

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