

NATIONAL CAPITAL REGION CONSTRUCTION LABOUR FORCE OUTLOOK: 2025 TO 2028

National Capital Heavy Construction Association
(NCHCA)
Ottawa, Ontario

January 30, 2025
Bill Ferreira



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



ABOUT BUILDFORCE CANADA

Strategic Partners

Owners

- ACTIMS (Alberta Council of Turnaround Industry Maintenance Stakeholders)
- BC Hydro
- Irving Oil
- LNG Canada
- Newfoundland and Labrador Hydro
- Ontario Power Generation
- Shell Canada
- Suncor

Construction Associations

- Canadian Construction Association
- Canadian Home Builders' Association
- Merit Canada
- National Construction Labour Relations Alliance
- Progressive Contractors Association of Canada

Labour Unions

- Canada's Building Trades Unions
- CLAC

BuildForce is a national industry-led organization committed to providing information and resources to the construction industry in Canada to assist with its workforce development requirements.

Scenario forecast is based on:

- macroeconomic and demographic data
- construction and maintenance investment in residential and non-residential sectors
- inventory of major construction projects
- input from provincial LMI committees

The BuildForce labour market model covers 34 “on-site” trades and occupations and an “other” category that includes all remaining occupations (mostly office/administrative staff).

Construction industry totals align with Statistics Canada's Labour Force Survey.

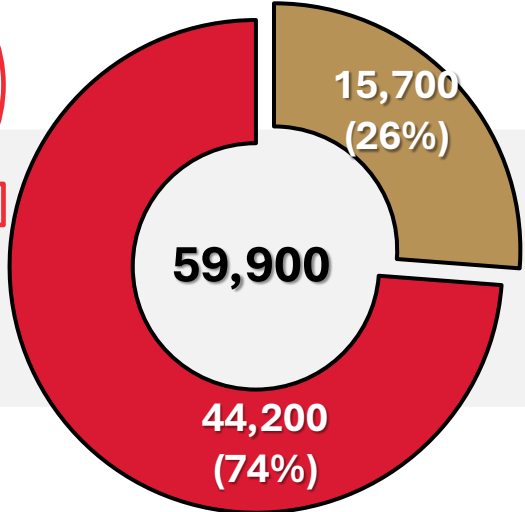
WHERE ARE WE TODAY

CONSTRUCTION INDUSTRY EMPLOYMENT

Number of individuals employed: annualized for 2024

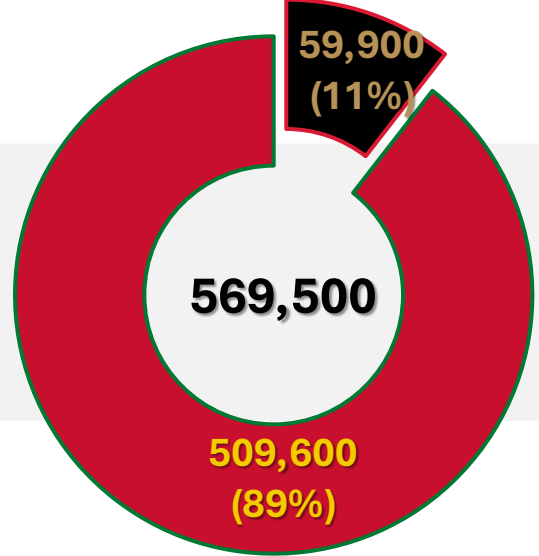
Additional employment in Eastern Ontario
19,700

Ottawa - Gatineau



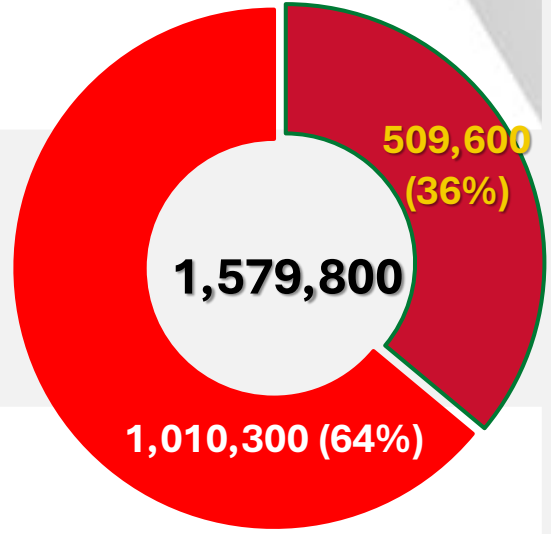
- Ottawa-Gatineau, Quebec
- Ottawa-Gatineau, Ontario

Ottawa/Gatineau - Ontario



- Ottawa-Gatineau, Total
- Rest of Ontario

Ontario - Canada



- Ontario
- Canada



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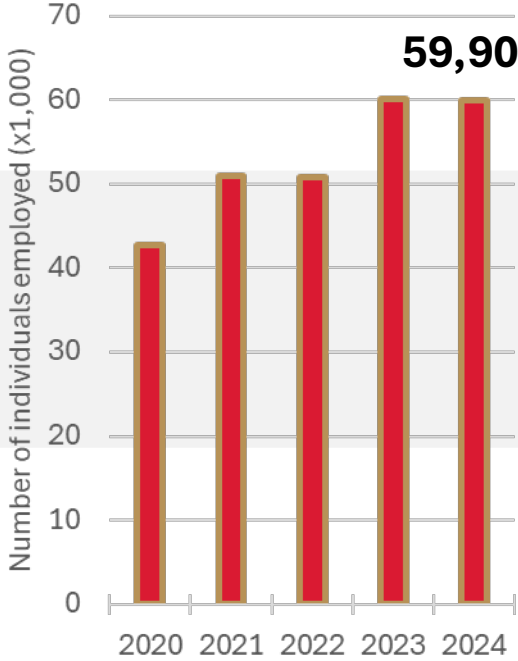


Source: Statistics Canada. Table 14-10-0023-01 Labour force characteristics by industry, annual and Table 14-10-0384-01 Employment by industry, census metropolitan areas, annual (x 1,000)

EMPLOYMENT GROWTH

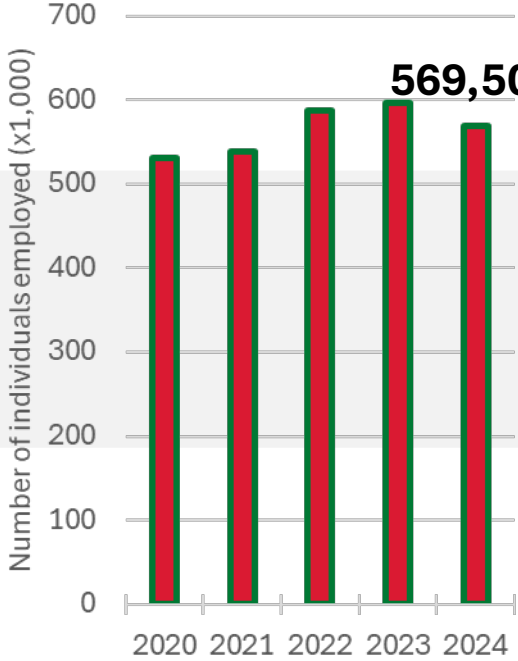
National Capital Region, Ontario and Canada

2020 to 2024: +40%*



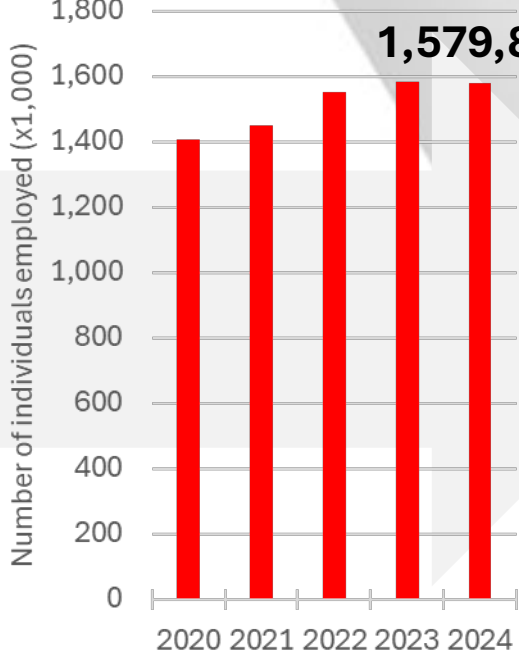
■ National Capital Region

2020 to 2024: +7%*



■ Ontario

2020 to 2024: +12%*



■ Canada



Source: Statistics Canada. Table 14-10-0023-01 Labour force characteristics by industry, annual (x 1,000) and Table 14-10-0384-01 Employment by industry, census metropolitan areas, annual (x 1,000)

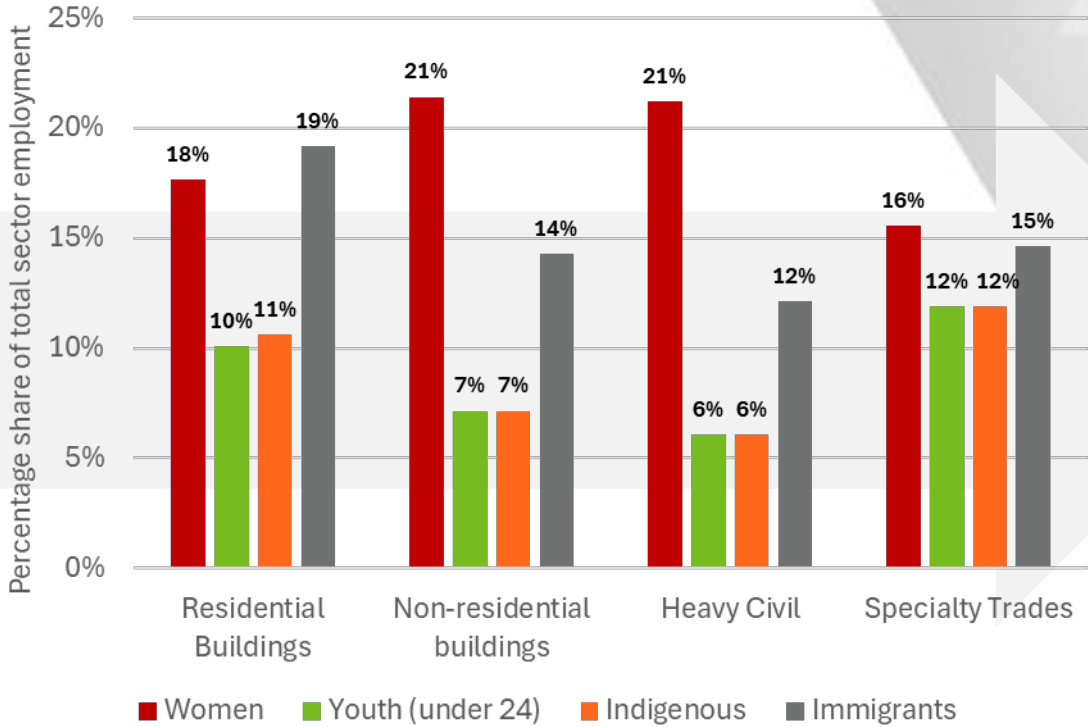
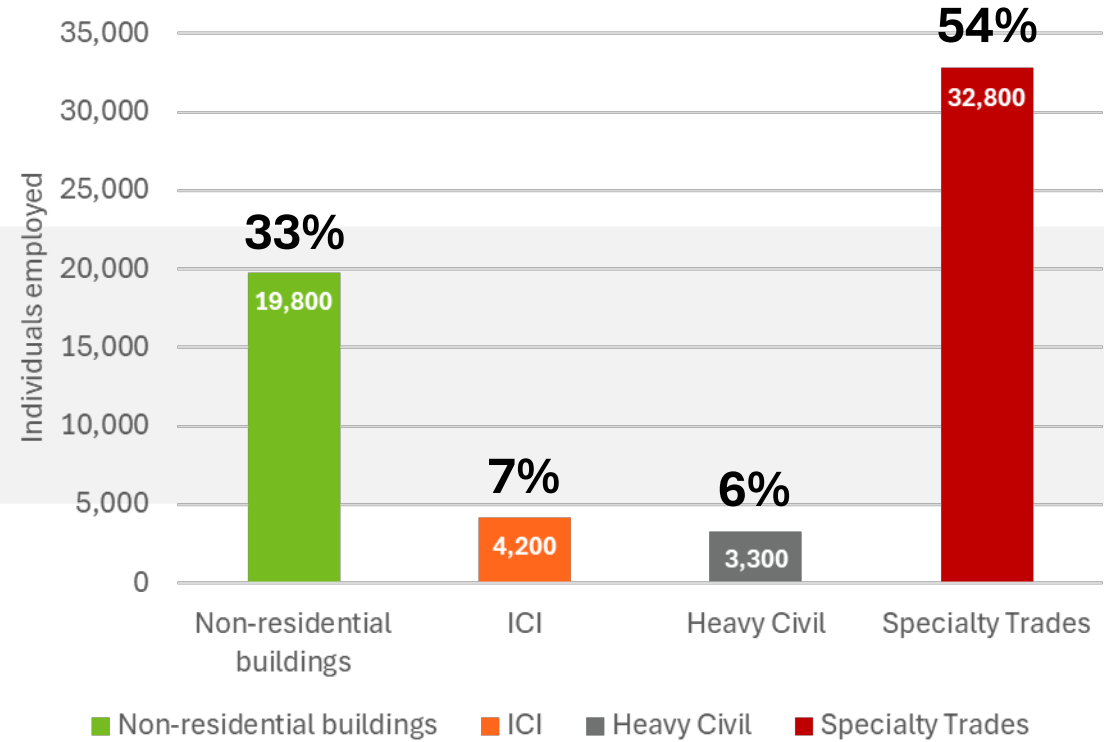
* Percentage growth between 2020 and 2024.

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NATIONAL CAPITAL REGION

Composition of the industry: 2024



Source: Statistics Canada, Table 1 Employed population by selected demographic characteristics, industry, North American Industry Classification and BuildForce Canada calculations

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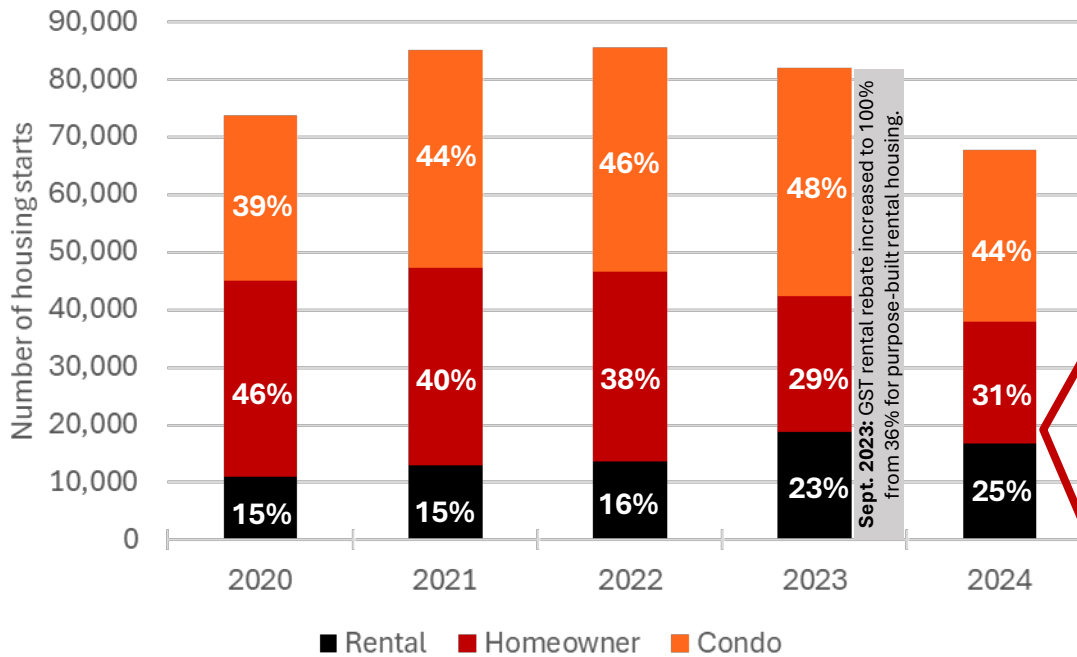
CONSTRUCTION INDUSTRY OUTLOOK

2024 to 2028

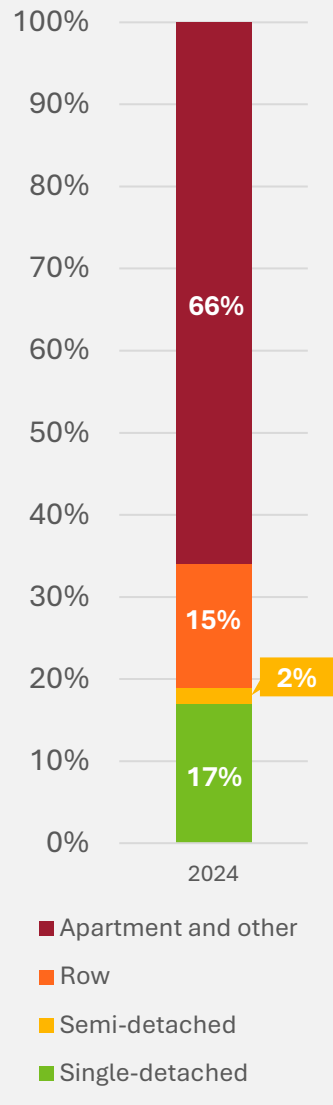
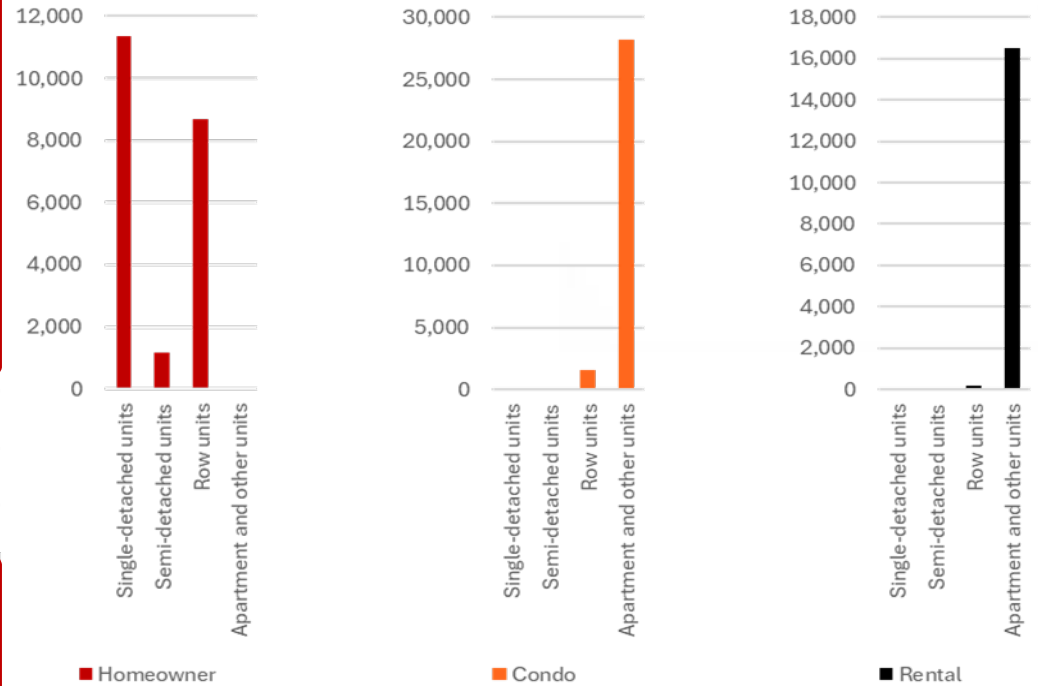
RESIDENTIAL INVESTMENT

Ontario CMAs* over 50,000-in-population: 2020-2024

HOUSING START BY OCCUPANCY TYPE



2024 HOUSING STARTS BY OCCUPANCY



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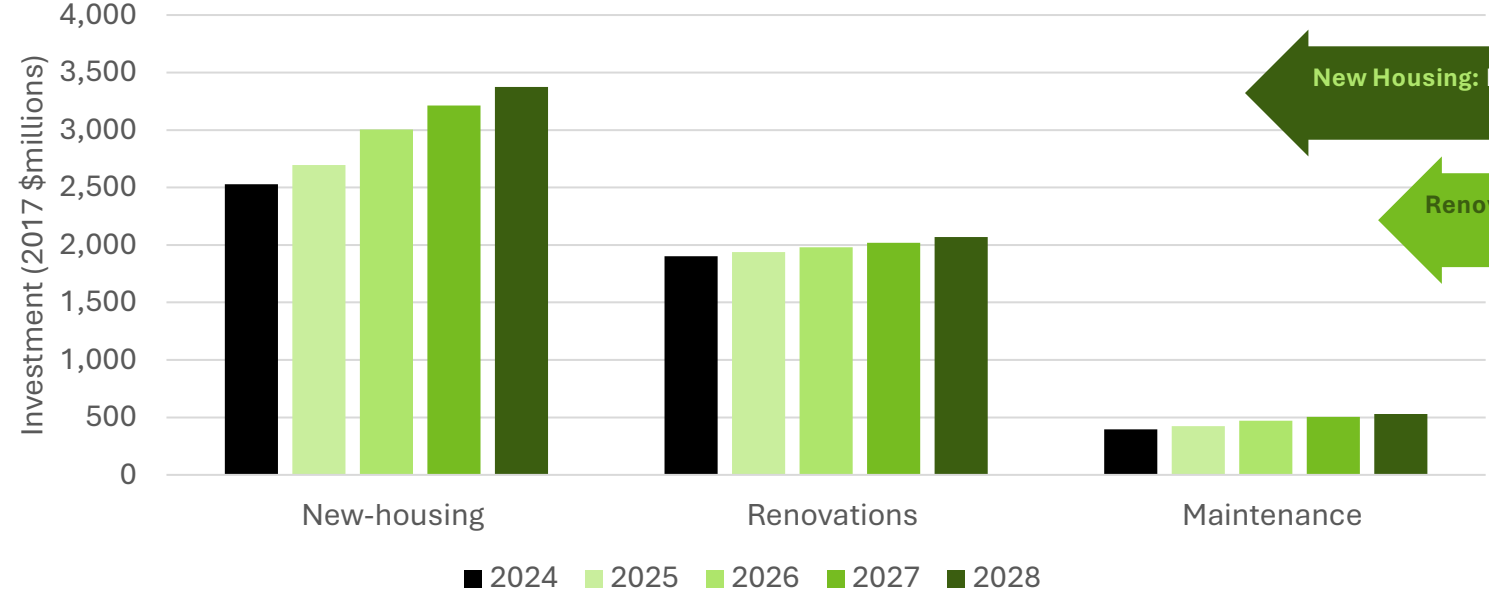
Source: Statistics Canada. Table 34-10-0152-01 Canada Mortgage and Housing Corporation, housing starts, by type of dwelling unit and market type in all centres of 50,000 and over for Canada and provinces

* Census Metropolitan Areas (CMAs)

RESIDENTIAL INVESTMENT

Estimated: 2024-2028

RESIDENTIAL INVESTMENT
OTTAWA



Key demand drivers

- New Housing:** Population growth due to international and domestic migration drives demand for new rentals, condos, singles, rows and semi-detached units
- Renovations:** Resales, aging-in-place, and electrification of homes (space, water and vehicle recharging)
- Maintenance:** Aging of existing housing stock and housing assets



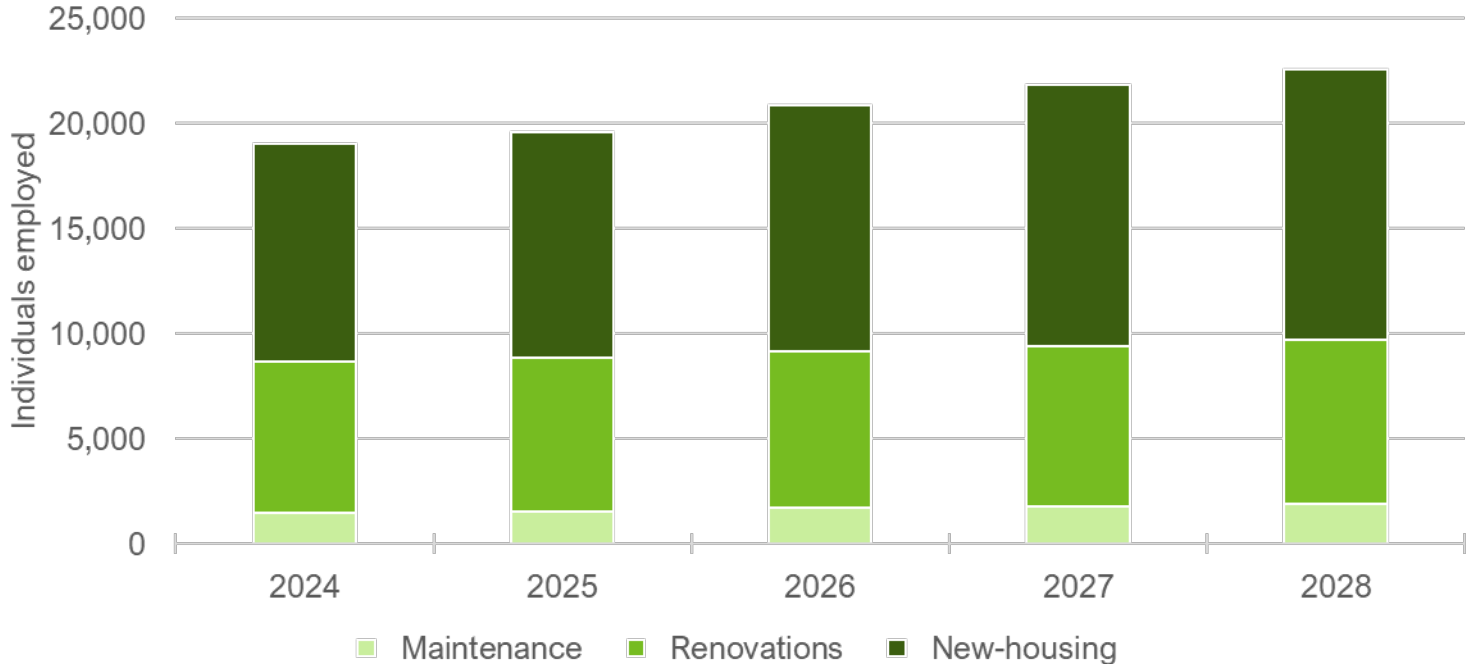
Source: Statistics Canada and CMHC data, and BuildForce Canada tabulation

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EMPLOYMENT AND LABOUR MARKET

RESIDENTIAL EMPLOYMENT CHANGE 2024-2028



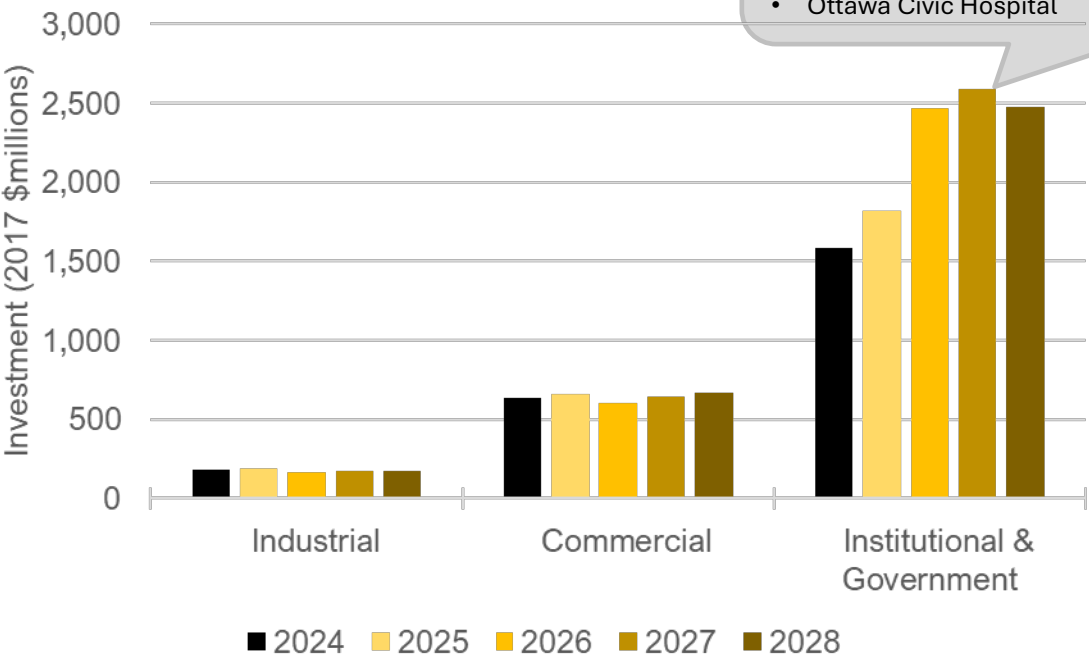
Residential Labour Force Change Direct trades and Occupations

2024 LABOUR FORCE 20,900	2028 LABOUR FORCE 23,700	2,800 DEMAND GROWTH
		2,100 RETIREMENTS
A POSITIVE MOBILITY FLOW REPRESENTS A REQUIREMENT TO SUPPLEMENT THE LOCAL CONSTRUCTION LABOUR FORCE WITH WORKERS FROM OUTSIDE THE INDUSTRY. REQUIREMENT WITH		+4,900 TOTAL HIRING NEEDS
A NEGATIVE FLOW REPRESENTS AN OUTFLOW OF WORKERS FROM THE LOCAL CONSTRUCTION LABOUR FORCE.		-1,600 NEW ENTRANT OFFSET
		+3,300 MOBILITY FLOW REQUIRED

NON-RESIDENTIAL INVESTMENT

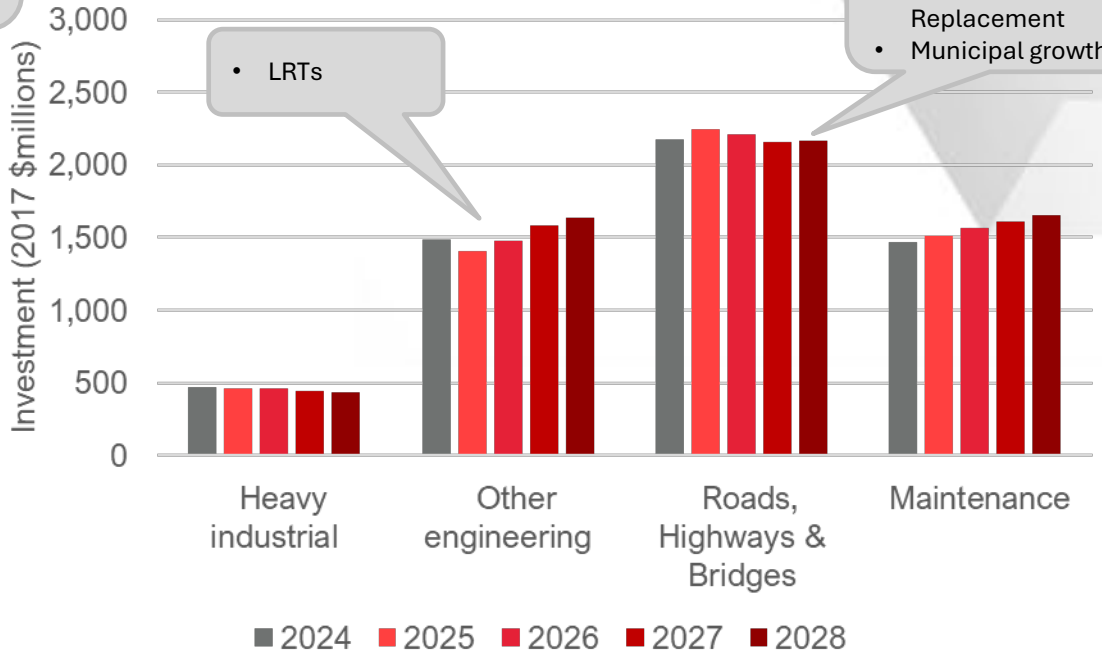
Estimated: 2024-2028

ICI INVESTMENT



- Federal Buildings (Parliament, Supreme Court, Pearson Buildings, Ottawa Public Library/Archives, TerraCanada)
- Ottawa Civic Hospital

ENGINEERING INVESTMENT



- LRTs

- Highway 17 – Arn prior to Renfrew
- Alexandra Bridge Replacement
- Municipal growth



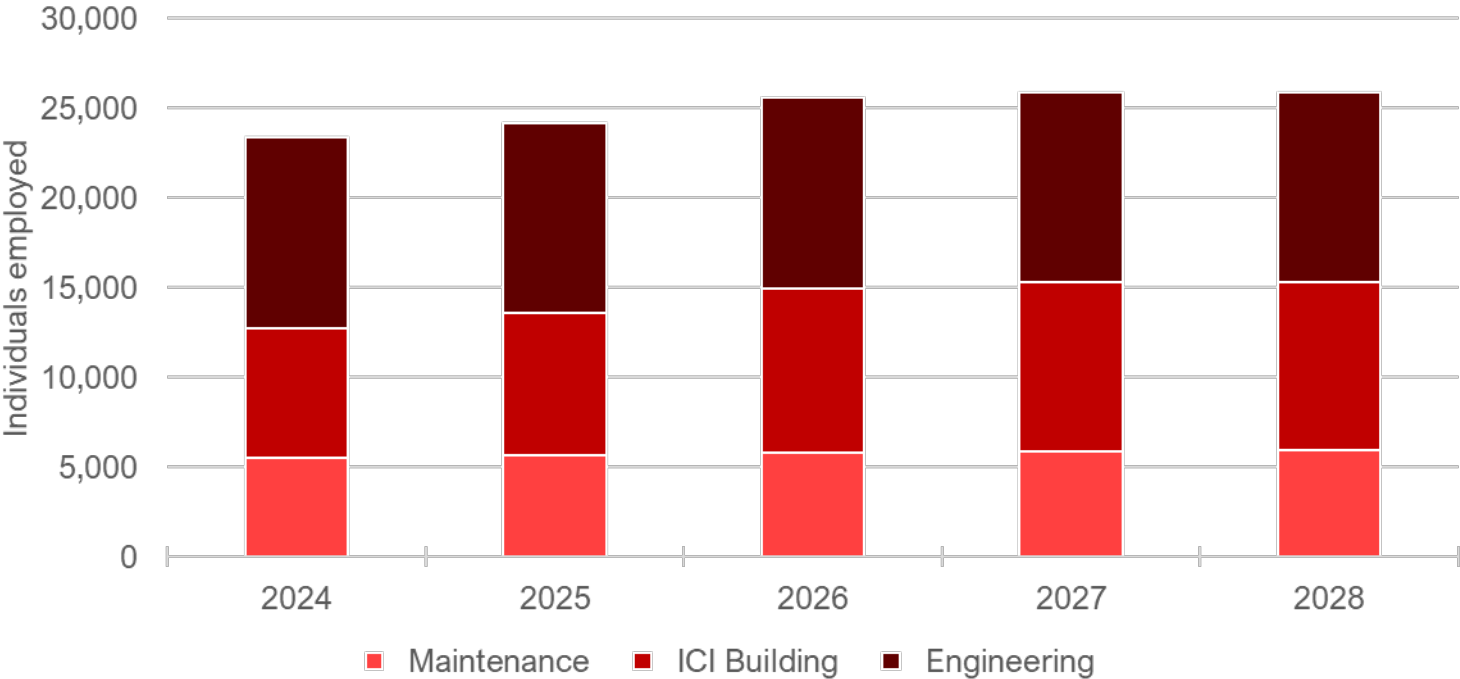
Source: Statistics Canada data and BuildForce Canada tabulation

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EMPLOYMENT AND LABOUR MARKET

**NON-RESIDENTIAL EMPLOYMENT CHANGE
2024-2028**



Non-residential Labour Force Change
Direct trades and Occupations



2024 LABOUR FORCE 25,100	2028 LABOUR FORCE 27,400	2,300 DEMAND GROWTH
		1,600 RETIREMENTS
A POSITIVE MOBILITY FLOW REPRESENTS A REQUIREMENT TO SUPPLEMENT THE LOCAL CONSTRUCTION LABOUR FORCE WITH WORKERS FROM OUTSIDE THE REGION AND/OR THE INDUSTRY.		+3,900 TOTAL HIRING NEEDS
A NEGATIVE FLOW REPRESENTS AN OUTFLOW OF WORKERS FROM THE LOCAL CONSTRUCTION LABOUR FORCE.		-2,300 NEW ENTRANT OFFSET
		+1,600 MOBILITY FLOW REQUIRED

TOTAL LABOUR FORCE REQUIREMENTS

34 direct trades and occupations



CONSTRUCTION LABOUR FORCE CHANGE

<p>2024</p>  <p>LABOUR FORCE</p> <p>46,000</p>	<p>2028</p>  <p>LABOUR FORCE</p> <p>51,100</p>
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5,100
DEMAND GROWTH

+

3,700
RETIREMENTS

+8,800
TOTAL HIRING NEEDS

+

-3,900
NEW ENTRANT OFFSET

=

+4,900
MOBILITY FLOW REQUIRED



A POSITIVE MOBILITY FLOW REPRESENTS A REQUIREMENT TO SUPPLEMENT THE LOCAL CONSTRUCTION LABOUR FORCE WITH WORKERS FROM OUTSIDE THE REGION AND/OR THE INDUSTRY.

A NEGATIVE FLOW REPRESENTS AN OUTFLOW OF WORKERS FROM THE LOCAL CONSTRUCTION LABOUR FORCE.



CONCLUSION

Construction industry: 2024 to 2028

- Demand challenges are expected to remain strong
- New entrants to the industry increasing, but not at a rate sufficient to keep pace with retirements and demand requirements
- Northern Ontario may be a potential source of recruitment, but all regions in the province expected to remain busy throughout most of the forecast
- Potential new demands will place considerable stress on the industry
- Competition for younger workers expected to intensify



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