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MANITOBA

CONSTRUCTION & MAINTENANCE LOOKING FORWARD

HIGHLIGHTS
2025–2034



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SUMMARY

Overall construction investment recorded a slight gain in Manitoba in 2024, as growth in the province's non-residential sector outweighed a slight contraction in its residential sector.

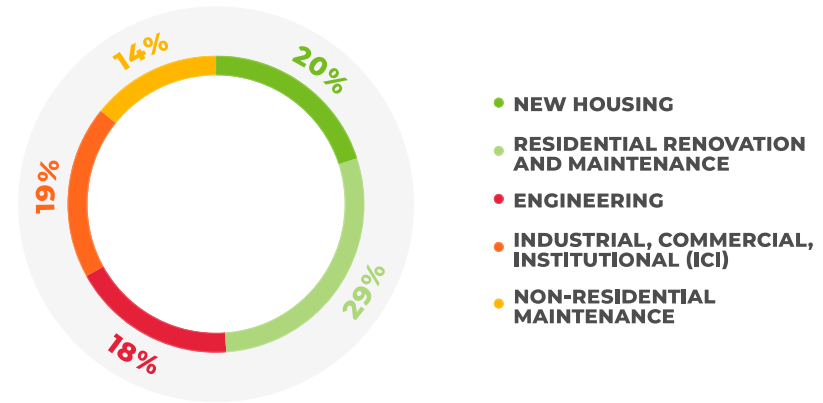
Investment levels in the former have charted a strong upward curve since 2022, and were sustained by strong levels of investment in both the engineering construction sector and in the construction of industrial, commercial, and institutional (ICI) buildings. Meanwhile, investment in the residential sector contracted for the third year in a row as interest rate pressures dampened demand for new housing.

The BuildForce Canada 2025–2034 *Construction and Maintenance Looking Forward* outlook for Manitoba calls for investment levels in both sectors to increase steadily across the forecast period. Activity in the residential sector is expected to benefit from declining interest rates and positive population growth, with housing starts expected to average 7,700 units annually. The non-residential sector, meanwhile, is expected to benefit from growth in both components. Utilities projects and works on roads, highways, and bridges drive growth in engineering construction, while growth in ICI buildings construction is driven across all three sub-components.

These factors combine to elevate employment across the forecast period. Residential construction employment rises by 9% above 2024 levels. Non-residential construction employment ends the decade at almost 26% above 2024 levels.

In addition to meeting the labour demands created by such growth, the construction industry must remain focused on replacing the estimated 9,800 workers, or 21% of the 2024 labour force, who are projected to leave the industry due to retirement by 2034.

DISTRIBUTION OF CONSTRUCTION EMPLOYMENT IN 2024, MANITOBA*



10-YEAR WORKFORCE OUTLOOK FOR MANITOBA



* Due to rounding, numbers may not add up to 100%.



HIGHLIGHTS

- Residential construction investment is projected to grow into 2030 as interest-rate pressures ease. Housing starts reach above 8,000 units during this period.
- While demand for new housing subsidies in later years of the forecast, renovation activity intensifies.
- Non-residential construction investment is projected to increase by 37% above 2024 levels by 2034, driven by a significant number of projects.
- Employment in the construction of ICI buildings is expected to grow by more than 40% by 2034.
- Rising construction demands and projected retirements combine to create a hiring requirement of as many as 19,400 workers by 2034.



MANITOBA CONSTRUCTION OUTLOOK

NOTE TO READER: The investment trends and employment projections presented in this report were developed with industry input prior to the emergence of potential trade tensions between Canada and the United States. The forecast therefore does not take into account the possible application of tariffs on Canadian exports to and imports from the United States, nor does it account for any resulting changes in trading patterns between Canada and its other key trading partners.

Manitoba's construction sector is poised for growth as it enters the 2025–2034 BuildForce Canada forecast period.

Investment growth in recent years has been held back as elevated interest rates have curbed demand for residential construction in particular. Consumers are expected to return to the market for new housing in 2025 and beyond as interest rates are projected to decline further and wages and incomes adjust to inflation.

Meanwhile, the non-residential sector continues to benefit from activity on a wide range of projects across its engineering construction and industrial, commercial, and institutional (ICI) buildings sectors. These include a significant number of projects in the utilities sector as well as on several major roads, highways, and bridges projects, and work in the healthcare, education, and commercial sectors.



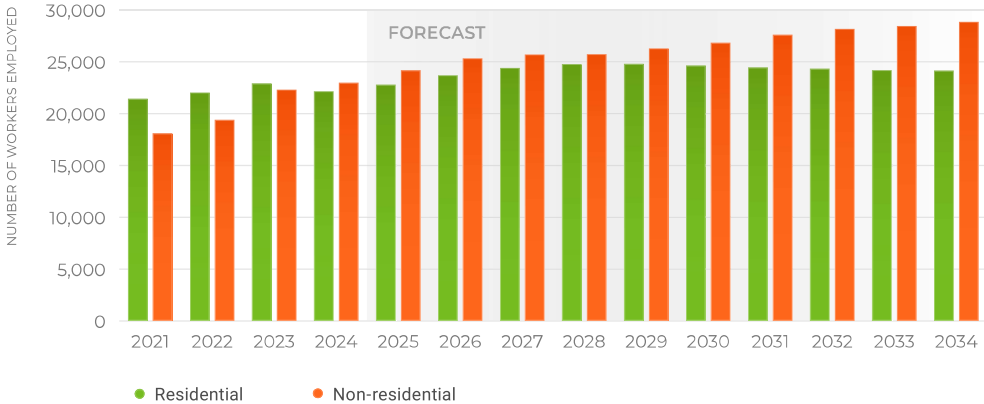


The long-run outlook calls for investment in the residential and non-residential sectors to see notable growth. The residential sector is expected to increase almost continuously into 2034, increasing 20% from 2024 levels. Initially, growth is driven by new-housing construction; later years are propelled by growth in residential renovations and maintenance. Non-residential investment is forecast to increase by 37% over the decade, given the significant volume of projects underway and planned across the province.

Figure 1 shows the anticipated change in residential and non-residential employment across the forecast period.

Given these trends, and the expected retirement of some 9,800 workers, the industry may need to recruit as many as 19,400 workers to meet its labour force needs by 2034. While the projected recruiting of 11,500 first-time new entrants from the local population is expected to partially offset the impact of retirements on the labour force, these new workers may not possess the skills and experience of retiring workers, which in turn may compound potential skilled labour shortages locally.

FIGURE 1:
CONSTRUCTION EMPLOYMENT GROWTH OUTLOOK, MANITOBA



SOURCE: Statistics Canada, BuildForce Canada (2025–2034)



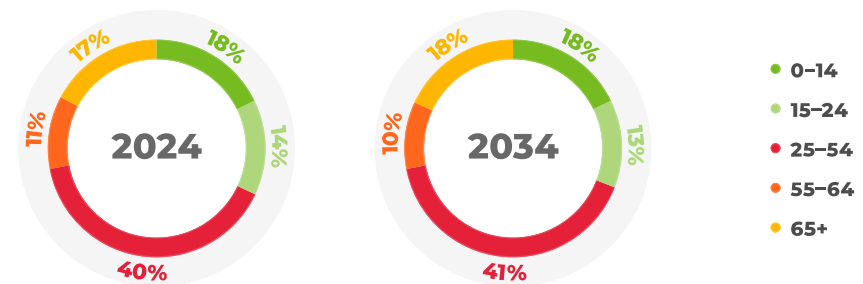
A YOUNGER DEMOGRAPHIC SUSTAINS POPULATION GROWTH

Manitoba continues to benefit from a population that is generally younger than the national average.

As Figure 2 shows, the share of people in Manitoba who are aged 65 or older, and who are mostly retired, is projected to rise from 17% in 2024 to 18% by 2034. Both figures are notably lower than the national average of 19% in 2024 and a projected 21% by 2034. Meanwhile, the province's share of people who are aged 15 to 24 years, and who are about to enter the labour force, was 14% in 2024 and is projected to contract to 13% by 2034. The national average was 12% in 2024, and is expected to remain unchanged by 2034.

These shifts in the population could have significant impacts on the province's economy and construction demands, including housing, and commercial and institutional buildings, as well as infrastructure requirements. Moreover, with all sectors of the provincial economy experiencing this shift, the competition for youth recruitment is expected to intensify significantly.

FIGURE 2:
POPULATION AGE DISTRIBUTION, MANITOBA*



* Due to rounding, numbers may not add up to 100%.

SOURCE: BuildForce Canada

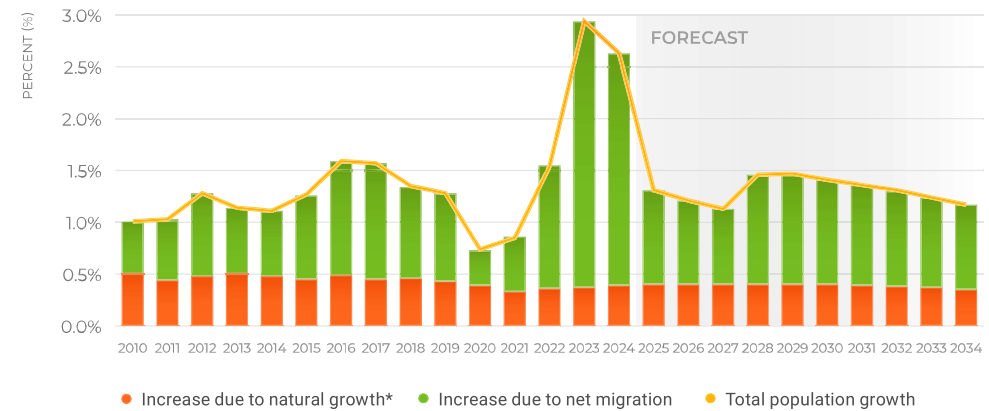


Due to its relatively young population, Manitoba is expected to maintain a positive natural rate of population growth* throughout the outlook period. Although the rate has been declining since 2016, it is expected to stabilize into the early 2030s as the province benefits from recent migration trends.

The recent high levels of international migration are unlikely to be sustained through the short-term as changes to federal immigration policies should reduce the number of permanent and non-permanent residents settling in the province. Immigration numbers are, however, expected to rebound by 2028 and beyond, helping to sustain annual rates of population growth in the province at between 1% and 1.5%.

Figure 3 shows the various factors influencing population growth in Manitoba over the forecast period.

FIGURE 3:
SOURCES OF POPULATION GROWTH (%), MANITOBA



* Natural rate of population growth refers to the growth in the population due to the number of births relative to the number of deaths, which leads to a positive or negative natural rate.

SOURCE: Statistics Canada, BuildForce Canada (2025–2034)



SECTOR INSIGHTS

The following sections provide sector-specific insights into the provincial residential and non-residential labour markets.

The BuildForce LMI system tracks supply and accounts for the change in the available labour force, including retirements, new entrants¹, and net mobility². For Manitoba, rankings are reported for 19 residential and 29 non-residential trades and occupations.

¹ **New entrants** are measured by applying the traditional proportion of the provincial labour force that enters the construction industry. The projected estimate across the forecast period assumes that the construction industry can recruit this group in competition with other industries.

² **Net mobility** refers to the movement of labour in and out of the local construction industry labour force. In-mobility captures the movement into the labour force of out-of-province industry workers and/or workers from outside the industry. Many members of this group will move quickly out of the provincial labour force as work declines, referred to as out-mobility.



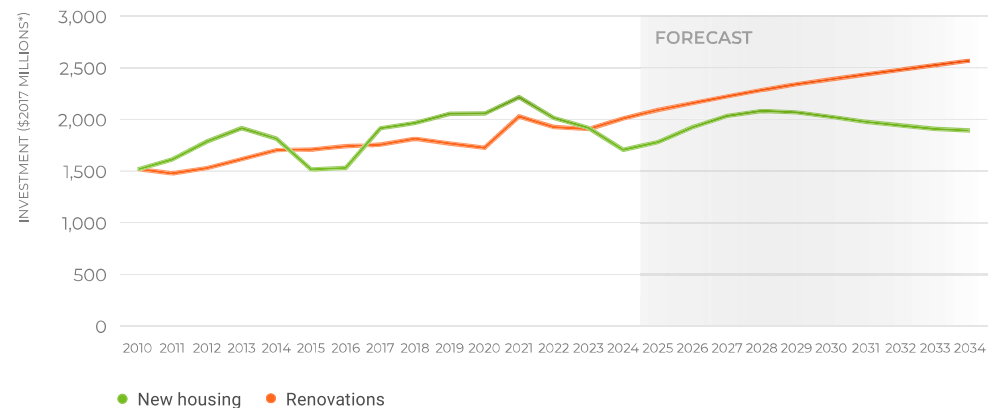
RESIDENTIAL SECTOR

Residential-sector investment levels reached a recent peak in 2021, but have moderated since under pressure from rising interest rates. Levels contracted by 3% in 2024. Although investment increased in residential renovations, this gain was more than offset by a contraction in new housing activity.

Figure 4 shows the renovation and new-housing investment trends for residential construction.

Investment levels are projected to return to growth between 2025 and 2030 as the effects of anticipated interest rate cuts take hold in the market and builders adjust to pent-up demand. Growth in new housing investment is particularly strong between 2025 and 2028, as gains in both single-detached and multi-unit starts increase investment by more than 22% above the low levels seen in 2024. Later years see investment in new housing decline modestly as the supply of new housing in the province better aligns with population demands. Investment in residential renovations, meanwhile, is projected to grow across the entire forecast period, rising by just under 28% from 2024 levels, as affordability concerns and home maintenance requirements drive growth.

FIGURE 4:
RESIDENTIAL CONSTRUCTION INVESTMENT, MANITOBA



* \$2017 millions indicates that the investment values are in year 2017 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 (2025–2034)



Residential construction employment rises to a peak of 12% above 2024 levels by 2029. Employment growth slows in later years, increasing by 9% from 2024 levels by 2034, with gains greatest in renovations (16%) and in residential maintenance (12%).

Table 1 summarizes the estimated percent change in residential employment by sector across three periods: the short term (2025–2027), the medium term (2028–2030), and the long term (2031–2034).

This analysis is based on existing trends and market forces and does not take into account aspirational public-sector initiatives to increase the housing supply. Direct government interventions such as tax incentives and subsidies are, however, factored into the forward analysis as they have a more immediate impact on prevailing market forces and consumer behaviour.

TABLE 1:
**CHANGES IN RESIDENTIAL EMPLOYMENT
BY SECTOR, MANITOBA**

SECTOR	% CHANGE 2025–2027	% CHANGE 2028–2030	% CHANGE 2031–2034
Total residential employment	10%	1%	-2%
New housing	16%	-3%	-10%
Renovations	7%	4%	3%
Residential maintenance	3%	4%	4%

SOURCE: Statistics Canada, BuildForce Canada (2025–2034)



RESIDENTIAL RANKINGS,
RISKS, AND MOBILITY

Based on currently known demands, industry recruitment and retirement estimates, the following ranks apply to the 19 covered trades in the province. See Table 2.

MARKET RANKINGS

- 1

Workers meeting employer qualifications are available in local markets to meet an increase in demand at the current offered rate of compensation and other current working conditions. Excess supply is apparent and there is a risk of losing workers to other markets.
- 2

Workers meeting employer qualifications are available in local markets to meet an increase in demand at the current offered rate of compensation and other working conditions.
- 3

The availability of workers meeting employer qualifications in the local market may be limited by large projects, plant shutdowns or other short-term increases in demand. Employers may need to complete to attract needed workers. Establish patterns of recruiting and mobility are sufficient to meet job requirements.
- 4

Workers meeting qualifications are generally not available in local markets to meet any increase. Employers will need to compete to attract additional workers. Recruiting and mobility may extend beyond traditional sources and practices.
- 5

Needed workers meeting employer qualifications are not available in local markets to meet current demand so that projects or production may be delayed or deferred. There is excess demand, competition is intense and recruiting reaches to remote markets.

TABLE 2:

RESIDENTIAL MARKET RANKINGS, MANITOBA

TRADES AND OCCUPATIONS – RESIDENTIAL	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Bricklayers	3	4	3	3	3	3	3	3	3	3	3
Carpenters	3	4	4	3	3	3	3	3	3	3	3
Concrete finishers	3	4	3	3	3	3	3	3	3	3	3
Construction estimators	4	4	4	4	3	3	3	3	3	3	3
Construction managers	3	4	4	3	3	3	3	3	3	3	3
Contractors and supervisors	4	4	4	4	3	3	3	3	3	3	3
Electricians	3	4	3	3	3	3	3	3	3	3	3
Floor covering installers	4	4	3	3	3	3	3	3	3	3	3
Heavy equipment operators (except crane)	3	4	4	3	3	3	3	3	3	3	3
Home building and renovation managers	4	4	4	4	4	3	3	3	3	3	3
Painters and decorators (except interior decorators)	4	4	3	3	3	3	3	3	3	3	3
Plasterers, drywall installers and finishers, and lathers	3	4	3	3	3	3	3	3	3	3	3
Plumbers	3	4	4	4	3	3	3	3	3	3	3
Residential and commercial installers and servicers	3	4	3	3	3	3	3	3	3	3	3
Roofers and shinglers	4	4	3	3	3	3	3	3	3	3	3
Sheet metal workers	3	4	4	3	3	3	3	3	3	3	3
Tiles setters	3	3	4	4	3	3	3	3	3	3	3
Trades helpers and labourers	3	3	4	3	3	3	3	3	3	3	3
Truck drivers	3	4	4	3	3	3	3	3	3	3	3

SOURCE: BuildForce Canada



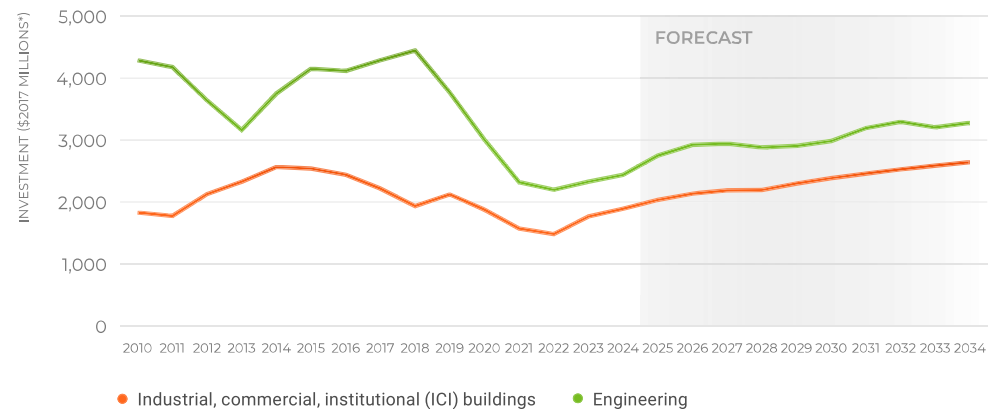
NON-RESIDENTIAL SECTOR

Non-residential construction activity has been rising steadily since 2022, with growth reported in both the engineering construction sector and in the construction of industrial, commercial, and institutional (ICI) buildings. Project demands have been elevated in the healthcare and education sectors, with work on projects such as the Portage District Hospital, Neepawa Health Centre, and St. Boniface Hospital Emergency redevelopment, as well as ongoing water and wastewater projects, including the Winnipeg North End Sewage Treatment Plant.

Investment levels are projected to continue to rise across the forecast period, rising by just under 37% from 2024 levels by 2034. Both components are expected to see increases in investment of between 35% and 40% over the forecast period.

Figure 5 shows the projected outlook for ICI buildings and engineering-construction investment.

FIGURE 5:
NON-RESIDENTIAL CONSTRUCTION INVESTMENT, MANITOBA



* \$2017 millions indicates that the investment values are in year 2017 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 (2025-2034)



Activity in ICI buildings construction should be driven in the early years by ongoing work on key healthcare projects and, later, by strong demand for manufacturing, transportation, and warehousing facilities, particularly in and around Winnipeg.

In engineering construction, activity should be sustained by water and wastewater projects in Winnipeg, Winkler, Portage La Prairie, and Tataskweyak Cree Nation, by Manitoba Hydro’s investment in hydroelectric turbines and the generating station at Pointe du Bois, and by several roads, highways, and bridges projects.

Non-residential construction employment is expected to grow significantly across the forecast period, rising almost 26% above 2024 levels by 2034. ICI buildings construction (+42%) and engineering construction (+24%) lead growth, while maintenance-related employment rises by 4%.

Table 3 summarizes the estimated percent change in non-residential employment by sector across three periods: the short term (2025–2027), the medium term (2028–2030), and the long term (2031–2034).

TABLE 3:
CHANGES IN NON-RESIDENTIAL EMPLOYMENT
BY SECTOR, MANITOBA

SECTOR	% CHANGE 2025–2027	% CHANGE 2028–2030	% CHANGE 2031–2034
Total non-residential employment	12%	4%	8%
Industrial buildings	31%	5%	13%
Commercial and institutional buildings	13%	12%	9%
Heavy industrial	14%	7%	11%
Other engineering	15%	3%	6%
Roads, highways and bridges	18%	-18%	1%
Non-residential maintenance	-1%	2%	3%

SOURCE: Statistics Canada, BuildForce Canada (2025–2034)





NON-RESIDENTIAL RANKINGS, RISKS, AND MOBILITY

Based on currently known demands, industry recruitment and retirement estimates, the following ranks apply to the 29 covered trades in the province. See Table 4.

TABLE 4:
NON-RESIDENTIAL MARKET RANKINGS, MANITOBA

TRADES AND OCCUPATIONS – NON-RESIDENTIAL	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Boilermakers	3	3	3	3	3	3	3	3	3	3	3
Carpenters	4	4	3	3	3	3	3	3	3	3	3
Concrete finishers	4	4	3	3	3	3	3	3	3	3	3
Construction estimators	4	4	4	3	3	3	3	3	3	3	3
Construction managers	4	4	4	4	3	3	3	3	3	3	3
Construction millwrights and industrial mechanics	4	4	4	3	3	3	3	3	3	3	3
Contractors and supervisors	4	4	4	3	3	3	3	3	3	3	3
Crane operators	4	4	4	3	3	3	3	3	3	3	3
Drillers and blasters	4	4	3	3	3	3	3	3	3	3	3
Electrical power line and cable workers	4	4	4	3	3	3	3	4	3	3	3
Electricians	4	4	4	3	3	3	3	3	3	3	3
Elevator constructors and mechanics	4	4	4	3	3	3	3	3	3	3	3
Floor covering installers	4	4	4	4	3	3	3	3	3	3	3
Glaziers	4	4	4	3	3	3	3	3	3	3	3
Heavy equipment operators (except crane)	3	3	3	3	3	3	3	3	3	3	3
Heavy-duty equipment mechanics	4	4	4	3	3	3	3	3	3	3	3

TRADES AND OCCUPATIONS – NON-RESIDENTIAL	2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034
Insulators	4	3	3	3	3	3	3	3	3	3	3
Ironworkers and structural metal fabricators	4	4	3	3	3	3	3	3	3	3	3
Painters and decorators (except interior decorators)	4	4	3	3	3	3	3	3	3	3	3
Plasterers, drywall installers and finishers, and lathers	4	4	4	3	3	3	3	3	3	3	3
Plumbers	4	4	4	3	3	3	3	3	3	3	3
Refrigeration and air conditioning mechanics	4	4	4	3	3	3	3	3	3	3	3
Residential and commercial installers and servicers	4	4	3	3	3	3	3	3	3	3	3
Roofers and shinglers	4	4	3	3	3	3	3	3	3	3	3
Sheet metal workers	4	4	4	3	3	3	3	3	3	3	3
Steamfitters, pipefitters and sprinkler system installers	3	3	3	3	3	3	3	3	3	3	3
Trades helpers and labourers	4	3	3	3	3	3	3	3	3	3	3
Truck drivers	3	4	4	3	3	3	3	3	3	3	3
Welders and related machine operators	4	4	3	3	3	3	3	3	3	3	3

SOURCE: BuildForce Canada



BUILDING A SUSTAINABLE LABOUR FORCE

THE AVAILABLE LABOUR FORCE

Although its population is younger than most, Manitoba's construction industry will nonetheless be faced with an expected hiring requirement of 19,400 workers over the forecast period. As many as 9,800 of those workers, or 21% of the current labour force, are expected to exit the industry due to retirement by 2034.

Some of these hiring requirements may be met by an estimated 11,500 first-time new entrants under the age of 30 from the local population, leaving a gap of about 7,900 workers that will need to be recruited from outside the local construction labour force.

Keeping pace with recruitment and training will require a combination of strategies, including maintaining local recruitment and training efforts, particularly from groups traditionally under-represented in the construction labour force, the hiring of workers from other industries with the required skills sets, and the recruitment of immigrants to Canada with skilled trades training and/or construction experience.

Figure 6 provides a summary of the estimated changes in the construction labour force across the forecast period.

FIGURE 6:
CHANGES IN THE CONSTRUCTION LABOUR FORCE, MANITOBA



* 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



LABOUR FORCE RECRUITMENT

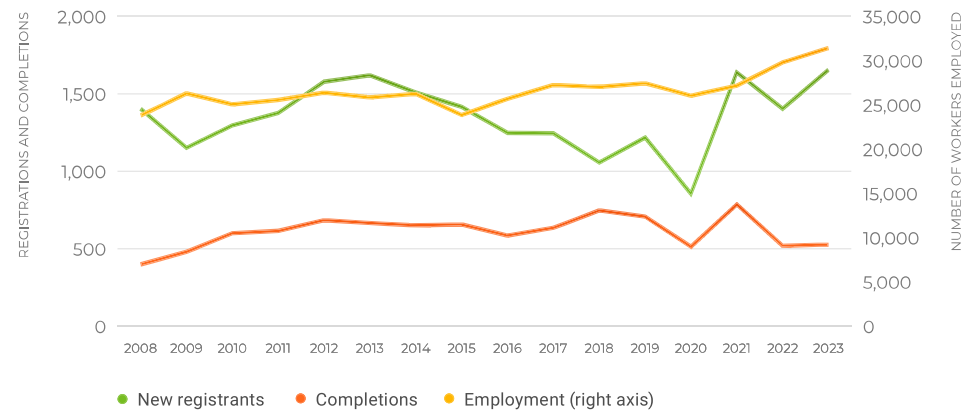
APPRENTICESHIP

The construction industry is dependent on a variety of skilled trades, some voluntary and some compulsory, as well as several skilled trades that fall outside the traditional apprenticeship development systems of the province. As such, while apprenticeship registrations cannot be viewed as a complete measure of industry recruitment, the metric is a useful barometer of industry success in the recruitment of new entrants.

New registrations in Manitoba's 17 largest trade programs experienced a significant recovery post-pandemic, in line with considerable growth in the province's construction sector.

In 2023, new registrations rose by 18%, reaching a record high, primarily driven by increases in the refrigeration and air conditioning mechanic, carpenter, and plumber trades. Completions remain notably lower than the average observed over the past decade, likely due to the declining number of new registrations following the peak in 2013, as well as the drop in new registrations during the pandemic. The substantial recovery in new registrations may soften the risk of workforce requirements running ahead of the number of newly certified journeypersons over the outlook period. (See Figure 7.)

FIGURE 7:
NEW APPRENTICE REGISTRATIONS, COMPLETIONS,
AND TRADE EMPLOYMENT, MANITOBA



SOURCE: BuildForce Canada

BUILDFORCE CANADA



Table 5 provides a trade-by-trade breakdown of the anticipated certification requirements to meet the construction industry’s share of employment and replacement demand over the scenario period. Based on projected new registrations, several trades are at risk of completions not keeping pace with the number of new journeypersons required over the outlook period. Trades within this group include mobile crane operator, bricklayer, welder, carpenter, insulator (heat and frost), and boilermaker.

TABLE 5:
**ESTIMATED CONSTRUCTION CERTIFICATION DEMAND AND
PROJECTED COMPLETIONS BY TRADE, MANITOBA, 2025 TO 2034³**

TRADE	TOTAL CERTIFICATION DEMAND – CONSTRUCTION	TARGET NEW REGISTRANTS – CONSTRUCTION	APPRENTICE CERTIFICATION SUPPLY RISK – ALL INDUSTRIES
Mobile Crane Operator	147	25	●
Bricklayer	64	26	●
Welder	76	38	●
Carpenter	1,450	831	●
Insulator (Heat and Frost)	13	9	●
Boilermaker	32	25	●
Industrial Electrician	71	67	●
Roofer	45	44	●
Industrial Mechanic (Millwright)	72	80	●
Construction Electrician	1,750	1,984	●

TRADE	TOTAL CERTIFICATION DEMAND – CONSTRUCTION	TARGET NEW REGISTRANTS – CONSTRUCTION	APPRENTICE CERTIFICATION SUPPLY RISK – ALL INDUSTRIES
Refrigeration and Air Conditioning Mechanic	243	305	●
Sheet Metal Worker	119	191	●
Heavy-Duty Equipment Technician	35	57	●
Plumber	649	1,093	●
Steamfitter/Pipefitter	53	91	●
Sprinkler Fitter	23	72	●
Ironworker (Generalist)	16	57	●

- Certifications required exceed projected completions
- Certifications required in line with projected completions
- Projected completions exceed certifications required

³ This analysis does not account for an existing skills mismatch at the 2024 starting point.

SOURCE: BuildForce Canada

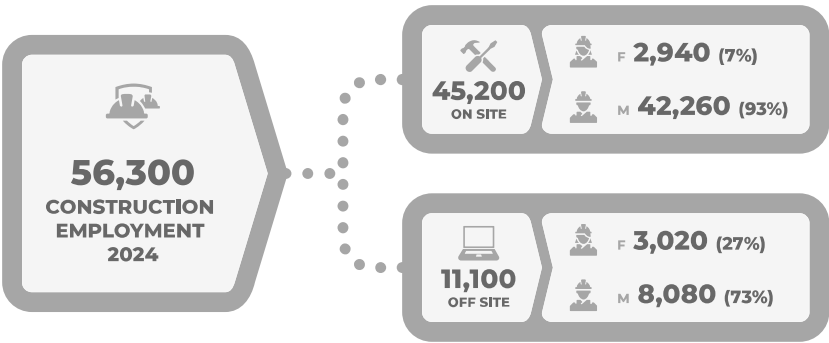


UNDER-REPRESENTED GROUPS OF WORKERS

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 boom generation of workers continues retiring throughout the 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. Specifically, it must increase recruitment of individuals from groups traditionally underrepresented in the current construction labour force, including women, Indigenous People, and immigrants to Canada by raising awareness and working with settlement organizations to promote career opportunities to individuals new to the country.

In 2024, there were 5,960 women employed in Manitoba’s construction industry, of which 49% worked on site, directly on construction projects, while the remaining 51% worked off site, primarily in administrative and management-related occupations. Of the 45,200 tradespeople employed in the industry, women made up 7% (see Figure 8).

FIGURE 8:
DETAILED CONSTRUCTION EMPLOYMENT BY GENDER,
MANITOBA, 2024

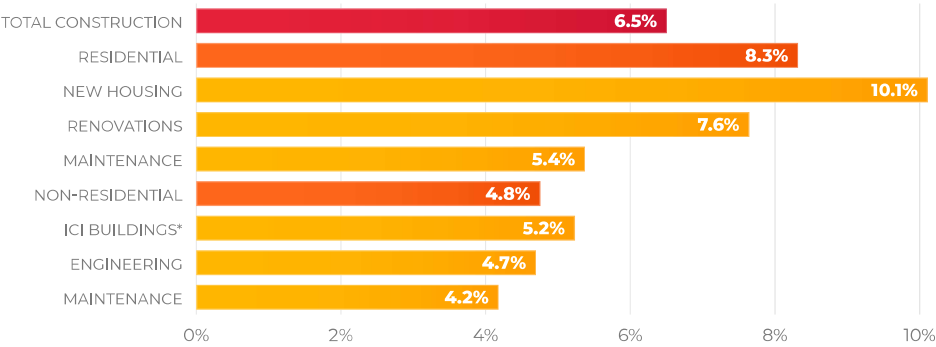


SOURCE: BuildForce Canada calculations based on Statistics Canada's Labour Force Survey (LFS) and 2021 Census of the Population.



The estimated 2,940 tradeswomen in Manitoba are represented across all sectors of construction, but given the nature of construction work in the province, women account for a higher share of total tradespeople (8.3%) in residential construction. Across sectors, new housing construction has the highest representation of women, accounting for 10.1% of the workforce (see Figure 9). The top five trades and occupations in which women tend to be employed are trade helpers and labourers (27% of all tradeswomen), carpenters (18%), construction managers (14%), contractors and supervisors (11%), and construction estimators (4%).

FIGURE 9:
**WOMEN'S SHARE OF TOTAL DIRECT TRADES
AND OCCUPATIONS (ON SITE), MANITOBA**



* industrial, commercial, institutional

SOURCE: BuildForce Canada calculations based on Statistics Canada's Labour Force Survey (LFS) and 2021 Census of the Population.



The Indigenous population is the fastest growing population in Canada and therefore presents recruitment opportunities for Manitoba's construction industry. In 2023, the share of Indigenous People in Canada's workforce was 3.9% and their share of the national construction workforce was 5.2%. Manitoba had the highest share of Indigenous People working in the construction sector, which in part is understandable due to the relatively larger share Indigenous People make up of the province's population.

In 2023, Indigenous People accounted for 17.7% of the province's construction workforce, which is the highest it has ever been. This share is notably higher than the share of Indigenous People in the provincial labour force at 13.8% (see Table 6). As the Indigenous population continues to expand, the sector must continue its successful recruitment efforts and engage in initiatives that promote retention.

TABLE 6:
**REPRESENTATION OF INDIGENOUS POPULATION
IN MANITOBA'S CONSTRUCTION WORKFORCE**

INDUSTRY	INDIGENOUS	NON-INDIGENOUS	TOTAL	INDIGENOUS SHARE OF TOTAL WORKFORCE, %
Construction				
2014	7,200	40,000	47,200	15.3%
2023	10,300	48,000	58,300	17.7%
All Industries				
2014	70,600	593,800	664,400	10.6%
2023	99,900	625,300	725,200	13.8%

SOURCE: Statistics Canada, Labour Force Survey, Custom Data Request 2023





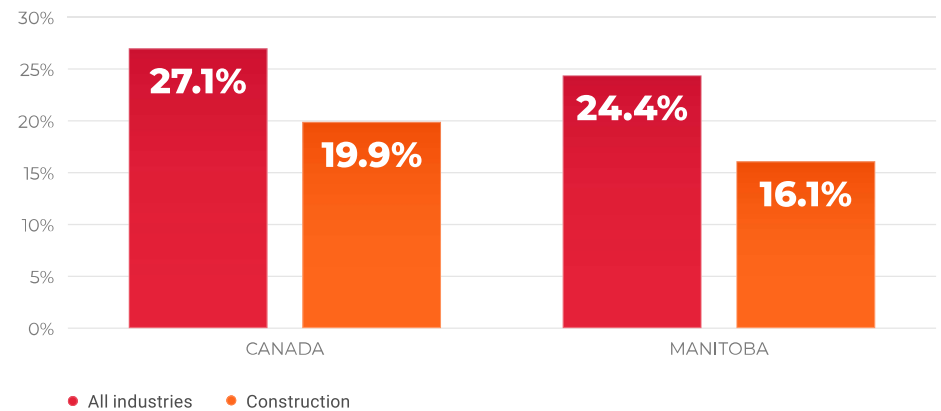
Manitoba's construction industry may also leverage newcomers (immigrants) to Canada over the forecast period to meet labour requirements. Due to the declining natural rates of population growth, immigrants are the sole source of labour force growth in the province.

Immigrants have been playing an increasingly important role in replenishing the workforce, with the share of immigrants in the provincial workforce increasing from 19.8% in 2014 to 24.4% in 2023. In 2024, Manitoba met its target for skilled immigrants under the Provincial Nominee Program and the provincial government wants to increase the number for 2025⁴ despite federal cuts to targets for each province and the country.

Although the province has been successful in attracting and integrating immigrants into the labour force, immigrants remain under-represented in the construction industry. The construction labour force share of immigrants did increase from 11.9% in 2014 to 16.1% in 2023, but that is still notably lower than the share in the overall provincial labour force. (See Figure 10).⁵

Based on historical settlement trends (and including recent immigration target cuts), the province is expected to welcome more than 231,300 new immigrants between 2025 and 2034. As these individuals will make up an increasing share of the province'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.

FIGURE 10:
SHARE (%) OF IMMIGRANTS IN THE CONSTRUCTION
LABOUR FORCE, 2023



⁴Froese, Ian, "Ottawa deals blow to Manitoba's provincial nominee program, cutting number of immigrant approvals in half," CBC News, 2025 January 18, <https://www.cbc.ca/news/canada/manitoba/manitoba-provincial-nominee-program-numbers-half-1.7435110>

⁵Statistics Canada, Labour Force Survey, Custom Data Request 2023.

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



CONCLUSIONS AND IMPLICATIONS

The *2025–2034 Construction and Maintenance Looking Forward* scenario for Manitoba calls for strong levels of growth for the province's residential and non-residential sectors to the end of the decade.

Growth in the province's residential sector has been slowed by rising interest rates and affordability concerns in recent years. As interest rate pressures ease, demand for new housing is expected to accelerate, with the greatest gains recorded through the period of 2025 to 2028. Although housing starts levels and investment in new-housing construction slow in later years, growth in the residential sector is sustained by strong activity in residential renovations.

Meanwhile, activity in the province's non-residential construction sector is expected to be driven by strong growth in both the engineering construction component and in the construction of industrial, commercial, and institutional (ICI) buildings. Engineering construction growth will be led by a significant number of utilities projects and major roads, highways, and bridges projects. Growth in the ICI buildings sector is consistent to the end of the forecast period, supported by several healthcare and education projects, and commercial and manufacturing building projects.

The industry will be confronted by the challenge of an aging demographic. As many as 9,800 workers are projected to leave the construction industry due to retirement by 2034. Coupled with labour force growth created by project demands, the industry could face a total hiring requirement of as many as 19,400 workers. Closing this gap will require a combination of strategies that include enhanced local recruitment and training, including the recruitment of immigrants and newly arrived immigrants, and promoting career opportunities to workers with comparable skill sets who have been displaced from other industries.

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 labour 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.

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CUSTOMIZABLE TABLES AND GRAPHS AVAILABLE FOR:

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



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