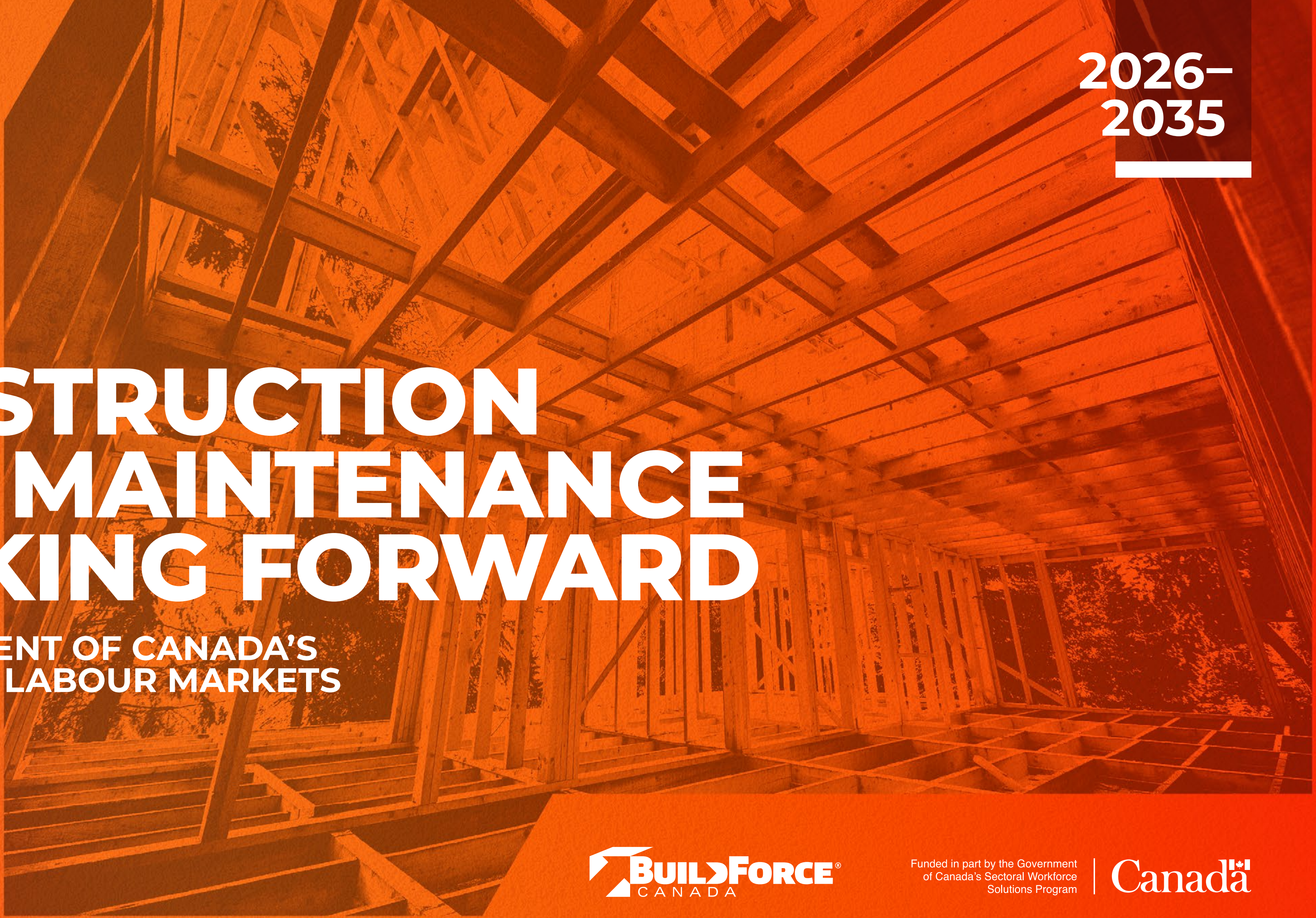

2026–2035

CONSTRUCTION AND MAINTENANCE LOOKING FORWARD

AN ASSESSMENT OF CANADA'S RESIDENTIAL LABOUR MARKETS

BUILDFORCE CANADA

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

Canada

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ABOUT BUILDFORCE CANADA

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

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

ACKNOWLEDGEMENTS

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

This project is funded in part by the Government of Canada's Sectoral Workforce Solutions Program.

NATIONAL INSIGHTS

CANADA

CANADA'S CONSTRUCTION INDUSTRY

Employment in Canada's construction sector exceeded 1.6 million people in 2025. The industry is among the greatest contributors to economic output in the country, accounting for 7% of Canada's total gross domestic product, and the employment of approximately one in every 13 working Canadians. What's more, the industry is driven by small businesses, with approximately 62% of industry firms classified as micro businesses consisting of fewer than five employees.

Labour Force Survey[1] data from Statistics Canada finds that construction employment has risen in almost every year since 2004, adding more than 650,000 workers over the period.

Employment growth has been especially strong in the post-pandemic years when a number of factors led to significant growth in activity in both residential and non-residential construction in almost every region of the country. These trends caused industry unemployment rates to significantly outpace growth in the labour force, leading to rates of 3% and below in the summer of 2022.

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

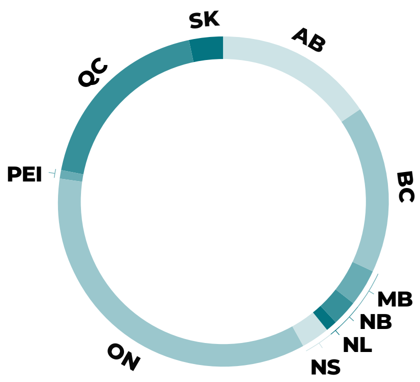
Although labour markets have since trended back toward more traditional levels, they remain well below historical, pre-pandemic levels. Through 2024, for example, unemployment in the construction sector averaged 5.6% monthly; through 2025, rates rose to an average of 6.2% monthly. Initially, this change was driven by gains in the labour force outpacing gains in employment. More recently, employment growth has slowed, while the industry's labour force has contracted. This trend may be a function of slowing demand for residential construction activity in many provinces and regions.

Employment, labour force, and unemployment figures published by Statistics Canada in the Labour Force Survey (reported above) is inclusive of all trades and occupations working in the construction industry, including administrative and other off-site occupations. BuildForce Canada's 2026–2035 Construction and Maintenance Looking Forward scenario focuses on the 34 trades and occupations primarily involved in on-site activities. These trades and occupations account for approximately 75% of national construction employment as reported by the Labour Force Survey.

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

FIGURE 1

SHARE OF TOTAL CONSTRUCTION INDUSTRY EMPLOYMENT BY PROVINCE



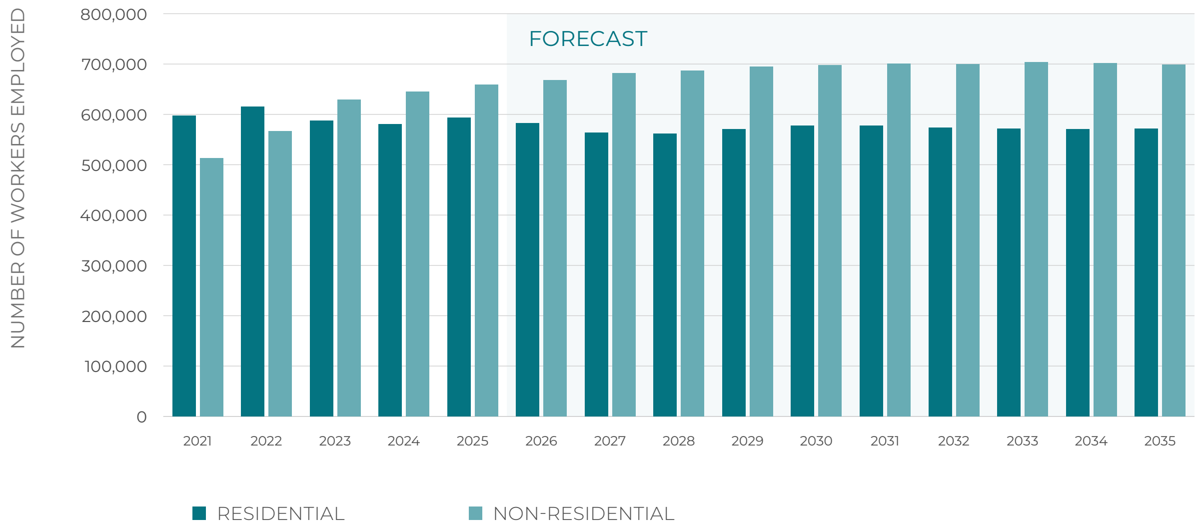
ALBERTA	15.7%
BRITISH COLUMBIA	16.3%
MANITOBA	3.8%
NEW BRUNSWICK	2.3%
NEWFOUNDLAND AND LABRADOR	1.2%
NOVA SCOTIA	2.9%
ONTARIO	35.3%
PRINCE EDWARD ISLAND	0.7%
QUEBEC	18.6%
SASKATCHEWAN	3.2%

NATIONAL OVERVIEW

Although construction employment in the residential sector rose by 2% in 2025, some provinces saw employment reductions, while others gained. Overall residential construction investment rose on the strength of increased numbers of housing starts and a small gain in activity relating to residential renovations. Within new-housing construction, a small contraction in the number of starts relating to single-detached[2] units was more than offset by a notable gain in activity pertaining to multi-unit residential construction, and in apartment-type units in particular. This trend may be driven by tax changes that have made purpose-built rental projects more viable, and which made up more than 50 percent of housing starts in 2025. The move was also driven by affordability issues that have incentivized consumers to purchase more affordable multi-unit dwellings as opposed to single-detached units. It may also be partly attributed to pent-up demand caused by elevated interest rates in the two previous years.

2 Single-detached (single) refers to a building containing only one dwelling unit that is completely separated on all sides from any other dwelling or structure.

CONSTRUCTION EMPLOYMENT GROWTH OUTLOOK **CANADA**



SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

As Figure 2 shows, the outlook calls for investment in residential construction activity to rise by 5% across the forecast period, driven by renewed growth in later years. Initially, investment in new residential construction is projected to slow for the period of 2026 to 2027. This occurs as a direct result of the objectives of the federal Immigration Levels Plan to reduce immigration and decrease the number of non-permanent residents to 5% of the overall population by late 2027. As immigration is the principal driver of population growth in Canada, this change is projected to have a significant effect on demand for new-housing construction.

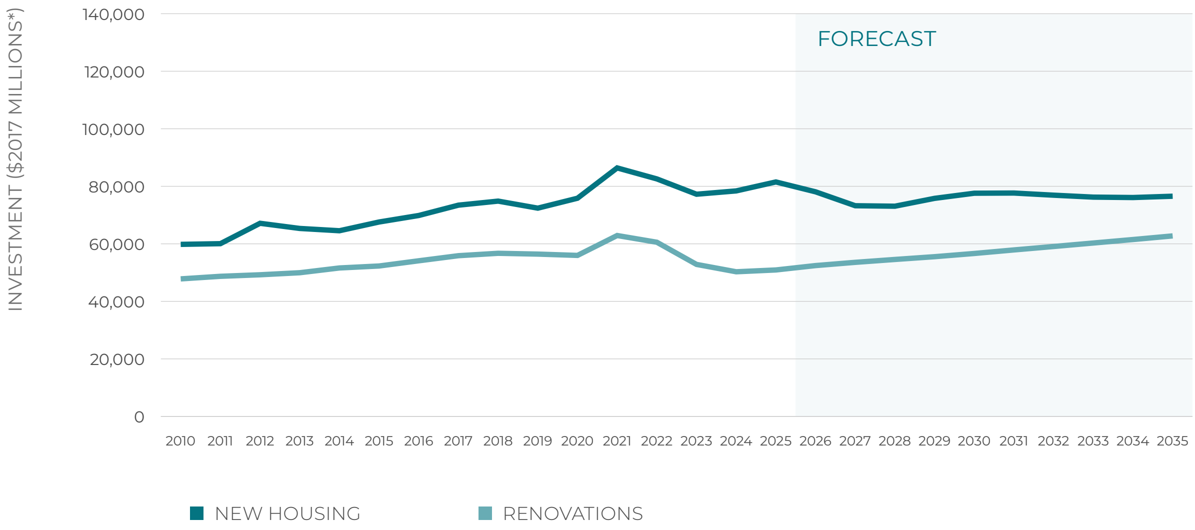
Investment levels are projected to rise in 2028 and through to the end of the forecast period. Initially, growth is greatest in demand for new housing as immigration levels are restored. In later years (i.e., 2031 and beyond), as population growth slows, investment growth is driven mostly by steady gains in demand for residential renovations.

By 2035, investment in new-home construction is projected to contract by 6% compared to 2025 levels, while investment in residential renovations is projected to rise by 23%.

Note: 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.

FIGURE 2

RESIDENTIAL CONSTRUCTION INVESTMENT **CANADA**



* $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 (2026–2035)

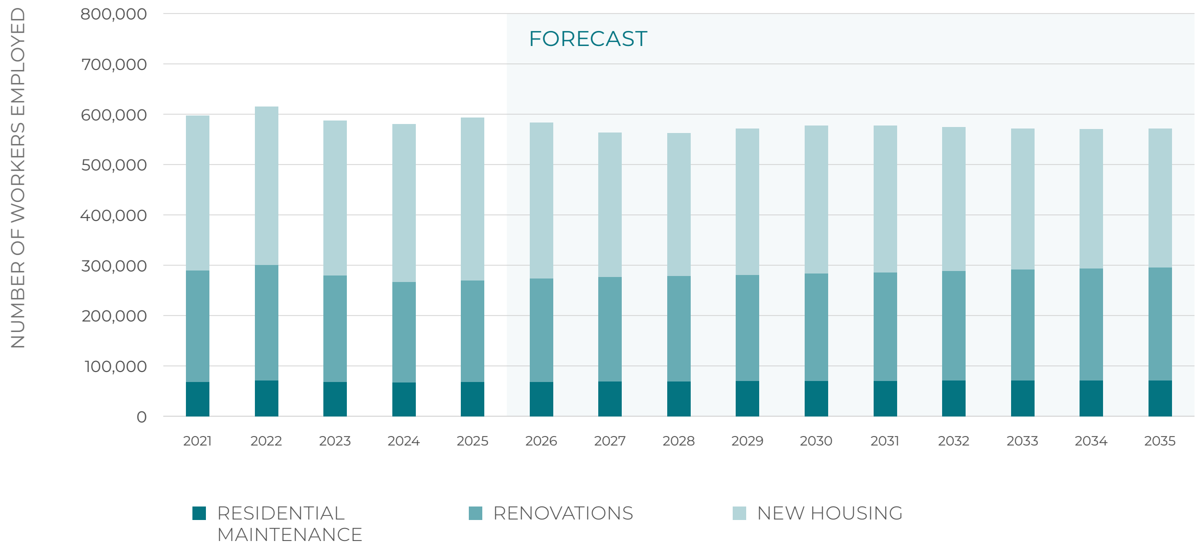
EMPLOYMENT

Employment among the 34 trades and occupations tracked in the BuildForce Canada LMI model in both residential and non-residential construction was estimated at above 1.25 million workers in 2025. That figure was a slight increase from the 1.23 million workers reported in 2024.

As Figure 3 shows, residential construction employment rose slightly – by 2% – in 2025, driven by increases in all market segments (i.e., employment relating to new housing, residential renovations, and residential maintenance activity). The outlook calls for employment to contract to 2028 as slowing population growth lessens demand for new housing. Employment is projected to then rise into 2031 as demand for new housing is restored, and then be mostly sustained to 2035 as contractions in the new-housing component offset gains in employment relating to renovations and maintenance activity.

FIGURE 3

RESIDENTIAL CONSTRUCTION EMPLOYMENT GROWTH OUTLOOK **CANADA**



SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

Compared to elevated levels in 2025, overall residential construction employment is projected to be 4% lower by 2035, although due to retirements, substantial hiring requirements are forecasted for the sector, per below. Losses are concentrated in new-home construction, in which employment is projected to contract by 15%. Meanwhile, employment relating to residential renovations (+11%) and residential maintenance activities (+5%) is expected to increase and only partially offset expected new construction declines.

Table 1 shows the anticipated changes in residential employment by province across three periods: the short term (2026–2028), the medium term (2029–2031), and the long term (2032–2035).

TABLE 1

CHANGES IN RESIDENTIAL EMPLOYMENT BY PROVINCE

REGION	% CHANGE **2026–2028**	% CHANGE **2029–2031**	% CHANGE **2032–2035**
CANADA	-5%	3%	-1%
NEWFOUNDLAND AND LABRADOR	-9%	8%	-9%
NOVA SCOTIA	-9%	-4%	-1%
NEW BRUNSWICK	-14%	-7%	-4%
PRINCE EDWARD ISLAND	-14%	5%	1%
QUEBEC	-10%	-3%	0%
ONTARIO	0%	10%	1%
MANITOBA	-3%	-1%	0%
SASKATCHEWAN	12%	2%	7%
ALBERTA	-9%	-4%	-4%
BRITISH COLUMBIA	-10%	2%	-6%

SOURCE: BuildForce Canada

LABOUR FORCE

Although residential construction activity is expected to slow across the forecast period, the industry will nonetheless be faced with a labour-force management challenge. By 2035, 135,000 residential construction workers, or 21% of the 2025 labour force, are projected to retire. That figure is an average of between 13,000 and 14,000 workers annually, and comprises mostly workers from the baby boom generation who depart the sector with decades of work experience.

Meanwhile, with residential construction activity projected to recede across the decade, hiring needs relating to employment could contract by as many as 17,500 workers compared to 2025. When this figure is added to projected retirements, the industry's overall hiring requirement is estimated at 117,500 workers by 2035. Although the residential sector is projected to recruit approximately 113,600 new-entrant workers under the age of 30 during this period to help offset some of this requirement, a labour force shortage of 3,900 workers may emerge by 2035.

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

FIGURE 4

CHANGES IN THE RESIDENTIAL LABOUR FORCE **CANADA**

633,400
LABOUR FORCE
2025

-17,500
WORKERS

615,900
LABOUR FORCE
2035

HIRING NEEDS

-17,500
WORKERS

+135,000
RETIREMENTS

OFFSET BY

-113,600
NEW ENTRANTS

+3,900
NET MOBILITY*

* 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

BUILDING A SUSTAINABLE LABOUR FORCE

Canada's labour force is being reshaped by long-term demographic trends, including declining fertility rates and smaller family sizes over the past several decades. As a result, the pool of younger workers entering the workforce has been shrinking. This pressure will increase as the baby boomer generation continues to retire, intensifying competition for new talent.

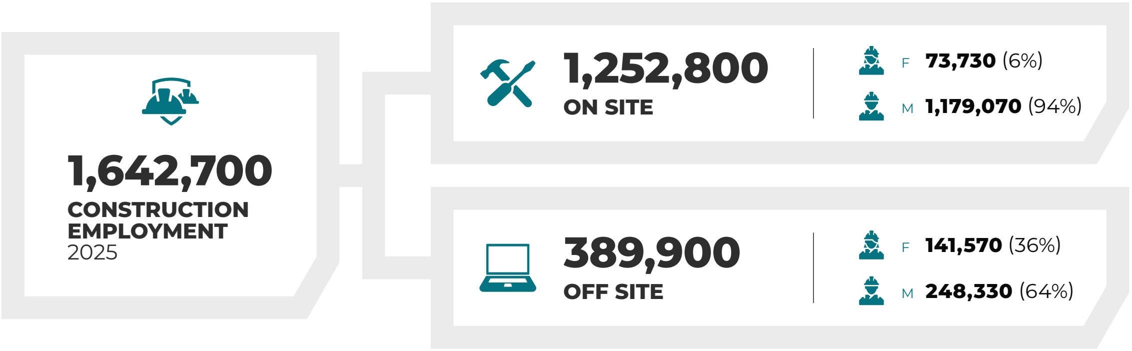
To respond to these challenges, the construction industry must broaden its recruitment efforts. Strengthening the workforce will require greater engagement with groups traditionally under-represented in the current construction labour force, including women, Indigenous Peoples, and immigrants to Canada.

WOMEN

In 2025, there were approximately 215,300 women employed in Canada's construction industry, of which 34% worked on site, directly on construction projects, while the remaining 66% worked off site, primarily in administrative and management-related occupations. Within the residential construction sector, women accounted for 36% of the total off-site labour force. Of the 1,252,800 on-site tradespeople employed in the industry, women made up 6% (see Figure 5).

FIGURE 5

DETAILED CONSTRUCTION EMPLOYMENT BY GENDER **CANADA**



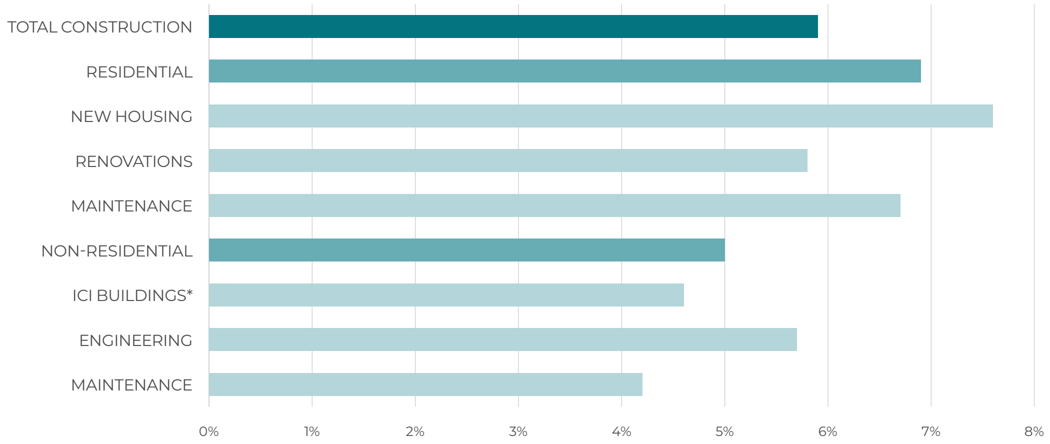
SOURCE: BuildForce Canada calculations based on Statistics Canada's Labour Force Survey and 2021 Census of the Population

The estimated 73,730 on-site tradeswomen in Canada work across all areas of the construction sector, but women represent a larger share of the workforce in residential construction (6.9%) than in non-residential construction (5.0%).

Across sectors, new-housing construction has the highest representation of women, accounting for 7.6% of the workforce (see Figure 6). The top five trades and occupations in which women tend to be employed are trade helpers and labourers (21% of all tradeswomen), construction managers (19%), painters and decorators (9%), contractors and supervisors (8%), and home building and renovation managers (5%).

FIGURE 6

WOMEN'S SHARE OF TOTAL DIRECT TRADES AND OCCUPATIONS (ON SITE) **CANADA**



* industrial, commercial, institutional

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

INDIGENOUS PEOPLES

The Indigenous population is the fastest growing population in Canada and therefore presents recruitment opportunities for Canada's construction industry. In 2025, Indigenous Peoples accounted for 4.8% of Canada's construction labour force, which is a slight increase from the share of 4.6% observed in 2016. This share is notably higher than the share of Indigenous Peoples represented in the overall labour force (see Table 2). As the Indigenous population continues to expand, recruitment and retention efforts will need to be dedicated to increasing the industry's share of the population into the labour force.

TABLE 2

REPRESENTATION OF INDIGENOUS POPULATION IN CONSTRUCTION WORKFORCE **CANADA**

INDUSTRY	INDIGENOUS	NON-INDIGENOUS	TOTAL	INDIGENOUS SHARE OF TOTAL WORKFORCE, %
CONSTRUCTION				
2016	69,400	1,446,200	1,515,700	4.6%
2025	82,400	1,635,500	1,717,800	4.8%
ALL INDUSTRIES				
2016	637,600	18,677,000	19,314,600	3.3%
2025	798,400	21,740,300	22,538,700	3.5%

SOURCE: Statistics Canada, Labour Force Survey, Custom Data Request 2025

NEWCOMERS

Canada's construction industry may also leverage newcomers (new immigrants) over the forecast period to meet labour requirements. Due to the declining natural rates of population growth[3], immigrants are the primary source of labour force growth in Canada.

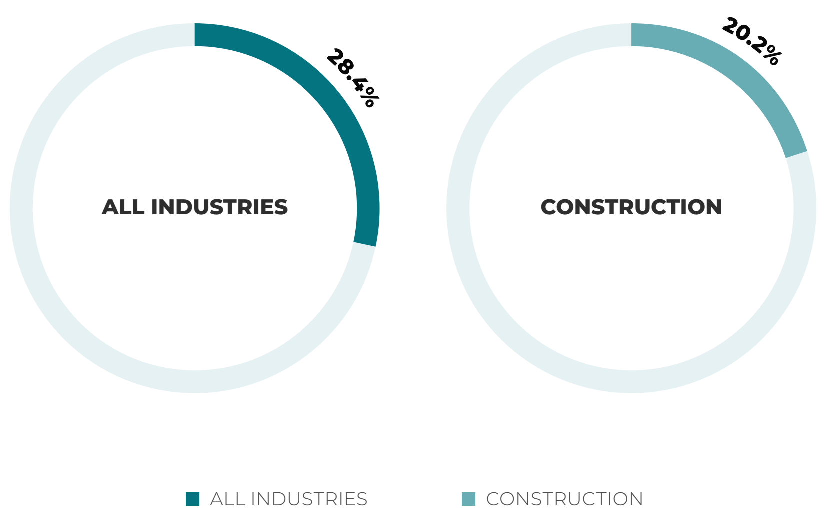
Immigrants have been playing an increasingly important role in replenishing the workforce, with the share of immigrants in the workforce increasing from 23.8% in 2016 to 28.4% in 2025. Canada has been successful in attracting and integrating immigrants into the labour force; however, immigrants remain under-represented in the construction industry. The share of immigrants in the construction labour force was 20.2% in 2025, which is notably lower than the share in the overall labour force. (See Figure 7.)

Based on historical settlement patterns, Canada is expected to welcome more than 3.2 million new immigrants between 2026 and 2035. As these individuals will make up an increasing share of Canada'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.

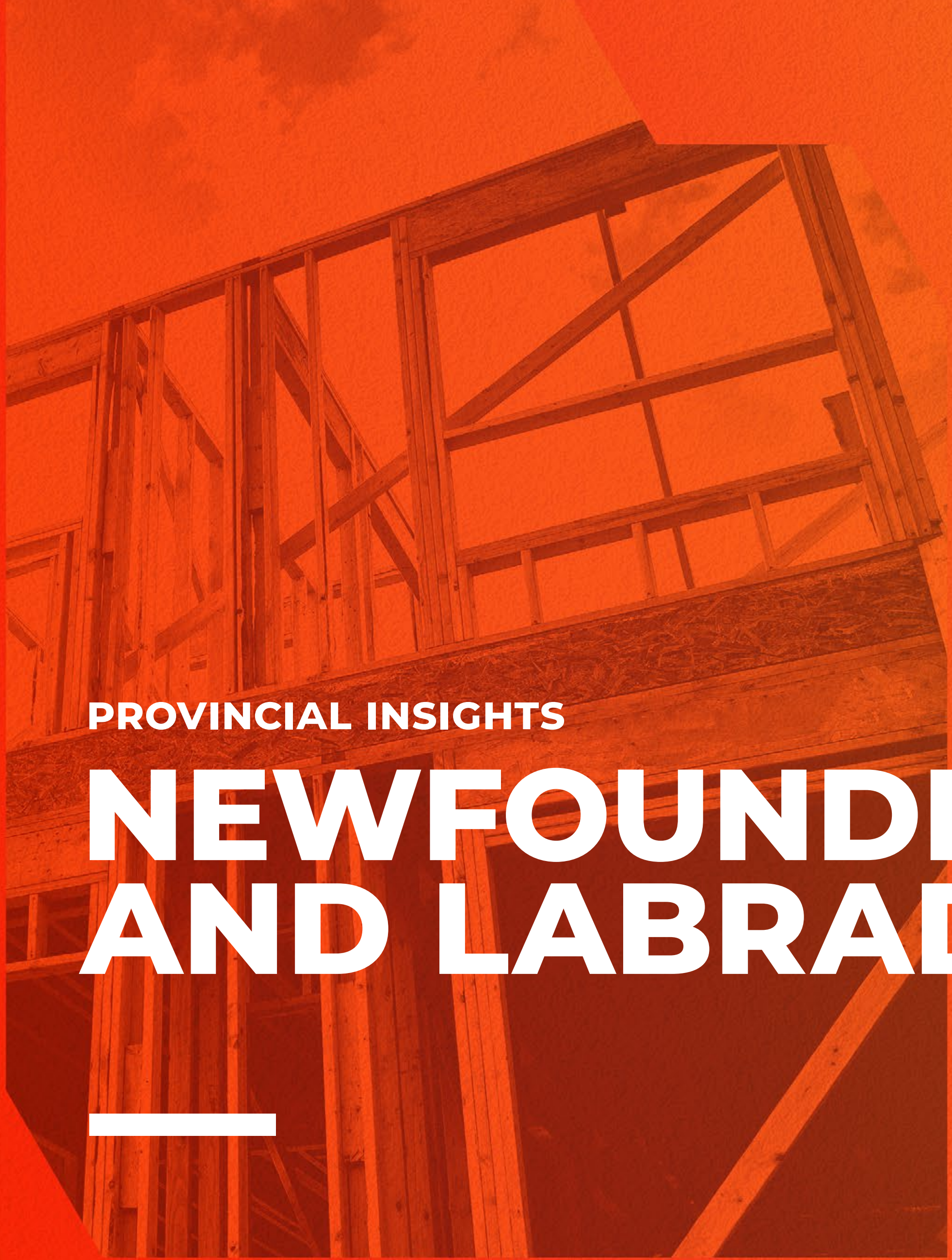
3 The natural rate of population growth refers to the growth in the population due to the number of births relative to the number of deaths, which leads to a positive or negative natural rate.

FIGURE 7

SHARE (%) OF NEWCOMERS IN THE CONSTRUCTION LABOUR FORCE (2025) **CANADA**



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



PROVINCIAL INSIGHTS

NEWFOUNDLAND AND LABRADOR

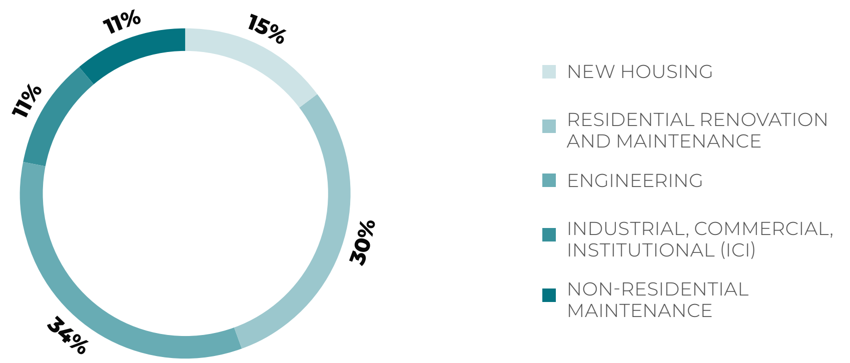
ECONOMIC OUTLOOK

Newfoundland and Labrador's economy experienced strong growth in 2024 and 2025, driven in part by high levels of population growth recorded between 2022 and 2024, and the return to production at the Hebron and Terra Nova oil fields following their respective refurbishments.

A significant jump in economic output is forecasted for 2026 with the beginning of production at the West White Rose offshore oil project and as the Valentine Gold project is expected to reach full production capacity. The middle years of the forecast see growth levels of between 1% and 3% as the residential construction sector experiences reduced activity that is driven by lower levels of provincial in-migration. This, however, is offset by the anticipated start of construction work on the Bay du Nord offshore oilfield in 2028 and several hydro development projects in Labrador. Combined, these projects drive economic growth in the province at particularly elevated levels in 2031 and 2032.

The final years of the outlook see Newfoundland and Labrador enter a down cycle in oil production, which is expected to contract economic growth in 2034 and 2035.

DISTRIBUTION OF CONSTRUCTION EMPLOYMENT IN 2025 **NEWFOUNDLAND AND LABRADOR**



10-YEAR WORKFORCE OUTLOOK FOR **NEWFOUNDLAND AND LABRADOR**

5,900
RETIREMENTS

+4,100
NEW ENTRANTS

570
EMPLOYMENT CHANGE
(3.7%)

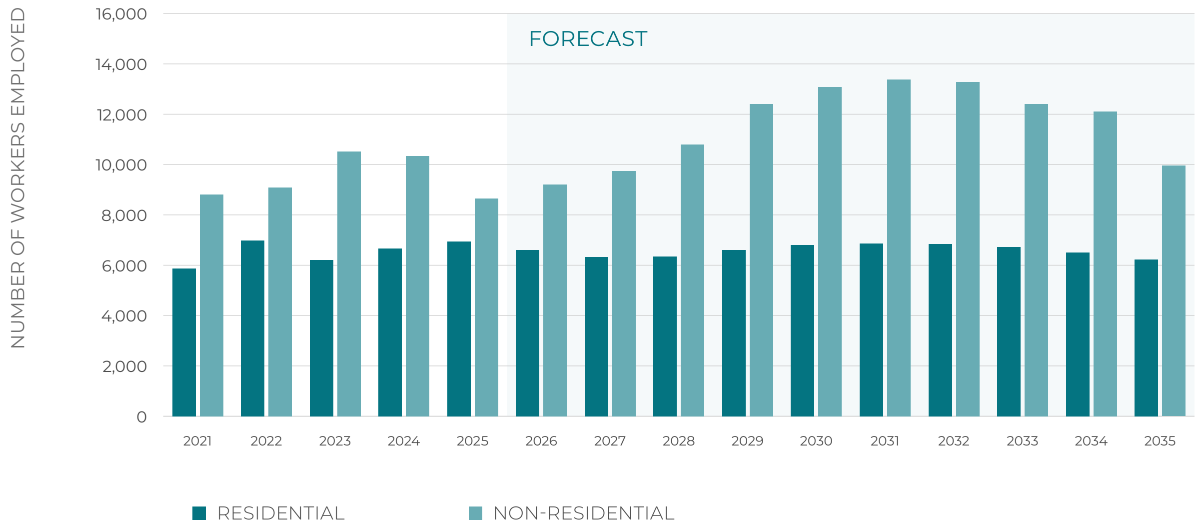
15.9%
AVERAGE UNEMPLOYMENT RATE

POPULATION GROWTH AND DEMOGRAPHICS

Population growth rates have begun to slow in Newfoundland and Labrador since the province experienced record levels of growth in the years immediately following the COVID-19 pandemic. The reduction in growth is directly attributable to actions taken by the federal government to slow immigration and decrease the number of non-permanent residents arriving in Canada.

Population growth is expected to slow again in 2026 and 2027 before returning to growth in 2028 and through to the early 2030s as the level of non-permanent and permanent residents increases again. (See Figure 8.)

CONSTRUCTION EMPLOYMENT GROWTH OUTLOOK
NEWFOUNDLAND AND LABRADOR



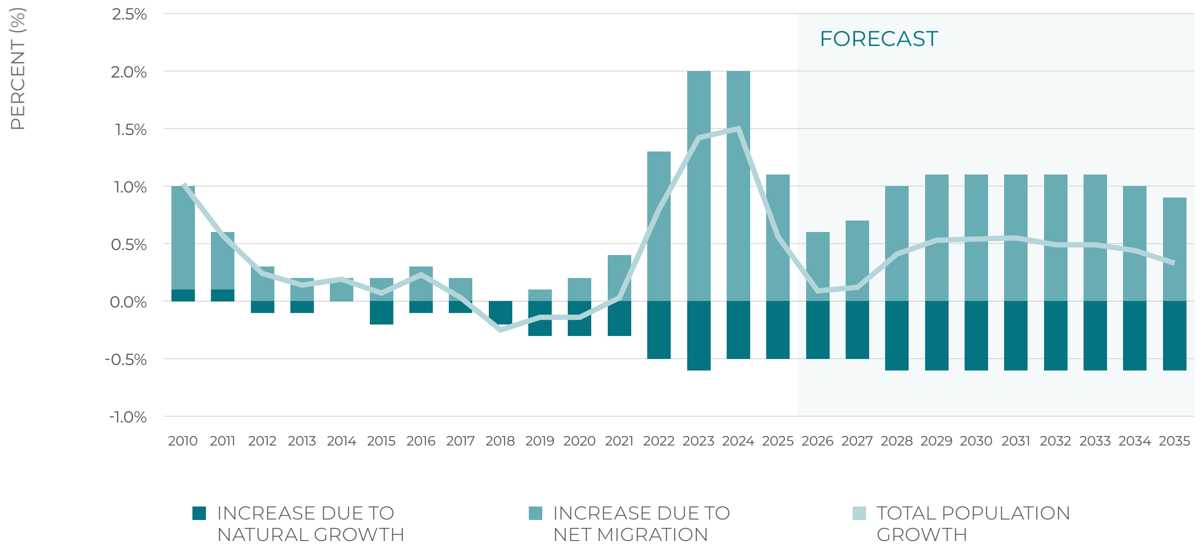
SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

The challenge for Newfoundland and Labrador lies with an older and aging population. The province's natural rate of population growth[4] has been negative since 2012, and is expected to trend lower through the forecast period. In the absence of migration, the province's population would be projected to decline at a rate of about 0.5% every year over the next 10 years. Offsetting this trend somewhat has been the recent increase in migrants to the province, both from domestic and international sources.

The rate of population growth in the province is expected to near 0% in 2026 and 2027. It rises to 0.5% and remains near those levels for most of the early 2030s.

FIGURE 8

SOURCES OF POPULATION GROWTH (%)
NEWFOUNDLAND AND LABRADOR



SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

4 The 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.

RESIDENTIAL CONSTRUCTION INVESTMENT

Unlike most other provinces, residential construction investment levels in Newfoundland and Labrador are principally driven by investment in residential renovations. Expenditures in these activities are expected to increase modestly over the forecast period, in line with expected growth in wages and incomes, and with the provincial Home Modification Program[5].

In the longer term, these gains are expected to offset a more cyclical outlook for investment in new-housing construction. Housing starts rose to around 1,600 units in each of 2024 and 2025, but are expected to slow into 2027 as population-driven demand eases. Renewed growth follows into the early 2030s as population growth leads to increases in demand for both single-detached[6] and multi-unit dwellings.

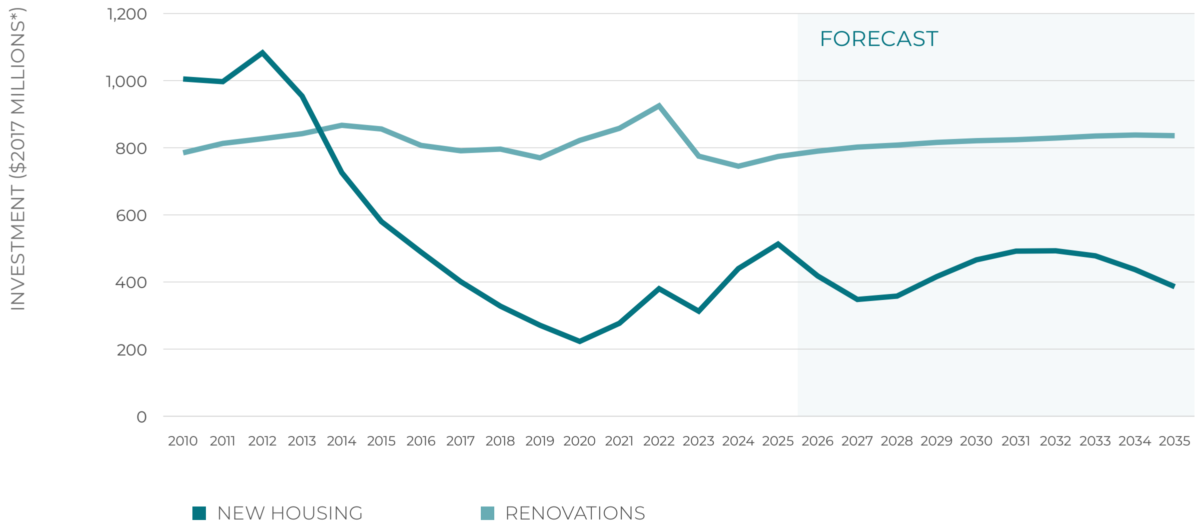
A closer look at forecasted trends in housing starts shows that single-detached starts are expected to slow in the short term to 2027 due to slower population growth in the province. As wages and incomes are expected to increase in later years, and as migration returns to more traditional annual levels, starts for this unit type are expected to increase to just under 1,000 units annually by 2032 before levels subside again with weaker population growth. (See Figure 9.)

5 https://www.nlhc.nl.ca/housing-programs/home-modification-program-hmp/

6 Single-detached (single) refers to a building containing only one dwelling unit that is completely separated on all sides from any other dwelling or structure.

FIGURE 9

RESIDENTIAL CONSTRUCTION INVESTMENT
NEWFOUNDLAND AND LABRADOR



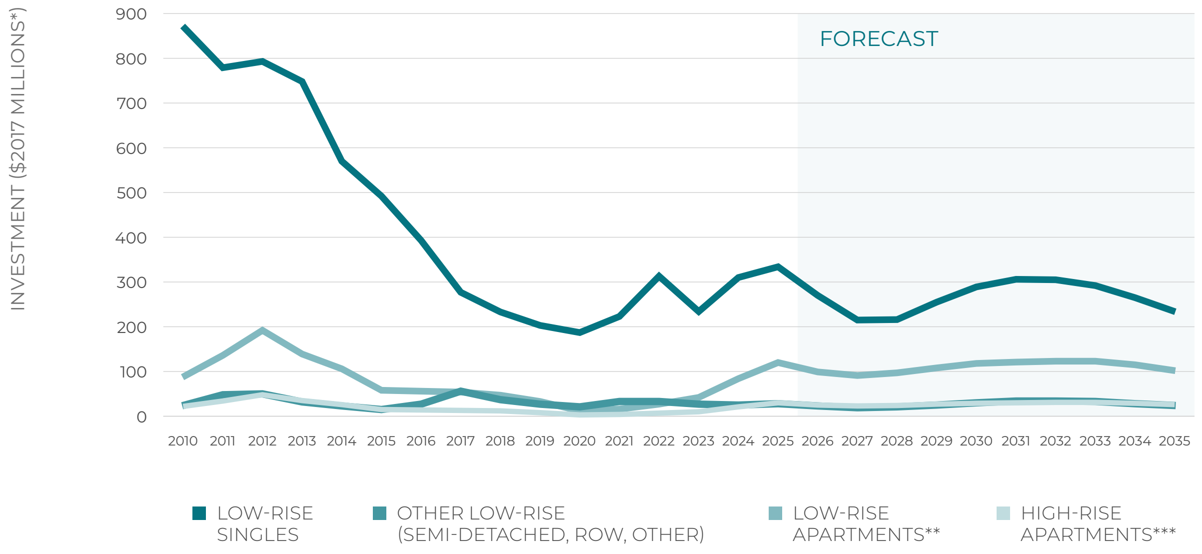
* $2017 millions indicates that the investment values are in year 2017 dollars (base year), that is, adjusted for inflation. This is used to calculate the real physical year-to-year change of the value of construction, factoring out growth (increase in value) due to increases in prices.

SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

Starts for multi-family units follow a similar trend as demand is suppressed initially as fewer migrants, who tend to rent housing before buying homes, arrive in the province. Among these unit types, demand for apartments is expected to be most affected. Multi-unit starts return to growth in 2028 and rise to a scenario peak in 2032, with demand increasing for apartment units and semi-detached and row-housing units over this period. Helping to drive this growth is the federal government's GST rebate on the construction of rental housing properties. (See Figure 10.)

FIGURE 10

NEW HOUSING CONSTRUCTION INVESTMENT
NEWFOUNDLAND AND LABRADOR



* $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.

** Low-rise apartments are buildings with four storeys or fewer.

*** High-rise apartments are buildings with five or more storeys.

SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

RESIDENTIAL CONSTRUCTION EMPLOYMENT

Residential construction employment levels in Newfoundland and Labrador are expected to trend lower into 2027 as activity in the province's new-housing construction sector slows. Employment then reaches a scenario peak in 2031 and 2032 before contracting to the end of 2035. These trends are almost entirely driven by fluctuations in the new-housing market – and in particular for employment relating to the construction of low-rise single-family units.

By 2035, residential construction employment is expected to contract by 10% compared to 2025 levels, with the greatest loss of employment experienced in the new-housing component (-27%). Employment relating to residential renovations (-2%) and residential maintenance (-2%) is also expected to decline.

Table 3 summarizes the estimated percent change in residential employment by sector across three periods: the short term (2026–2028), the medium term (2029–2031), and the long term (2032–2035).

TABLE 3

CHANGES IN RESIDENTIAL EMPLOYMENT BY SECTOR **NEWFOUNDLAND AND LABRADOR**

SECTOR	% CHANGE **2026–2028**	% CHANGE **2029–2031**	% CHANGE **2032–2035**
RESIDENTIAL	-9%	8%	-9%
NEW HOUSING	-27%	33%	-25%
RENOVATIONS	1%	-1%	-3%
RESIDENTIAL MAINTENANCE	-1%	-1%	0%

Note that 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.

SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

RANKINGS, RISKS, AND MOBILITY: TRADES AND OCCUPATIONS

The BuildForce LMI system tracks supply and accounts for the change in the available labour force, including retirements, new entrants[7], and net mobility[8]. Based on currently known demands, industry recruitment and retirement estimates, the following ranks apply to the 13 covered trades in the province. See Table 4.

The recent growth in new-home construction tightened labour markets across several trades and occupations. With lower levels of migration and weaker population growth, residential markets are projected to return to balance in 2026 and weaken for some trades and occupations in 2027 before remaining generally balanced across the remainder of the forecast period. Some tightness may persist for construction managers due to anticipated retirements and experience requirements for backfilling these positions.

7 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.

8 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.

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

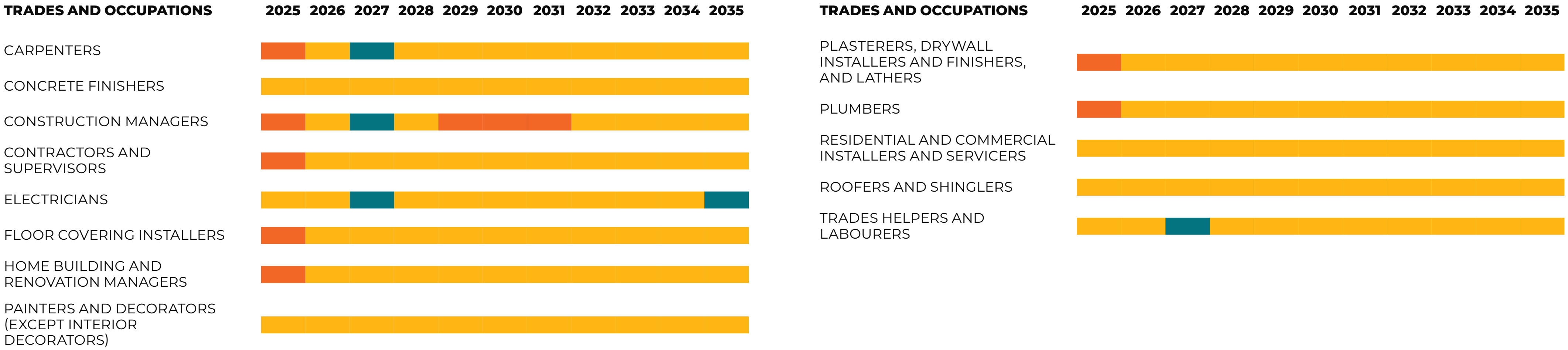
Workers meeting qualifications are generally not available in local markets to meet any increase. Employers will need to compete to attract additional workers. Recruiting and mobility may extend beyond traditional sources and practices.

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 4

RESIDENTIAL MARKET RANKINGS
NEWFOUNDLAND AND LABRADOR



SOURCE: BuildForce Canada

BUILDING A SUSTAINABLE LABOUR FORCE

THE AVAILABLE RESIDENTIAL LABOUR FORCE

The outlook for residential construction activity in Newfoundland and Labrador over the 2026 to 2035 forecast period is such that labour force needs pertaining to demand growth are expected to contract by 1,200 workers. Adding to this hiring requirement is the projected retirement of 2,500 workers, or 29% of the 2025 labour force, and leaving the sector with a total hiring requirement of 1,300 workers.

That requirement is expected to be entirely offset by the recruitment of 1,400 first-time new entrants under the age of 30 from the local population, and may produce a surplus of 100 workers by 2035. Although some of these workers may seek work in the province's non-residential construction sector, there is a risk that they may exit the construction sector or pursue employment in other provinces.

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 skill sets, and the recruitment of immigrants to Canada with skilled trades training and/or construction experience.

Figure 11 provides a summary of the estimated changes in the residential construction labour force across the forecast period.

FIGURE 11

CHANGES IN THE RESIDENTIAL LABOUR FORCE
NEWFOUNDLAND AND LABRADOR

8,600
LABOUR FORCE
2025

-1,200
WORKERS

7,400
LABOUR FORCE
2035

HIRING NEEDS

-1,200
WORKERS

+2,500
RETIREMENTS

OFFSET BY

-1,400
NEW ENTRANTS

-100
NET MOBILITY*

* 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 Newfoundland and Labrador's largest construction trade programs saw a steep decline in the years preceding the pandemic, as trade employment retreated from peak levels. Post-pandemic, new registrations have been on the rise, responding to the gains in employment observed in recent years. In 2023, new registrations increased by 25% on an annual basis, returning to levels not seen since 2016. Intake eased slightly in 2024 but remained elevated at close to 600 new registrants.

New apprenticeship registrations are expected to remain elevated in the near term, supported by the federal government's recently announced investment to recruit and train skilled trades workers under the Team Canada Strong initiative. In addition to supporting increased intake, the funding places a strong emphasis on improving completion outcomes through enhanced incentives and employer supports.[9]

Completions have been slower to recover, remaining below pre-pandemic levels in 2024. However, completions have trended upward in recent years, with a notable increase of nearly 20% in 2024. It will likely take several more years before the renewed influx of new registrations translates to a sustained increase in newly certified journeypersons. See Figure 12.

9 Prime Minister Carney announces Team Canada Strong – a nationwide plan to recruit up to 100,000 skilled trades workers

FIGURE 12

NEW APPRENTICESHIP REGISTRATIONS, COMPLETIONS, AND TRADE EMPLOYMENT **NEWFOUNDLAND AND LABRADOR**

SOURCE: 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.

Projected new registrations are expected to increase over the decade in line with employment growth, supporting higher anticipated completions. As a result, several trades are well positioned to meet future demand with sufficient numbers of certified workers. However, continued alignment will depend on provincial training capacity and the ability to sustain completion rates. The carpenter trade remains a key exception, with projected completions falling short of anticipated journeyperson requirements over the outlook period.

🟥 CERTIFICATIONS REQUIRED EXCEED PROJECTED COMPLETIONS

🟨 CERTIFICATIONS REQUIRED IN LINE WITH PROJECTED COMPLETIONS

🟩 PROJECTED COMPLETIONS EXCEED CERTIFICATIONS REQUIRED

TABLE 5

ESTIMATED CONSTRUCTION CERTIFICATION DEMAND AND PROJECTED TARGET OF NEW ENTRANTS BY TRADE NEWFOUNDLAND AND LABRADOR*

TRADE	TOTAL CERTIFICATION DEMAND CONSTRUCTION	TARGET NEW REGISTRANTS CONSTRUCTION	APPRENTICE CERTIFICATION SUPPLY RISK ALL INDUSTRIES
CARPENTER	352	111	🟥
STEAMFITTER/PIPEFITTER	85	91	🟨
CONSTRUCTION ELECTRICIAN	475	527	🟨
INDUSTRIAL ELECTRICIAN	99	138	🟩
PLUMBER	73	114	🟩
INDUSTRIAL MECHANIC (MILLWRIGHT)	61	110	🟩
MOBILE CRANE OPERATOR	42	95	🟩
HEAVY-DUTY EQUIPMENT TECHNICIAN	29	70	🟩
POWERLINE TECHNICIAN	27	78	🟩
WELDER	32	127	🟩
REFRIGERATION AND AIR CONDITIONING MECHANIC	29	123	🟩

* This analysis does not account for existing labour market imbalances at the 2025 starting point.

SOURCE: BuildForce Canada

UNDER-REPRESENTED GROUPS OF WORKERS

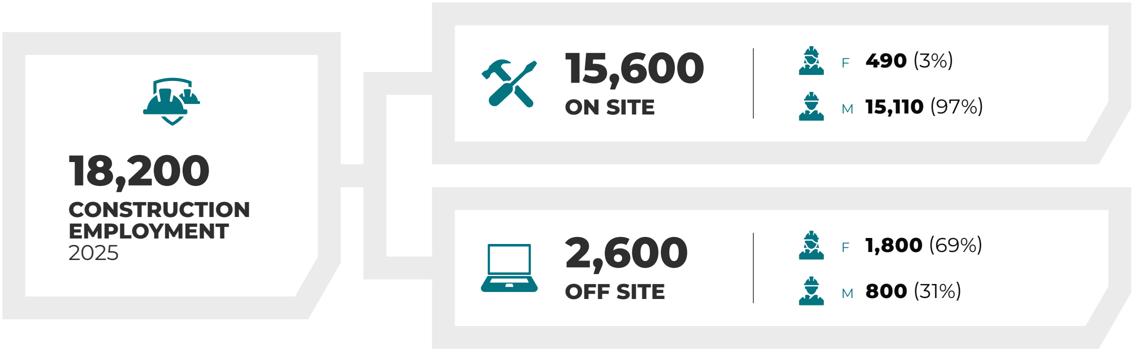
Due in part to lower fertility rates and smaller family sizes in Canada for more than three decades, the share of younger Canadians available to enter the labour force has been in decline for several years. To help mitigate the impact of this shift in demographics, the construction industry must diversify its recruitment. In order to succeed, the industry must increase recruitment of individuals from groups traditionally under-represented in the current construction labour force, including women, Indigenous People, and newcomers.

WOMEN

In 2025, there were approximately 2,290 women employed in Newfoundland and Labrador's construction industry, of which 21% worked on site, directly on construction projects, while the remaining 79% worked off site, primarily in administrative and management-related occupations. Of the 15,600 tradespeople employed in the industry, women made up only 3%. See Figure 13.

FIGURE 13

DETAILED CONSTRUCTION EMPLOYMENT BY GENDER
NEWFOUNDLAND AND LABRADOR

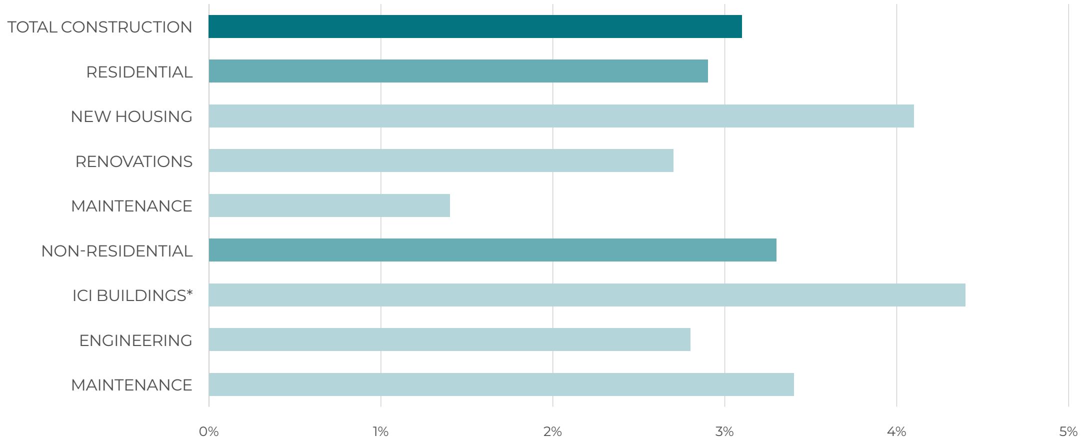


SOURCE: BuildForce Canada calculations based on Statistics Canada's Labour Force Survey and 2021 Census of the Population

The estimated 490 on-site tradeswomen in Newfoundland and Labrador account for a similar share of the total workforce in both residential and non-residential construction. Across sectors, ICI building construction (4.4%) and new-housing construction (4.1%) have the highest representation of women (see Figure 14). The top five trades and occupations in which women tend to be employed are trade helpers and labourers (31% of all tradeswomen), electricians (19%), construction managers (14%), carpenters (10%), and contractors and supervisors (8%).

FIGURE 14

WOMEN'S SHARE OF TOTAL DIRECT TRADES AND OCCUPATIONS (ON SITE) **NEWFOUNDLAND AND LABRADOR**



* industrial, commercial, institutional

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

INDIGENOUS PEOPLES

The Indigenous population is the fastest growing population in Canada and therefore presents recruitment opportunities for Newfoundland and Labrador's construction industry. As of 2025, Indigenous Peoples accounted for 8.4% of the province's construction labour force, a modest increase over the past decade. This share is also slightly higher than the share of Indigenous Peoples represented in the overall labour force (see Table 6). As the Indigenous population continues to expand, recruitment efforts will need to continue to be dedicated to increasing the industry's share of the working population into the labour force.

TABLE 6

REPRESENTATION OF INDIGENOUS POPULATION IN PROVINCIAL CONSTRUCTION WORKFORCE **NEWFOUNDLAND AND LABRADOR**

INDUSTRY	INDIGENOUS	NON-INDIGENOUS	TOTAL	INDIGENOUS SHARE OF TOTAL WORKFORCE, %
CONSTRUCTION				
2016	2,100	29,400	31,500	6.7%
2025	1,800	19,700	21,500	8.4%
ALL INDUSTRIES				
2016	20,500	252,000	272,400	7.5%
2025	21,800	251,000	272,700	8.0%

SOURCE: Statistics Canada, Labour Force Survey, Custom Data Request 2025

NEWCOMERS

Newfoundland and Labrador's construction industry may also leverage new immigrants to Canada over the outlook period to meet labour requirements. Due to the declining natural rate of population growth, immigrants are the sole source of labour force growth in the province.

Based on the 2021 Census, immigrants accounted for 3.3% of Newfoundland and Labrador's overall workforce.[10] The province's share of immigrants is notably below the share in Canada overall (see Figure 15). The share of immigrants in the construction labour force was less than 1%, which is significantly lower than the share in Canada's construction industry of 19.4%.[11]

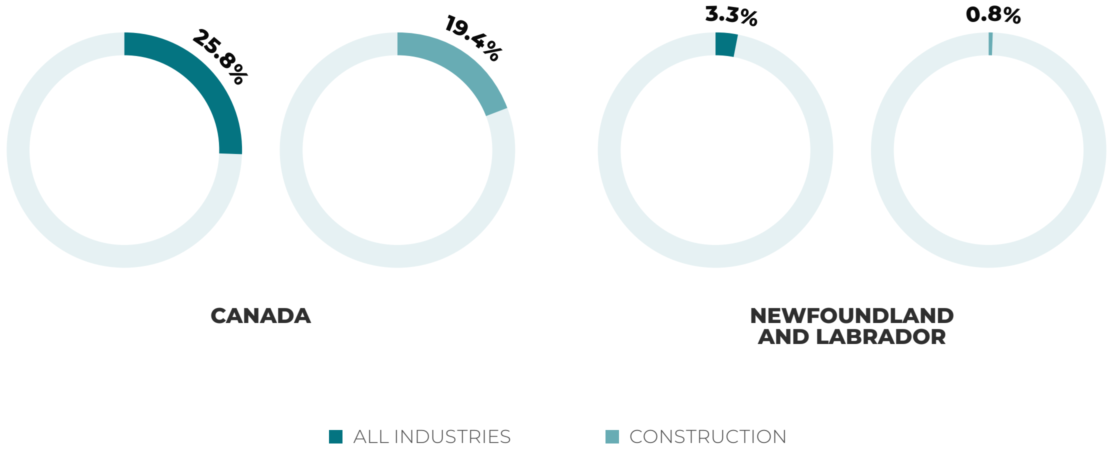
Based on historical settlement trends (and factoring in revised immigration targets), the province is expected to welcome more than 51,200 newcomers between 2026 and 2035. As these individuals will make up an increasing share of the province's core working-age population, additional recruitment efforts will be required to ensure the construction industry recruits its share of newcomers into the labour force.

10 According to the Labour Force Survey, the share of immigrants in the provincial workforce increased from 2.3% in 2016 to 6.1% in 2025. Construction-specific immigrant shares are not available due to suppression, limiting assessment of immigrant representation in the sector.

11 Due to data suppression at the provincial level, Census data is the most reliable source for labour market information on Immigrants.

FIGURE 15

SHARE (%) OF NEWCOMERS IN THE CONSTRUCTION LABOUR FORCE (2021) **NEWFOUNDLAND AND LABRADOR**



SOURCE: Statistics Canada, 2021 Census. Custom Data Request

PROVINCIAL INSIGHTS

PRINCE EDWARD ISLAND

ECONOMIC OUTLOOK

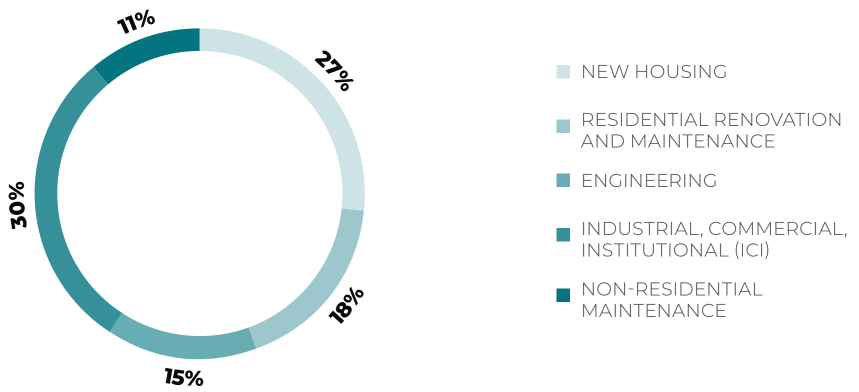
Prince Edward Island experienced several years of strong economic growth following the conclusion of the COVID-19 pandemic. High levels of population growth, driven by an influx of international migration, helped to fuel strong domestic demand for residential and non-residential construction during this period.

Economic growth in the province has slowed in recent years, with output in 2025 dropping to below 2.5% as tariffs imposed by the United States on Canada impacted export activities. Meanwhile, the federal government has adjusted its Immigration Levels Plan to curb the number of permanent and non-permanent residents arriving to the country. Employment growth has slowed as a result.

Growth is expected to continue to contract through the forecast near term (i.e., into 2028) as a downcycle begins in the province's residential and non-residential construction markets in response to slowing population growth and with anticipated major project completions, and as business investment levels respond to more challenging export conditions. GDP growth over this period is expected to average below 1% annually for this period.

In the longer run, a new upward cycle emerges. GDP growth is expected to average 2% annually as investment in both residential and non-residential construction responds to increased population growth.

DISTRIBUTION OF CONSTRUCTION EMPLOYMENT IN 2025 **PRINCE EDWARD ISLAND**



10-YEAR WORKFORCE OUTLOOK FOR **PRINCE EDWARD ISLAND**

1,650
RETIREMENTS

+1,730
NEW ENTRANTS

-752
EMPLOYMENT CHANGE
(-8.9%)

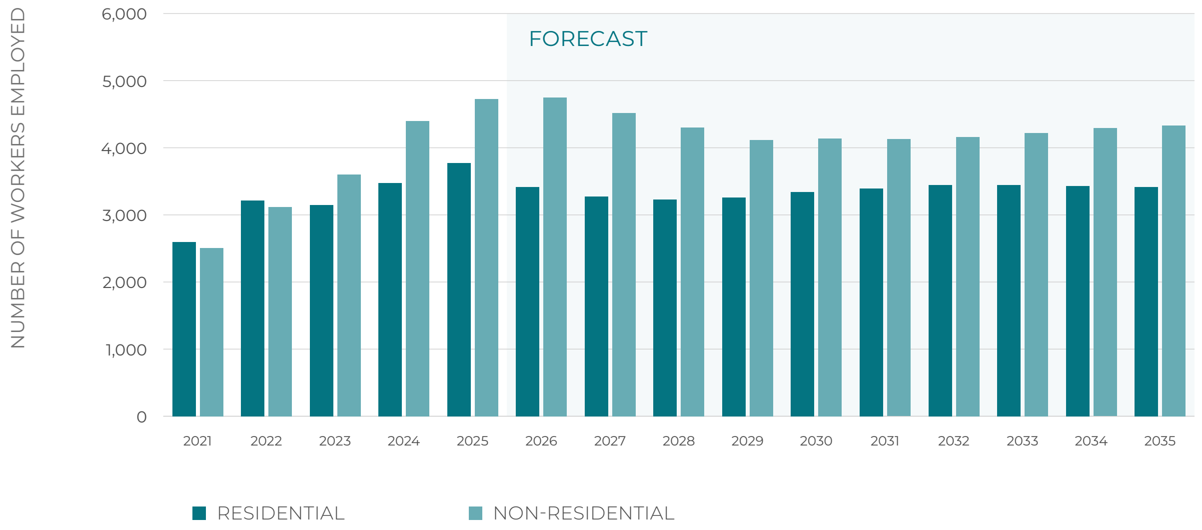
9.0%
AVERAGE UNEMPLOYMENT RATE

POPULATION GROWTH AND DEMOGRAPHICS

Strong migration levels – both from abroad and from other provinces – during the immediate post-pandemic years helped to drive population growth in Prince Edward Island to unprecedented heights for the period between 2022 and 2024. Growth in the former was due to a surge in non-permanent residents, while the rise in the latter was created by comparatively lower costs of living in the province.

Population growth levels, which are driven exclusively by migration, contracted in 2025 as the federal government enacted measures to lower the percentage of non-permanent residents in the country to 5% of the overall population by 2027. Prince Edward Island's population is expected to decline further in 2026 before making a recovery for the period of 2028 to 2031 as international migration levels are anticipated to increase from the lows in 2026. (See Figure 16.)

CONSTRUCTION EMPLOYMENT GROWTH OUTLOOK
PRINCE EDWARD ISLAND



SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

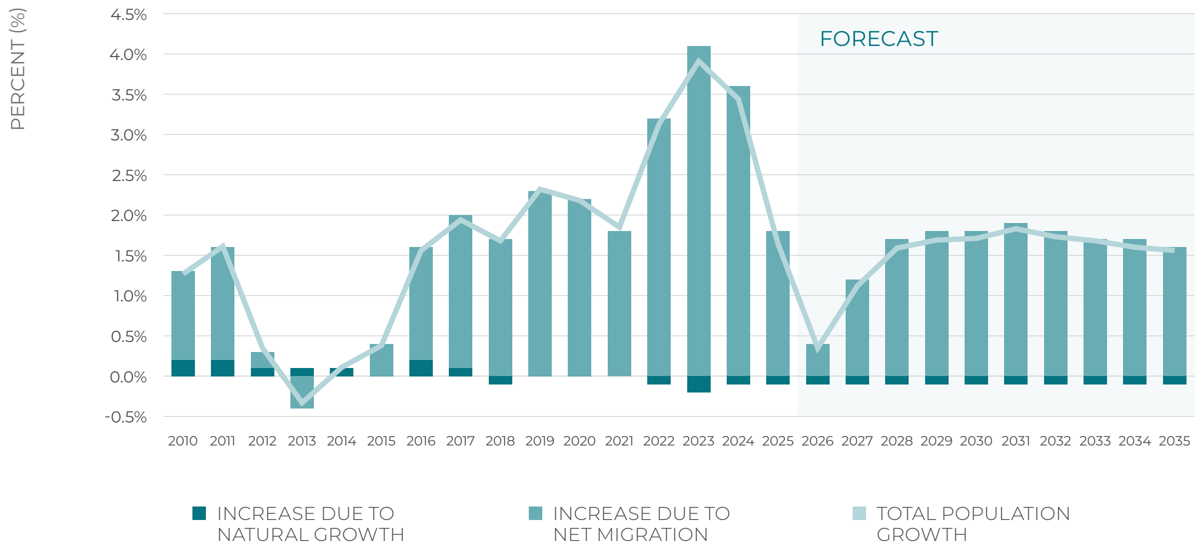
The natural rate of population growth[12] in Prince Edward Island turned negative in 2018, and reached its lowest point in 2023. Although that rate is expected to remain negative through to the end of the forecast period in 2035, fertility rates are expected to increase, as recent migrants reach their prime working and child-bearing years.

The rate of population growth in the province is expected to reach a low of 0.4% in 2026 and rebound thereafter, reaching a forecast peak of 1.8% in 2031.

12 The 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.

FIGURE 16

SOURCES OF POPULATION GROWTH (%) **PRINCE EDWARD ISLAND**



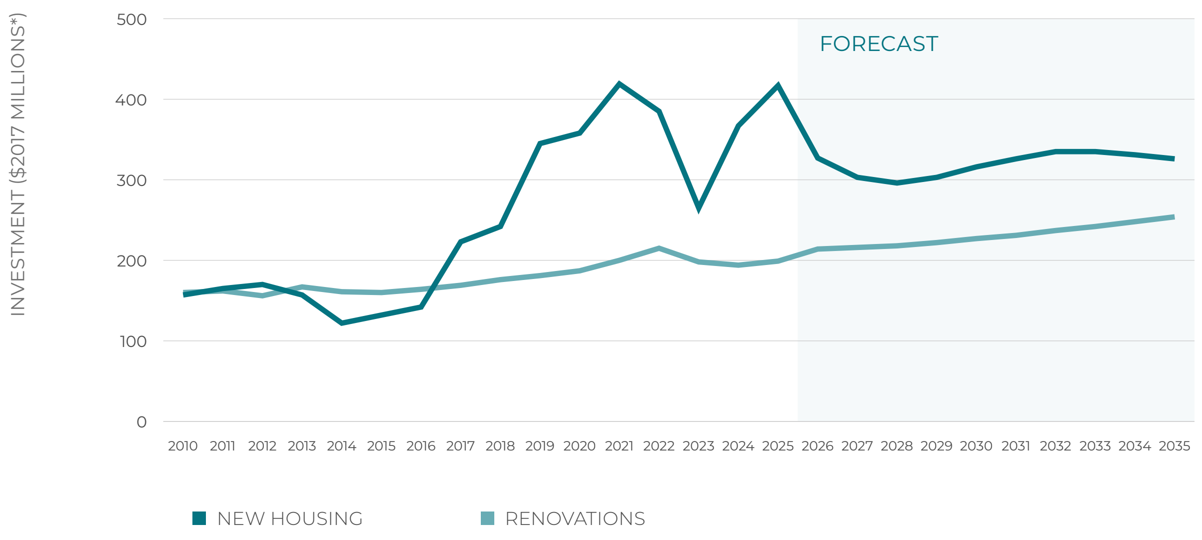
SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

RESIDENTIAL CONSTRUCTION INVESTMENT

Following reduced levels of residential activity between 2022 and 2023, residential construction investment levels returned to growth in 2024 and reached a recent peak in 2025 with record levels of new-housing construction. Demand was strong for multi-unit properties, and low-rise apartment buildings in particular. Investment in new-housing construction is projected to contract into 2028 as population growth slows before stabilizing to 2035. (See Figure 17.)

FIGURE 17

RESIDENTIAL CONSTRUCTION INVESTMENT **PRINCE EDWARD ISLAND**



* $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 (2026–2035)

Demand for the construction of multi-unit dwellings is expected to recede from peak levels across this period, particularly as the province sees lower levels of international migration and as the rental vacancy rate – which was among the lowest in the country – eases. Despite these comparative contractions, the level of construction of multi-unit dwellings in the province is expected to remain above historical averages for the forecast period, supported in part by the federal government's GST residential rental property rebate, and provincial and social housing programs.

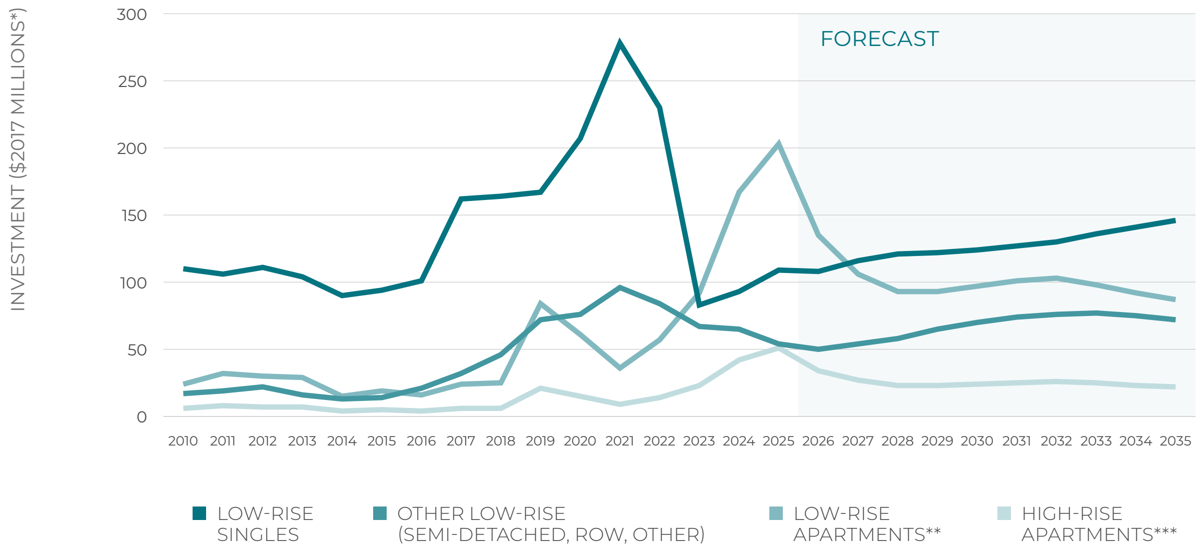
Starts for single-detached[13] units rose notably in 2025 as interest rate pressures eased and the market responded to recently elevated levels of household formations. Starts for these unit types are expected to rise almost continuously across the forecast period as wages and incomes adjust to higher housing costs, and as more recent migrants achieve enough wealth to be able to afford these comparatively higher-priced unit types. (See Figure 18.)

Investment in residential renovations is expected to increase continuously across the forecast period, and help to partially offset the slowing outlook for new-housing construction. Renovation investment grows in response to the province's aging housing stock, an aging population that chooses to age in place, and provincial programs that offer financial assistance to complete repairs.

13 Single-detached (single) refers to a building containing only one dwelling unit that is completely separated on all sides from any other dwelling or structure.

FIGURE 18

NEW HOUSING CONSTRUCTION INVESTMENT **PRINCE EDWARD ISLAND**



* $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.

** Low-rise apartments are buildings with four storeys or fewer.

*** High-rise apartments are buildings with five or more storeys.

SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

RESIDENTIAL CONSTRUCTION EMPLOYMENT

Employment relating to new-housing construction in Prince Edward Island has expanded significantly since 2019. This trend was initially driven by surges in demand for single-detached housing. Recently, the trend has shifted to increased demand for multi-unit dwellings. This fact, combined with more moderate growth in renovation activity, led to an increase of 45% in residential employment in Prince Edward Island between 2021 and 2025.

An anticipated contraction in housing starts from the peak is expected to temper employment in 2026. This trend is offset somewhat by increased demand for residential renovations, and should return employment to near-2024 levels.

Over the later years of the forecast, overall employment is expected to maintain levels at or around those reported in 2024. Employment relating to new housing contracts as many multi-unit builds are completed, but are not replaced by similar volumes of housing starts. This trend is countered somewhat by growing levels of renovation activity.

By 2035, residential construction employment is expected to contract by 9% compared to 2025 levels. Employment relating to new-housing construction contracts by 26% compared to its 2025 peak, while renovation employment rises by 15%, and maintenance employment increases by 18%.

Table 7 summarizes the estimated percent change in residential employment by sector across three periods: the short term (2026–2028), the medium term (2029–2031), and the long term (2032–2035).

TABLE 7

CHANGES IN RESIDENTIAL EMPLOYMENT BY SECTOR **PRINCE EDWARD ISLAND**

SECTOR	% CHANGE **2026–2028**	% CHANGE **2029–2031**	% CHANGE **2032–2035**
RESIDENTIAL	-14%	5%	1%
NEW HOUSING	-28%	7%	-4%
RENOVATIONS	6%	3%	5%
RESIDENTIAL MAINTENANCE	7%	4%	6%

Note that 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.

SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

RANKINGS, RISKS, AND MOBILITY: TRADES AND OCCUPATIONS

The BuildForce LMI system tracks supply and accounts for the change in the available labour force, including retirements, new entrants[14], and net mobility[15]. Based on currently known demands, industry recruitment and retirement estimates, the following ranks apply to the 10 covered trades in the province.

Labour market conditions are projected to weaken over the medium term in line with declines in housing starts and investment relative to peak levels and very tight market conditions reported in 2025. Markets return to balance in 2030 under renewed growth across the remainder of the forecast period. See Table 8.

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.

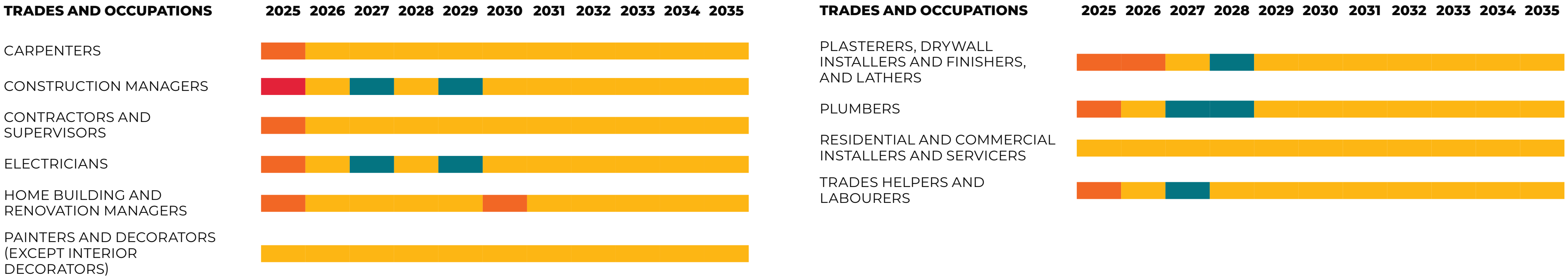
---

14 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.

15 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.

TABLE 8

RESIDENTIAL MARKET RANKINGS **PRINCE EDWARD ISLAND**



SOURCE: BuildForce Canada

BUILDING A SUSTAINABLE LABOUR FORCE

THE AVAILABLE LABOUR FORCE

With residential construction activity in Prince Edward Island expected to slow across the 2026 to 2035 forecast period, the industry's labour force may be expected to contract by as many as 250 workers by 2035. Adding to this hiring requirement is the expected retirement of 760 workers, or approximately 19% of the 2025 labour force, creating a total hiring requirement of 510 workers.

This requirement is expected to be more than offset by the recruitment of 720 first-time new entrants under the age of 30 from the local population, and may create a surplus of 210 workers by 2035. As the province's non-residential sector is also projected to experience a labour force surplus over the forecast period, there is a risk that displaced workers may exit the province's construction sector or pursue employment in other provinces.

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 skill sets, and the recruitment of immigrants to Canada with skilled trades training and/or construction experience.

Figure 19 provides a summary of the estimated changes in the residential construction labour force across the forecast period.

FIGURE 19

CHANGES IN THE RESIDENTIAL LABOUR FORCE
PRINCE EDWARD ISLAND

4,050
LABOUR FORCE
2025

-250
WORKERS

3,800
LABOUR FORCE
2035

HIRING NEEDS

-250 WORKERS

+760 RETIREMENTS

OFFSET BY

-720 NEW ENTRANTS

-210
NET MOBILITY*

* 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.

Over the past decade, new apprentice registrations in the largest construction trade programs in Prince Edward Island have more than doubled, keeping pace with employment growth over the same period.

In 2024, new registrations rose to a record level, driven by increased intakes in the carpenter, construction electrician, and refrigeration and air-conditioning mechanic programs. New apprenticeship registrations are expected to remain above historical averages, supported by the federal government's recently announced investment to recruit and train skilled trades workers under the Team Canada Strong initiative. In addition to supporting increased intake, the funding places a strong emphasis on improving completion outcomes through enhanced incentives and employer supports.[16]

Completions reached a record level in 2024, and are expected to continue to rise over the coming years in line with the growing number of new registrations. See Figure 20.

FIGURE 20

NEW APPRENTICESHIP REGISTRATIONS, COMPLETIONS, AND TRADE EMPLOYMENT PRINCE EDWARD ISLAND

SOURCE: BuildForce Canada

16 Prime Minister Carney announces Team Canada Strong – a nationwide plan to recruit up to 100,000 skilled trades workers

Table 9 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 the current pace of new registrations, the number of newly certified journeypersons is projected to keep pace with demand requirements over the outlook period. However, any significant increase in construction activity or decline in the program completion rate may lead to increased recruitment challenges for select trades.

TABLE 9

ESTIMATED CONSTRUCTION CERTIFICATION DEMAND AND PROJECTED TARGET OF NEW ENTRANTS BY TRADE **PRINCE EDWARD ISLAND***

TRADE	**TOTAL CERTIFICATION DEMAND** CONSTRUCTION	**TARGET NEW REGISTRANTS** CONSTRUCTION	**APPRENTICE CERTIFICATION SUPPLY RISK** ALL INDUSTRIES
CARPENTER	88	268	■ (green)
CONSTRUCTION ELECTRICIAN	87	360	■ (green)
INDUSTRIAL ELECTRICIAN	20	59	■ (green)
PLUMBER	48	218	■ (green)
REFRIGERATION AND AIR CONDITIONING MECHANIC	25	70	■ (green)

- ■ (red) CERTIFICATIONS REQUIRED EXCEED PROJECTED COMPLETIONS
- ■ (yellow) CERTIFICATIONS REQUIRED IN LINE WITH PROJECTED COMPLETIONS
- ■ (green) PROJECTED COMPLETIONS EXCEED CERTIFICATIONS REQUIRED

* This analysis does not account for existing labour market imbalances at the 2025 starting point.

SOURCE: BuildForce Canada

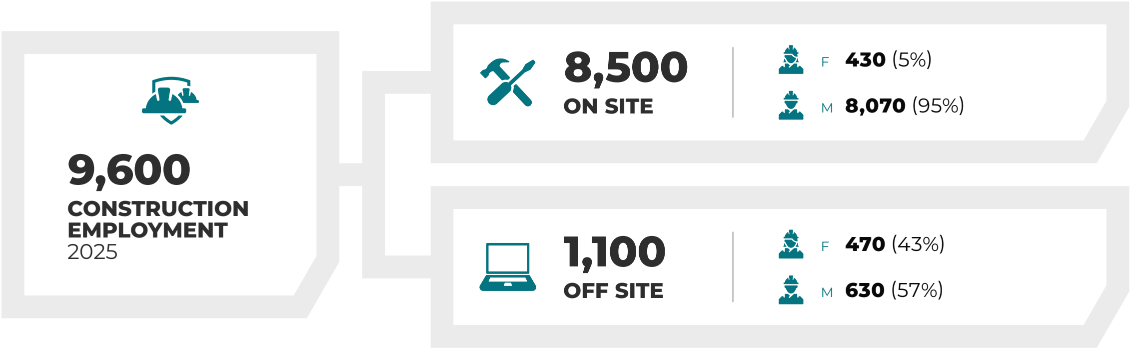
UNDER-REPRESENTED GROUPS OF WORKERS

Canada's labour force is being reshaped by long-term demographic trends, including declining fertility rates and smaller family sizes over the past several decades. As a result, the pool of younger workers entering the workforce has been shrinking. This pressure will increase as the baby boomer generation continues to retire, intensifying competition for new talent. To respond to these challenges, the construction industry must broaden its recruitment efforts. Strengthening the workforce will require greater engagement with traditionally under-represented groups, including women, Indigenous Peoples, and newcomers to Canada.

WOMEN

In 2025, there were approximately 900 women employed in Prince Edward Island's construction industry, of which 48% worked on site, directly on construction projects, while the remaining 52% worked off site, primarily in administrative and management-related occupations. Of the 8,500 tradespeople employed in the industry, women made up 5% (see Figure 21).

FIGURE 21
DETAILED CONSTRUCTION EMPLOYMENT BY GENDER
PRINCE EDWARD ISLAND

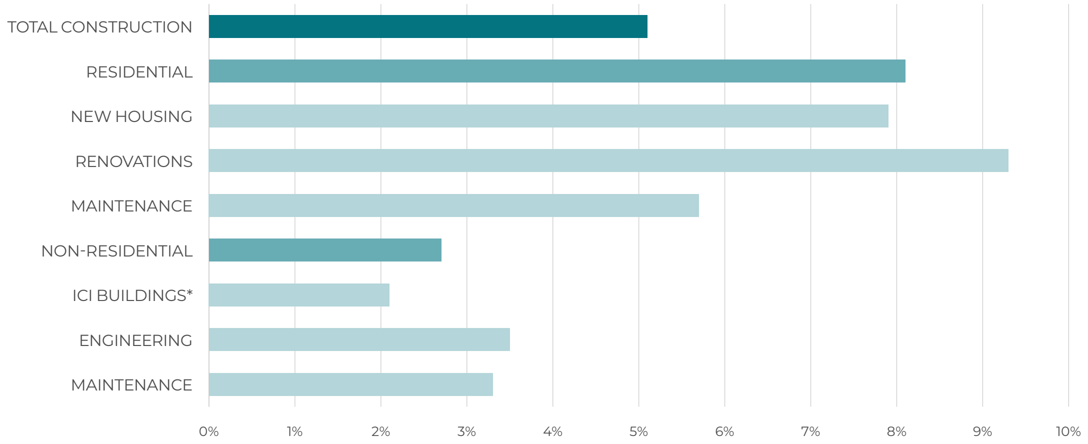


SOURCE: BuildForce Canada calculations based on Statistics Canada's Labour Force Survey and 2021 Census of the Population

The estimated 430 on-site tradeswomen in Prince Edward Island are represented across all sectors of construction, with a higher share working in residential (8.1%) than non-residential (2.7%) construction. Across sectors, residential renovations have the highest representation of women, accounting for 9.3% of the workforce (see Figure 22). The top five trades and occupations in which women tend to be employed are carpenters (39% of all tradeswomen), trade helpers and labourers (35%), contractors and supervisors (12%), painters and decorators (8%), and home and building renovation managers (5%).

FIGURE 22

WOMEN'S SHARE OF TOTAL DIRECT TRADES AND OCCUPATIONS (ON SITE) **PRINCE EDWARD ISLAND**



* industrial, commercial, institutional

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

INDIGENOUS PEOPLES

The Indigenous population is the fastest growing population in Canada and therefore presents recruitment opportunities for Prince Edward Island's construction industry. In 2021, Indigenous Peoples accounted for almost 3% of the province's construction labour force, which is more than double the share observed in 2016.[17] This share is higher than the share of Indigenous Peoples represented in the overall labour force (see Table 10).[18] As the Indigenous population continues to expand, recruitment and retention efforts will need to be dedicated to increasing the industry's share of the population into the labour force.

17 For small provinces, Census data is the most reliable source for labour market information on Indigenous Peoples.

18 According to the Labour Force Survey, in 2025, Indigenous Peoples comprised 1.4% of the provincial labour force. Data for the construction workforce are not available due to suppression.

TABLE 10

REPRESENTATION OF INDIGENOUS POPULATION IN PROVINCIAL CONSTRUCTION WORKFORCE
PRINCE EDWARD ISLAND

INDUSTRY	INDIGENOUS	NON-INDIGENOUS	TOTAL	INDIGENOUS SHARE OF TOTAL WORKFORCE, %
CONSTRUCTION				
2016	60	5,385	5,445	1.1%
2021	175	6,525	6,690	2.6%
ALL INDUSTRIES				
2016	1,340	75,310	76,650	1.7%
2021	1,680	80,270	81,945	2.1%

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

NEWCOMERS

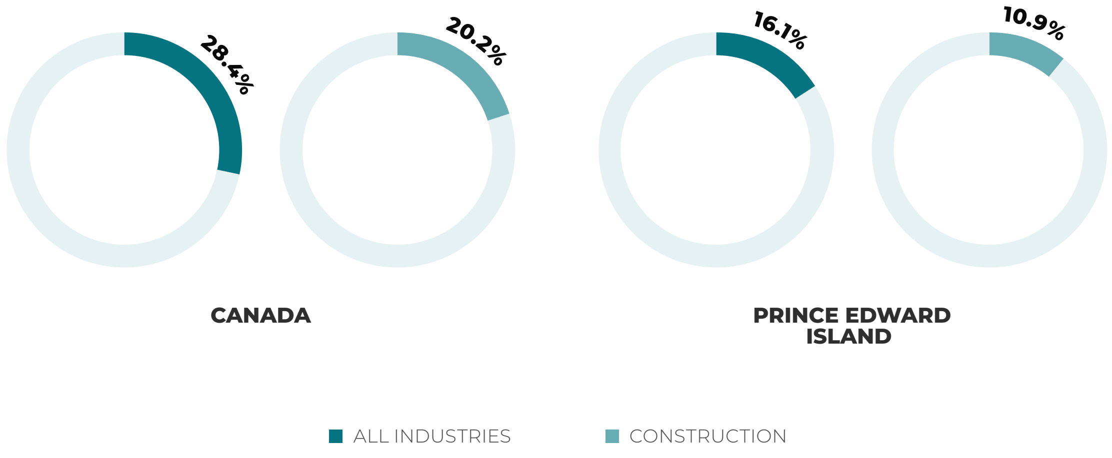
Prince Edward Island's construction industry may also leverage newcomers (new immigrants) to Canada over the outlook period to meet labour requirements. Due to the declining natural rate of population growth, immigrants are the primary source of labour force growth in the province.

Immigrants have been playing an increasingly important role in replenishing the workforce, with the share of immigrants in the workforce more than doubling in the past decade, increasing from 5.4% in 2016 to 16.1% in 2025. While the province has been successful in attracting and integrating immigrants into the labour force, the province's share of immigrants is notably below the share in Canada overall (see Figure 23). The share of immigrants in the construction labour force was 10.9% in 2025, compared to 16.1% across all industries.

Based on historical settlement patterns (and factoring in revised immigration targets), Prince Edward Island is expected to welcome more than 28,400 new immigrants between 2026 and 2035. 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 23

SHARE (%) OF NEWCOMERS IN THE CONSTRUCTION LABOUR FORCE (2025) **PRINCE EDWARD ISLAND**



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

PROVINCIAL INSIGHTS

NOVA SCOTIA

ECONOMIC OUTLOOK

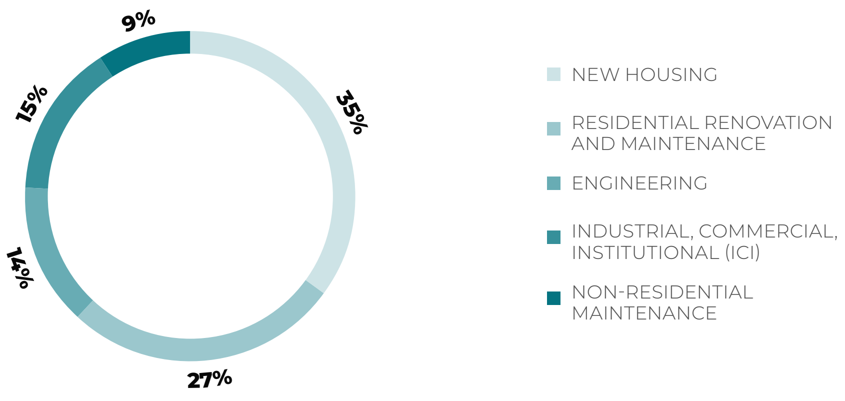
In Nova Scotia, GDP growth rates are expected to average between 1.5% and 2% over the next few years. Output is being supported by increasing public sector investment in the form of major healthcare and education projects provincially and increased investments by the Department of National Defence federally.

Business investment, meanwhile, is expected to be elevated in 2026 driven by ongoing wind-power investments, but may experience some weakness in later years, particularly as changes to the federal immigration policy reduce international migration, slow population growth, and soften domestic demand.

Slowing population growth in the province could also moderate activity in the residential construction sector. After reaching record levels in 2025, housing starts are expected to recede from an historic peak over the first half of the forecast period, weighing on domestic GDP growth into the late 2020s. Later years see some of this down cycle offset by growing business investment.

Overall GDP growth in the province is expected to soften through the medium term, and average approximately 1.5% annually between 2029 and 2031. The longer-term outlook sees a new positive cycle emerge as the residential sector returns to growth.

DISTRIBUTION OF CONSTRUCTION EMPLOYMENT IN 2025 **NOVA SCOTIA**



10-YEAR WORKFORCE OUTLOOK FOR **NOVA SCOTIA**

8,200
RETIREMENTS

+7,200
NEW ENTRANTS

-137
EMPLOYMENT CHANGE
(-0.4%)

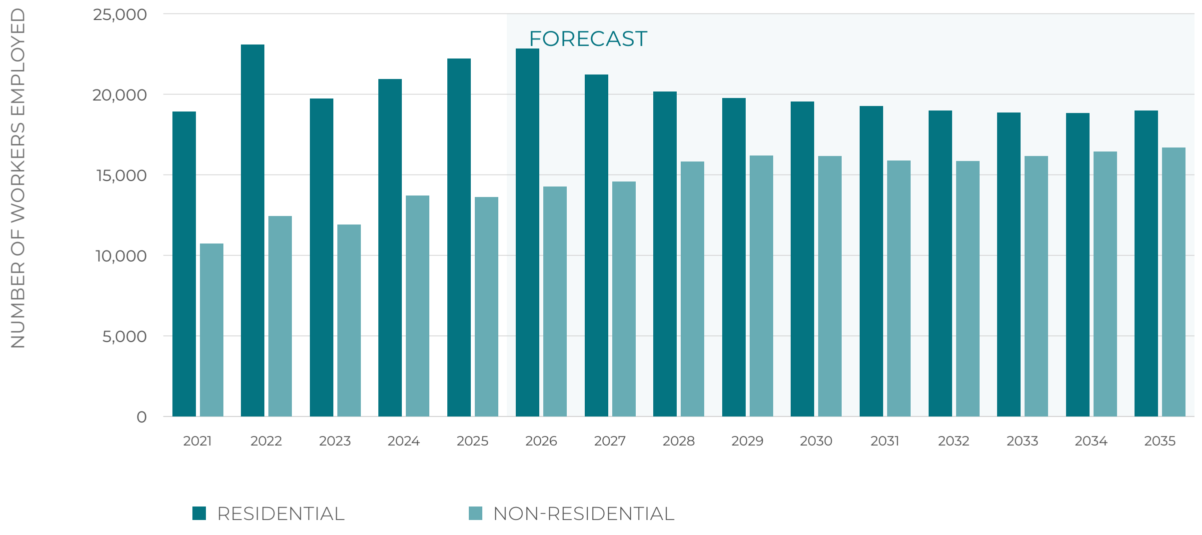
6.3%
AVERAGE UNEMPLOYMENT RATE

POPULATION GROWTH AND DEMOGRAPHICS

Population growth in Nova Scotia began to slow in 2025 in line with the federal government's plan to reduce immigration and decrease the number of non-permanent residents coming into the country. Prior to this, the province had seen a surge in international migration. Net interprovincial migration, which was elevated between 2021 and 2024, also saw a sharp pullback.

Net migration is expected to slow into 2026 and lead to a modest reduction in Nova Scotia's population as the federal government works toward its goal of lowering the non-permanent resident stock in this country to 5% of the overall population by late 2027. Later years see population growth levels return to around 1% annually. (See Figure 24.)

CONSTRUCTION EMPLOYMENT GROWTH OUTLOOK **NOVA SCOTIA**

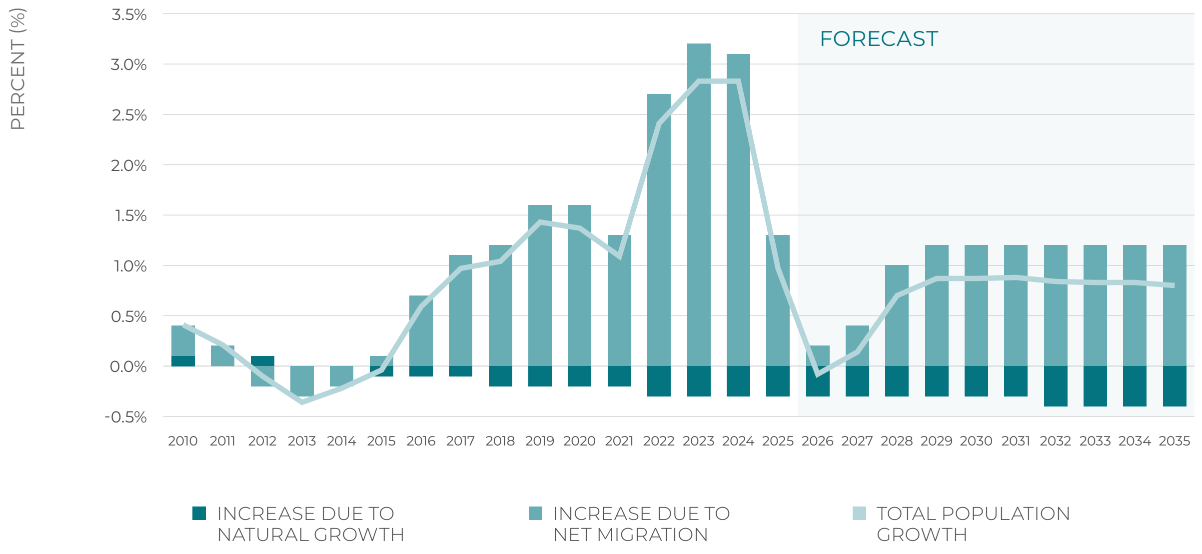


SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

Nova Scotia counts one of the older provincial populations in Canada. Its natural rate of population growth[19] has been negative since 2013, and has continued to trend downward over the past decade. Migration is therefore the only driver of population growth in the province. The recent boom in international migration to the province is expected to lift Nova Scotia's fertility rate into the late 2020s, but this trend is unlikely to be sustained beyond 2030.

FIGURE 24

SOURCES OF POPULATION GROWTH (%) **NOVA SCOTIA**



SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

19 The 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.

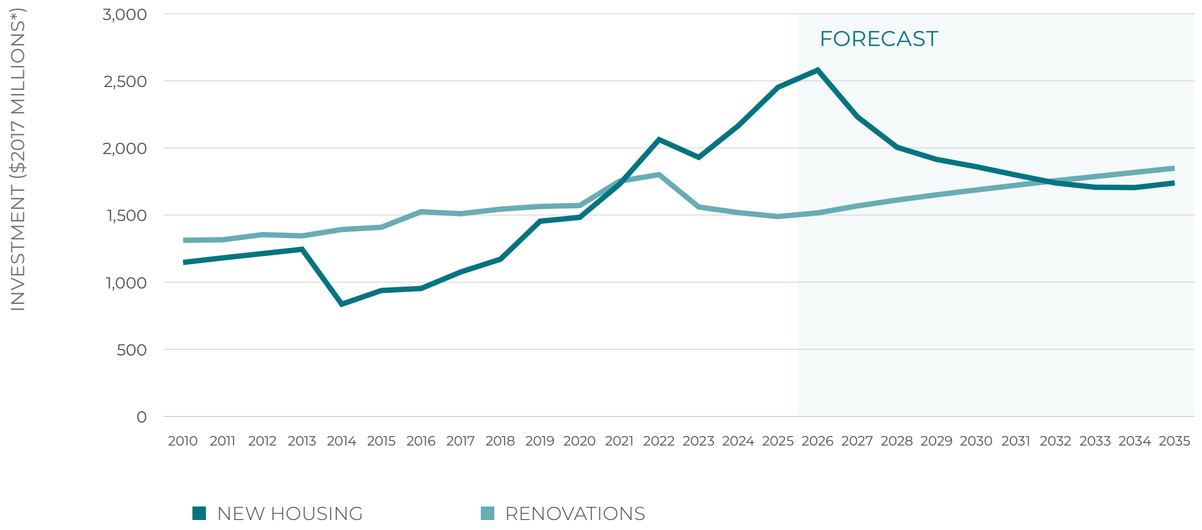
RESIDENTIAL CONSTRUCTION INVESTMENT

Residential construction investment levels enter the forecast period on an upward trend. The recent surge in international migration helped create a peak of nearly 10,000 housing starts in 2025 – with approximately 70% of those being apartment buildings. In terms of investment, that peak is expected to carry through into 2026 as construction of the latter units will likely carry over given the longer construction periods often required for high-rise and apartment-unit types. (See Figure 25.)

New-housing investment is projected to peak in 2026 and then recede into 2033 as demand for multi-unit dwellings – and apartment-type units in particular – slows across most of the forecast period. Nova Scotia's multi-unit housing market has been supported by low rental vacancy rates that in turn have been driven by high levels of in-migration and population growth. As population growth slows, demand for these types of units is expected to contract from recent peaks, but remain nonetheless above historical norms – supported in part by public-sector initiatives to drive the construction of more rental housing units and by a return to growth in international migration.

FIGURE 25

RESIDENTIAL CONSTRUCTION INVESTMENT **NOVA SCOTIA**



* $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 (2026–2035)

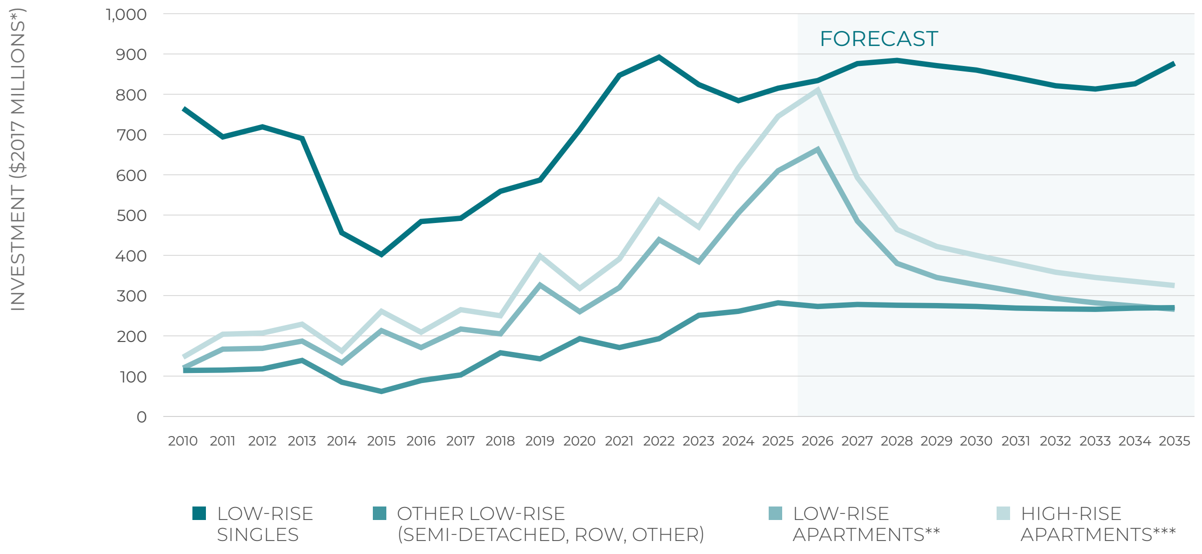
Housing starts for single-detached[20] units, meanwhile, are expected to trend upward across the short-term outlook. The recent easing of interest rates, combined with anticipated growth in wages and incomes, has encouraged consumers to release their pent-up demand into the market.

Starts for single-detached homes are expected to average around 2,200 units annually across the forecast period, supported in the medium and long terms by renewed population growth, and as recent arrivals to the province achieve the wealth and wages to afford the cost of these comparatively higher-priced housing units. (See Figure 26.)

Investments in residential renovations, meanwhile, slowed from a peak in 2022 and into 2025 as rising interest rates deterred consumers from entering the market. As real incomes are projected to rise and borrowing costs stabilize, renovation investments are expected to increase strongly across the forecast period. This trend is spurred in part by provincial incentives for owners to adopt energy upgrades and to repair housing assets. By 2032, investments in residential renovations are expected to rise beyond investments in new-housing construction in the province.

FIGURE 26

NEW HOUSING CONSTRUCTION INVESTMENT **NOVA SCOTIA**



* $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.

** Low-rise apartments are buildings with four storeys or fewer.

*** High-rise apartments are buildings with five or more storeys.

SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

20 Single-detached (single) refers to a building containing only one dwelling unit that is completely separated on all sides from any other dwelling or structure.

RESIDENTIAL CONSTRUCTION EMPLOYMENT

Residential construction employment levels enter the forecast period on an upward trend, due in part to growth in demand for new housing. Employment is expected to reach a forecast peak of nearly 23,000 workers in 2026 before generally trending downward into the early 2030s as demand for new-housing construction subsides.

Of note over this period is the change in composition of residential employment. Where employment in the construction of new housing has been the principal driver of residential employment in the province, employment relating to residential renovations is expected to exceed new-housing employment by 2033 and through to the end of the forecast period.

By structure type, the construction of low-rise single-detached homes is expected to account for the greatest number of workers in the province's new-housing sector to the end of the forecast period. Meanwhile, employment relating to the construction of new high- and low-rise apartments is expected to recede across the forecast period post-2026 as activity slows relative to recent highs.

Residential construction employment in Nova Scotia is projected to rise by 3% in 2026 before slowing through the remainder of the forecast period. Compared to 2025 highs, employment is projected to contract by 15% with gains in renovations (+12%) and residential maintenance (+14%) insufficient to fully offset the anticipated declines in new-housing construction (-36%).

Table 11 summarizes the estimated percent change in residential employment by sector across three periods: the short term (2026–2028), the medium term (2029–2031), and the long term (2032–2035).

TABLE 11

CHANGES IN RESIDENTIAL EMPLOYMENT BY SECTOR **NOVA SCOTIA**

SECTOR	% CHANGE **2026–2028**	% CHANGE **2029–2031**	% CHANGE **2032–2035**
RESIDENTIAL	-9%	-4%	-1%
NEW HOUSING	-21%	-13%	-7%
RENOVATIONS	5%	4%	3%
RESIDENTIAL MAINTENANCE	7%	4%	3%

Note that 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.

SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

RANKINGS, RISKS, AND MOBILITY: TRADES AND OCCUPATIONS

The BuildForce LMI system tracks supply and accounts for the change in the available labour force, including retirements, new entrants[21], and net mobility[22]. Based on currently known demands, industry recruitment and retirement estimates, the following ranks apply to the 19 covered trades in the province.

Record levels of activity in 2025 and 2026 translate into tight labour market conditions for most trades and occupations through this period. Conditions weaken briefly in 2028 as housing starts and investment recede from recent peak levels of activity. Markets return to balance across the remainder of the forecast period as growth in renovation and maintenance work add to labour demands. See Table 12.

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.

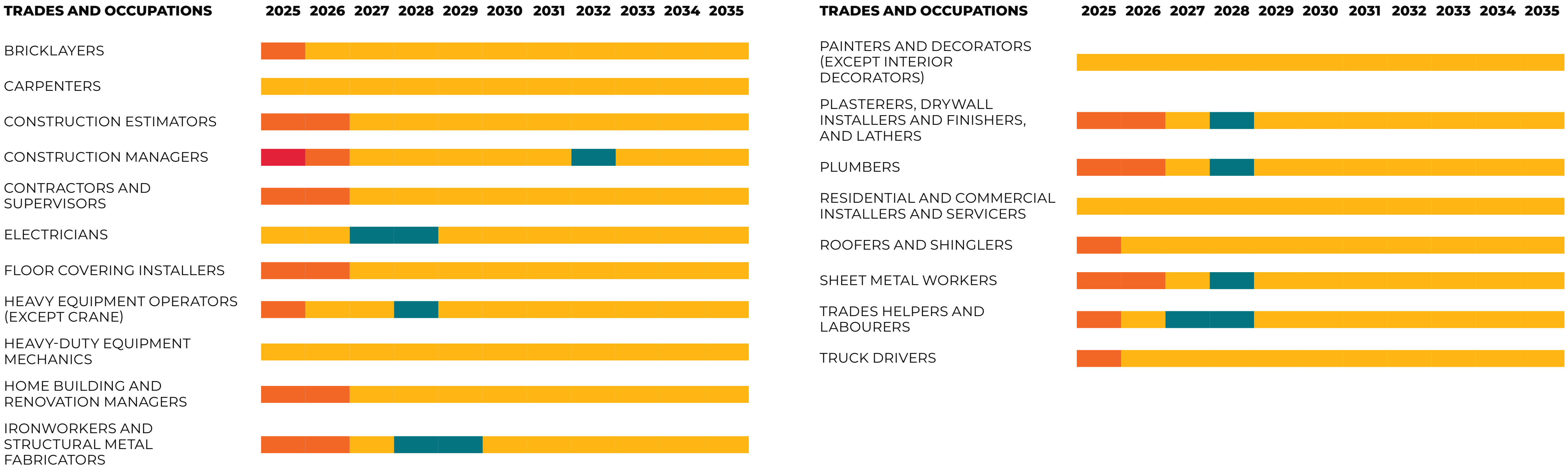
---

21 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.

22 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.

TABLE 12

RESIDENTIAL MARKET RANKINGS **NOVA SCOTIA**



SOURCE: BuildForce Canada

BUILDING A SUSTAINABLE LABOUR FORCE

THE AVAILABLE RESIDENTIAL LABOUR FORCE

With residential construction activity in Nova Scotia expected to contract over the 2026 to 2035 forecast period, demand pressures may be such that the industry's labour force could contract by 3,200 workers. Adding to this hiring requirement is the projected retirement of 5,000 workers, or 21% of the 2025 labour force, leaving the sector with a total hiring requirement of 1,800 workers.

These hiring requirements are expected to be more than offset by an estimated 3,900 first-time new entrants under the age of 30 from the local population, leaving the provincial residential labour force with a projected surplus of 2,100 workers. While some of these workers are likely to pursue work in the province's non-residential construction sector, there is a risk that they may exit the construction sector altogether or pursue employment in other provinces.

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 skill sets, and the recruitment of immigrants to Canada with skilled trades training and/or construction experience.

Figure 27 provides a summary of the estimated changes in the residential construction labour force across the forecast period.

FIGURE 27

CHANGES IN THE RESIDENTIAL LABOUR FORCE **NOVA SCOTIA**

23,900
LABOUR FORCE
2025

-3,200
WORKERS

20,700
LABOUR FORCE
2035

HIRING NEEDS

-3,200
WORKERS

+5,000
RETIREMENTS

OFFSET BY

-3,900
NEW ENTRANTS

-2,100
NET MOBILITY*

* 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.

Training programs in Nova Scotia have seen significant expansion in recent years. In 2023, new registrations in the province's largest construction trades reached a record high, increasing by more than 70% from the previous year. While there was a slight softening in 2024, new registrations have outpaced employment growth and remain significantly higher than the average annual intake over the last decade. Despite this moderation, registrations in the four largest trade programs – construction electrician, carpenter, plumber, and refrigeration and air conditioning mechanic – continued to rise to record levels.

New registrations are projected to moderate slightly in the near-term, returning to levels more closely aligned with historical intake relative to industry employment. However, new apprenticeship registrations are expected to remain above historical averages, supported by the federal government's recently announced investment to recruit and train skilled trades workers under the Team Canada Strong initiative. In addition to supporting increased intake, the funding places a strong emphasis on improving completion outcomes through enhanced incentives and employer supports.[23]

Completions increased in 2023, although at a much slower pace (+5%). The influx of apprentices in 2023 will lead to a significant rise in certified workers over the next four to six years, provided the province has sufficient capacity to train and retain these apprentices. There has been a strong focus on retention of apprentices in the province, which aims to increase the retention rate of apprentices from 43% to 60% by 2028. See Figure 28.

FIGURE 28

NEW APPRENTICESHIP REGISTRATIONS, COMPLETIONS, AND TRADE EMPLOYMENT NOVA SCOTIA

SOURCE: BuildForce Canada

23 Prime Minister Carney announces Team Canada Strong – a nationwide plan to recruit up to 100,000 skilled trades workers

Table 13 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 heavy-duty equipment technician, carpenter, and bricklayer. While several other trades currently appear balanced, even modest economic shifts could lead to supply challenges.

TABLE 13

ESTIMATED CONSTRUCTION CERTIFICATION DEMAND AND PROJECTED TARGET OF NEW ENTRANTS BY TRADE **NOVA SCOTIA***

TRADE	**TOTAL CERTIFICATION DEMAND** CONSTRUCTION	**TARGET NEW REGISTRANTS** CONSTRUCTION	**APPRENTICE CERTIFICATION SUPPLY RISK** ALL INDUSTRIES
HEAVY-DUTY EQUIPMENT TECHNICIAN	64	36	
CARPENTER	693	503	
BRICKLAYER	86	65	
WELDER	108	92	
POWERLINE TECHNICIAN	100	90	
STEAMFITTER/PIPEFITTER	128	115	
INDUSTRIAL MECHANIC (MILLWRIGHT)	29	28	
SPRINKLER FITTER	32	44	
CONSTRUCTION ELECTRICIAN	853	1,175	
INDUSTRIAL ELECTRICIAN	123	183	
REFRIGERATION AND AIR CONDITIONING MECHANIC	250	465	
PLUMBER	336	659	
SHEET METAL WORKER	71	190	
INSULATOR (HEAT AND FROST)	29	95	

- CERTIFICATIONS REQUIRED EXCEED PROJECTED COMPLETIONS
- CERTIFICATIONS REQUIRED IN LINE WITH PROJECTED COMPLETIONS
- PROJECTED COMPLETIONS EXCEED CERTIFICATIONS REQUIRED

* This analysis does not account for existing labour market imbalances at the 2025 starting point.

SOURCE: BuildForce Canada

UNDER-REPRESENTED GROUPS OF WORKERS

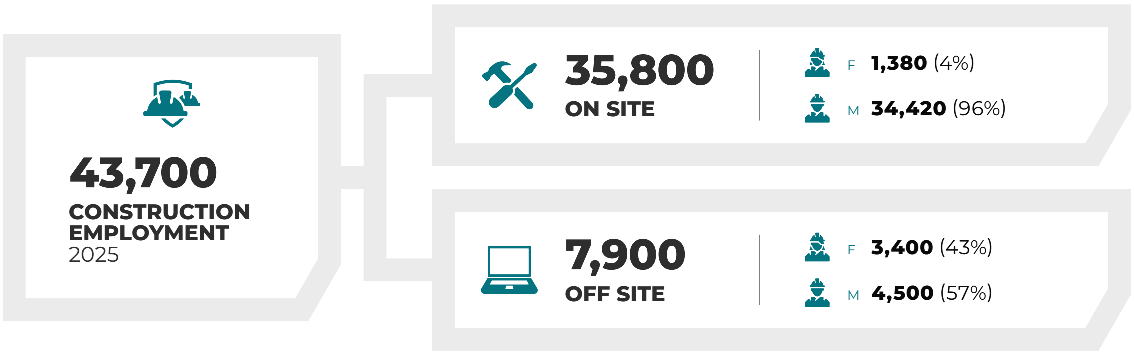
Canada's labour force is being reshaped by long-term demographic trends, including declining fertility rates and smaller family sizes over the past several decades. As a result, the pool of younger workers entering the workforce has been shrinking. This pressure will increase as the baby boomer generation continues to retire, intensifying competition for new talent. To respond to these challenges, the construction industry must broaden its recruitment efforts. Strengthening the workforce will require greater engagement with traditionally under-represented groups, including women, Indigenous Peoples, and newcomers to Canada.

WOMEN

In 2025, there were approximately 4,780 women employed in Nova Scotia's construction industry, of which 29% worked on site, directly on construction projects, while the remaining 71% worked off site, primarily in administrative and management-related occupations. Of the 35,800 on-site tradespeople employed in the industry, women made up only 4%. (See Figure 29).

FIGURE 29

DETAILED CONSTRUCTION EMPLOYMENT BY GENDER **NOVA SCOTIA**

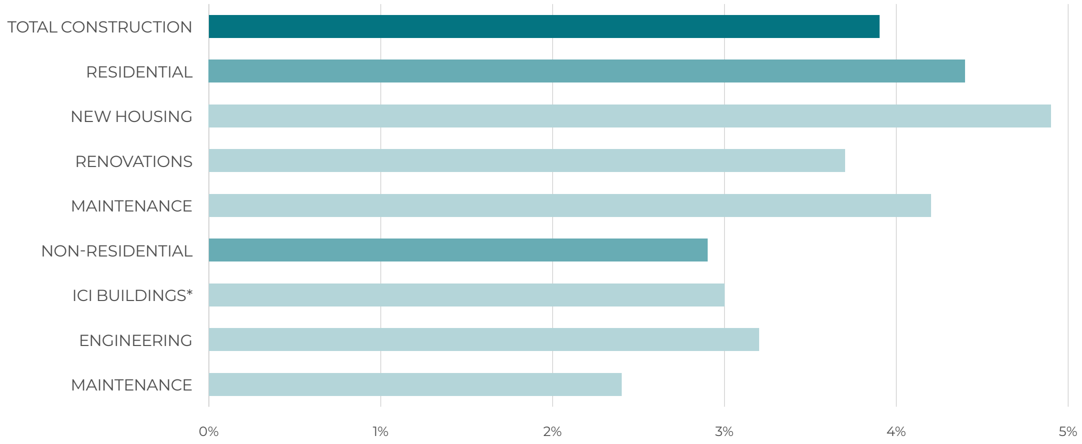


SOURCE: BuildForce Canada calculations based on Statistics Canada's Labour Force Survey and 2021 Census of the Population

The estimated 1,380 on-site tradeswomen in Nova Scotia are represented across all sectors of construction, but women account for a higher share of total tradespeople in residential construction (4.4%) versus non-residential (2.9%). Across sectors, new housing has the highest representation of women, accounting for 4.9% of the workforce. (See Figure 30.) The top trades and occupations in which women tend to be employed are trade helpers and labourers (25% of all tradeswomen), construction managers (19%), contractors and supervisors (12%), carpenters (10%), and construction estimators (6%).

FIGURE 30

WOMEN'S SHARE OF TOTAL DIRECT TRADES AND OCCUPATIONS (ON SITE) **NOVA SCOTIA**



* industrial, commercial, institutional

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

INDIGENOUS PEOPLES

Indigenous Peoples are an important part of Nova Scotia's workforce and construction labour supply. In 2025, Indigenous Peoples made up 4.2% of the provincial workforce and 4.2% of the construction workforce. Compared with 2016, Indigenous representation edged down slightly from 4.4% (all industries) and 4.5% (construction), suggesting a broadly stable, but not increasing, share over the period. (See Table 14).

TABLE 14

REPRESENTATION OF INDIGENOUS POPULATION IN PROVINCIAL CONSTRUCTION WORKFORCE **NOVA SCOTIA**

INDUSTRY	**INDIGENOUS**	**NON-INDIGENOUS**	**TOTAL**	**INDIGENOUS SHARE OF TOTAL WORKFORCE,** %
CONSTRUCTION				
2016	1,800	37,800	39,600	4.6%
2025	1,900	43,300	45,300	4.2%
ALL INDUSTRIES				
2016	21,100	461,000	482,100	4.4%
2025	23,400	536,000	559,400	4.2%

SOURCE: Statistics Canada, Labour Force Survey, Custom Data Request 2025

NEWCOMERS

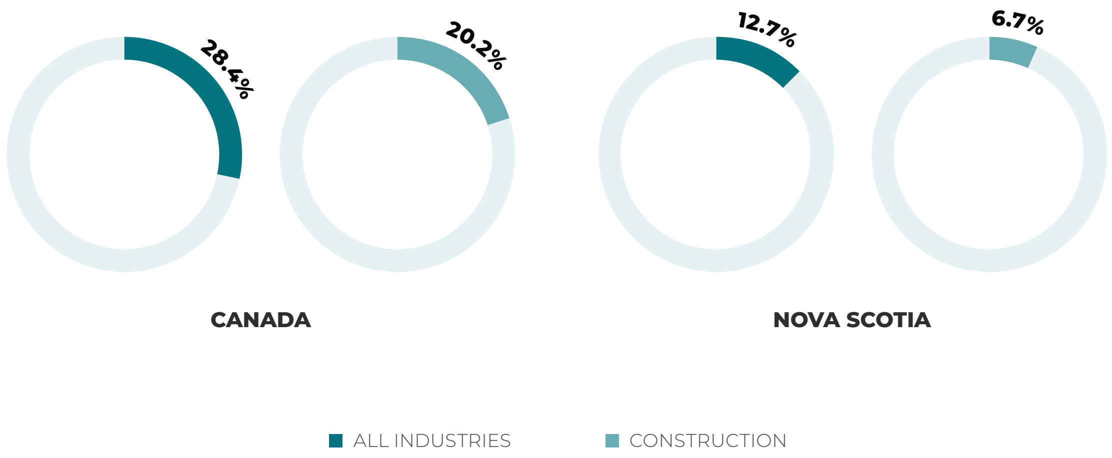
Nova Scotia's construction industry must also leverage newcomers (new immigrants) to Canada to meet labour requirements. Due to the declining natural rate of population growth, immigrants are the primary source of labour force growth in the province.

In 2025, immigrants represented 12.7% of the province's workforce, well below the national average, despite strong growth since 2016. In construction, immigrants made up 6.7%, also well below the national construction share (20.2%), indicating continued under-representation in the sector. (See Figure 31.)

Based on historical settlement trends (and factoring in revised immigration targets), the province is expected to welcome more than 87,500 new immigrants between 2026 and 2035. 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 continues to recruit its share of newcomers into the labour force.

FIGURE 31

SHARE (%) OF NEWCOMERS IN THE CONSTRUCTION LABOUR FORCE (2025) **NOVA SCOTIA**



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

PROVINCIAL INSIGHTS

NEW BRUNSWICK

ECONOMIC OUTLOOK

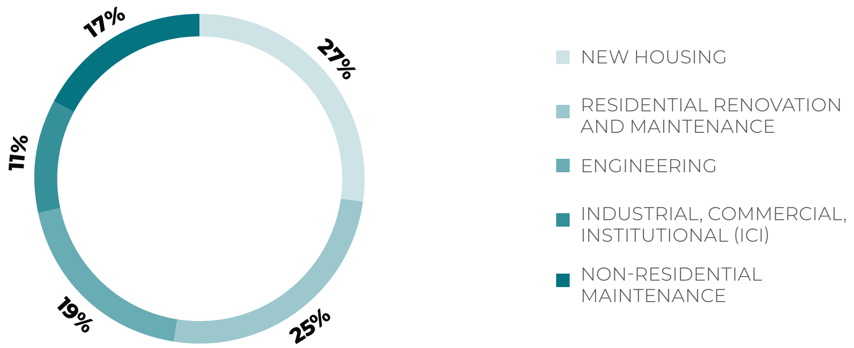
New Brunswick's economic growth was significantly affected by the tariff dispute between Canada and the United States in 2025. The province is a net exporter of softwood lumber, with the United States accounting for approximately 90% of its export market. Tariffs and countervailing duties on these goods caused a notable contraction in exports in 2025, and present a further risk to economic growth in 2026.

Slowing population growth is expected to have mixed effects on the economy in the near future. While it is expected to weaken domestic demand and depress residential construction activity, the resulting labour force contractions are expected to elevate wages and incomes, and should position consumer spending as a leading contributor to growth. Also sustaining growth across the forecast period is a record capital budget presented by the provincial government, which will see a significant rise in investments in new schools, social housing developments, and infrastructure.

Meanwhile, business investment is projected to continue to grow, despite uncertainties created by tariffs. Industrial investments are being supported by large investments in wood products, while NB Power's capital plan is set to rise sharply, and the commercial sector is responding to several years of rapid population growth.

Overall, GDP growth is expected to average 1.2% annually across the forecast period.

DISTRIBUTION OF CONSTRUCTION EMPLOYMENT IN 2025 **NEW BRUNSWICK**



10-YEAR WORKFORCE OUTLOOK FOR **NEW BRUNSWICK**

6,600
RETIREMENTS

+6,400
NEW ENTRANTS

-1,849
EMPLOYMENT CHANGE
(-6.3%)

11.5%
AVERAGE UNEMPLOYMENT RATE

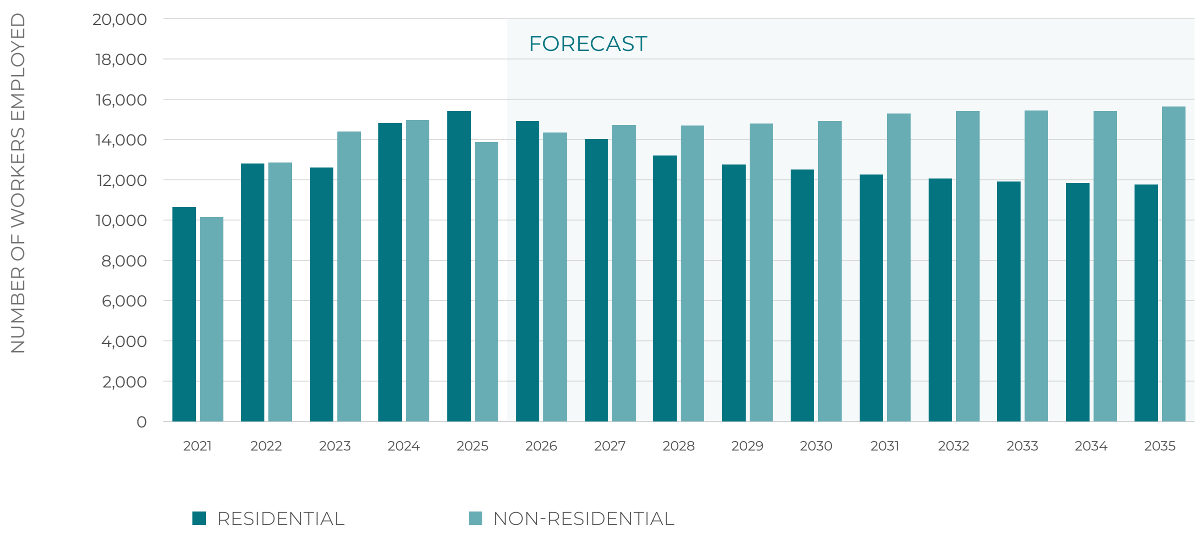
POPULATION GROWTH AND DEMOGRAPHICS

After population growth averaged 2.8% per year from 2022 to 2024, it began to slow in 2025 as the federal government enacted its plan to reduce immigration and decrease the number of non-permanent residents to 5% of the overall population by 2027.

The outlook calls for population growth to slow substantially in 2026 as a result of this policy. From 2029 through to the end of the forecast period, the province is projected to welcome more than 9,000 international migrants annually – significantly above the number it received prior to the COVID-19 pandemic.

Immigration is New Brunswick's principal source of population growth, as interprovincial migration levels have receded in recent years due to tightening unemployment rates elsewhere in Canada. The province is not anticipated to experience any major influxes of interprovincial migrants across the forecast period. (See Figure 32.)

CONSTRUCTION EMPLOYMENT GROWTH OUTLOOK **NEW BRUNSWICK**



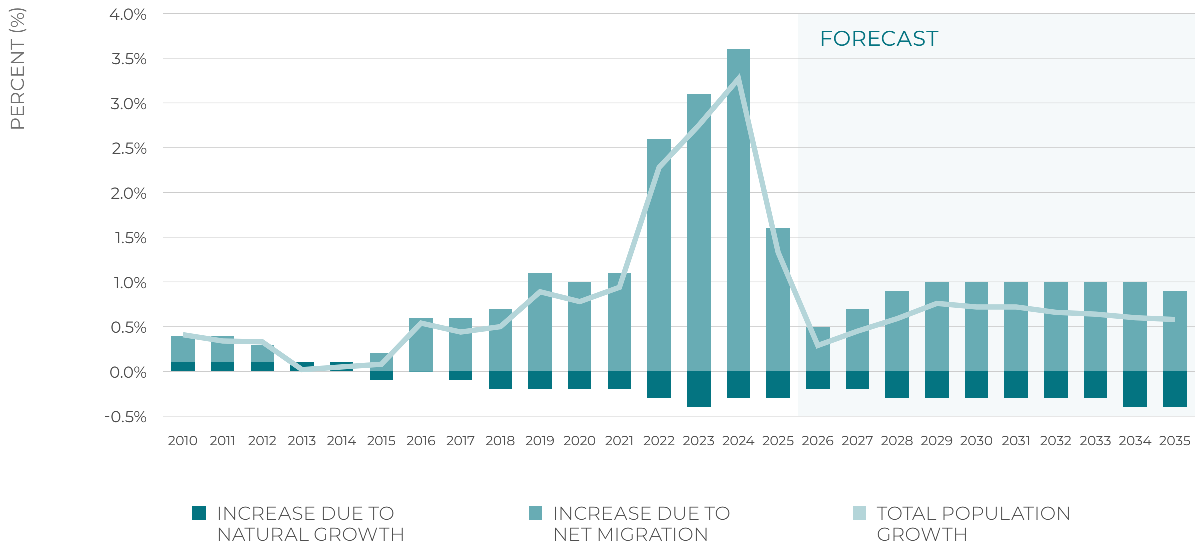
SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

Moreover, New Brunswick is one of Canada's older populations. Its natural rate of population growth[24] has been negative since 2015 and has trended lower since. International migration is therefore needed to bolster population growth and expand the labour force. As a result of the recent influx of migration, fertility rates are expected to rise in the short term, and should help to offset some of this negative trend.

New Brunswick's population is anticipated to grow by 0.3% in 2026 and average 0.4% in the short-term (i.e., between 2026 and 2028). Population growth is projected to rise to 2029 and stabilize near 0.6% through to 2035.

FIGURE 32

SOURCES OF POPULATION GROWTH (%) **NEW BRUNSWICK**



SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

24 The 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.

RESIDENTIAL CONSTRUCTION INVESTMENT

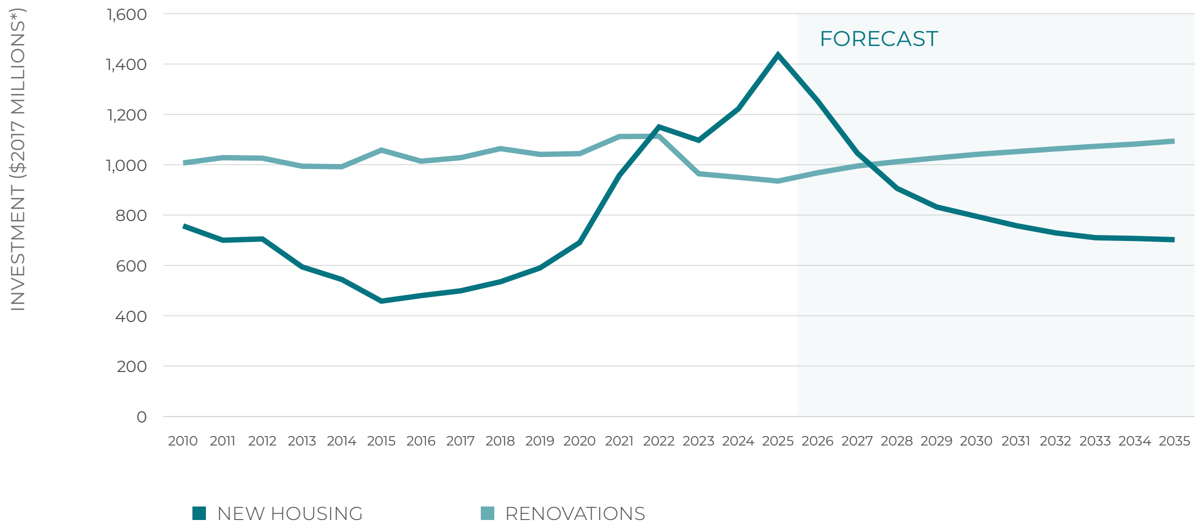
The surges in international migration seen in New Brunswick between 2022 and 2024 led to a recent peak of nearly 7,600 housing starts in 2025. As the federal government's changes to immigration rules come into effect, start levels are expected to recede in 2026 and generally trend lower across the remainder of the decade. Totals are expected to contract to 4,000 units by 2030 and remain below that level through 2035. This figure is slightly below levels experienced through the 2000s – and above those seen in the 2010s. (See Figure 33.)

Starts for multi-unit dwellings are expected to be most affected over this period. These comparatively lower-priced units, and apartment-type units in particular, are typically the first-choice housing options for newcomers, and are therefore expected to be most affected by the reductions in new permanent and non-permanent residents. Demand for these unit types may also be affected by easing of the province's rental vacancy rate, which has doubled from 1.5% in 2023 to 3% in 2025.

Starts for these unit types are expected to recede to about 2,000 units by 2035, supported in part by the province's suspension of the provincial sales tax on new multi-unit housing developments. Demand is expected to be greatest for low-rise apartments in particular – which have surpassed single-detached construction in recent years – through to the middle years of

FIGURE 33

RESIDENTIAL CONSTRUCTION INVESTMENT **NEW BRUNSWICK**



* $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 (2026–2035)

the forecast. Investment levels slow notably thereafter through to 2035. Investment in high-rise apartments is also expected to decline over the forecast period.

Demand for single-detached[25] housing in New Brunswick, measured in terms of housing starts, rose to a peak of more than 1,700 units in 2025. Starts for this unit type are projected to contract moderately into 2028, and remain close to 1,300 units annually through the medium-term forecast years. Starts are expected to rise gradually to the end of the forecast period as wages and incomes rise, and as international migrants in their prime working ages achieve enough wealth to afford these comparatively higher-priced unit types.

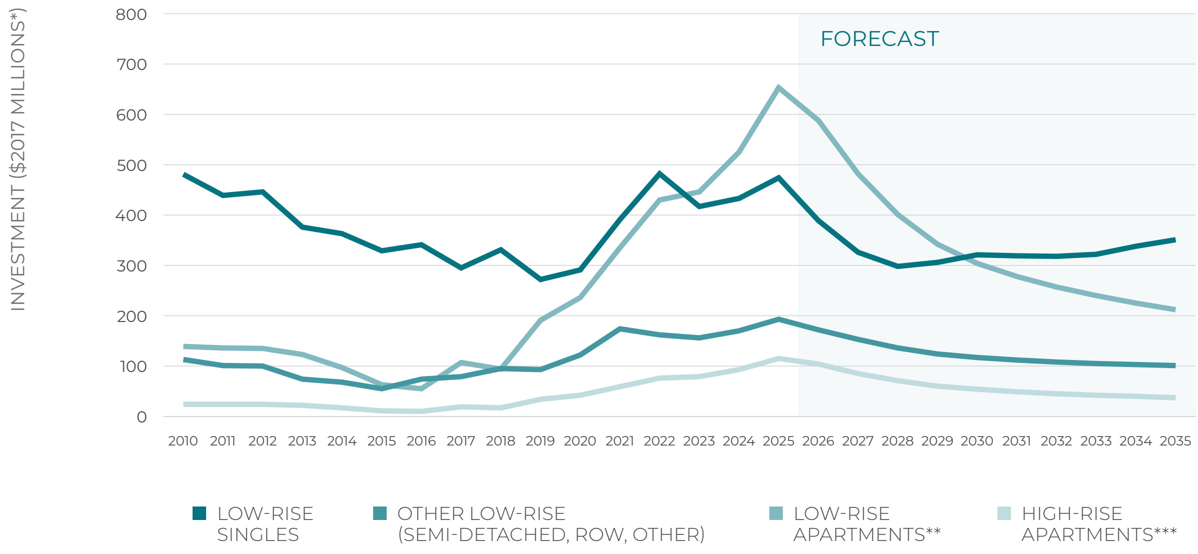
As a share of total residential construction, low-rise single-detached units are projected to return to being the principal driver of new-housing investment in the province by 2030. (See Figure 34.)

Investment in residential renovations in the province fell gradually in 2024 and 2025, driven in part by elevated interest rates. As these stabilize, investment levels are projected to grow through to the end of the forecast period, and surpass new-housing-related activity as the principal driver of residential construction investment in the province by 2028.

25 Single-detached (single) refers to a building containing only one dwelling unit that is completely separated on all sides from any other dwelling or structure.

FIGURE 34

NEW HOUSING CONSTRUCTION INVESTMENT **NEW BRUNSWICK**



* $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.

** Low-rise apartments are buildings with four storeys or fewer.

*** High-rise apartments are buildings with five or more storeys.

SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

RESIDENTIAL CONSTRUCTION EMPLOYMENT

Residential construction employment in New Brunswick increased by 45% between 2021 and 2025, adding almost 5,000 workers over this period – largely due to increasing demand for new-housing activity.

Demand for new-housing – and new apartment units in particular – is expected to ease across the forecast period, bringing with it a slowdown in employment relating to new-housing construction. This contraction is offset partially by increased demand for residential renovations.

Over the decade, residential construction employment in New Brunswick is expected to contract by 24% compared to the recent peak in 2025. Losses are exclusive to the new-housing component, which is expected to contract by more than 50% over this period. Combined employment relating to residential renovations and maintenance activities is expected to rise by 6% over the decade.

Table 15 summarizes the estimated percent change in residential employment by sector across three periods: the short term (2026–2028), the medium term (2029–2031), and the long term (2032–2035).

TABLE 15

CHANGES IN RESIDENTIAL EMPLOYMENT BY SECTOR **NEW BRUNSWICK**

SECTOR	% CHANGE **2026–2028**	% CHANGE **2029–2031**	% CHANGE **2032–2035**
RESIDENTIAL	-14%	-7%	-4%
NEW HOUSING	-32%	-19%	-11%
RENOVATIONS	5%	1%	0%
RESIDENTIAL MAINTENANCE	5%	1%	0%

Note that 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.

SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

RANKINGS, RISKS, AND MOBILITY: TRADES AND OCCUPATIONS

The BuildForce LMI system tracks supply and accounts for the change in the available labour force, including retirements, new entrants[26], and net mobility[27]. Based on currently known demands, industry recruitment and retirement estimates, the following ranks apply to the 16 covered trades in the province. See Table 16.

Although record levels of activity in 2025 translated into tight market conditions across most trades and occupations, labour markets are projected to return to balance in 2026 as new-home construction and housing starts decline. Conditions weaken in 2027 and 2028 as apartment starts recede further, before returning to mostly balanced conditions across the remainder of the forecast period.

26 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.

27 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.

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

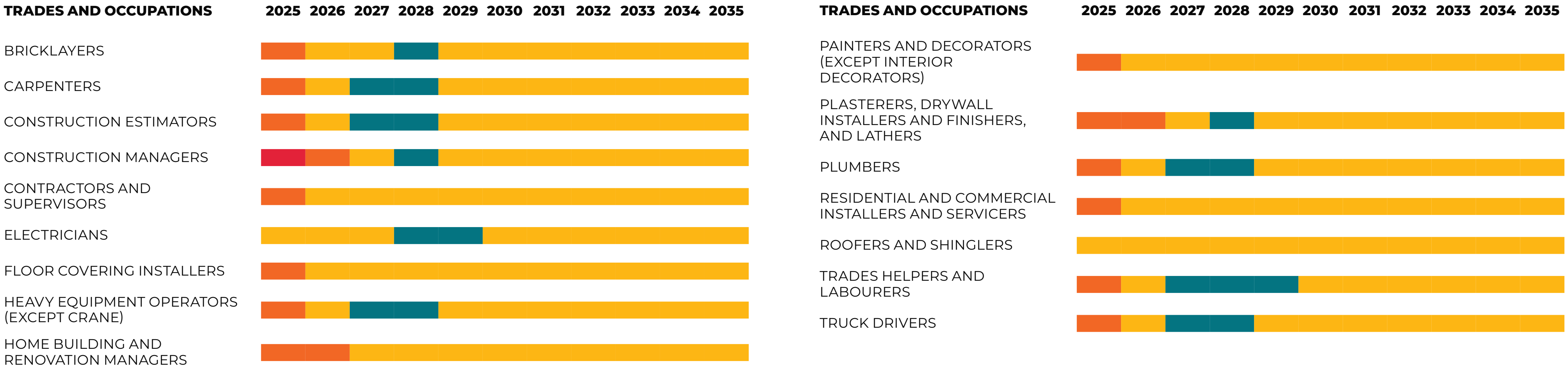
Workers meeting qualifications are generally not available in local markets to meet any increase. Employers will need to compete to attract additional workers. Recruiting and mobility may extend beyond traditional sources and practices.

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 16

RESIDENTIAL MARKET RANKINGS **NEW BRUNSWICK**



SOURCE: BuildForce Canada

BUILDING A SUSTAINABLE LABOUR FORCE

THE AVAILABLE RESIDENTIAL LABOUR FORCE

With activity in New Brunswick expected to slow across the forecast period, the residential labour force is expected to contract by 3,700 workers compared to 2025 levels. When combined with the expected retirement of as many as 3,300 workers across the forecast period, or 19% of the 2025 labour force, the industry may face a projected hiring surplus of 400 workers.

This figure may be compounded by the expected recruitment of 2,900 first-time new entrants under the age of 30 from the local population, and may lead to a surplus of as many as 3,300 workers in the province's residential sector. Although some of these workers may seek work in the province's non-residential construction sector, there is a risk that they may exit the construction sector or pursue employment in other provinces.

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 skill sets, and the recruitment of immigrants to Canada with skilled trades training and/or construction experience.

Figure 35 provides a summary of the estimated changes in the residential construction labour force across the forecast period.

FIGURE 35

CHANGES IN THE RESIDENTIAL LABOUR FORCE **NEW BRUNSWICK**

17,100
LABOUR FORCE
2025

-3,700
WORKERS

13,400
LABOUR FORCE
2035

HIRING NEEDS

-3,700
WORKERS

+3,300
RETIREMENTS

OFFSET BY

-2,900
NEW ENTRANTS

-3,300
NET MOBILITY*

* 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.

In 2023, registrations in the largest construction trades programs in New Brunswick increased by 17%, reaching a record high of roughly 1,100, driven largely by growth in the carpenter, construction electrician, refrigeration and air conditioning mechanic, and millwright trades. Intake eased slightly in 2024, but remained above 1,000 new registrations.

Looking ahead, new apprenticeship registrations are expected to remain above historical norms, supported by the federal government's recently announced investment to recruit and train skilled trades workers under the Team Canada Strong initiative. In addition to supporting increased intake, the funding places a strong emphasis on improving completion outcomes through enhanced incentives and employer supports.[28]

Completions remain notably lower than the average observed over the past decade. It will likely take several more years before the renewed influx of new registrations translates to a sustained increase in newly certified journeypersons. See Figure 36.

FIGURE 36

NEW APPRENTICESHIP REGISTRATIONS, COMPLETIONS, AND TRADE EMPLOYMENT **NEW BRUNSWICK**

SOURCE: BuildForce Canada

28 Prime Minister Carney announces Team Canada Strong – a nationwide plan to recruit up to 100,000 skilled trades workers

Table 17 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. There is a risk that completions in the boilermaker trade will not keep pace with the number of new journeypersons required over the outlook period. While several other trades currently appear balanced, even modest economic shifts could lead to supply challenges.

TABLE 17

ESTIMATED CONSTRUCTION CERTIFICATION DEMAND AND PROJECTED TARGET OF NEW ENTRANTS BY TRADE **NEW BRUNSWICK***

TRADE	**TOTAL CERTIFICATION DEMAND** CONSTRUCTION	**TARGET NEW REGISTRANTS** CONSTRUCTION	**APPRENTICE CERTIFICATION SUPPLY RISK** ALL INDUSTRIES
BOILERMAKER	137	103	🟥
STEAMFITTER/PIPEFITTER	83	77	🟨
SPRINKLER FITTER	23	25	🟨
HEAVY-DUTY EQUIPMENT TECHNICIAN	57	72	🟨
WELDER	72	93	🟨
HOIST OPERATOR (BOOM TRUCK)	62	82	🟨
CARPENTER	386	608	🟩
INDUSTRIAL MECHANIC (MILLWRIGHT)	54	90	🟩
SHEET METAL WORKER	65	114	🟩
CONSTRUCTION ELECTRICIAN	489	1,015	🟩
INDUSTRIAL ELECTRICIAN	67	204	🟩
PLUMBER	142	471	🟩
POWERLINE TECHNICIAN	12	53	🟩
REFRIGERATION AND AIR CONDITIONING MECHANIC	71	340	🟩
BRICKLAYER	8	56	🟩

🟥 CERTIFICATIONS REQUIRED EXCEED PROJECTED COMPLETIONS

🟨 CERTIFICATIONS REQUIRED IN LINE WITH PROJECTED COMPLETIONS

🟩 PROJECTED COMPLETIONS EXCEED CERTIFICATIONS REQUIRED

* This analysis does not account for existing labour market imbalances at the 2025 starting point.

SOURCE: BuildForce Canada

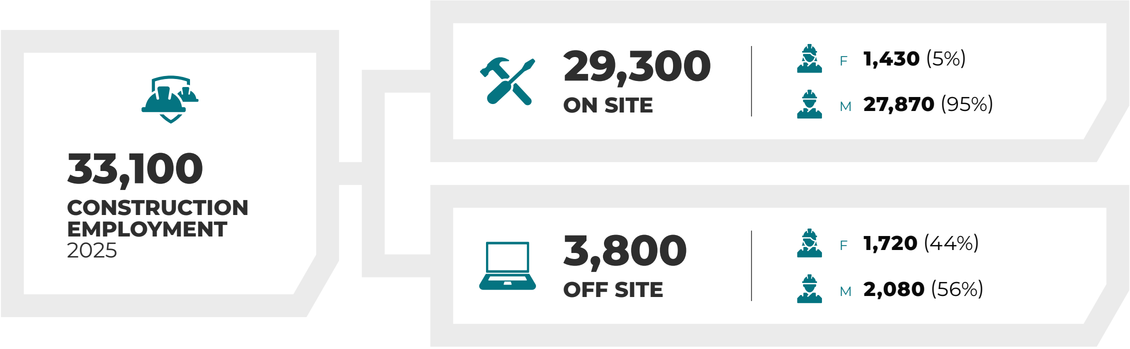
UNDER-REPRESENTED GROUPS OF WORKERS

Canada's labour force is being reshaped by long-term demographic trends, including declining fertility rates and smaller family sizes over the past several decades. As a result, the pool of younger workers entering the workforce has been shrinking. This pressure will increase as the baby boomer generation continues to retire, intensifying competition for new talent. To respond to these challenges, the construction industry must broaden its recruitment efforts. Strengthening the workforce will require greater engagement with traditionally under-represented groups, including women, Indigenous Peoples, and newcomers to Canada.

WOMEN

In 2025, there were approximately 3,150 women employed in New Brunswick's construction industry, of which 45% worked on site, directly on construction projects, while the remaining 55% worked off site, primarily in administrative and management-related occupations. Of the 29,300 on-site tradespeople employed in the industry, women made up only 5%. (See Figure 37).

FIGURE 37
DETAILED CONSTRUCTION EMPLOYMENT BY GENDER **NEW BRUNSWICK**

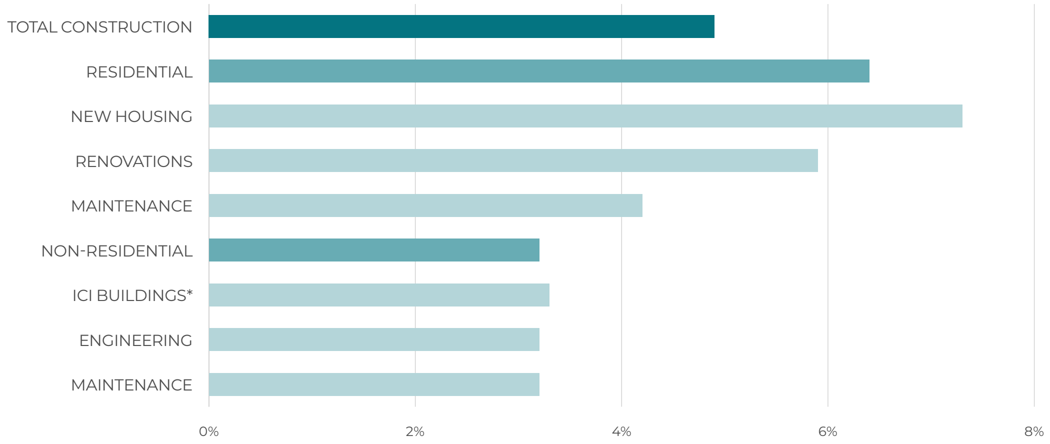


SOURCE: BuildForce Canada calculations based on Statistics Canada's Labour Force Survey and 2021 Census of the Population

The estimated 1,430 on-site tradeswomen in New Brunswick are represented across all sectors of construction. Women account for a higher share of total tradespeople in residential construction (6.4%) than in non-residential construction (3.2%). Across sectors, new-housing construction has the highest share of women in the workforce at 7.3%. (See Figure 38.) The top five trades and occupations in which women tend to be employed (as a % of all tradeswomen) are trade helpers & labourers (33%), carpenters (19%), construction managers (12%), plumbers (9%), and contractors and supervisors (7%).

FIGURE 38

WOMEN'S SHARE OF TOTAL DIRECT TRADES AND OCCUPATIONS (ON SITE) **NEW BRUNSWICK**



* industrial, commercial, institutional

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

INDIGENOUS PEOPLES

The Indigenous population is the fastest growing population in Canada and therefore presents recruitment opportunities for New Brunswick's construction industry. Indigenous representation in the province remains below the national share. In 2025, Indigenous Peoples made up 2.9% of the overall workforce and 3.2% of construction, both slightly below the national share. While Indigenous representation increased modestly since 2016 across the broader workforce, it has remained unchanged in the construction industry. (See Table 18.)

As the Indigenous population continues to expand, recruitment and retention efforts will need to be dedicated to increasing the industry's share of the population into the labour force.

TABLE 18

REPRESENTATION OF INDIGENOUS POPULATION IN PROVINCIAL CONSTRUCTION WORKFORCE **NEW BRUNSWICK**

INDUSTRY	INDIGENOUS	NON-INDIGENOUS	TOTAL	INDIGENOUS SHARE OF TOTAL WORKFORCE, %
CONSTRUCTION				
2016	1,000	30,200	31,200	3.2%
2025	1,100	33,600	34,600	3.2%
ALL INDUSTRIES				
2016	10,600	385,200	395,800	2.7%
2025	12,700	422,800	435,600	2.9%

SOURCE: Statistics Canada, Labour Force Survey, Custom Data Request 2025

NEWCOMERS

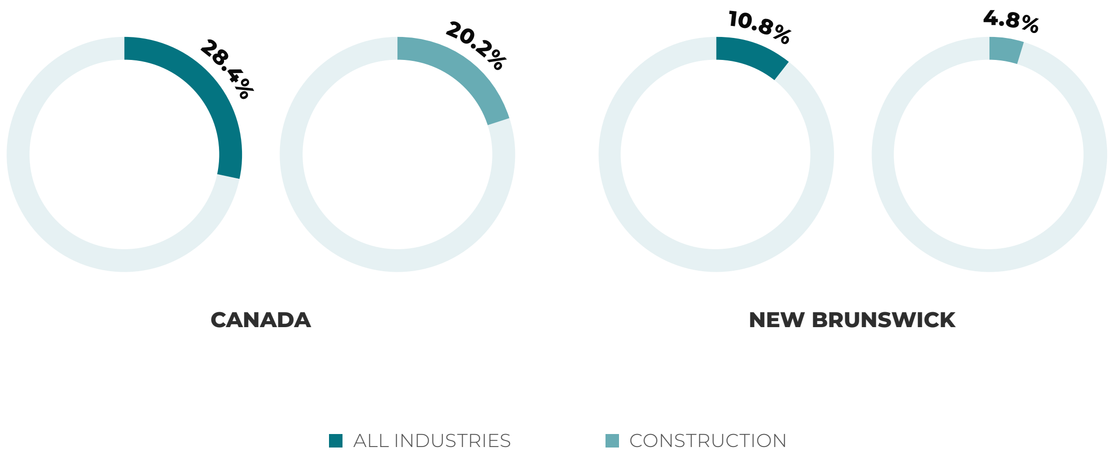
New Brunswick's construction industry may also leverage newcomers to Canada over the outlook period to meet labour requirements. With declining natural population growth, immigration is becoming an increasingly important source of labour force growth.

The share of immigrants in the provincial workforce increased from 4.4% in 2016 to 10.8% in 2025. While the province has made progress in attracting and integrating immigrants, its share remains well below the national share (28.4%). (See Figure 39). In construction, immigrants accounted for 4.8% of the workforce in 2025, significantly lower than the national construction share (20.2%), indicating ongoing under-representation in the sector.

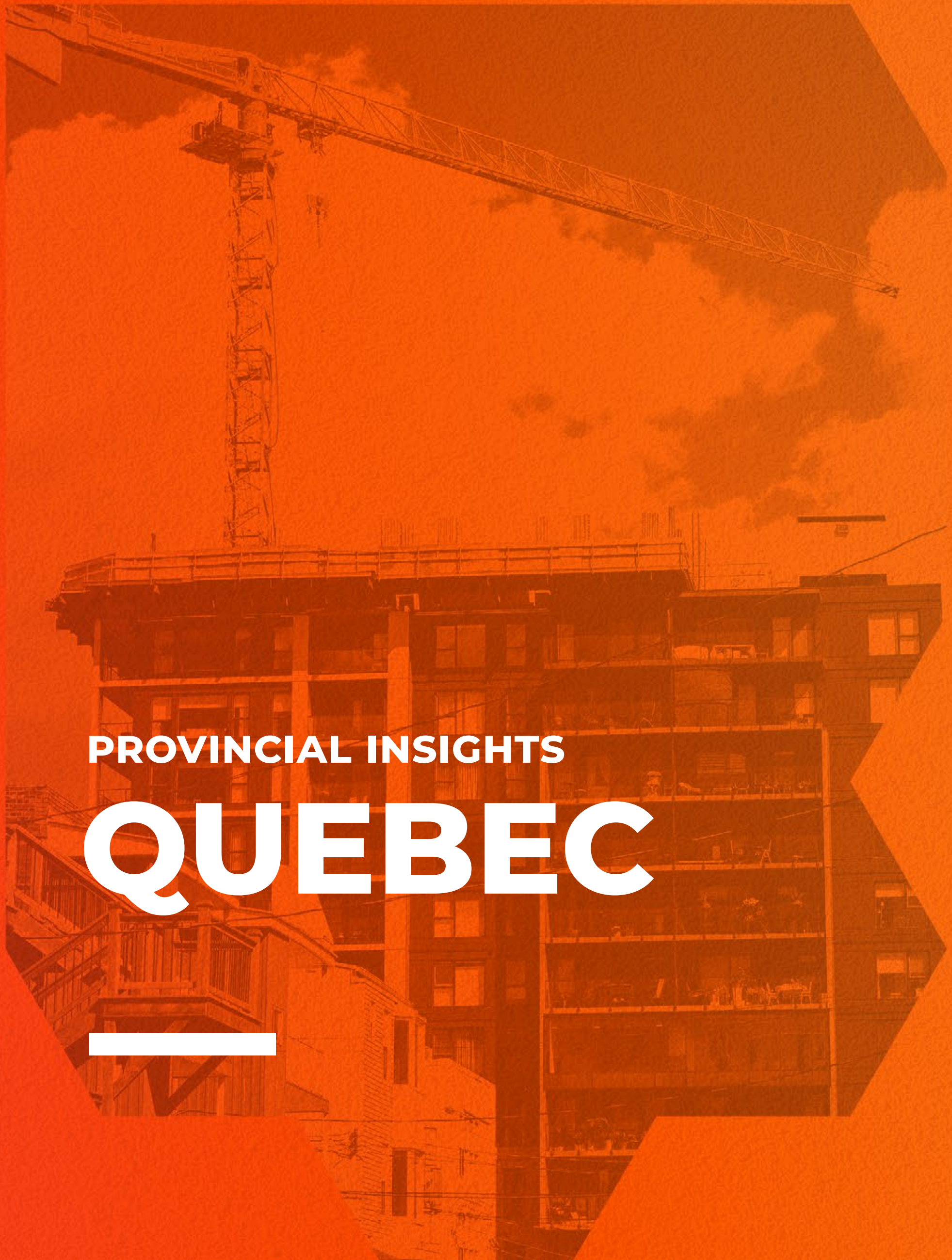
Based on historical settlement patterns (and factoring in new immigration target numbers), the province is expected to welcome more than 81,000 newcomers between 2026 and 2035. As these individuals will make up an increasing share of the province's core working-age population, additional recruitment efforts will be required to ensure the construction industry recruits its share of newcomers into the labour force.

FIGURE 39

SHARE (%) OF NEWCOMERS IN THE CONSTRUCTION LABOUR FORCE (2025) **NEW BRUNSWICK**



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



PROVINCIAL INSIGHTS

QUEBEC

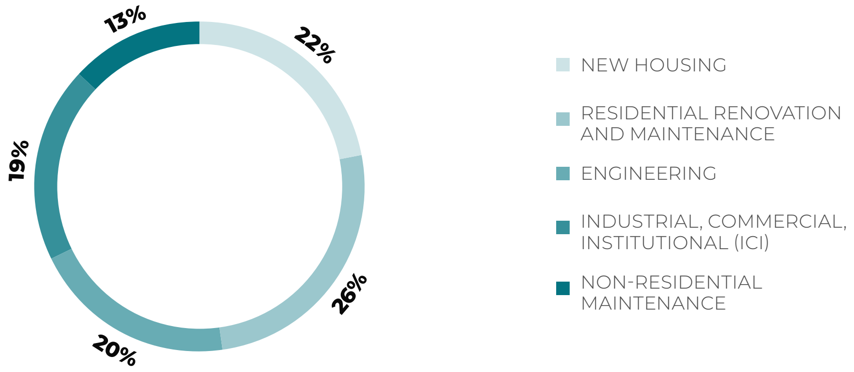
ECONOMIC OUTLOOK

Economic growth slowed in Quebec in 2025 as trade uncertainty, elevated living costs, and a downshift in the federal Immigration Levels Plan weakened population growth. The moderation in migration reduced growth in domestic demand and employment, with residential construction activity contracting following a recent peak in housing starts in 2025. These pressures are expected to persist into the short term as the province's population is projected to contract in 2026 and 2027 and population growth is projected at more moderate levels over the forecast period compared to the last 10 years.

Business investment, which surged in recent years due to major project activity, began to decelerate in 2025 due to the ongoing uncertainty around trade and tariffs between Canada and the United States and the completion of several large projects.

Overall, real GDP growth in Quebec is expected to average approximately 1.1% annually over the next five years, reflecting slower population growth but sustained by consumption-driven growth and positive net exports (exports less imports).

DISTRIBUTION OF CONSTRUCTION EMPLOYMENT IN 2025 **QUEBEC**



10-YEAR WORKFORCE OUTLOOK FOR **QUEBEC**

49,900
RETIREMENTS

+47,700
NEW ENTRANTS

-14,153
EMPLOYMENT CHANGE
(-6.1%)

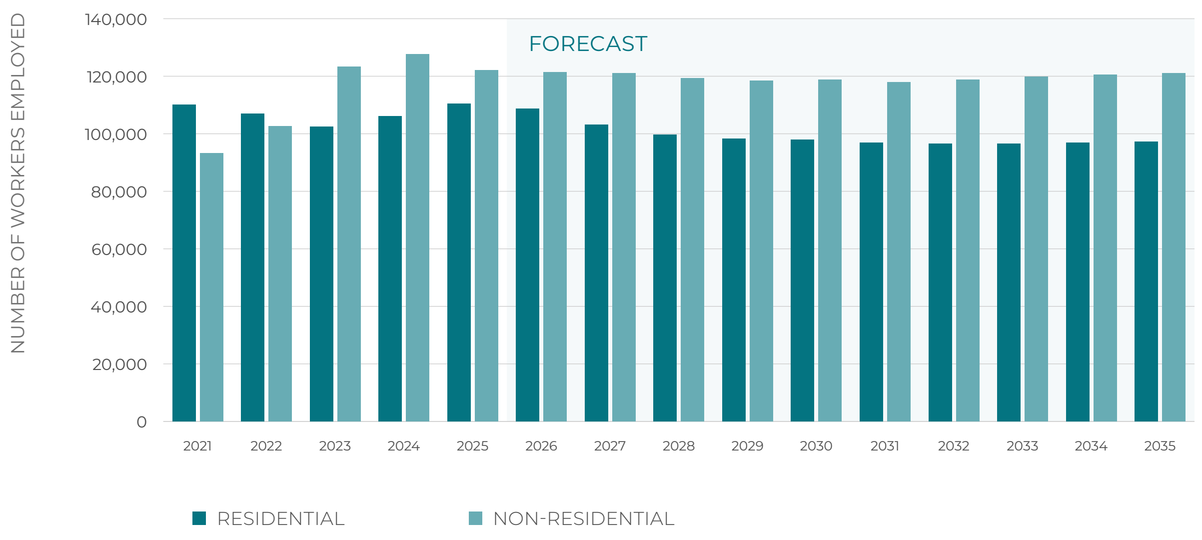
6.0%
AVERAGE UNEMPLOYMENT RATE

POPULATION GROWTH AND DEMOGRAPHICS

Quebec's population growth slowed markedly in 2025, falling to 0.7% following an average annual rate of 1.6% between 2022 and 2024. This deceleration reflects federal policy actions aimed at reducing immigration targets and lowering the number of non-permanent residents living in the country to 5% of the country's population.

Although the number of permanent residents immigrating into Canada is expected to remain at nearly 60,000 persons annually, elevated emigration and sustained non-permanent resident outflows are expected to push net international migration into negative territory in 2026. This represents a sharp shift from the historically high inflows recorded in 2024. As the federal government reaches its target of reducing the non-permanent resident share of the population by late 2027, net international migration is projected to rebound beginning in 2028 and stabilize in the range of 60,000 to 70,000 persons per year thereafter. (See Figure 40.)

CONSTRUCTION EMPLOYMENT GROWTH OUTLOOK QUEBEC

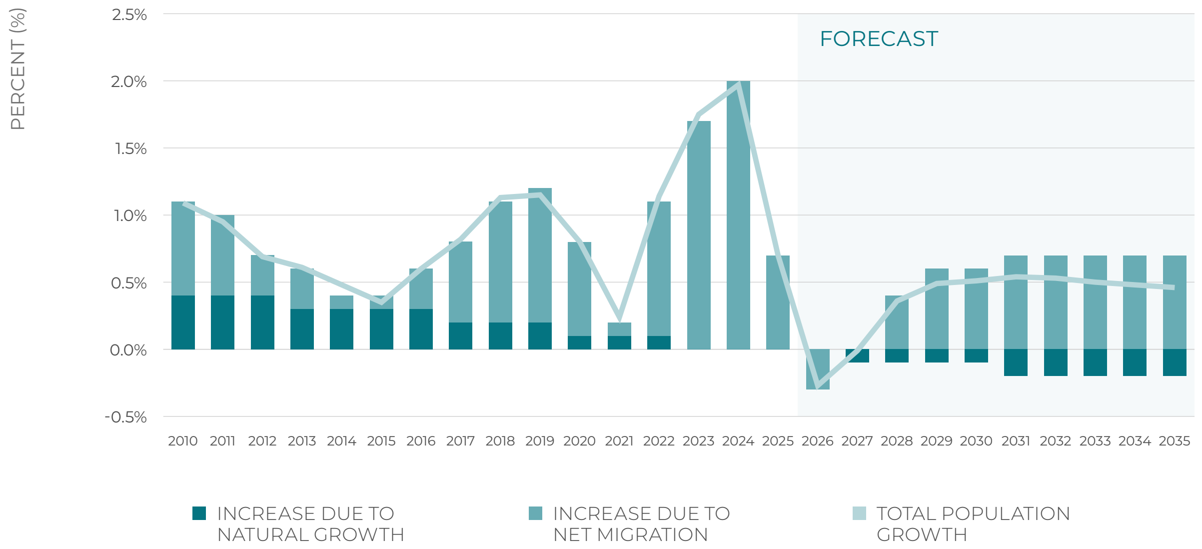


SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

The natural rate of population growth[29] in Quebec turned negative in 2024 as deaths exceeded births due to population aging and declining fertility rates. This trend is expected to continue across the forecast period, increasing reliance on international migration to support population growth and labour force expansion. Combined, these factors are projected to result in negative population growth in 2026 and 2027, followed by a gradual rebound to approximately 0.5% annual growth beginning in 2029 and continuing through the end of the decade.

FIGURE 40

SOURCES OF POPULATION GROWTH (%) QUEBEC



SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

29 The 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.

RESIDENTIAL CONSTRUCTION INVESTMENT

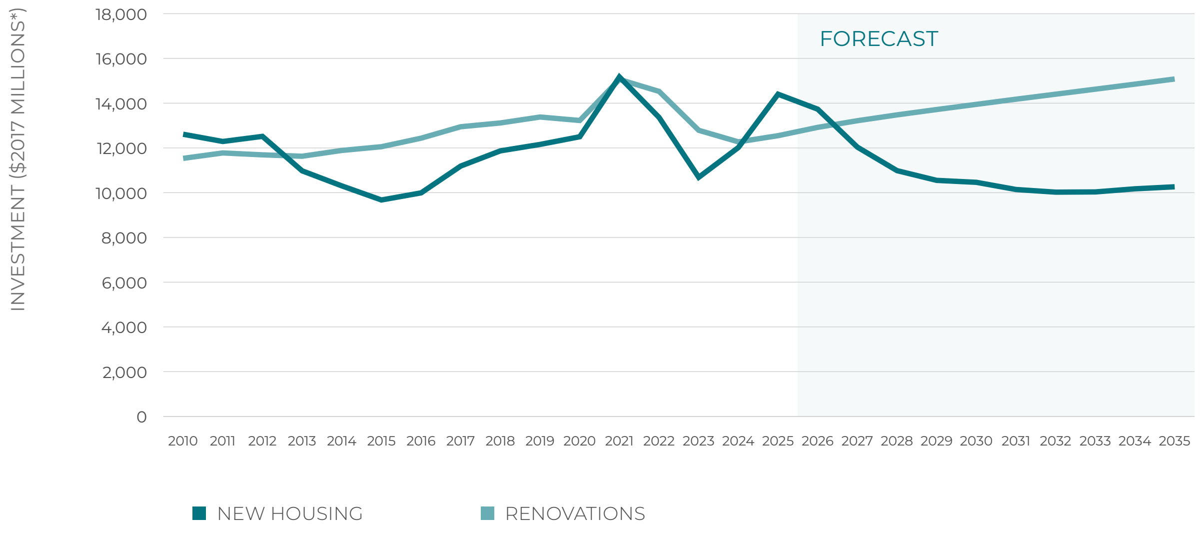
Residential construction activity in Quebec reached a recent peak in 2025, with housing starts approaching 60,000 units. Increased activity was driven largely by demand for apartment units and in Montreal in particular. Housing starts are projected to recede over the short term as population-driven demand slows, although pent-up demand may prevent an abrupt contraction. (See Figure 41.)

Weakening demand for multi-unit construction is expected to account for the majority of the near-term decline in total housing starts as easing rental market pressures reduce the need for new apartment units. Vacancy rates have risen steadily, supported by increased new construction and outflows of non-permanent residents. In contrast, lower borrowing costs and rising incomes are expected to support modest growth in single-detached[30] housing construction over the short term, although affordability pressures are expected to continue to limit overall gains.

30 Single-detached (single) refers to a building containing only one dwelling unit that is completely separated on all sides from any other dwelling or structure.

FIGURE 41

RESIDENTIAL CONSTRUCTION INVESTMENT **QUEBEC**



* $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.

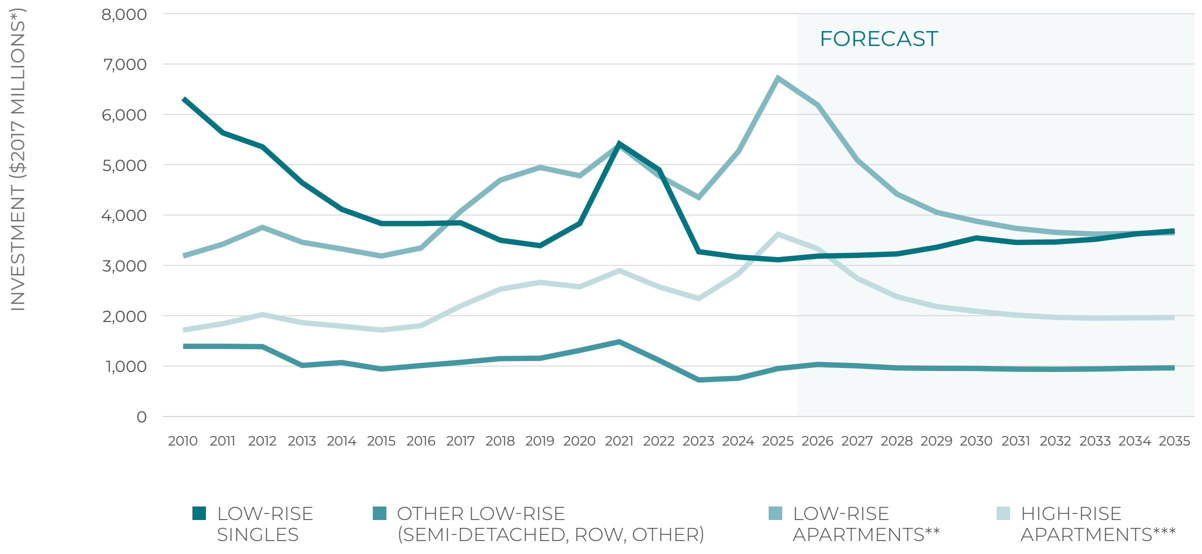
SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

Across the forecast period, multi-unit residential construction is projected to stabilize around 28,000 units annually. Low-rise apartments (i.e., structures four storeys or less) are expected to remain the dominant structure type in Quebec, with the share of high-rise units remaining relatively stable despite ongoing urban densification. (See Figure 42.)

Overall new-home construction is projected to decline beginning in 2026 and continue falling through the medium term as reduced apartment construction outweighs gains in higher-value single-detached homes. Renovation activity, which was constrained by elevated interest rates through 2024, is expected to recover and grow steadily as borrowing conditions ease, real incomes rise, and the province's housing stock expands. By 2027, investment in residential renovations is expected to become the primary driver of residential construction investment, leading to moderate gains in overall residential activity later in the forecast period.

FIGURE 42

NEW HOUSING CONSTRUCTION INVESTMENT **QUEBEC**



* $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.

** Low-rise apartments are buildings with four storeys or fewer.

*** High-rise apartments are buildings with five or more storeys.

SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

RESIDENTIAL CONSTRUCTION EMPLOYMENT

Residential construction employment levels in Quebec reached an elevated level of more than 110,000 workers in 2025. As demand for new housing in particular contracts over the forecast period, however, the sector is expected to experience employment losses. By 2035, residential construction employment levels are expected to contract by 12% compared to 2025 levels.

Employment losses are concentrated in new-housing construction, which contracts by almost 36% over the forecast period. Partially offsetting these declines are projected gains in employment in both residential renovations (+9%) and residential maintenance activities (+5%).

Table 19 summarizes the estimated percent change in residential employment by sector across three periods: the short term (2026–2028), the medium term (2029–2031), and the long term (2032–2035).

TABLE 19

CHANGES IN RESIDENTIAL EMPLOYMENT BY SECTOR **QUEBEC**

SECTOR	% CHANGE **2026–2028**	% CHANGE **2029–2031**	% CHANGE **2032–2035**
RESIDENTIAL	-10%	-3%	0%
NEW HOUSING	-26%	-10%	-3%
RENOVATIONS	4%	2%	2%
RESIDENTIAL MAINTENANCE	3%	1%	1%

Note that 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.

SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

RANKINGS, RISKS, AND MOBILITY: TRADES AND OCCUPATIONS

The BuildForce LMI system tracks supply and accounts for the change in the available labour force, including retirements, new entrants[31], and net mobility[32]. Based on currently known demands, industry recruitment and retirement estimates, the following ranks apply to the 25 covered trades in the province. See Table 20.

Elevated levels of activity tightened labour market conditions in 2025, but as housing starts and related investment declines in 2026, conditions return to mostly balanced. As activity continues to recede, markets are projected to weaken in 2027 and 2028 before returning to balance by 2029 for the remainder of the forecast period as any further declines in new-home construction moderate and offset increased renovation and maintenance work.

31 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.

32 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.

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

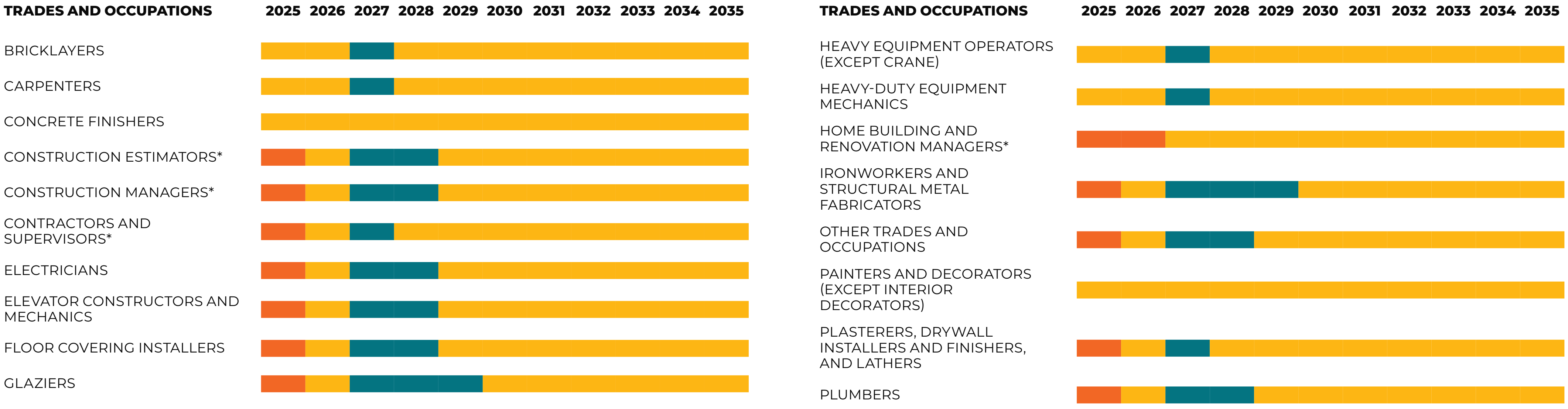
Workers meeting qualifications are generally not available in local markets to meet any increase. Employers will need to compete to attract additional workers. Recruiting and mobility may extend beyond traditional sources and practices.

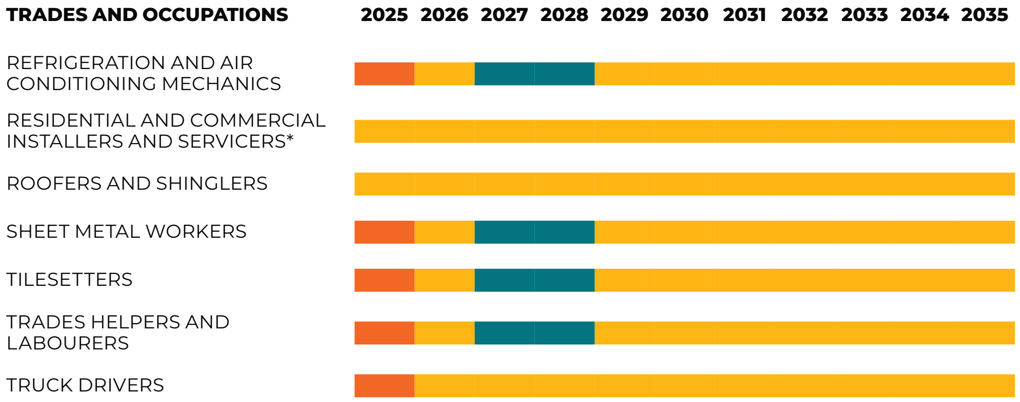
5

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 20

RESIDENTIAL MARKET RANKINGS **QUEBEC**





* Trades and occupations marked with an asterisk fall outside the jurisdiction of the CCQ and will follow ebbs and flows in the labour market

Note: although the BuildForce Canada rankings system may indicate conditions outside normal labour market conditions, trades and occupations managed by Commission de la Construction du Québéc (CCQ) should be balanced as the organization applies the Act on Labour Relations, Vocational Training, and Workforce Management in the Construction Industry (Act R-20).

SOURCE: BuildForce Canada

BUILDING A SUSTAINABLE LABOUR FORCE

THE AVAILABLE RESIDENTIAL LABOUR FORCE

The volume of residential construction activity in Quebec is expected to slow across the 2026 to 2035 forecast period, bringing with it an anticipated labour force reduction of as many as 12,900 workers. When added to the need to replace as many as 24,500 workers, or 21% of the 2025 labour force, who are expected to exit the industry due to retirement by 2035, the industry may face a hiring requirement of 11,600 workers.

This requirement is expected to be more than offset by the recruitment of 20,600 first-time new entrants under the age of 30 from the local population, and could create a surplus of 9,000 workers by 2035. This excess supply is likely to be curtailed by the Commission de la construction du Québec, which manages construction labour markets in the province.

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 skill sets, and the recruitment of immigrants to Canada with skilled trades training and/or construction experience.

Figure 43 provides a summary of the estimated changes in the residential construction labour force across the forecast period.

FIGURE 43

CHANGES IN THE RESIDENTIAL LABOUR FORCE **QUEBEC**

116,600
LABOUR FORCE
2025

-12,900
WORKERS

103,700
LABOUR FORCE
2035

HIRING NEEDS

-12,900
WORKERS

+24,500
RETIREMENTS

OFFSET BY

-20,600
NEW ENTRANTS

-9,000
NET MOBILITY*

* 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 across the largest construction trades programs in Quebec reached a record high in 2022. This surge coincided with strong gains in construction employment during the same period. Following this peak, intake moderated, with new registrations falling by 17% in 2023 and a further 2% in 2024.

Looking ahead, new apprenticeship registrations are expected to remain elevated, supported by the federal government's recently announced investment to recruit and train skilled trades workers under the Team Canada Strong initiative. In addition to supporting increased intake, the funding places a strong emphasis on improving completion outcomes through enhanced incentives and employer supports.[33]

Completions increased by 8% in 2024 and remain above the average recorded over the past decade, likely reflecting the elevated intake observed in the years leading into the pandemic. Over the remainder of the decade, the province is expected to see a further increase in the supply of certified journeypersons, as a large cohort of apprentices who registered in 2021 and 2022 complete their programs.[34] (See Figure 44.)

FIGURE 44

NEW APPRENTICESHIP REGISTRATIONS, COMPLETIONS, AND TRADE EMPLOYMENT **QUEBEC**

SOURCE: BuildForce Canada

33 Prime Minister Carney announces Team Canada Strong – a nationwide plan to recruit up to 100,000 skilled trades workers

34 A supply-demand analysis of certified journeypersons is not available for Quebec due to its unique apprenticeship system and registration mechanisms that are not directly aligned with labour market demand measures.

UNDER-REPRESENTED GROUPS OF WORKERS

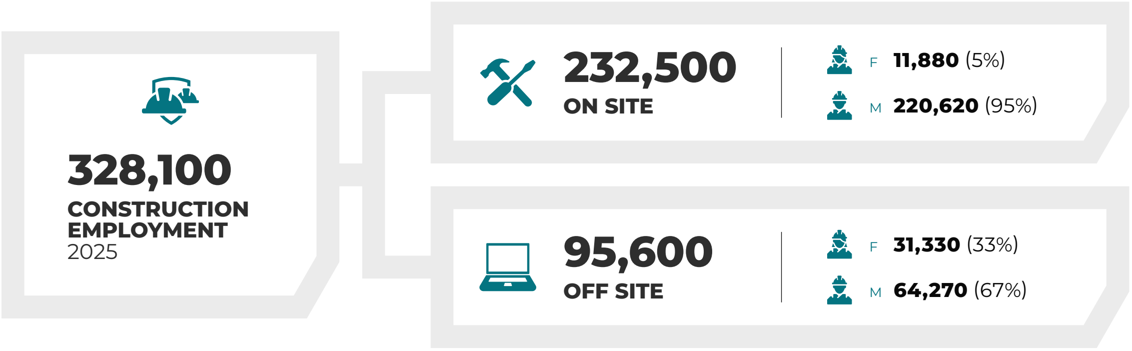
Canada's labour force is being reshaped by long-term demographic trends, including declining fertility rates and smaller family sizes over the past several decades. As a result, the pool of younger workers entering the workforce has been shrinking. This pressure will increase as the baby boomer generation continues to retire, intensifying competition for new talent. To respond to these challenges, the construction industry must broaden its recruitment efforts. Strengthening the workforce will require greater engagement with traditionally under-represented groups, including women, Indigenous Peoples, and newcomers to Canada.

WOMEN

In 2025, there were approximately 43,210 women employed in Quebec's construction industry, of which 27% worked on site, directly on construction projects, while the remaining 73% worked off site, primarily in administrative and management-related occupations. Of the 232,500 tradespeople employed in the industry, women made up 5%. (See Figure 45).

FIGURE 45

DETAILED CONSTRUCTION EMPLOYMENT BY GENDER **QUEBEC**

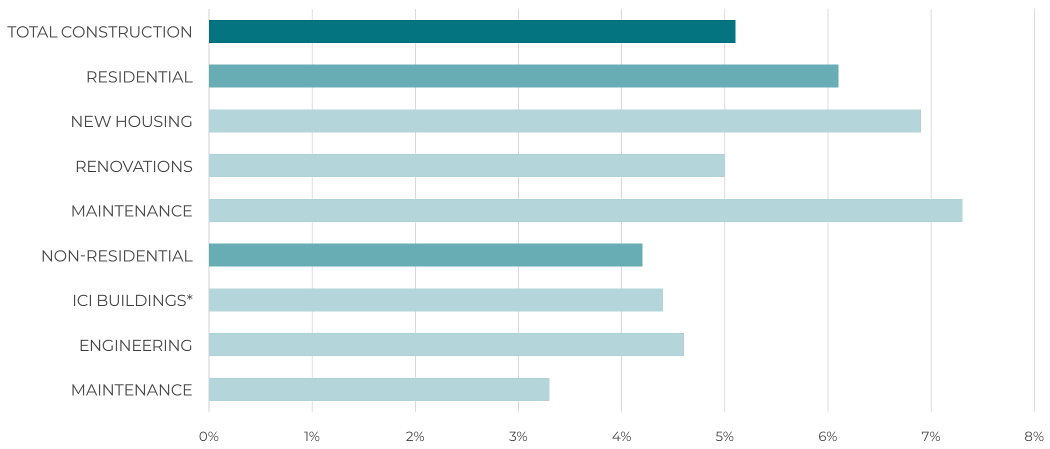


SOURCE: BuildForce Canada calculations based on Statistics Canada's Labour Force Survey and 2021 Census of the Population

The estimated 11,880 on-site tradeswomen in Quebec 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 (6.1%) in residential construction. Across sectors, residential maintenance construction has the highest representation of women, accounting for 7.3% of the workforce. (See Figure 46.) The top five trades and occupations in which women tend to be employed are construction managers (20% of all tradeswomen), trade helpers and labourers (15%), painters and decorators (12%), construction estimators (11%), and carpenters (6%).

FIGURE 46

WOMEN'S SHARE OF TOTAL DIRECT TRADES AND OCCUPATIONS (ON SITE) **QUEBEC**



* industrial, commercial, institutional

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

INDIGENOUS PEOPLES

The Indigenous population is the fastest growing population in Canada and therefore presents recruitment opportunities for Quebec's construction industry. In 2025, Indigenous Peoples made up 3.5% of Canada's overall workforce and 4.8% of the national construction workforce. In Quebec, however, Indigenous Peoples accounted for just 2.1% of the provincial labour force and 2.7% of the construction workforce. While the construction industry has a higher share of Indigenous Peoples compared to the broader provincial labour force, both figures remain below the national average. (See Table 21.)

As the Indigenous population continues to grow, targeted recruitment and retention strategies will be crucial for enhancing the representation of this group within the construction labour force.

TABLE 21

REPRESENTATION OF INDIGENOUS POPULATION IN PROVINCIAL CONSTRUCTION WORKFORCE QUEBEC

INDUSTRY	INDIGENOUS	NON-INDIGENOUS	TOTAL	INDIGENOUS SHARE OF TOTAL WORKFORCE, %
CONSTRUCTION				
2016	5,500	265,200	270,600	2.0%
2025	9,400	335,500	344,900	2.7%
ALL INDUSTRIES				
2016	61,600	4,314,500	4,376,200	1.4%
2025	102,500	4,818,100	4,920,600	2.1%

SOURCE: Statistics Canada, Labour Force Survey, Custom Data Request 2025

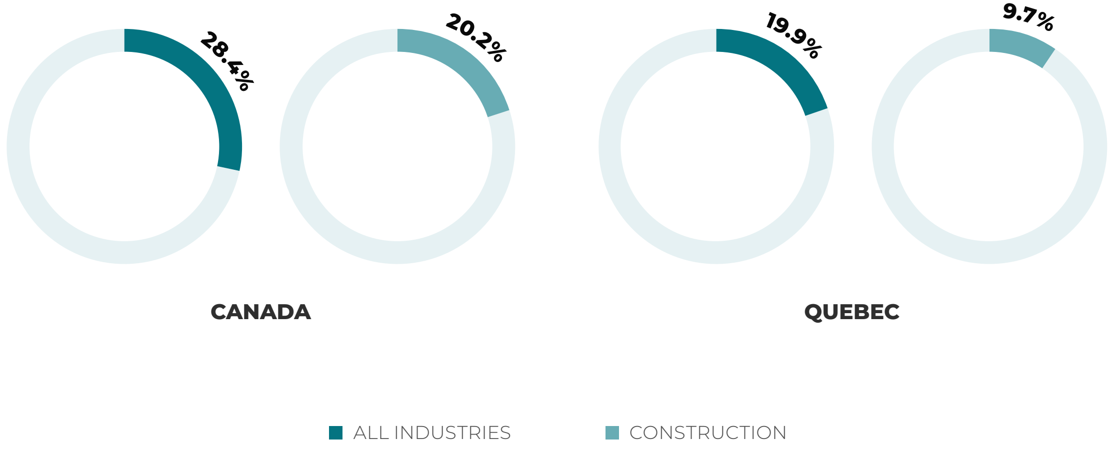
NEWCOMERS

Quebec's construction industry may also leverage newcomers to Canada over the forecast period to meet labour requirements. Due to the declining natural rate of population growth, immigrants are the primary source of labour force growth in the province. Newcomers have been playing an increasingly important role in replenishing the workforce, with their share in the workforce increasing from 15.3% in 2016 to 19.9% in 2025. While the province has been successful in attracting and integrating immigrants into the labour force, its share of immigrants is notably below the share in Canada overall. (See Figure 47.) The share of immigrants in the construction labour force was just 9.7% in 2025, which is up from 8.0% in 2016, but is much lower than the share in the overall labour force and significantly lower than the share in Canada's construction industry.

Based on historical settlement patterns, the province is expected to welcome more than 500,400 new immigrants between 2026 and 2035. 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 47

SHARE (%) OF NEWCOMERS IN THE CONSTRUCTION LABOUR FORCE (2025) **QUEBEC**



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

PROVINCIAL INSIGHTS

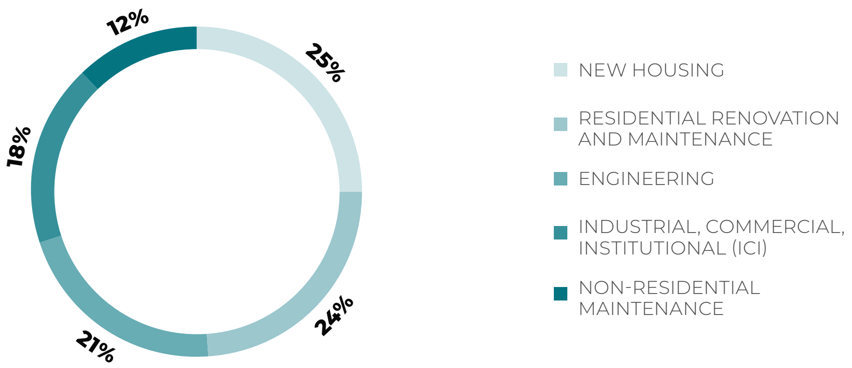
ONTARIO

ONTARIO OUTLOOK

Ontario's construction labour market showed weakness in 2025. Data from Statistics Canada's Labour Force Survey[35] shows that the overall construction unemployment rate in the province reached 6.7% at the end of the year (compared to 5.3% at the end of 2024), driven by growth in the province's construction labour force (+1.2%) and a small contraction in overall construction employment (-0.2%).

Labour conditions have eased in the residential sector, where investment levels have stepped down significantly since they recorded a peak in 2021. Several factors have led to this trend. Initially, these included elevated interest rates and consumer concerns over housing affordability. More recently, the market has been affected by uncertainty created by the ongoing tariff dispute between Canada and the United States, by reductions in immigration levels, and, in some regions of the province, an abundance of unsold multi-unit residential dwellings.

DISTRIBUTION OF CONSTRUCTION EMPLOYMENT IN 2025 ONTARIO



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

The BuildForce Canada 2026–2035 Construction and Maintenance Looking Forward outlook scenario for the province's residential sector calls for investment levels to slow in the short term before rebounding through to the end of the decade as growth resumes in both new-housing construction and residential renovations and maintenance activity.

Initially, demand for new housing in the province is expected to be further constrained by lower immigration levels and a surplus of unsold units. Investment in the sector is expected to return to growth by 2028 – in line with the expected conclusion of the federal government's plan to reduce the number of non-permanent residents arriving in Canada. Thereafter, and to the end of the decade, investment is expected to be driven by strong levels of new construction among both single-detached and multi-unit dwellings. That activity is expected to be supplemented by continuous growth in demand for residential renovations and maintenance.

10-YEAR WORKFORCE OUTLOOK FOR **ONTARIO**

92,000 RETIREMENTS	**+98,800** NEW ENTRANTS	**34,751** EMPLOYMENT CHANGE (7.9%)	**6.7%** AVERAGE UNEMPLOYMENT RATE

By 2035, overall residential construction investment is projected to rise by 24% compared to 2025 levels, with investment in new-housing construction rising by 22% over the period, and investment in residential renovations rising by 27%.

Due to the large size and diversity of the Ontario construction market, the BuildForce model assesses Ontario as six separate construction markets: Central, Eastern, the Greater Toronto Area (GTA), Northeastern, Northwestern, and Southwestern.

Table 22 summarizes the estimated percent change in total residential employment by region across Ontario's regions, and across three periods: the short term (2026–2028), the medium term (2029–2031), and the long term (2032–2035).

TABLE 22

CHANGES IN TOTAL RESIDENTIAL EMPLOYMENT ACROSS REGIONS **ONTARIO**

REGION	% CHANGE **2026–2028**	% CHANGE **2029–2031**	% CHANGE **2032–2035**
ONTARIO	0.1%	9.6%	0.9%
CENTRAL ONTARIO	5.2%	13.3%	1.5%
EASTERN ONTARIO	2.6%	6.4%	1.0%
GREATER TORONTO AREA	-5.1%	10.0%	0.8%
SOUTHWESTERN ONTARIO	3.2%	6.6%	-0.2%
NORTHEASTERN ONTARIO	-4.4%	0.1%	1.2%
NORTHWESTERN ONTARIO	-8.2%	7.2%	-0.2%

SOURCE: BuildForce Canada

POPULATION GROWTH AND DEMOGRAPHICS

Population growth in Ontario was significantly elevated in the immediate post-pandemic years, driven by an influx of immigration and of temporary foreign residents in particular. Levels stepped down significantly in 2025 and are projected to contract in 2026 in response to new targets described in the most recent iteration of the federal immigration plan.

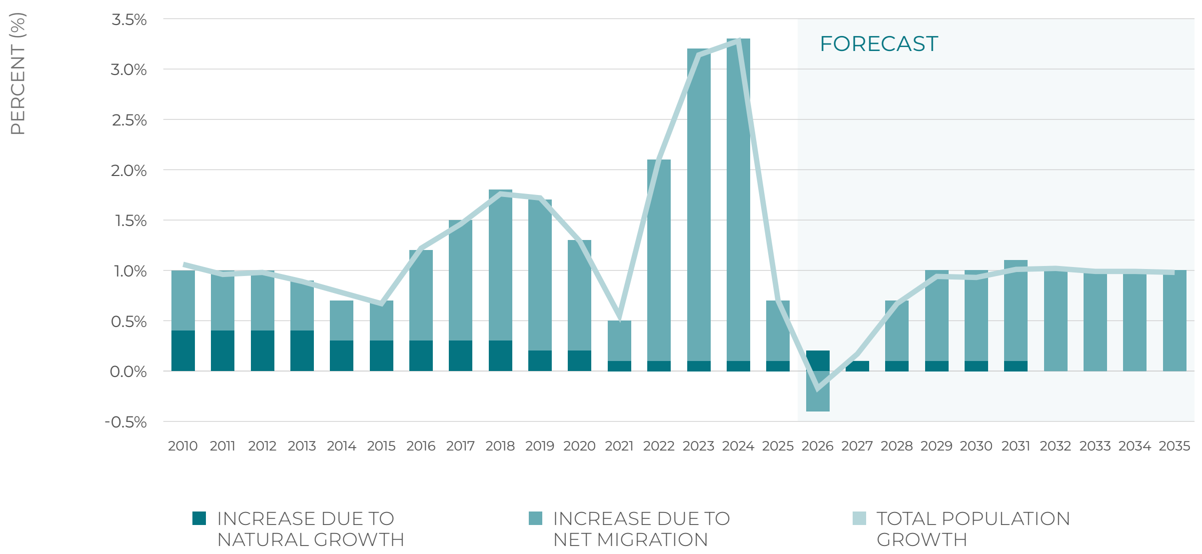
Population growth is expected to be modest in 2027 before increasing in 2028 and 2029 before stabilizing near 1% annually thereafter under the assumption that international migration returns to levels experienced through the late 2010s.

Although Ontario's natural rate of population growth[36] is positive, it has been declining consistently every year since 2010. This trend is projected to continue to the end of the decade, and is affected in part by negative rates of net interprovincial migration that began in 2021 and are expected to continue through 2035. Increasingly, Ontario is viewed as among the more expensive places to live in the country.

Figure 48 shows the various factors affecting population growth in Ontario over the forecast period.

FIGURE 48

SOURCES OF POPULATION GROWTH (%) **ONTARIO**



SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

36 The 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.

THE AVAILABLE RESIDENTIAL CONSTRUCTION LABOUR FORCE

The projected growth in Ontario's residential construction sector over the next 10 years will require increasing the sector's labour force by 23,500 workers. When combined with the need to replace as many as 50,300 workers who are projected to exit the industry due to retirement over the decade, the industry could face total hiring requirements of 73,800 workers by 2035.

Meeting hiring requirements could be partially addressed by the expected recruitment of 44,800 new-entrant workers under the age of 30 from within the province over the forecast period. Combined, these factors translate into a potential shortfall of 29,000 workers that will need to be recruited from outside the local construction labour force.

The BuildForce LMI system tracks supply and accounts for the change in the available labour force, including retirements, new entrants[37], and net mobility[38].

Figure 49 provides a summary of the estimated changes in the residential construction labour force across the full 2026–2035 forecast period.

37 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.

38 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.

FIGURE 49

CHANGES IN THE RESIDENTIAL LABOUR FORCE **ONTARIO**

235,900
LABOUR FORCE
2025

+23,500
WORKERS

259,400
LABOUR FORCE
2035

HIRING NEEDS

+23,500
WORKERS

+50,300
RETIREMENTS

OFFSET BY

-44,800
NEW ENTRANTS

+29,000
NET MOBILITY*

* 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.

Apprenticeship intake in Ontario has risen considerably in recent years, outpacing employment growth. In 2024, new registrations across the largest construction trade programs increased by 6% compared to the previous year, setting a provincial record for the number of newly registered apprentices. Many construction trades have recorded growth in recent years, with particularly strong gains observed in industrial mechanic (millwright), construction electrician, and carpenter programs.

New registrations are projected to moderate slightly in the near term, returning to levels more closely aligned with historical intake relative to industry employment. However, new apprenticeship registrations are expected to remain above historical averages, supported by the federal government's recently announced investment to recruit and train skilled trades workers under the Team Canada Strong initiative. In addition to supporting increased intake, the funding places a strong emphasis on improving completion outcomes through enhanced incentives and employer supports.[39]

Completions have remained relatively unchanged since the recovery observed in 2021. This trend is not uniform across all trades, with a handful – such as carpenter, refrigeration and air conditioning mechanic, steamfitter, and plumber – recording increases in completions in 2024. However, completions in the construction electrician program, the largest trade in terms of annual certifications, have trended downward since 2022. Stronger intake in recent years is expected to support higher completions over the outlook. The extent of this increase will depend on employer capacity and timely access to technical training. (See Figure 50.)

39 Prime Minister Carney announces Team Canada Strong – a nationwide plan to recruit up to 100,000 skilled trades workers

FIGURE 50

NEW APPRENTICESHIP REGISTRATIONS, COMPLETIONS, AND TRADE EMPLOYMENT **ONTARIO***

* Trades with fewer than 100 new registrations per year were excluded from the analysis.

SOURCE: BuildForce Canada

Table 23 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 welder, heavy equipment operator, and carpenter. While several other trades currently appear balanced, even modest economic shifts could lead to supply challenges.

- CERTIFICATIONS REQUIRED EXCEED PROJECTED COMPLETIONS
- CERTIFICATIONS REQUIRED IN LINE WITH PROJECTED COMPLETIONS
- PROJECTED COMPLETIONS EXCEED CERTIFICATIONS REQUIRED

TABLE 23

ESTIMATED CONSTRUCTION CERTIFICATION DEMAND AND PROJECTED TARGET OF NEW ENTRANTS BY TRADE **ONTARIO***

TRADE	**TOTAL CERTIFICATION DEMAND** CONSTRUCTION	**TARGET NEW REGISTRANTS** CONSTRUCTION	**APPRENTICE CERTIFICATION SUPPLY RISK** ALL INDUSTRIES
WELDER	275	83	■ (red)
HEAVY EQUIPMENT OPERATOR (TRACTOR - LOADER - BACKHOE)	145	53	■ (red)
HEAVY EQUIPMENT OPERATOR (DOZER)	139	65	■ (red)
HEAVY EQUIPMENT OPERATOR (EXCAVATOR)	141	78	■ (red)
CARPENTER	5,334	4,154	■ (red)
LATHER (INTERIOR SYSTEMS MECHANIC)	793	769	■ (red)
REFRIGERATION AND AIR CONDITIONING MECHANIC	2,623	2,938	■ (red)
INDUSTRIAL ELECTRICIAN	980	1,103	■ (red)

TRADE	**TOTAL CERTIFICATION DEMAND** CONSTRUCTION	**TARGET NEW REGISTRANTS** CONSTRUCTION	**APPRENTICE CERTIFICATION SUPPLY RISK** ALL INDUSTRIES
INDUSTRIAL MECHANIC (MILLWRIGHT)	786	941	
MOBILE CRANE OPERATOR	327	452	
SHEET METAL WORKER	1,389	2,178	
CONSTRUCTION ELECTRICIAN	9,328	15,612	
RESIDENTIAL AIR CONDITIONING SYSTEMS MECHANIC	683	1,174	
STEAMFITTER/PIPEFITTER	488	967	
PLUMBER	4,131	8,212	
POWERLINE TECHNICIAN	264	637	
SPRINKLER FITTER	458	1,135	
IRONWORKER (STRUCTURAL/ ORNAMENTAL)	100	757	

* This analysis does not account for existing labour market imbalances at the 2025 starting point.

SOURCE: BuildForce Canada

UNDER-REPRESENTED GROUPS OF WORKERS

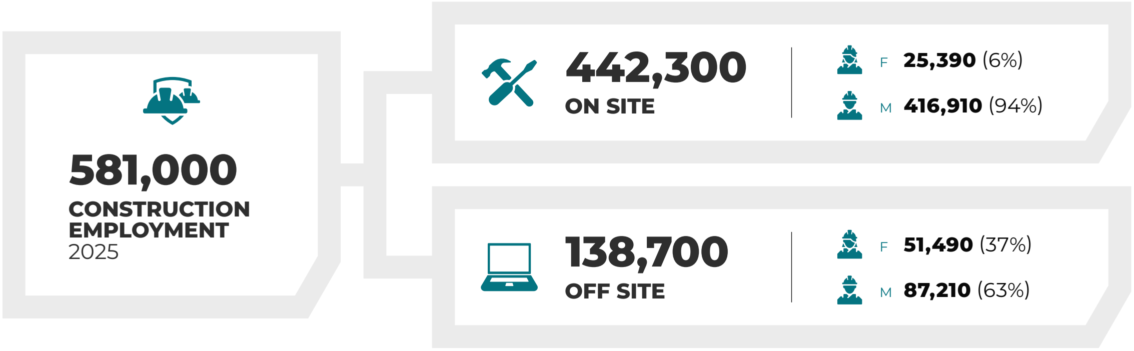
Canada's labour force is being reshaped by long-term demographic trends, including declining fertility rates and smaller family sizes over the past several decades. As a result, the pool of younger workers entering the workforce has been shrinking. This pressure will increase as the baby boomer generation continues to retire, intensifying competition for new talent. To respond to these challenges, the construction industry must broaden its recruitment efforts. Strengthening the workforce will require greater engagement with traditionally under-represented groups, including women, Indigenous Peoples, and newcomers to Canada.

WOMEN

In 2025, there were approximately 76,880 women employed in Ontario's construction industry, of which 33% worked on site, directly on construction projects, while the remaining 67% worked off site, primarily in administrative and management-related occupations. Of the 442,300 on-site tradespeople employed in the industry, women made up 6%. (See Figure 51).

FIGURE 51

DETAILED CONSTRUCTION EMPLOYMENT BY GENDER **ONTARIO**

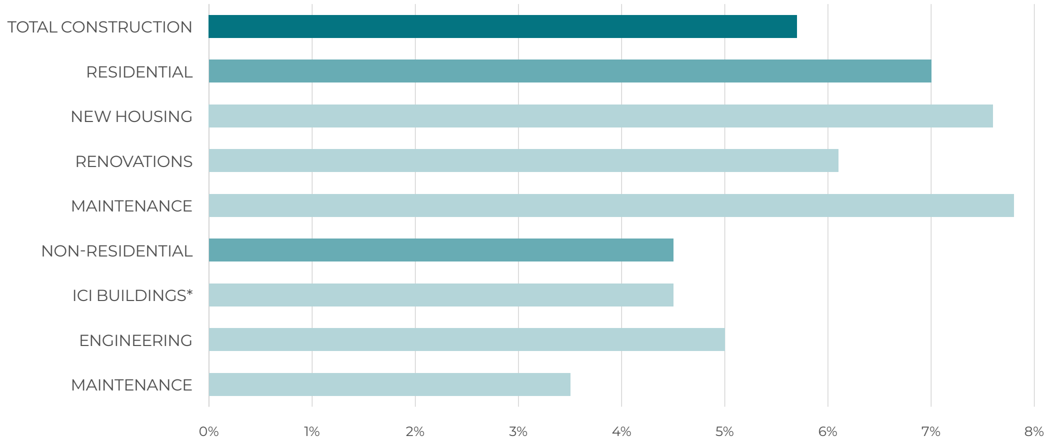


SOURCE: BuildForce Canada calculations based on Statistics Canada's Labour Force Survey and 2021 Census of the Population

The estimated 25,390 on-site tradeswomen in Ontario 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 (7.0%) in residential construction. Across sectors, residential maintenance has the highest representation of women, accounting for approximately 7.8% of the workforce. (See Figure 52.) The top five trades and occupations in which women tend to be employed are construction managers (21% of all tradeswomen), trade helpers and labourers (19%), painters and decorators (14%), home building and renovation managers (9%), and contractors and supervisors (9%).

FIGURE 52

WOMEN'S SHARE OF TOTAL DIRECT TRADES AND OCCUPATIONS (ON SITE) ONTARIO



* industrial, commercial, institutional

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

INDIGENOUS PEOPLES

The Indigenous population is the fastest growing population in Canada and therefore presents recruitment opportunities for Ontario's construction industry. The province has made strides in increasing the representation of Indigenous Peoples in the construction workforce. In 2025, Indigenous Peoples comprised 3.5% of Ontario's construction labour force, up from 2.6% in 2016. This proportion exceeds the 2.2% share of Indigenous Peoples in the overall labour force. (See Table 24.)

As the Indigenous population continues to expand, recruitment and retention efforts will need to remain dedicated to increasing the industry's share of the population into the labour force.

TABLE 24

REPRESENTATION OF INDIGENOUS POPULATION IN PROVINCIAL CONSTRUCTION WORKFORCE **ONTARIO**

INDUSTRY	INDIGENOUS	NON-INDIGENOUS	TOTAL	INDIGENOUS SHARE OF TOTAL WORKFORCE, %
CONSTRUCTION				
2016	13,500	511,600	525,100	2.6%
2025	21,100	585,400	606,500	3.5%
ALL INDUSTRIES				
2016	154,100	7,260,800	7,415,000	2.1%
2025	194,400	8,701,600	8,896,000	2.2%

SOURCE: Statistics Canada, Labour Force Survey, Custom Data Request 2025

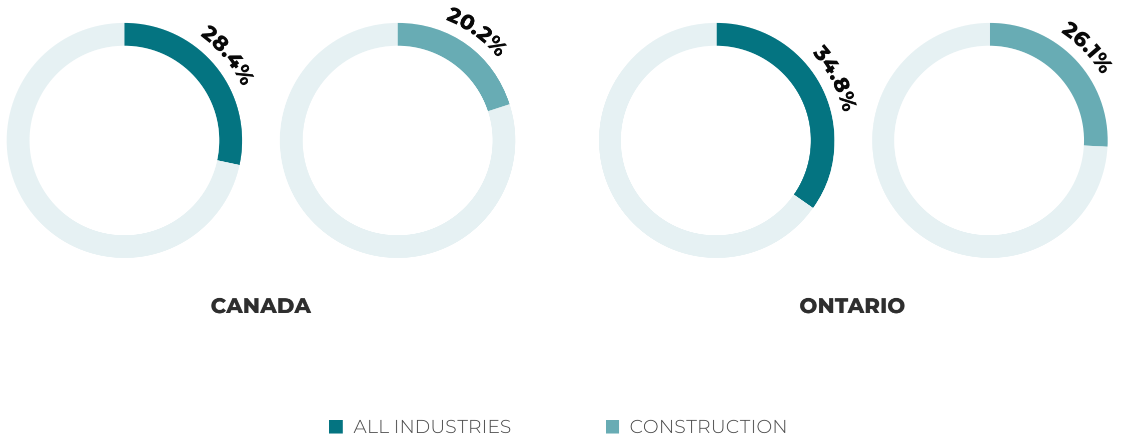
NEWCOMERS

Ontario's construction industry may also leverage newcomers to Canada over the forecast period to meet labour requirements. Due to the declining natural rate of population growth, immigrants are the primary source of labour force growth in the province. Immigrants have been playing an increasingly important role in replenishing the Ontario workforce, with the share of immigrants in the workforce increasing from 31.7% in 2016 to 34.8% in 2025. Ontario has a higher proportion of immigrants in the workforce compared to the rest of Canada, both across all industries and within construction. However, immigrants remain under-represented in Ontario's construction industry. In 2025, immigrants made up 26.1% of the construction labour force, which is lower than the share in the overall provincial labour force. (See Figure 53).

Based on historical settlement trends, the province is expected to welcome nearly 1,296,500 immigrants between 2026 and 2035. As these individuals will make up an increasing share of the province's core working-age population, sustained recruitment efforts will be required to ensure the construction industry recruits its share of newcomers into the labour force, as other sectors compete for labour.

FIGURE 53

SHARE (%) OF NEWCOMERS IN THE CONSTRUCTION LABOUR FORCE (2025) **ONTARIO**



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

REGIONAL INSIGHTS

CENTRAL ONTARIO

ECONOMIC OUTLOOK

Economic growth in the Central Ontario region has slowed considerably since 2022. The region contains a large manufacturing base, including a number of major automotive plants. The ongoing tariff dispute between Canada and the United States has therefore notably impacted private sector growth in the region, and is expected to continue to do so through 2026.

Offsetting this contraction somewhat has been a recent surge in population growth that was due to stronger-than-normal levels of interprovincial migration, and large numbers of migrants from abroad. This trend will be tempered notably by the federal government's plan to reduce the number of temporary foreign residents through to the end of 2027.

Investment in residential construction in the region is expected to be constrained initially by high levels of unsold inventory in some municipalities within the region and slowing population growth. Later years see investment return to growth with subsequent population increases. Business investment, meanwhile, has been supported by activity on a number of major projects in recent years, but is anticipated to be constrained over the near term by trade uncertainty and slower population growth.

GDP growth is projected to fall to just under 1% in 2026 but rises to above 2% into the medium-term years of the forecast as trade tensions are projected to ease.

POPULATION GROWTH AND DEMOGRAPHICS

Central Ontario experienced three years of significant population growth between 2022 and 2024 with an influx of migration coming principally from abroad and, to a lesser degree, from nearby regions.

Population growth began to slow in the region through 2025 in line with the federal government's plan to reduce the number of non-permanent residents in the country to 5% of the overall population by late 2027. Given that a large part of this reduction is coming through the reduction of international students, this change is projected to have an outsized impact on some of the region's municipalities, and in particular those that host major colleges or universities.

Population growth is expected to reach 0.1% in 2026 – the lowest rate on record for the region – before rising into 2029 as immigration levels are restored to historical norms and as the region continues to benefit from migration from elsewhere in Ontario. Levels are expected to remain sustained at an annual average of 1% after 2029 and for the remaining years of the forecast.

Central Ontario's population is aging. Its natural rate of population growth[40] reached zero in 2022, and has remained at or slightly above that level since. Growth has been bolstered in part by the recent rise in international migration, with many new arrivals coming to the region in their prime child-bearing ages. This trend may be short-lived, however, and the natural rate of growth is expected to again turn negative in 2027 and through to 2035.

40 The 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.

RESIDENTIAL CONSTRUCTION INVESTMENT

Central Ontario was among the few regions in the province to experience growth in housing starts in 2025. Several census metropolitan areas (CMAs) within the region recorded growth in multi-unit construction activity during the year, including Brantford, Kitchener-Waterloo, Hamilton, and Niagara.

This trend toward more affordable multi-unit construction has weakened new-housing investment levels. Muted growth in investment is projected for 2026 and 2027 before a recovery in housing starts, and for single-detached starts in particular, causes investment levels to rise into the early 2030s. This increase in demand for single-detached units is likely to be driven by the region's population structure, including demand from recent migrants, as well as announced taxation rebates from the federal and provincial governments.

Demand for the construction of multi-family units is expected to soften in 2026 and 2027, particularly among high-rise apartment units, which are considered to be over-supplied in some parts of the region. The reduction in international students is also expected to release a large amount of housing in the affected CMAs.

Later years see demand increasing through municipal densification targets and cost pressures. Planned investments in the light-rail systems in the Kitchener-Waterloo and Hamilton regions are also expected to spur development and densification.

Of the types of new residential units projected for construction in the region, growth is projected to be greatest among new single-detached housing, with the outlook for it and other low-rise structures generally expected to drive increased housing starts in the region. Construction of low- and high-rise apartment units[41] is expected to weaken in the short term and remain generally unchanged through to 2035.

Meanwhile, following several years of decline, investment in residential renovations is expected to return to growth in 2026, and is expected to increase at an average annual rate of 2.5% to the end of the forecast period.

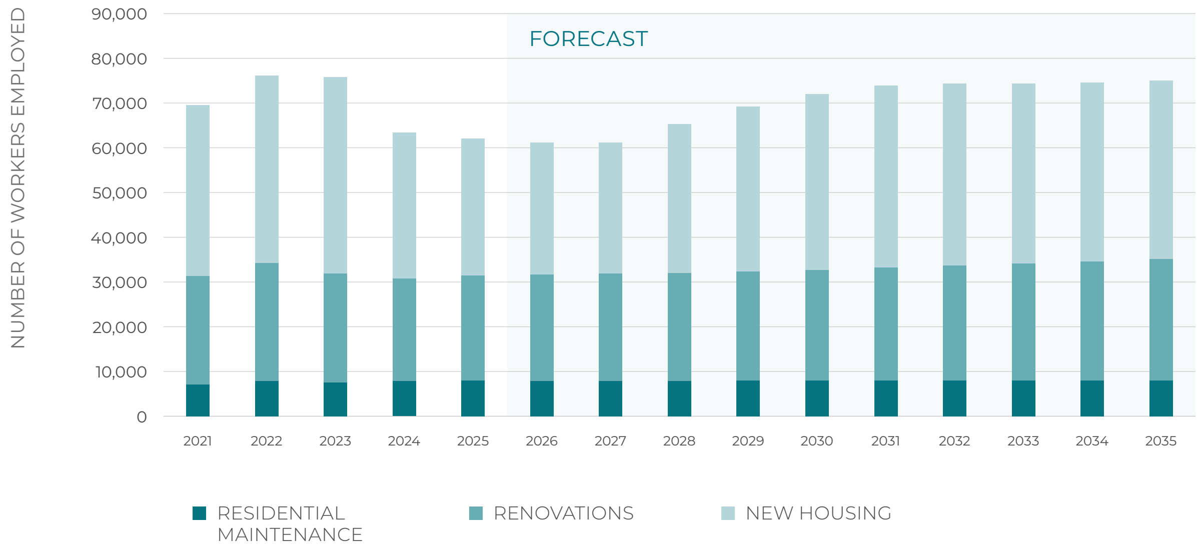
41 A low-rise apartment building has between one and four storeys; high-rise buildings have five storeys or more.

RESIDENTIAL CONSTRUCTION EMPLOYMENT

Residential construction employment levels surged in 2021 and 2022, but have experienced a pullback since due, in part, to elevated interest rates and reduced demand for new-housing construction.

Employment is expected to see small declines in 2026 and 2027 before renewed growth is expected between 2028 and 2031. Meanwhile, the region is expected to see modest gains in renovation activity across the forecast period, while employment relating to residential maintenance is expected to be comparatively unchanged.

RESIDENTIAL CONSTRUCTION EMPLOYMENT GROWTH OUTLOOK **CENTRAL ONTARIO**



SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

By 2035, total residential employment in the region is expected to rise by 21% compared to 2025 levels, with employment relating to new housing rising by 31%, renovation employment rising by 15%, and maintenance employment ending the decade unchanged.

Table 25 summarizes the estimated percent change in residential employment by sector across three periods: the short term (2026–2028), the medium term (2029–2031), and the long term (2032–2035).

TABLE 25

CHANGES IN RESIDENTIAL EMPLOYMENT BY SECTOR **CENTRAL ONTARIO**

SECTOR	% CHANGE **2026–2028**	% CHANGE **2029–2031**	% CHANGE **2032–2035**
RESIDENTIAL	5.2%	13.3%	1.5%

Note that 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.

SOURCE: BuildForce Canada

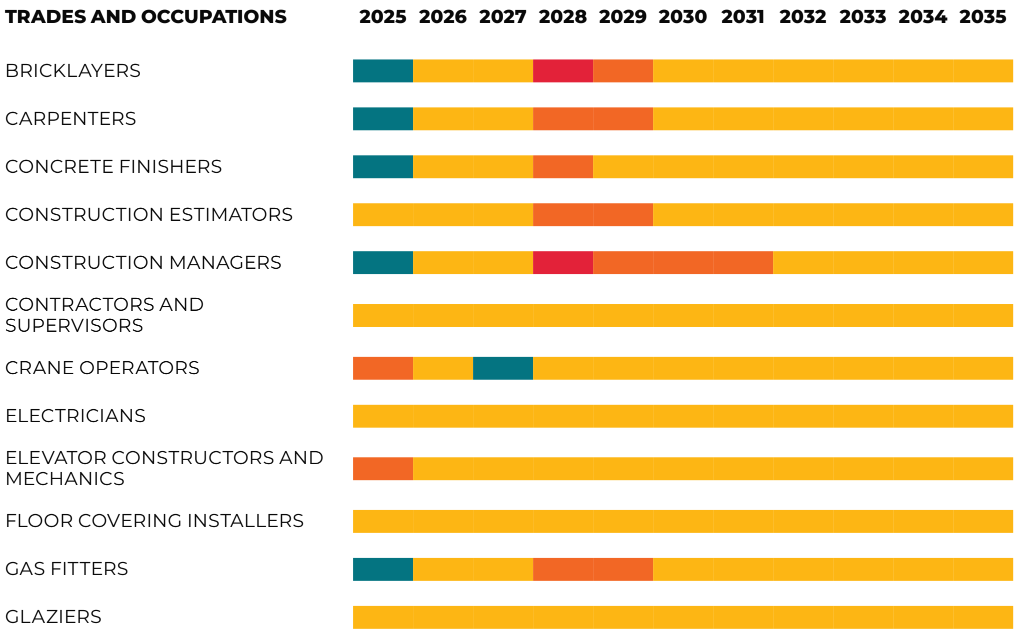
RESIDENTIAL RANKINGS, RISKS, AND MOBILITY

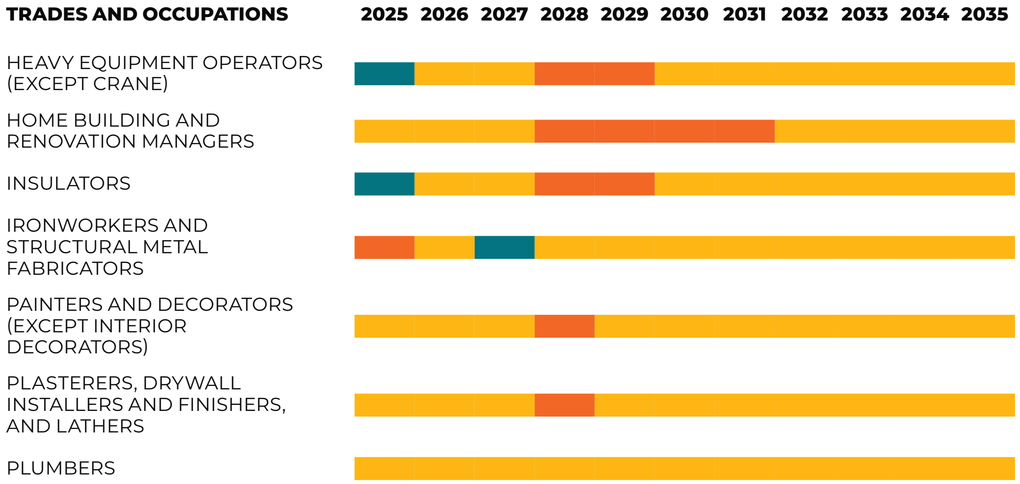
Based on currently known demands, industry recruitment and retirement estimates, the following ranks apply to the 27 covered trades in the region. See Table 26.

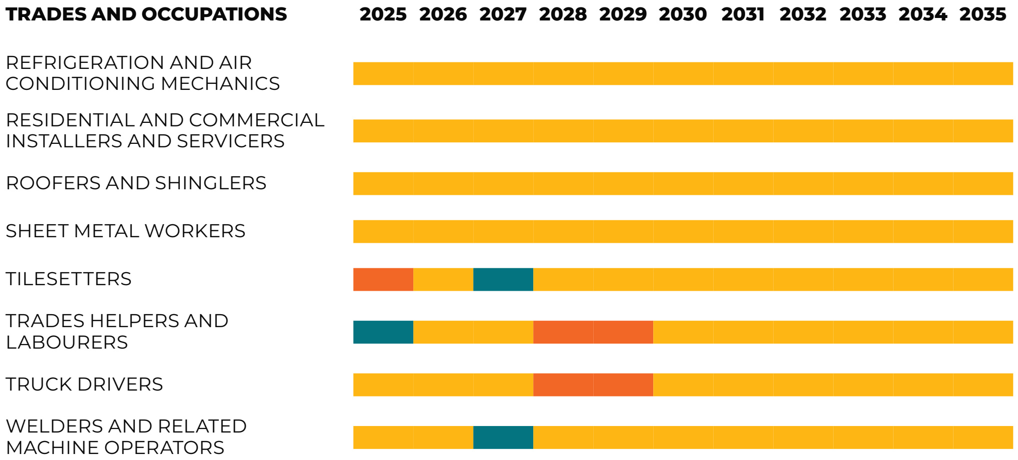
Recent investment declines translated into weaker labour market conditions in 2025 for many trades and occupations. Markets are expected to return to balance in 2026 and 2027 as these declines slow. Renewed growth in 2028 is expected to tighten markets again into 2029. Market conditions are expected to return to balance in later years.

TABLE 26

RESIDENTIAL MARKET RANKINGS **CENTRAL ONTARIO**







SOURCE: BuildForce Canada

REGIONAL INSIGHTS

EASTERN ONTARIO

ECONOMIC OUTLOOK

Although economic activity in Eastern Ontario is more protected than most other regions of the province from the effects of export tariffs imposed on Canadian goods by the United States, the region faced its own headwinds in 2025.

The 2025 federal budget, announced in November, aims to reduce the number of workers employed in the federal civil service by 40,000 workers from its 2024 peak. Eastern Ontario will be particularly affected by this transition, as 15% of the region's workers were employed in the federal public service in 2024. As these cuts began to occur, the region's job market slowed. Labour markets are expected to soften further as more cuts are made, and weak wage growth and low levels of consumer spending are expected to ensue.

The region's residential construction market received a boost in 2025, driven by increased activity in the construction of purpose-built rental housing units.

Economic growth is expected to slow further in 2026, despite ongoing construction on several major public-sector investment projects. Weaker overall employment, slowing population growth, and reduced consumer confidence are expected to create a drag on business investment and housing starts.

The outlook calls for GDP growth to rise thereafter and into 2029 on the strength of additional publicly funded major construction projects.

The region is expected to see GDP growth accelerate across the forecast period from a low of 1.2% in 2026 to a projected average of 1.7% over the remaining years.

POPULATION GROWTH AND DEMOGRAPHICS

As was the case across the country, population growth surged in Eastern Ontario in 2023 and 2024 due to an influx of international migrants to Canada.

Levels slowed in 2025 as the federal government enacted its plan to reduce immigration and decrease the number of non-permanent residents in the country. They are expected to slow again in 2026 before returning to growth in 2027, remaining closer to long-term historical levels for the remainder of the forecast period. Helping to bolster population growth in the region are healthy levels of inter-regional migration. The region has benefitted in recent years from strong employment growth and comparatively low costs of living compared to other Ontario regions.

As Eastern Ontario's population ages, its natural rate of population growth[42] trends downward. Rates reached zero in 2022 and have been negative since. Although that trend is expected to ease somewhat in the short-term forecast years, given the influx of international migrants settling in the region in their prime working and family-forming years, the rate is expected to remain at or below zero for the entirety of the forecast period. Overall population growth in the region is expected to drop below 1% in 2026 before rising to a forecast peak of 1.2% in 2029 and then easing thereafter as the natural growth rate declines further as expected deaths exceed births.

42 The 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.

RESIDENTIAL CONSTRUCTION INVESTMENT

Eastern Ontario was among the few regions in Ontario to see an increase in housing starts in 2025. The rise was attributable to a significant increase in the construction of purpose-built rental units, which more than doubled in Ottawa, and reached record levels in Belleville.

As rental vacancy rates across the region grow, the outlook for housing starts is expected to slow into 2026. Housing starts are expected to return to growth between 2027 and 2030 in response to pent-up demand and government programs created to incentivize first-time home buyers.

The volume of construction of single-detached homes has dropped significantly in the region since 2021 and is expected to do so again in 2026, given population growth trends and weakening employment. Demand for this unit type is expected to return to growth in 2027, with increases carrying through to the end of the forecast period.

Investment in multi-unit residential construction is projected to contract in 2026 from its peak in 2025. Most affected in this projection are starts for apartment-type units. Despite this pullback in 2026, demand fundamentals – including low interest rates and healthy population growth – remain strong in the region after several years of underbuilding. Later years see multi-unit starts remain elevated, with row housing accounting for an increasing share of overall activity.

Across the forecast period, the construction of single-detached homes is expected to drive activity. Demand for semi-detached and row-housing units is expected to increase across the forecast period. New construction among low- and high-rise apartments is projected to decline as a share of overall residential activity by 2035.

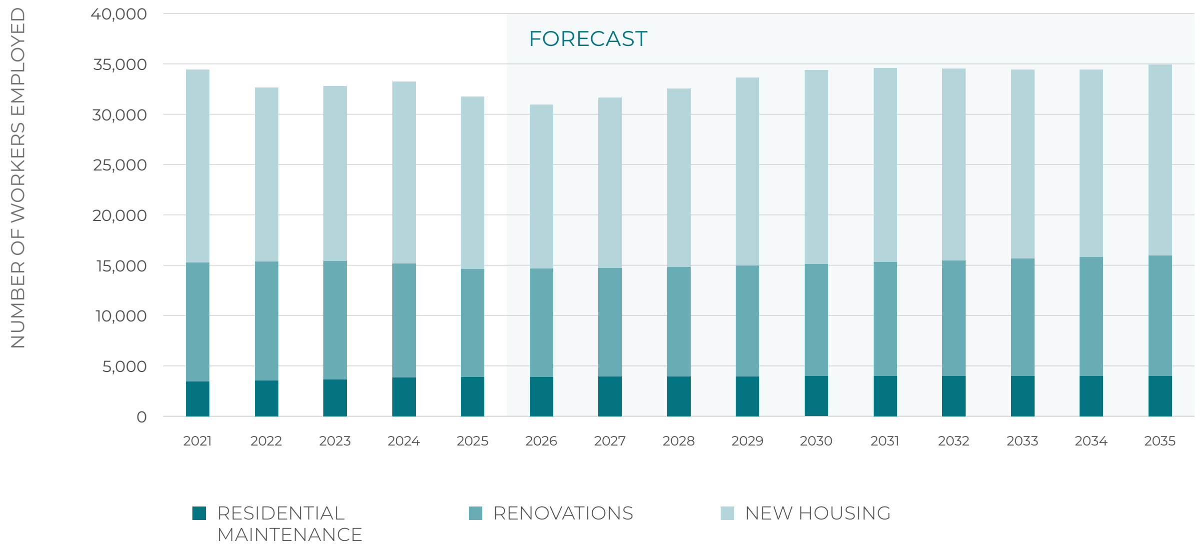
Residential construction investment levels are projected to rise across the forecast period, with the largest gains occurring between 2027 and 2031. Residential renovation activity is also projected to experience growth into 2035, with a steady upward cycle taking place after 2026.

RESIDENTIAL CONSTRUCTION EMPLOYMENT

Residential construction employment levels in Eastern Ontario have remained steady over the past five years.

Employment is projected to contract slightly into 2026 as the large volume of apartment projects underway in the region passes peak activity periods and concludes. As new-housing construction returns to growth for the period of 2027 to 2031, overall residential employment is projected to rise to a forecast peak of around 35,000 workers. Levels then remain elevated to the end of the forecast period.

RESIDENTIAL CONSTRUCTION EMPLOYMENT GROWTH OUTLOOK **EASTERN ONTARIO**



SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

By 2035, overall residential construction employment in the region is expected to rise by 10% compared to 2025 levels. Employment relating to new-housing construction is projected to rise by 11%, while employment relating to residential renovations is forecast to increase by 12%, and residential maintenance employment by 3%.

Table 27 summarizes the estimated percent change in residential employment by sector across three periods: the short term (2026–2028), the medium term (2029–2031), and the long term (2032–2035).

TABLE 27

CHANGES IN RESIDENTIAL EMPLOYMENT BY SECTOR **EASTERN ONTARIO**

SECTOR	% CHANGE **2026–2028**	% CHANGE **2029–2031**	% CHANGE **2032–2035**
RESIDENTIAL	2.6%	6.4%	1.0%

Note that 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.

SOURCE: BuildForce Canada

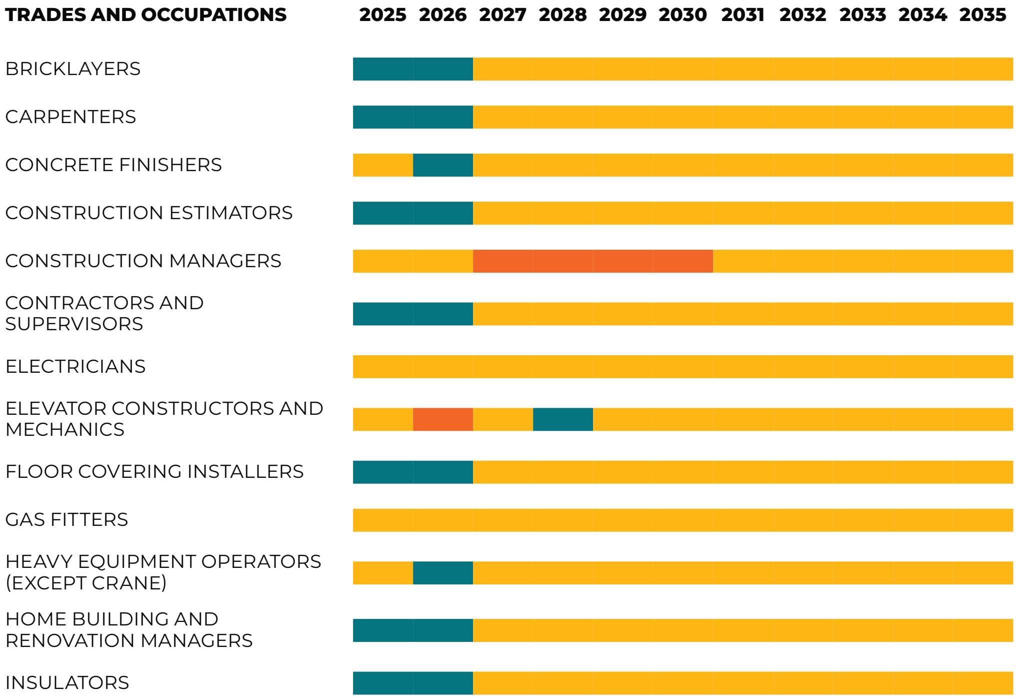
RESIDENTIAL RANKINGS, RISKS, AND MOBILITY

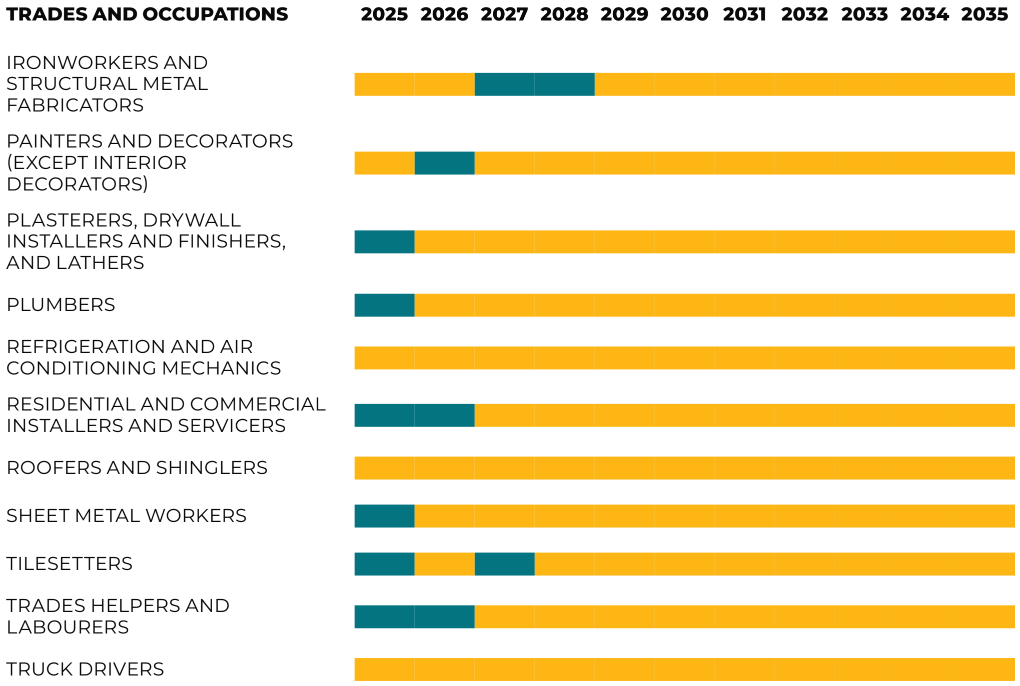
Based on currently known demands, industry recruitment and retirement estimates, the following ranks apply to the 24 covered trades in the region. See Table 28.

Labour market conditions weaken briefly for several trades and occupations in 2026, but are expected to return to balance by 2027 and across the forecast period under steady but moderate levels of growth.

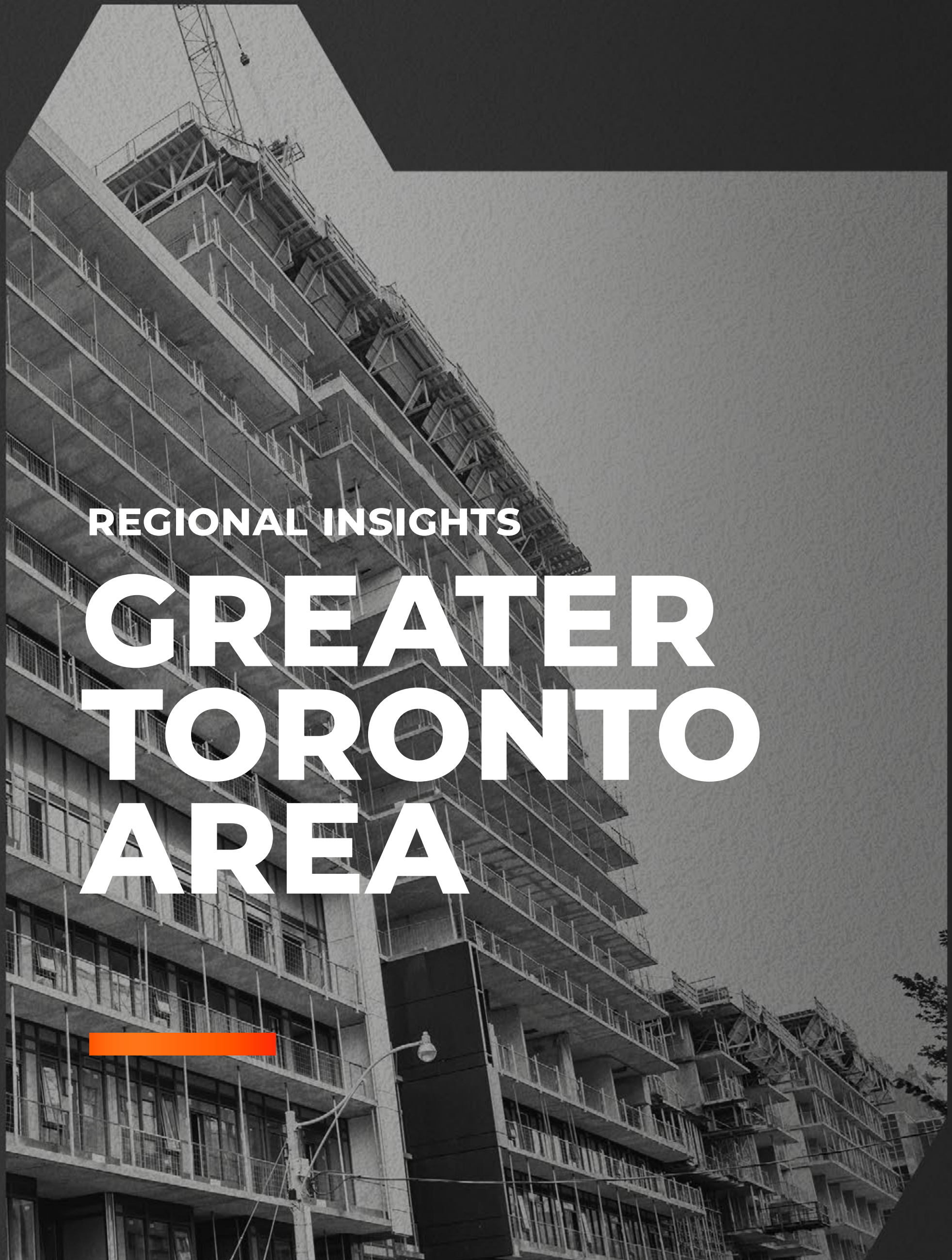
TABLE 28

RESIDENTIAL MARKET RANKINGS **EASTERN ONTARIO**





SOURCE: BuildForce Canada



REGIONAL INSIGHTS

GREATER TORONTO AREA

ECONOMIC OUTLOOK

Although economic growth in the Greater Toronto Area (GTA) has stepped down from the high levels reported in 2021, the region weathered economic headwinds in 2025. Helping to offset some of the impacts of tariffs imposed on Canadian goods by the United States, and the resulting pullback in investment in the industrial and manufacturing sector, were relatively strong levels of household spending, gains in commercial-sector capital investments, and sustained levels of non-residential construction activity. Investment in the residential sector, meanwhile, has been in decline in the region since 2022 as new-home construction has declined significantly.

Economic growth is projected to drop to below 1% in 2026 with the continued downcycle in the local home-building sector, as well as reduced levels of manufacturing activity created by trade uncertainty between Canada and the United States. Although slowing population growth, in the form of reduced levels of international immigration, will also drag on the economy, this trend is expected to tighten the local labour market and create some upward pressure on wages and incomes, which in turn is expected to sustain consumer spending in the near term.

By 2028, the region is expected to see a rebound in residential construction that is driven by renewed population growth and an increase in international migration in particular. Public capital investments are expected to rise through to 2030, in the form of major engineering construction and healthcare-sector projects.

Between 2027 and 2031, the region is expected to see average annual GDP growth rates of 1.9%. The longer-term outlook sees growth again climb to above 2% annually, driven by steady population growth and renewed residential-sector construction activity.

POPULATION GROWTH AND DEMOGRAPHICS

Population growth in the GTA slowed notably in 2025, in line with the federal government's plan to reduce immigration and decrease the number of non-permanent residents arriving in Canada. Last year saw the region experience negative net-migration levels for only the second time in 15 years – the other year being at the height of the COVID-19 pandemic in 2021.

Net migration to the region is expected to remain negative in 2026 and again in 2027, in part due to the updated federal Immigration Levels Plan, and in part due to the comparative high cost of living in the area. This, in turn, is expected to contract the region's population in both years before levels return to growth in 2028 and increase to the end of the forecast period.

Population growth is expected to average 1% annually for the latter half of the forecast period, bolstered in part by positive rates of natural population growth.

RESIDENTIAL CONSTRUCTION INVESTMENT

The Greater Toronto Area's housing market has been in decline since 2021. The rapid reduction in international migration since late 2024, coupled with an acceleration of residents leaving the region for more affordable housing, has reduced demand for all structural types, and particularly high-rise condominium units where unsold inventory has been rising.

Demand for residential rental properties has also eased significantly over the past two years due to slower population growth. It is expected to continue to decline over the short term as the population contracts. Additionally, although falling interest rates have helped ease mortgage rates for purchasers, affordability challenges remain. Government incentives to build additional purpose-built rental units are projected to keep construction of apartment buildings from declining further.

These trends are expected to create further downward pressure on residential investment levels in the short term, with a 20-year low in levels expected in 2027. As immigration returns as a driver of population growth, it helps to again increase investment in new-home construction into the early 2030s.

The outlook for housing starts in the single-detached and multi-unit markets should differ in their recoveries. Single-detached units are expected to increase in 2027 and into the early 2030s, due again to renewed population growth. Starts for these unit types, however, are expected to remain well below recent peaks, due in part to limited land availability in the region, and a lack of affordability for these unit types.

Meanwhile, the region's high-rise multi-unit residential market has stepped down from its high point in 2021 and is expected to remain lower through 2027. The region has a large inventory of unsold apartment units that must first be absorbed into the market before new construction is likely to resume. This is expected by 2028, due in part to returning population growth and new taxation incentives from the federal and provincial governments.

Across the forecast period, the region is expected to see a further short-term reduction in investment levels for high-rise apartment buildings. While investment levels in low-rise apartments and semi-detached and row units are expected to remain mostly unchanged across the decade, investment in low-rise single units is expected to rise between 2027 and 2031.

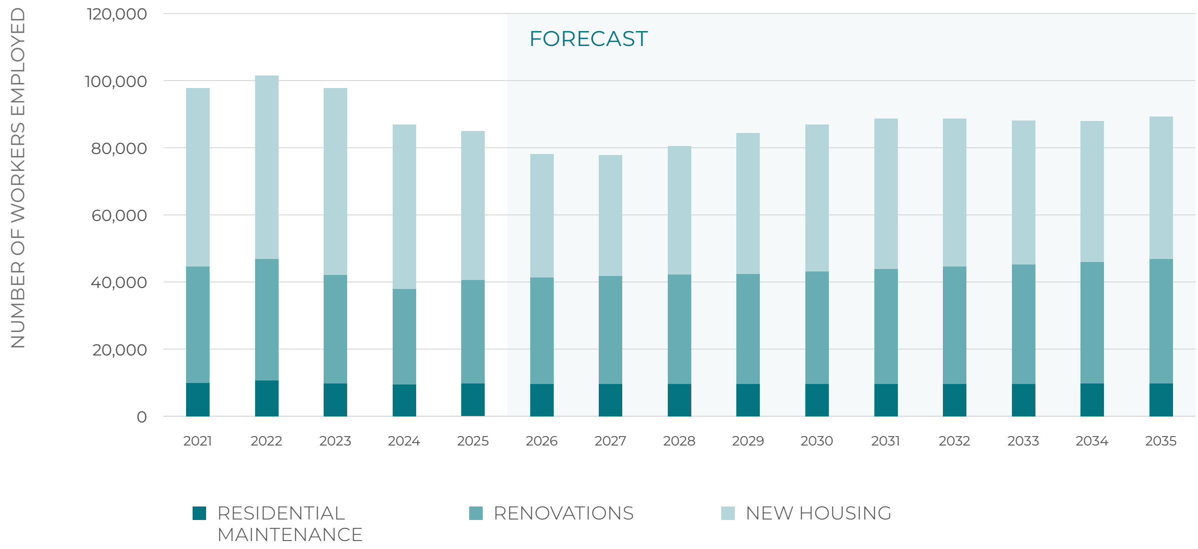
Investment in residential renovations in the GTA returned to growth in 2025 and is expected to continue to grow through the decade as inflation eases and a tightening regional labour market is projected to raise household incomes.

RESIDENTIAL CONSTRUCTION EMPLOYMENT

Strong demand for new housing in the early years of the 2020s elevated residential construction employment levels to above 100,000 workers in 2022. Levels have stepped down since.

Employment is expected to contract again in 2026 – to below 80,000 workers – with reduced demand for new housing, and particularly relating to the construction of new apartment units. Renewed growth is expected to increase employment between 2028 and 2032 and is then sustained across the remainder of the period. Increased demands are initially driven by gains in new single-detached home construction and growing residential renovation activity.

RESIDENTIAL CONSTRUCTION EMPLOYMENT GROWTH OUTLOOK **GREATER TORONTO AREA**



SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

By 2035, overall residential construction employment is expected to rise by 5% compared to 2025 levels. Although employment relating to new-housing construction is projected to contract by 4% over the forecast period, that decline is expected to be more than offset by a gain of 20% in employment relating to residential renovations. Residential maintenance employment is mostly unchanged across the forecast period.

Table 29 summarizes the estimated percent change in residential employment by sector across three periods: the short term (2026–2028), the medium term (2029–2031), and the long term (2032–2035).

TABLE 29

CHANGES IN RESIDENTIAL EMPLOYMENT BY SECTOR **GREATER TORONTO AREA**

SECTOR	% CHANGE 2026–2028	% CHANGE 2029–2031	% CHANGE 2032–2035
RESIDENTIAL	-5.1%	10.0%	0.8%

Note that 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.

SOURCE: BuildForce Canada

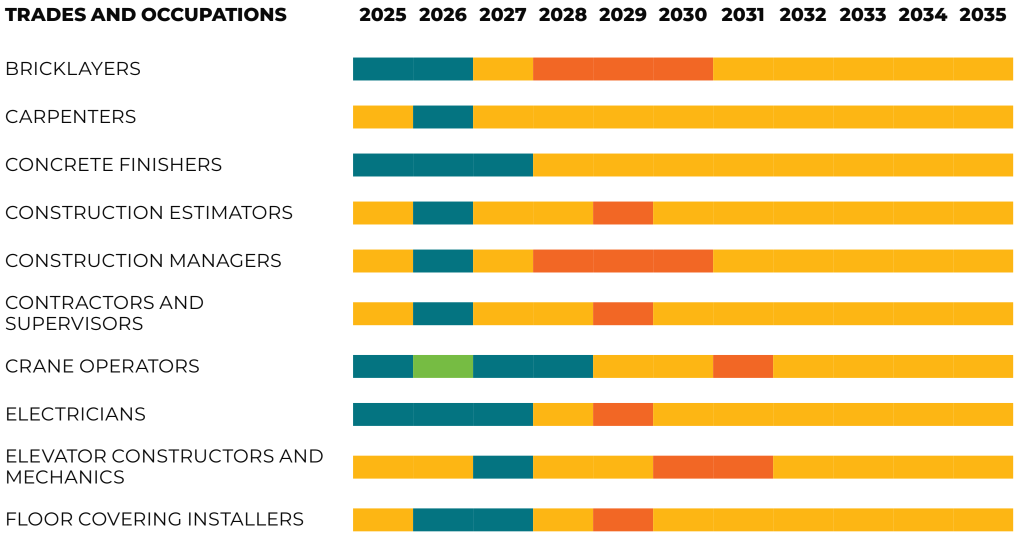
RESIDENTIAL RANKINGS, RISKS, AND MOBILITY

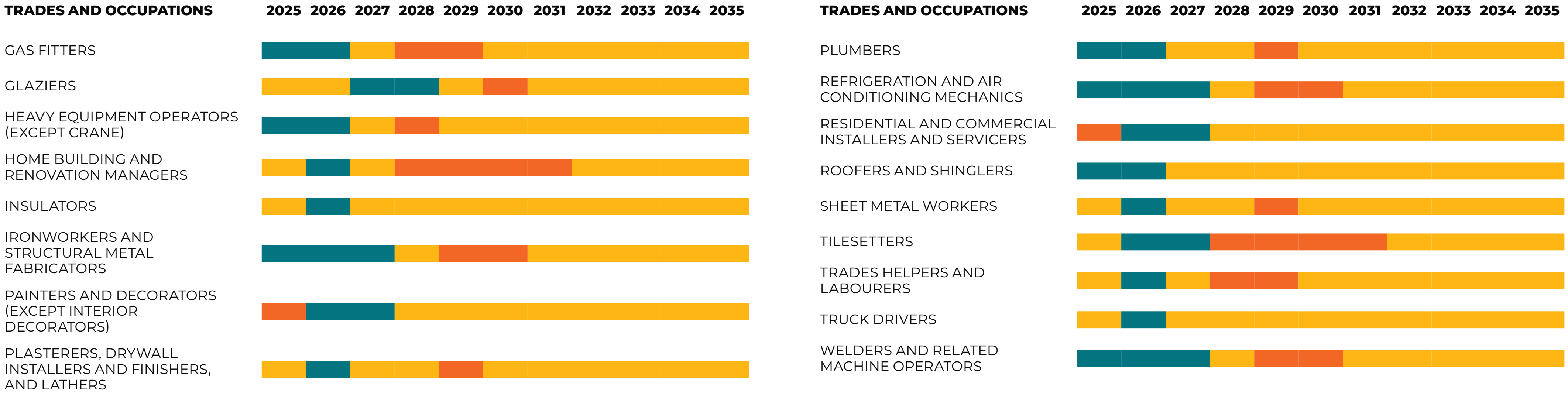
Based on currently known demands, industry recruitment and retirement estimates, the following ranks apply to the 27 covered trades in the region. See Table 30.

Declines in new-home construction weaken labour market conditions across most trades and occupations into 2027, with particularly loose conditions expected in 2026 for crane operators. Renewed growth between 2028 and 2030 tightens market conditions as the industry needs to draw in new workers to meet rising demands. By 2031, conditions return to balance under more moderate levels of growth.

TABLE 30

RESIDENTIAL MARKET RANKINGS **GREATER TORONTO AREA**





SOURCE: BuildForce Canada

REGIONAL INSIGHTS

NORTHEASTERN ONTARIO

ECONOMIC OUTLOOK

Northeastern Ontario's economy was resilient to the tariffs imposed by the United States on Canadian goods in 2025. An improvement in consumer spending and strength in the region's non-residential sector helped offset any significant negative impacts.

GDP growth is projected to slow in 2026 with slowing consumer spending related to weaker immigration and population growth. Non-residential construction supports growth over the near-term to 2028 and is boosted thereafter as several mining projects are projected to come on stream and add to exports for the region.

Overall, GDP growth in the Northeastern Ontario region is expected to average 1.3% over the near term to 2028, increasing to 2.9% in 2029. Growth is projected to average 1.6% across the remainder of the forecast period.

Of note, economic growth in the region has significant upside potential if a long list of major mining and infrastructure projects proceeds.

POPULATION GROWTH AND DEMOGRAPHICS

Northeastern Ontario saw a significant boost in population growth during the period of 2022 to 2024 when international migration levels surged. That trend began to reverse in 2025 as the federal government adjusted its Immigration Levels Plan, and is expected to continue to do so in 2026 and 2027. Migration levels are expected to return to growth in 2028 and through to 2035, supported by returning levels of immigration and from positive regional in-migration as workers seek to fill expected job vacancies.

Compared with Northwestern Ontario, the Northeast region has a younger demographic base. However, it also faces a negative natural population growth rate[43], with deaths exceeding births. As immigration slows in the short term, population growth rates are expected to turn negative. By 2028, however, the population growth rate turns positive again, and averages approximately 0.3% annually across the later years of the scenario.

43 The 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.

RESIDENTIAL CONSTRUCTION INVESTMENT

Residential construction investment has been elevated in Northeastern Ontario since 2021, as rapidly rising demand for new construction helped to offset reduced demand for residential renovations. Housing starts are expected to slow through the early years of the forecast period, and in response to reduced immigration levels. Much like in Northwestern Ontario, that reduction is expected to be moderate as builders respond to under-supply in the market.

The construction of single-detached homes has slowed significantly since reaching a peak in 2021. The outlook calls for starts for this unit type to rise significantly across the forecast period. This occurs in response to population growth and as real incomes rise, enabling more families to afford these unit types.

Multi-unit construction surged in 2024 and 2025 in response to the rapid population growth in the region. A similarly rapid decline is expected to slow demand in 2026 and again in 2027. Construction of these units is projected to return to growth through 2028 as immigration levels are projected to rise again, before slowing again over the later part of the forecast period in line with population trends.

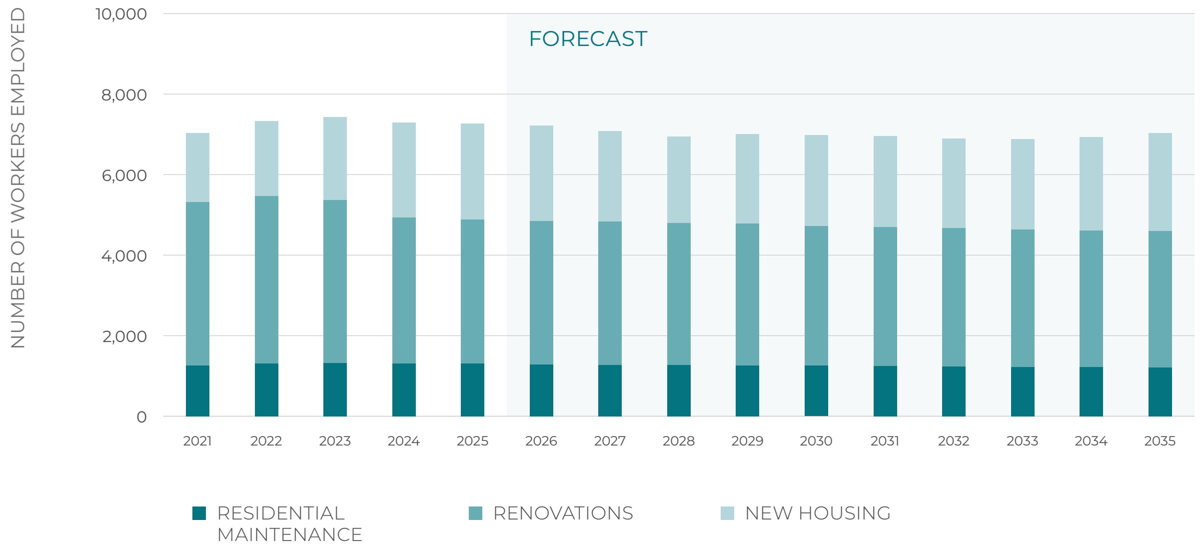
Over the forecast period, investment in new-housing construction is expected to generally trend upward to 2035 following declines in 2027 and 2028, while investment in residential renovations is expected to make modest gains, supported by strong income growth and a growing housing stock.

RESIDENTIAL CONSTRUCTION EMPLOYMENT

Residential construction employment levels in North-eastern Ontario have stepped down since 2022 and 2023, when employment relating to renovation activity was at an elevated level.

Employment is forecast to be comparatively unchanged in 2026 before experiencing modest declines into 2028 with a reduction in new-housing construction. Later years call for employment levels to remain around 7,000 workers annually through to the end of the forecast period, with gains in employment relating to new-housing offsetting small reductions in renovation-related employment.

RESIDENTIAL CONSTRUCTION EMPLOYMENT GROWTH OUTLOOK **NORTHEASTERN ONTARIO**



SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

By 2035, residential employment in the region is projected to contract by 3% compared to 2025 levels. Combined losses in employment relating to residential renovations (-5%) and residential maintenance activities (-7%) more than offset a gain of just under 3% in employment relating to new housing.

Table 31 summarizes the estimated percent change in residential employment by sector across three periods: the short term (2026–2028), the medium term (2029–2031), and the long term (2032–2035).

TABLE 31

CHANGES IN RESIDENTIAL EMPLOYMENT BY SECTOR **NORTHEASTERN ONTARIO**

SECTOR	% CHANGE **2026–2028**	% CHANGE **2029–2031**	% CHANGE **2032–2035**
RESIDENTIAL	-4.4%	0.1%	1.2%

Note that 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.

SOURCE: BuildForce Canada

RESIDENTIAL RANKINGS, RISKS, AND MOBILITY

Based on currently known demands, industry recruitment and retirement estimates, the following ranks apply to the 14 covered trades in the region. See Table 32.

Driven by moderate changes across the forecast period, labour market conditions for most trades and occupations are balanced.

TABLE 32

RESIDENTIAL MARKET RANKINGS **NORTHEASTERN ONTARIO**

TRADES AND OCCUPATIONS	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035
CARPENTERS											
CONSTRUCTION ESTIMATORS											
CONSTRUCTION MANAGERS											
CONTRACTORS AND SUPERVISORS											
ELECTRICIANS											
HEAVY EQUIPMENT OPERATORS (EXCEPT CRANE)											
HOME BUILDING AND RENOVATION MANAGERS											
OTHER TRADES AND OCCUPATIONS											
PAINTERS AND DECORATORS (EXCEPT INTERIOR DECORATORS)											
PLASTERERS, DRYWALL INSTALLERS AND FINISHERS, AND LATHERS											
PLUMBERS											
RESIDENTIAL AND COMMERCIAL INSTALLERS AND SERVICERS											
ROOFERS AND SHINGLERS											
TRADES HELPERS AND LABOURERS											

SOURCE: BuildForce Canada

REGIONAL INSIGHTS

NORTHWESTERN ONTARIO

ECONOMIC OUTLOOK

Northwestern Ontario's economy weathered most of the economic impacts created by the United States-imposed tariffs on Canadian goods in 2025. Strong levels of growth in the public- and private sectors, including in the construction sector, helped protect the economy from the worst of the impacts of tariffs.

With inflation projected to remain low across the forecast period, household spending is expected to be a key driver of growth in the regional economy. This is bolstered by additional investments by government, including on new healthcare and education projects. Offsetting these are recent steps taken by the federal government to reduce international migration levels, a projected downturn in residential construction as population growth slows, and the conclusion of several key major projects.

GDP growth in Northwestern Ontario is expected to slow with reduced residential construction and lower levels of public-sector investment, although these are expected to be offset by several major mining and utilities projects into 2028.

Overall, GDP growth in the Northwestern region is expected to average 1.4% annually into 2030 before slowing to 1.1% across the longer term.

Of note, economic growth in the region has significant upside potential if a long list of major mining and infrastructure projects, many of which are in the Ring of Fire region, are confirmed to proceed.

POPULATION GROWTH AND DEMOGRAPHICS

Population growth rose significantly in Northwestern Ontario between 2022 and 2024, driven principally by high levels of international migration. Growth slowed in 2025 and is expected to slow further in 2026, in line with the federal government's plan to reduce immigration and decrease the number of non-permanent residents by 2027. In the years that follow, the population is expected to increase, driven principally by greater inflows of residents from abroad and supplemented in later years by positive levels of migration from other regions of the province.

Northwestern Ontario is one of the older regions of Ontario. Its rate of natural population growth[44] has been negative since 2018 and is projected to remain so through to 2035. Although the recent growth in immigration seen during the period of 2022 to 2024 is expected to offset some of this negative trend in the short term, total population growth in the region is expected to remain negative in the short term to 2028, and only fractionally positive across the remainder of the forecast period.

44 The 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.

RESIDENTIAL CONSTRUCTION INVESTMENT

Investment in new housing in Northwestern Ontario rose notably between 2022 and 2024, in response to strong population growth. Multi-unit housing starts, and apartment starts in particular, rose significantly over that period. Although the region is expected to experience negative population growth over the medium-term, housing starts are expected to remain elevated to the end of the forecast period in response to years of under-building in the region and government incentives to build additional purpose-built rental units.

The outlook calls for single-detached housing starts to remain stable in 2026 before slowing in 2027, again in response to population growth pressures. Thereafter, demand for single-detached units is expected to grow to the end of the forecast period. This occurs as immigration levels are expected to increase and as the region's population ages to the point where they have accumulated enough wealth to afford these comparatively higher-priced unit types.

Demand for multi-unit dwellings reached a peak in 2024 driven by a surge in the construction of apartment units in Thunder Bay in particular. Levels have declined since and are expected to continue to do so into 2028 with expected immigration reductions. As the population returns to growth thereafter, and with government incentives to spur more residential construction, starts are expected to return to growth into the early 2030s before falling back into line with population trends.

Within the new-home construction component, activity relating to single-detached housing is unchanged in 2026 but recedes briefly in 2027 before generally rising across the remainder of the forecast period. Activity relating to the construction of low-rise and high-rise apartments[45] fluctuates in line with population growth.

Renovation activity remains a key driver of residential investment in the region. The forecast calls for investment levels to grow at a modest pace.

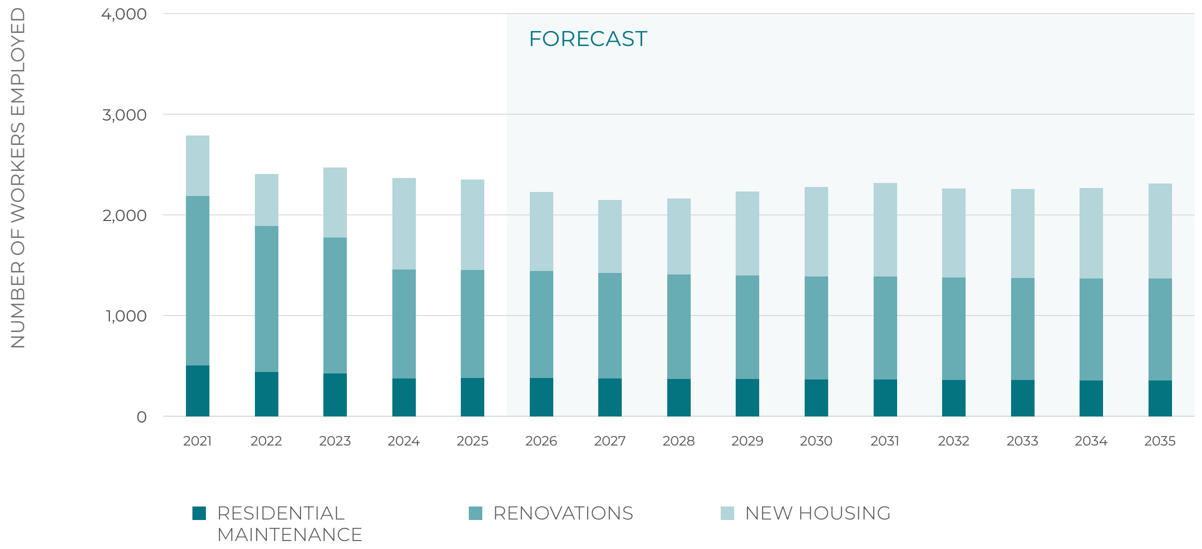
45 A low-rise apartment building has between one and four storeys; high-rise buildings have five storeys or more.

RESIDENTIAL CONSTRUCTION EMPLOYMENT

With residential renovation activity slowing in Northwestern Ontario since reaching a peak in 2021, residential construction employment levels have followed suit. Some of these losses were offset by gains in new-housing construction in 2024 and 2025, with employment levels sustained at approximately 2,400 workers.

The forecast calls for residential employment in the region to slow into 2027 with lower levels of new-home construction, and multi-unit housing in particular. As new-home construction resumes between 2028 and 2031, employment increases. Thereafter, and to the end of the forecast period, levels are mostly sustained through to the end of the forecast period

RESIDENTIAL CONSTRUCTION EMPLOYMENT GROWTH OUTLOOK **NORTHWESTERN ONTARIO**



SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

By the end of the decade, residential employment in the region is projected to contract marginally by 2% compared to 2025 levels. A gain in employment relating to new housing (+4%) offsets contractions in residential renovation employment (-5%) and residential maintenance employment (-8%).

Table 33 summarizes the estimated percent change in residential employment by sector across three periods: the short term (2026–2028), the medium term (2029–2031), and the long term (2032–2035).

TABLE 33

CHANGES IN RESIDENTIAL EMPLOYMENT BY SECTOR **NORTHWESTERN ONTARIO**

SECTOR	% CHANGE **2026–2028**	% CHANGE **2029–2031**	% CHANGE **2032–2035**
RESIDENTIAL	-8.2%	7.2%	-0.2%

Note that 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.

SOURCE: BuildForce Canada

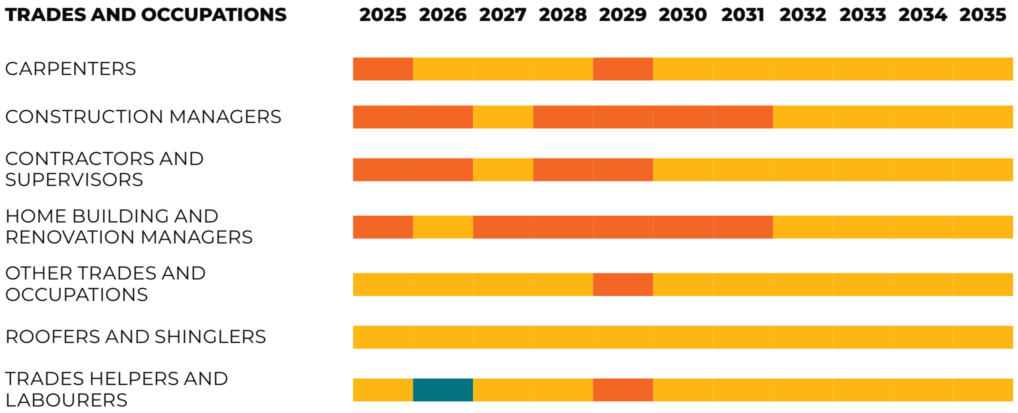
RESIDENTIAL RANKINGS, RISKS, AND MOBILITY

Based on currently known demands, industry recruitment and retirement estimates, the following ranks apply to the 7 covered trades in the region. See Table 34.

Although total employment is projected to recede in 2026 and 2027, overall labour market conditions are expected to remain tight for several trades and occupations over the medium term to 2029, and to 2031 for management-related occupations.

TABLE 34

RESIDENTIAL MARKET RANKINGS **NORTHWESTERN ONTARIO**



SOURCE: BuildForce Canada

REGIONAL INSIGHTS

SOUTHWESTERN ONTARIO

ECONOMIC OUTLOOK

Despite some headwinds, Southwestern Ontario's economy showed resilience in 2025. Although tariffs imposed on Canadian exports by the United States impacted the region's manufacturing sector and housing starts contracted by 20%, the local economy was boosted by a significant surge in business investment that was tied to major automotive-sector investments in the Windsor and London areas. These factors, combined with gains in household incomes and consumer spending, helped to realize a GDP growth rate of just under 2%.

As inflation remains under control, household spending is expected to be a key driver of economic growth in the region across the forecast period. In the short term, GDP output is expected to slow in 2026 as the federal government realizes its plan to lower immigration levels and population growth slows in the region as a result.

That downturn is expected to be brief, however. By 2027, public capital spending is expected to return to growth with the start of construction on the Fancsy Family Hospital project in Windsor, which carries through to 2031. Population growth in the region is also expected to return to growth, bringing with it an increase in residential construction and consumer spending.

Southwestern Ontario's GDP growth is projected to average approximately 1.6% annually through to 2030, with the longer-term average easing to approximately 1.5%.

POPULATION GROWTH AND DEMOGRAPHICS

Population growth has surged in Southwestern Ontario in recent years. As the federal government enacted its plan to lower the number of non-permanent residents in Canada to 5% of the overall population by late 2027, population growth stepped down in the region in 2025. It is expected to do so again in 2026, with growth in the region expected to be driven exclusively by inter-regional migration.

The region's population is projected to return to growth in 2027 as net inter-regional migration remains elevated in response to more affordable costs of living.

Southwestern Ontario's population, meanwhile, is aging. Its natural rate of population growth[46] is negative, with deaths exceeding births. Although the recent surge in international migration is projected to help offset some of this declining trend, the population is expected to continue to age over the forecast period. These factors are expected to combine to create population growth rates of below 1% across the forecast period, with growth projected to decelerate in the long-term years.

46 The 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.

RESIDENTIAL CONSTRUCTION INVESTMENT

Residential construction investment levels in Southwestern Ontario are expected to rise across the forecast period despite a reduction in housing starts in the short term. Thereafter, investment in new housing returns to growth, rising into 2031 before being sustained at an elevated level to 2035.

Driving growth during this period is a steady increase in demand for single-detached housing, which in turn is supported by stabilized interest rates as well as renewed population growth. Across the forecast period, single-detached home construction is expected to be the principal driver of new-housing investment in the region.

Starts for multi-unit dwellings, meanwhile, are expected to contract modestly over the near term in response to lower levels of international migration. Many key urban centres in the region, including the London and Windsor census metropolitan areas, are experiencing levels of over-supply in their rental housing markets. This is expected to create further downward pressure over the near term.

Construction levels return to growth through 2031, spurred in part by federal and provincial incentives for rental unit construction and for first-time home buyers, before receding in later years as population growth slows. Investment in the construction of new low- and high-rise apartments[47] is expected to moderate across the forecast period.

Investment in residential renovations enters the forecast period on a moderate upward trend. Although activity was slowed by rising interest rates between 2022 and 2024, and increased economic uncertainty, it is expected to grow steadily across the forecast period, supported by growth in household incomes and a larger housing stock that will require remodelling.

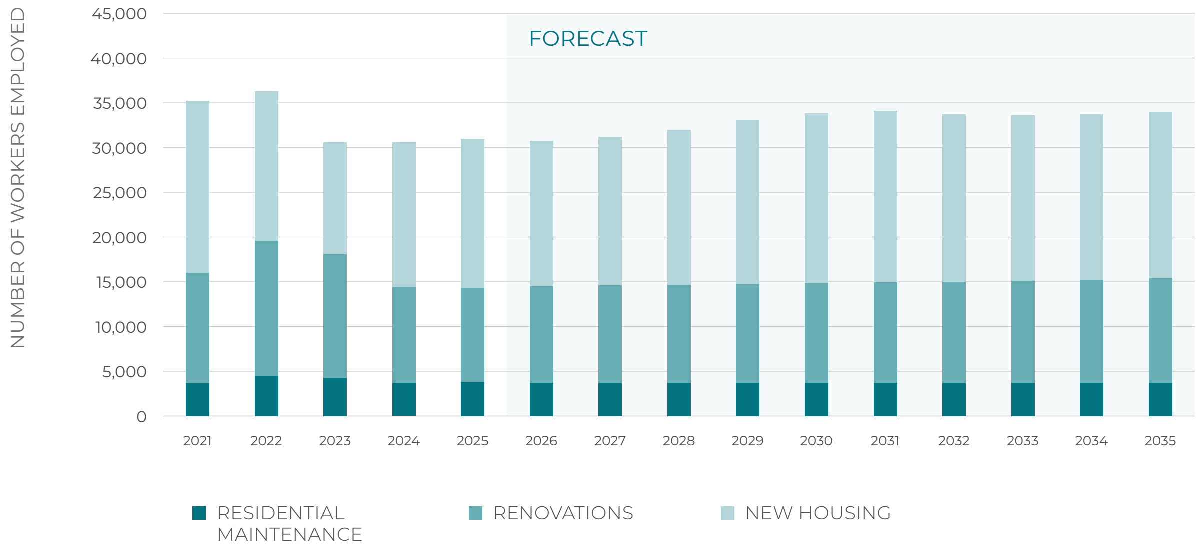
47 A low-rise apartment building has between one and four storeys; high-rise buildings have five storeys or more.

RESIDENTIAL CONSTRUCTION EMPLOYMENT

After dropping notably in 2023, residential construction employment levels in Southwestern Ontario have remained relatively unchanged since. They enter the forecast period above 30,000 workers, driven primarily by activity in new-home construction.

Employment is expected to recede modestly in 2026, again due to reduced activity in new-housing construction. Levels are projected to increase thereafter and through to 2031 as demand for new housing returns to growth, and remain elevated to the end of the forecast period.

RESIDENTIAL CONSTRUCTION EMPLOYMENT GROWTH OUTLOOK **SOUTHWESTERN ONTARIO**



SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

By 2035, overall residential employment is expected to rise by 10% compared to 2025 levels, with growth more concentrated in new-housing construction over this period, and in particular in the construction of new single-detached homes. Employment related to new-home construction is projected to rise by 15% from 2025 levels to a peak in 2031, and remain elevated through to 2035.

The outlook for employment relating to renovations rises steadily across the forecast period, up 10% compared to 2025. Maintenance employment is relatively unchanged.

Table 35 summarizes the estimated percent change in residential employment by sector across three periods: the short term (2026–2028), the medium term (2029–2031), and the long term (2032–2035).

TABLE 35

CHANGES IN RESIDENTIAL EMPLOYMENT BY SECTOR **SOUTHWESTERN ONTARIO**

SECTOR	% CHANGE **2026–2028**	% CHANGE **2029–2031**	% CHANGE **2032–2035**
RESIDENTIAL	3.2%	6.6%	-0.2%

Note that 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.

SOURCE: BuildForce Canada

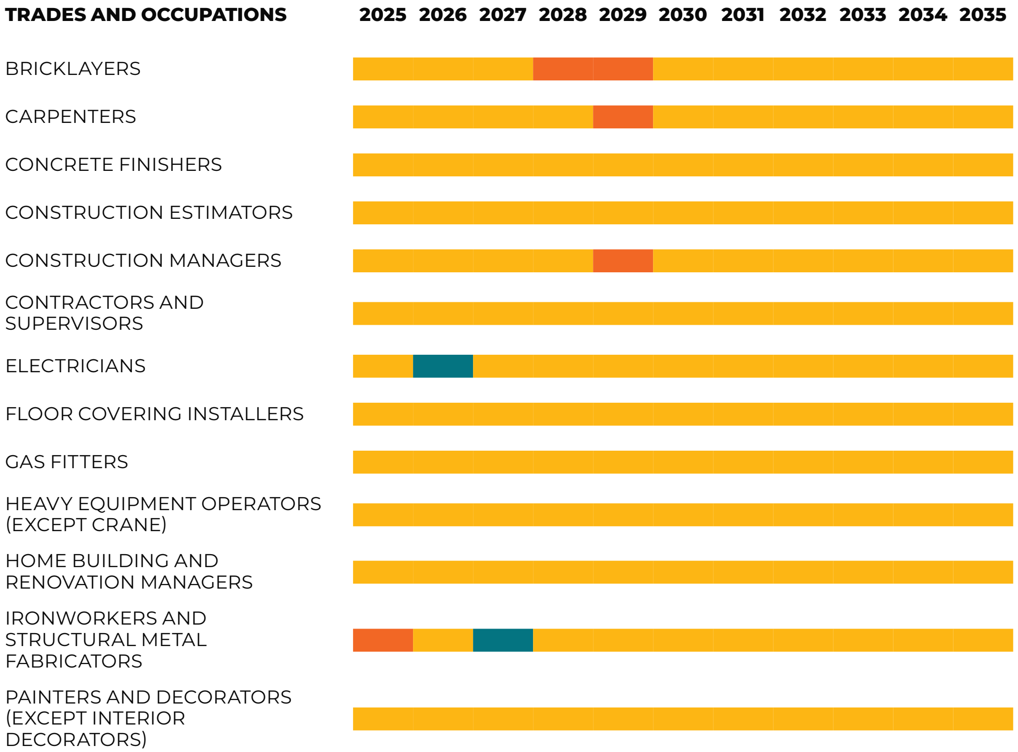
RESIDENTIAL RANKINGS, RISKS, AND MOBILITY

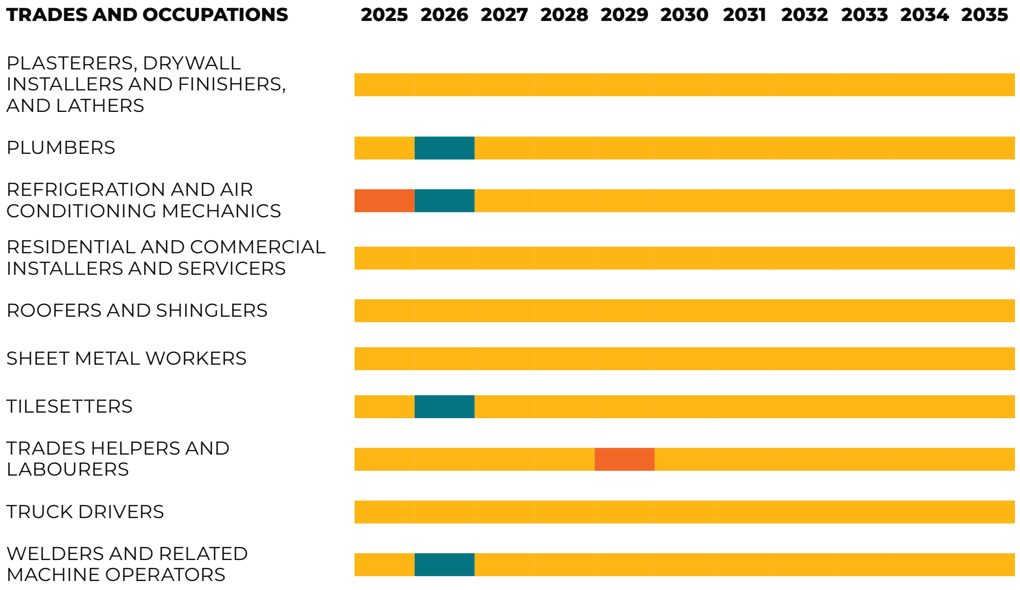
Based on currently known demands, industry recruitment and retirement estimates, the following ranks apply to the 23 covered trades in the region. See Table 36.

Labour market conditions weaken briefly for some trades and occupations in 2026, but overall market conditions are mostly balanced under steady but moderate levels of growth across the forecast period.

TABLE 36

RESIDENTIAL MARKET RANKINGS **SOUTHWESTERN ONTARIO**





SOURCE: BuildForce Canada

PROVINCIAL INSIGHTS

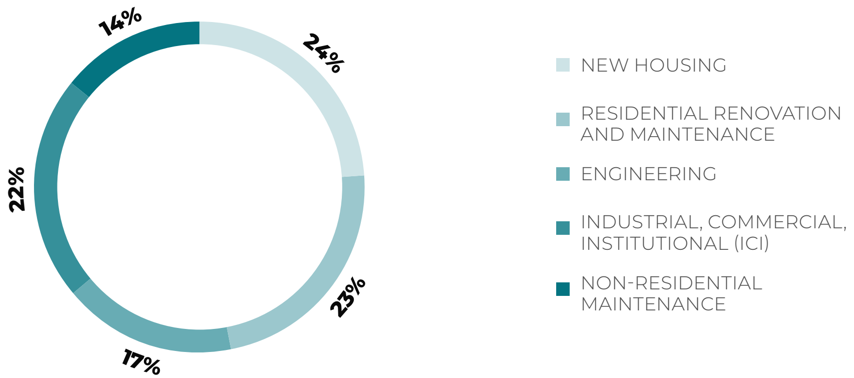
MANITOBA

ECONOMIC OUTLOOK

Despite economic headwinds created by the ongoing tariff dispute between Canada and the United States and by slower population growth, GDP growth in Manitoba in 2025 was only slightly lower than 2024. Business investment was strong and a long list of major non-residential construction projects helped to drive growth.

The outlook calls for steady economic growth in the province almost entirely across the forecast period, and at an average annual rate of 1.5%. In the short term, output created by key major construction projects helps to offset slower trade activity. In the medium term, gains in wages and incomes should help to offset slowing population growth, and therefore sustain the province's residential construction sector. A small reduction in growth occurs in 2031 with the completion of several known major construction projects.

DISTRIBUTION OF CONSTRUCTION EMPLOYMENT IN 2025 **MANITOBA**



10-YEAR WORKFORCE OUTLOOK FOR **MANITOBA**

10,000
RETIREMENTS

+11,700
NEW ENTRANTS

2,260
EMPLOYMENT CHANGE
(4.7%)

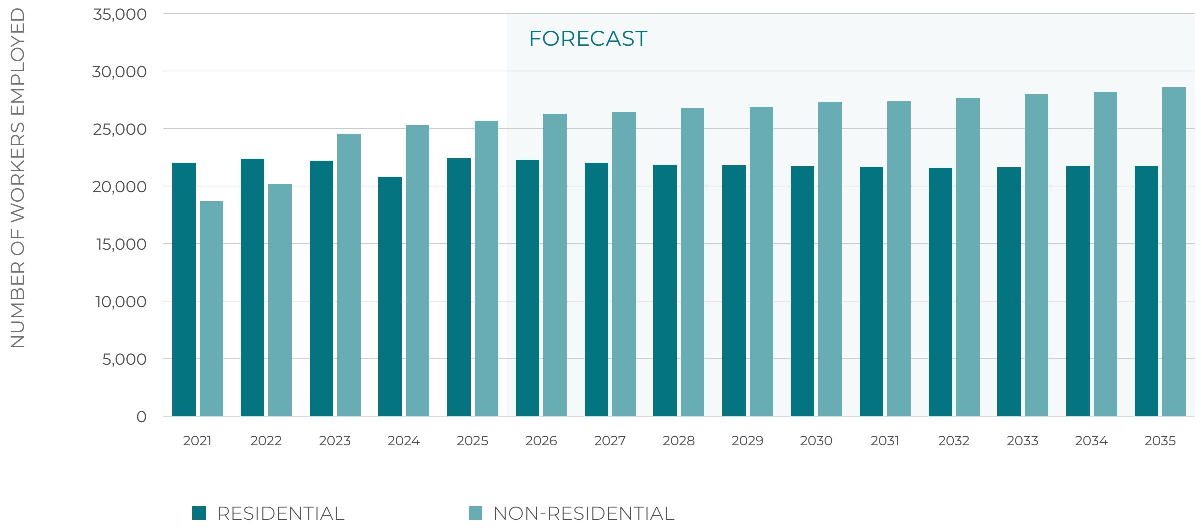
7.3%
AVERAGE UNEMPLOYMENT RATE

POPULATION GROWTH AND DEMOGRAPHICS

Population growth in Manitoba was significantly elevated in 2023 and 2024, supported by an influx of international migration at the conclusion of the COVID-19 pandemic. Growth dropped significantly in 2025 due to the federal government's plan to reduce immigration and to reduce the number of non-permanent residents to 5% of the Canadian population by late 2027.

The outlook calls for a slight population decline in 2026, given these conditions, before returning to growth rates of around 1% annually by the early 2030s. (See Figure 54.)

CONSTRUCTION EMPLOYMENT GROWTH OUTLOOK MANITOBA



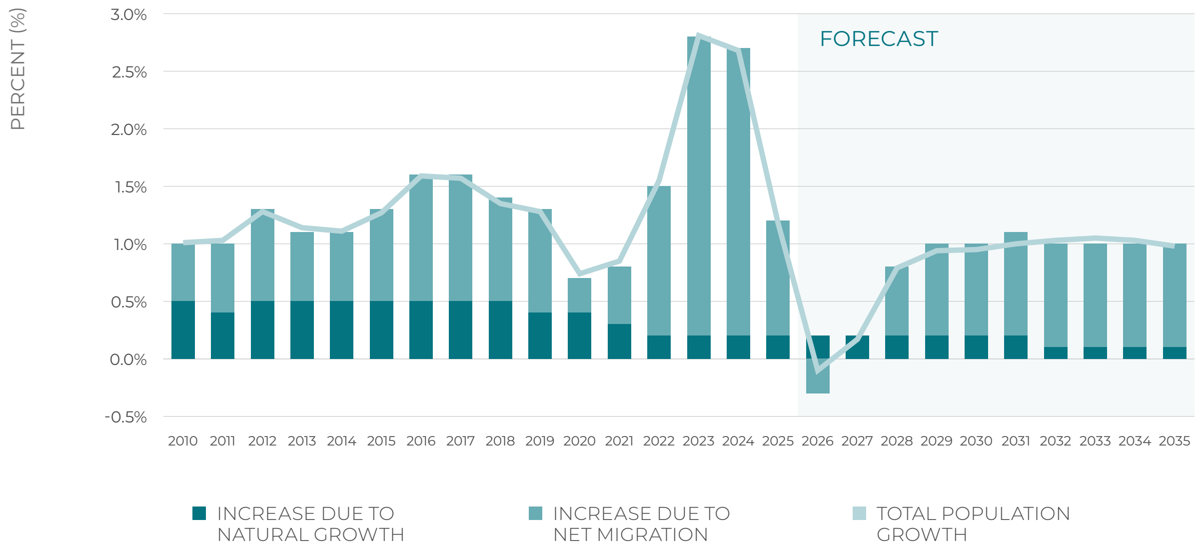
SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

Partially offsetting some of the negative migration trends is the fact that Manitoba has one of the youngest demographics in the country, with its natural rate of population growth[48] remaining positive. That rate is expected to be sustained at a positive level across the forecast period, due in part to migrants settling in the province during their prime working and child-bearing years.

48 The 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.

FIGURE 54

SOURCES OF POPULATION GROWTH (%) MANITOBA



SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

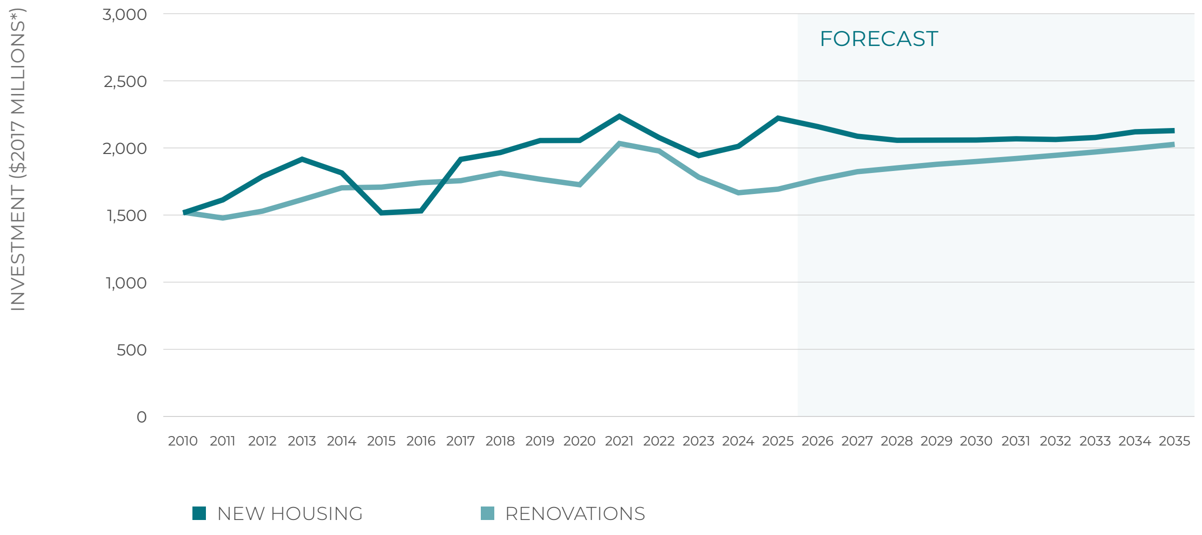
RESIDENTIAL CONSTRUCTION INVESTMENT

Demographic shifts, such as the anticipated receding levels of international migration, tend to have direct impacts on the residential sector. In Manitoba, total residential construction investment levels are expected to rise by 6% across the forecast period due to diverging trends in new-home construction and renovations. (See Figure 55.)

In the short term, levels decline due to slowing demand for new housing that is caused by slowing population growth. This decrease is offset somewhat by gains in residential renovation activity. Later years see investment levels moderate. Slowing levels of new construction into the early 2030s are offset by increasing renovation demand. Both sectors see modest increases in the final years of the decade.

FIGURE 55

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 (2026–2035)

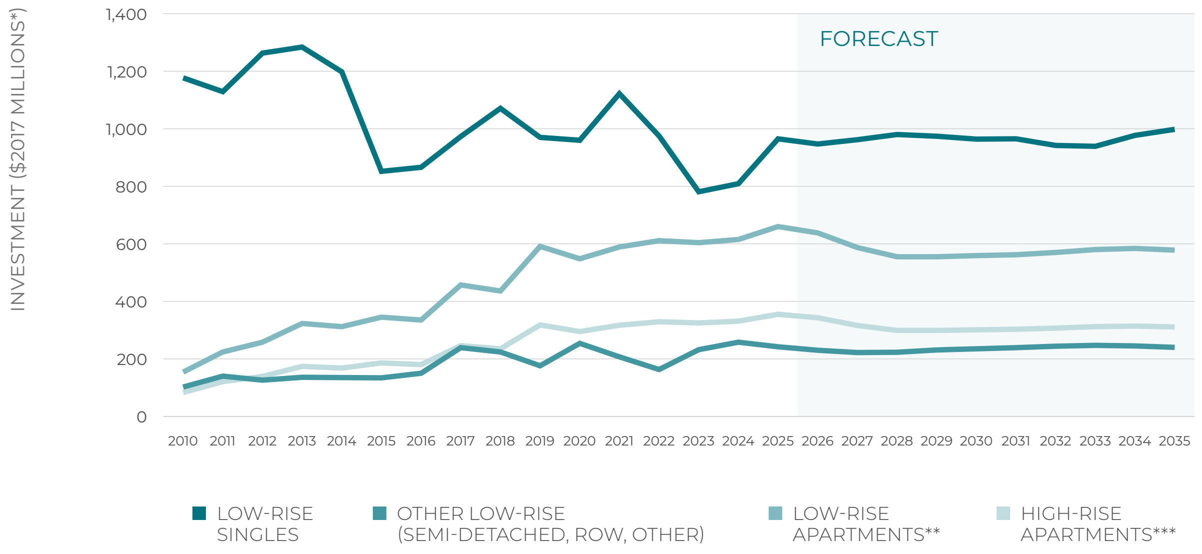
Housing starts approached a recent peak at 7,900 units in the province in 2025, but are expected to decline by as much as 11% through the short term. After 2028, however, starts remain almost unchanged to the end of the decade.

Demand for single-detached[49] units remains elevated across the forecast period, driven initially by stabilizing interest rates and, in later years, by population growth. Demand for multi-unit residential starts is expected to contract in the short term, again due to lower levels of international migration. Although this trend is expected to be countered somewhat by the federal government's 100% GST rebate on the construction of residential rental units. Start volumes increase again after 2028 as migration levels are projected to increase through the end of the forecast period, given the comparative affordability of these units. (See Figure 56.)

49 Single-detached (single) refers to a building containing only one dwelling unit that is completely separated on all sides from any other dwelling or structure.

FIGURE 56

NEW HOUSING 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.

** Low-rise apartments are buildings with four storeys or fewer.

*** High-rise apartments are buildings with five or more storeys.

SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

RESIDENTIAL CONSTRUCTION EMPLOYMENT

Employment in residential construction enters the forecast period at an elevated level and is expected to remain stable at an average of 21,800 workers annually through to the end of the decade.

Contractions in employment relating to new housing construction are offset by gains in employment in residential maintenance and renovations. Employment grows again in the later years of the forecast period, driven by increases in all three components.

Employment within the new-housing component continues to be driven by demand for low-rise single-detached units, with levels remaining almost unchanged through to 2035.

By the end of the decade, residential construction employment in Manitoba is projected to contract by 3%. Employment losses are exclusive to the new-housing sector which declines by 13% over 2025 levels. Employment relating to renovation and maintenance activity, however, both increase over the forecast period, helping to offset some of this loss.

Table 37 summarizes the estimated percent change in residential employment by sector across three periods: the short term (2026–2028), the medium term (2029–2031), and the long term (2032–2035).

TABLE 37

CHANGES IN RESIDENTIAL EMPLOYMENT BY SECTOR **MANITOBA**

SECTOR	% CHANGE **2026–2028**	% CHANGE **2029–2031**	% CHANGE **2032–2035**
RESIDENTIAL	-3%	-1%	0%
NEW HOUSING	-10%	-2%	-1%
RENOVATIONS	6%	1%	1%
RESIDENTIAL MAINTENANCE	2%	2%	2%

Note that 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.

SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

RANKINGS, RISKS, AND MOBILITY: TRADES AND OCCUPATIONS

The BuildForce LMI system tracks supply and accounts for the change in the available labour force, including retirements, new entrants[50], and net mobility[51]. Based on currently known demands, industry recruitment and retirement estimates, the following ranks apply to the 19 covered trades in the province. See Table 38.

Labour market conditions remained tight across most trades and occupations in 2025, due to rising demands for new-housing construction. Subsequent declines in new-home construction are mostly offset by gains in renovation and maintenance activity. As a result, market conditions are projected to return to balance in 2026 and across the forecast period.

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.

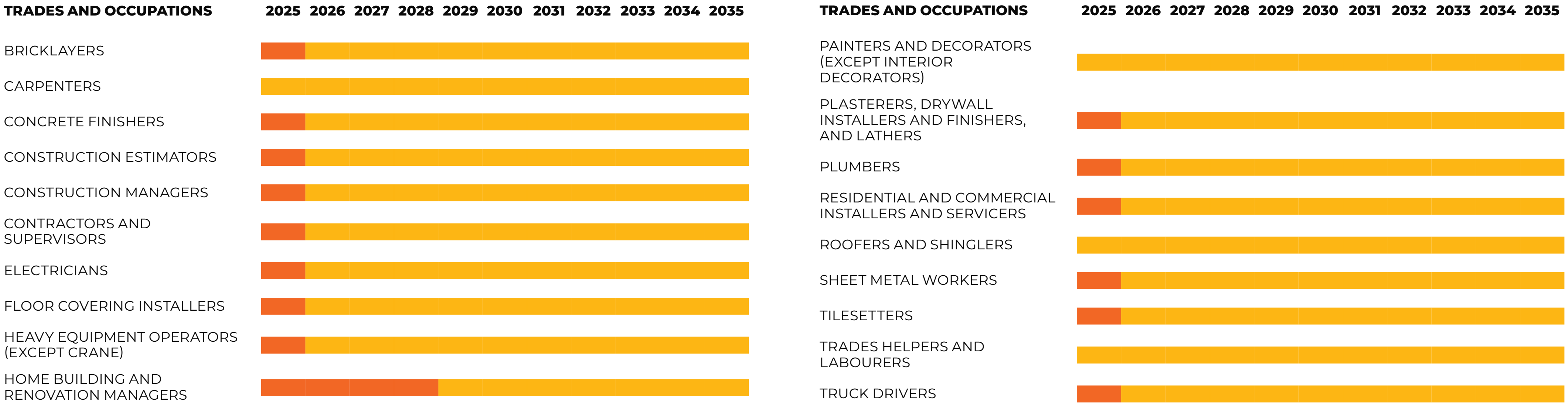
---

50 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.

51 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.

TABLE 38

RESIDENTIAL MARKET RANKINGS **MANITOBA**



SOURCE: BuildForce Canada

BUILDING A SUSTAINABLE LABOUR FORCE

THE AVAILABLE RESIDENTIAL LABOUR FORCE

The outlook for residential construction sector activity in Manitoba over the forecast period is such that the sector's labour force is projected to contract by 200 workers (compared with 2025 levels) by 2035. When added to the expected retirement of 5,000 residential workers over the same period, or 21% of the 2025 labour force, the sector's total hiring requirement is expected to reach 4,800 workers.

These hiring requirements are expected to be offset by the recruitment of 4,800 first-time new entrants under the age of 30 from the local population.

Despite this fact, the industry cannot afford complacency. 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 skill sets, and the recruitment of immigrants to Canada with skilled trades training and/or construction experience.

Figure 57 provides a summary of the estimated changes in the residential construction labour force across the forecast period.

FIGURE 57

CHANGES IN THE RESIDENTIAL LABOUR FORCE **MANITOBA**

23,800
LABOUR FORCE
2025

-200
WORKERS

23,600
LABOUR FORCE
2035

HIRING NEEDS

-200
WORKERS

+5,000
RETIREMENTS

OFFSET BY

-4,800
NEW ENTRANTS

0
NET MOBILITY*

* 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.

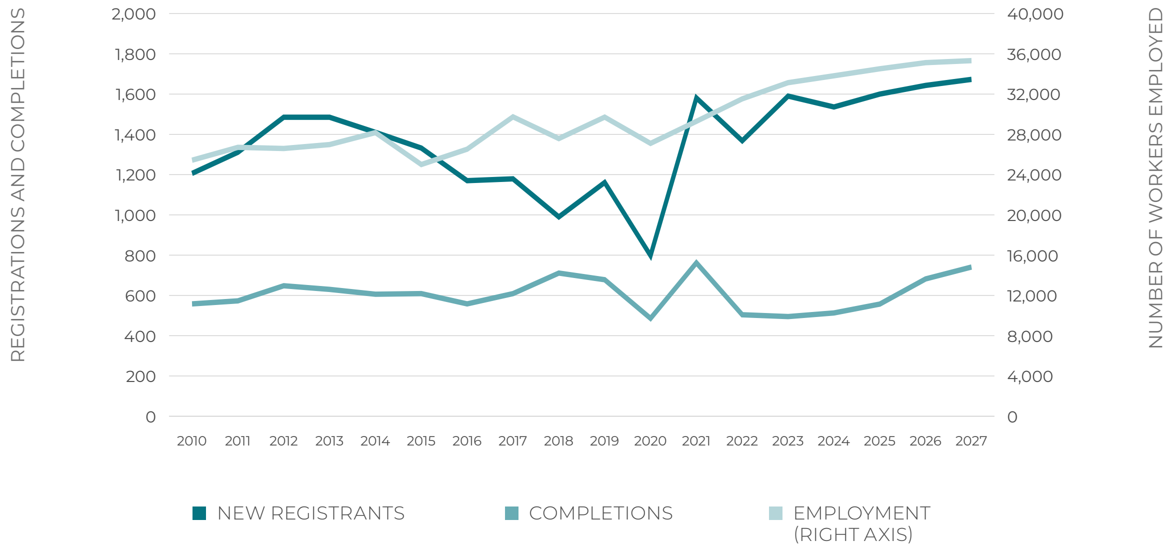
New apprenticeship registrations in Manitoba's largest construction programs rebounded strongly following the pandemic, mirroring robust growth in the province's construction sector. In 2023, intake increased by 16% to a record high, led by gains in refrigeration and air conditioning mechanic, carpenter, and plumber trades. In 2024, new registrations remained elevated, with intake sustained above 1,500.

New apprenticeship registrations are expected to remain above historical averages, supported by the federal government's recently announced investment to recruit and train skilled trades workers under the Team Canada Strong initiative. In addition to supporting increased intake, the funding places a strong emphasis on improving completion outcomes through enhanced incentives and employer supports.[52]

Completions remain well below the average observed over the past decade, reflecting the decline in registrations after 2013 and a sharp drop during the pandemic. While completions have yet to recover, the recent rise in intake will likely increase the supply of newly certified journeypersons over the coming decade. (See Figure 58.)

FIGURE 58

NEW APPRENTICESHIP REGISTRATIONS, COMPLETIONS, AND TRADE EMPLOYMENT **MANITOBA**



SOURCE: BuildForce Canada

52 Prime Minister Carney announces Team Canada Strong – a nationwide plan to recruit up to 100,000 skilled trades workers

Table 39 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, there is a risk that completions in the welder trade will not keep pace with the number of new journeypersons required over the outlook period. While several other trades currently appear balanced, even modest economic shifts could lead to supply challenges.

TABLE 39

ESTIMATED CONSTRUCTION CERTIFICATION DEMAND AND PROJECTED TARGET OF NEW ENTRANTS BY TRADE **MANITOBA***

TRADE	**TOTAL CERTIFICATION DEMAND** CONSTRUCTION	**TARGET NEW REGISTRANTS** CONSTRUCTION	**APPRENTICE CERTIFICATION SUPPLY RISK** ALL INDUSTRIES
WELDER	45	33	Red
MOBILE CRANE OPERATOR	47	46	Yellow
INDUSTRIAL MECHANIC (MILLWRIGHT)	76	82	Yellow
CARPENTER	924	1,042	Yellow
INDUSTRIAL ELECTRICIAN	73	91	Yellow
REFRIGERATION AND AIR CONDITIONING MECHANIC	306	403	Yellow
STEAMFITTER/PIPEFITTER	63	88	Green
HEAVY-DUTY EQUIPMENT TECHNICIAN	43	61	Green
CONSTRUCTION ELECTRICIAN	1,449	2,275	Green
PLUMBER	559	1,058	Green
SHEET METAL WORKER	79	183	Green
SPRINKLER FITTER	33	105	Green

Red: CERTIFICATIONS REQUIRED EXCEED PROJECTED COMPLETIONS

Yellow: CERTIFICATIONS REQUIRED IN LINE WITH PROJECTED COMPLETIONS

Green: PROJECTED COMPLETIONS EXCEED CERTIFICATIONS REQUIRED

* This analysis does not account for existing labour market imbalances at the 2025 starting point.

SOURCE: BuildForce Canada

UNDER-REPRESENTED GROUPS OF WORKERS

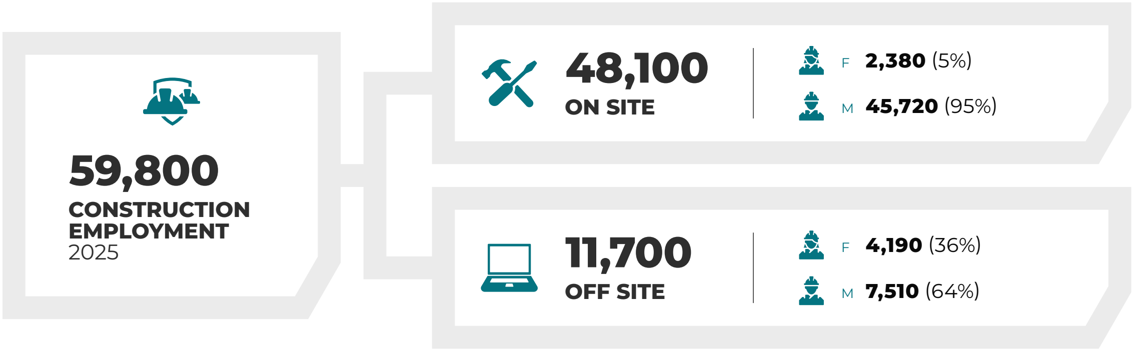
Canada's labour force is being reshaped by long-term demographic trends, including declining fertility rates and smaller family sizes over the past several decades. As a result, the pool of younger workers entering the workforce has been shrinking. This pressure will increase as the baby boomer generation continues to retire, intensifying competition for new talent. To respond to these challenges, the construction industry must broaden its recruitment efforts. Strengthening the workforce will require greater engagement with traditionally under-represented groups, including women, Indigenous Peoples, and newcomers to Canada.

WOMEN

In 2025, there were 6,570 women employed in Manitoba's construction industry, of which 36% worked on site, directly on construction projects, while the remaining 64% worked off site, primarily in administrative and management-related occupations. Of the 48,100 on-site tradespeople employed in the industry, women made up 5%. (See Figure 59).

FIGURE 59

DETAILED CONSTRUCTION EMPLOYMENT BY GENDER **MANITOBA**

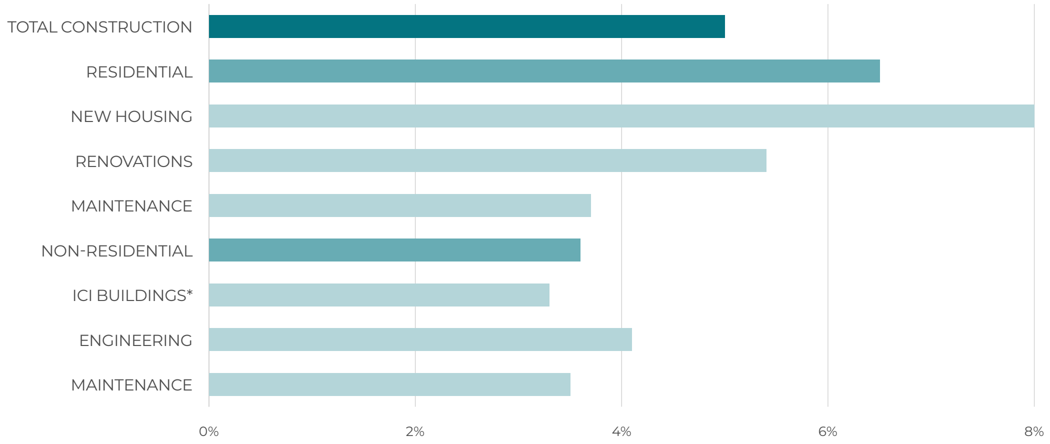


SOURCE: BuildForce Canada calculations based on Statistics Canada's Labour Force Survey and 2021 Census of the Population

The estimated 2,380 on-site 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 (6.5%) in residential construction. Across sectors, new-housing construction has the highest representation of women, accounting for 8.0% of the workforce. (See Figure 60.) The top five trades and occupations in which women tend to be employed are trade helpers and labourers (31% of all tradeswomen), construction managers (19%), carpenters (15%), contractors and supervisors (12%), and construction estimators (5%).

FIGURE 60

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 and 2021 Census of the Population

INDIGENOUS PEOPLES

The Indigenous population is the fastest growing population in Canada and therefore presents recruitment opportunities for Manitoba's construction industry. In 2025, Indigenous Peoples made up 3.5% of Canada's workforce and 4.8% of the national construction workforce. In Manitoba, Indigenous Peoples represented 11.9% of the provincial labour force and 16.5% of the construction labour force, both well above the national share. Since 2016, Indigenous representation has increased across the broader workforce and has increased in construction. (See Table 40.)

As the Indigenous population continues to expand, the sector must continue its successful recruitment efforts and engage in initiatives that promote retention.

TABLE 40

REPRESENTATION OF INDIGENOUS POPULATION IN PROVINCIAL CONSTRUCTION WORKFORCE MANITOBA

INDUSTRY	INDIGENOUS	NON-INDIGENOUS	TOTAL	INDIGENOUS SHARE OF TOTAL WORKFORCE, %
CONSTRUCTION				
2016	8,400	44,300	52,700	15.9%
2025	10,200	51,500	61,700	16.5%
ALL INDUSTRIES				
2016	78,000	599,700	677,700	11.5%
2025	92,700	686,800	779,500	11.9%

SOURCE: Statistics Canada, Labour Force Survey, Custom Data Request 2025

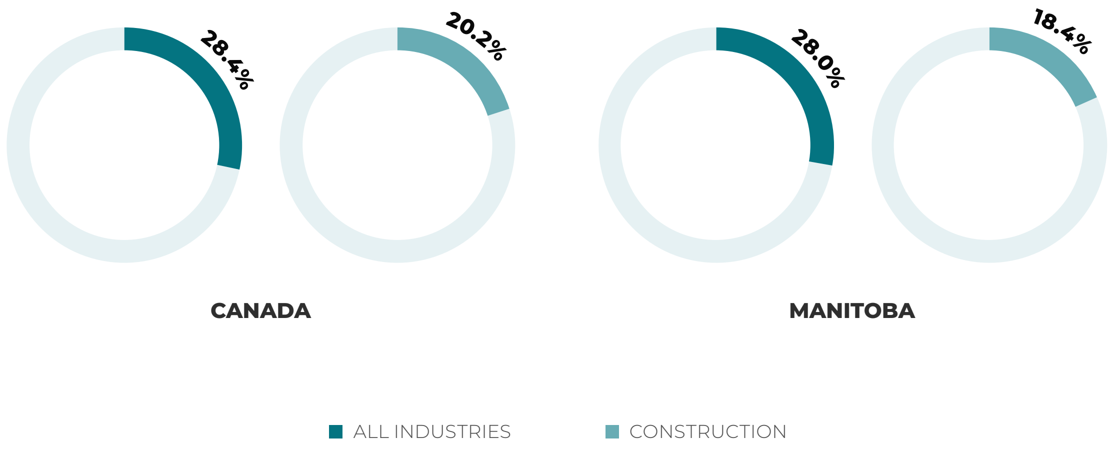
NEWCOMERS

Manitoba's construction industry may also leverage newcomers to Canada over the outlook period to meet labour requirements. Due to the declining natural rate of population growth, immigrants are the primary source of labour force growth in the province. The share of immigrants in the provincial workforce increased from 20.4% in 2016 to 28.0% in 2025, bringing the province in line with the national share. In construction, the share of immigrants increased from 13.4% to 18.4% over the same period. However, immigrants remain under-represented in the construction industry relative to the overall workforce and slightly below the national construction share. (See Figure 61.)

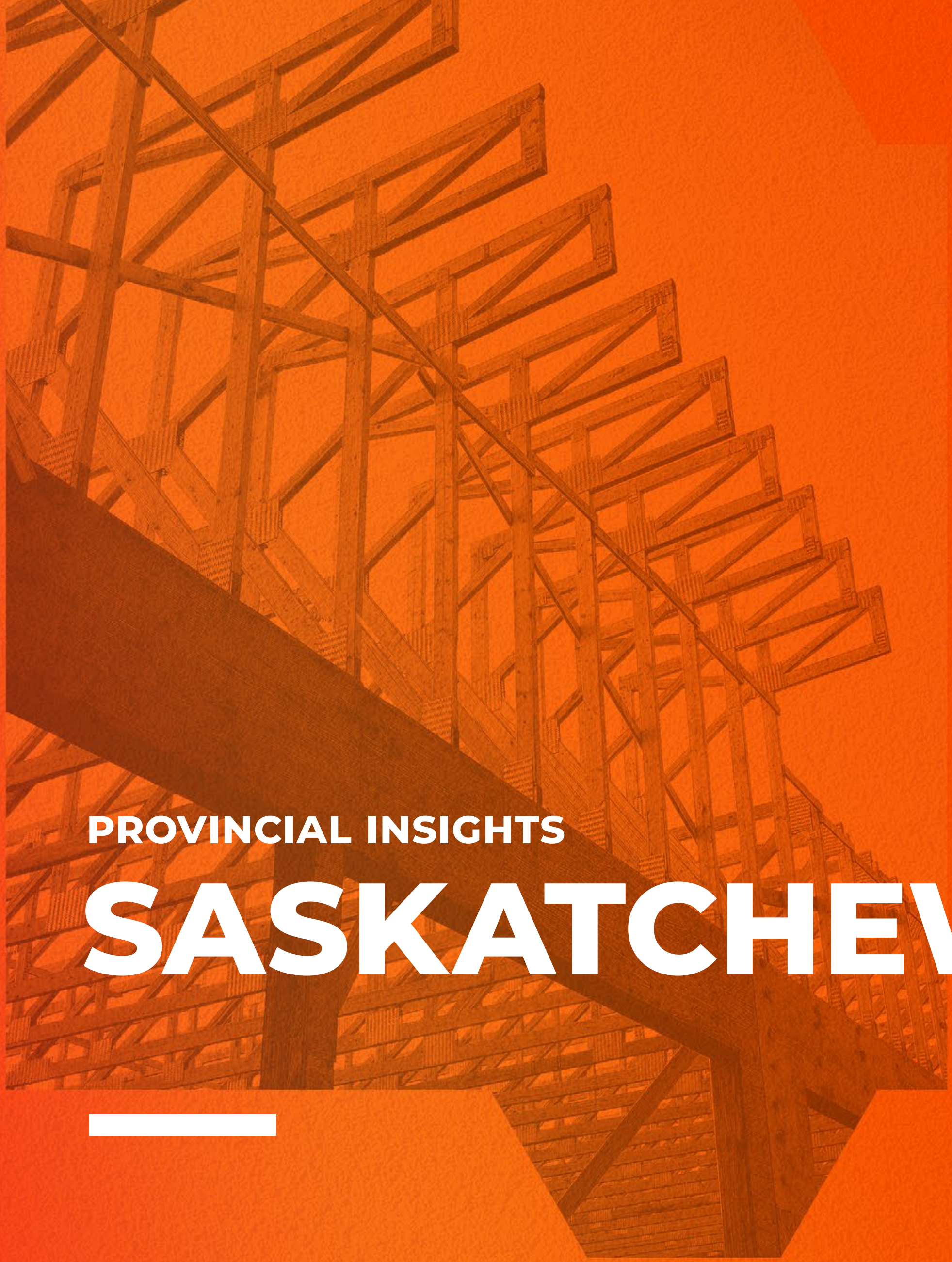
Based on historical settlement trends, the province is expected to welcome nearly 164,900 new immigrants between 2026 and 2035. As these individuals will make up an increasing share of the province's core working-age population, additional recruitment efforts will be required to ensure the construction industry recruits its share of newcomers into the labour force.

FIGURE 61

SHARE (%) OF NEWCOMERS IN THE CONSTRUCTION LABOUR FORCE (2025) **MANITOBA**



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



PROVINCIAL INSIGHTS

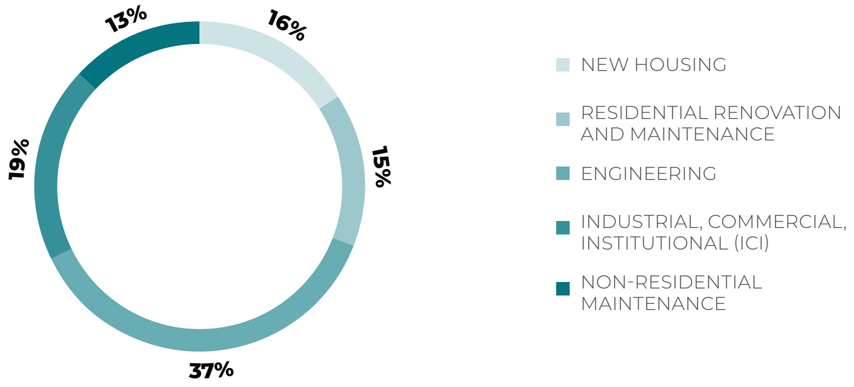
SASKATCHEWAN

ECONOMIC OUTLOOK

Economic growth in Saskatchewan enjoyed a strong year in 2025, driven by a bumper crop year, and supported by strong growth across the province's construction sector. The outlook calls for GDP growth to moderate in 2026 and 2027 as business investment – particularly in non-residential construction – plateaus due to export reductions caused by American tariffs and population growth slows with lower levels of in-migration.

The start of construction work on the second phase of the BHP Jansen potash mine helps to create a notable increase in GDP growth in 2028. Construction and investment levels are likely to remain muted thereafter and until 2032. Some of the relatively large resource-based projects conclude over that period, and that contraction more than offsets increasing demand for residential construction over the same period. Investment returns to growth in the later years of the forecast, driven by demands created by an increasing population.

DISTRIBUTION OF CONSTRUCTION EMPLOYMENT IN 2025 **SASKATCHEWAN**



10-YEAR WORKFORCE OUTLOOK FOR **SASKATCHEWAN**

9,400
RETIREMENTS

+9,900
NEW ENTRANTS

2,861
EMPLOYMENT CHANGE
(7.2%)

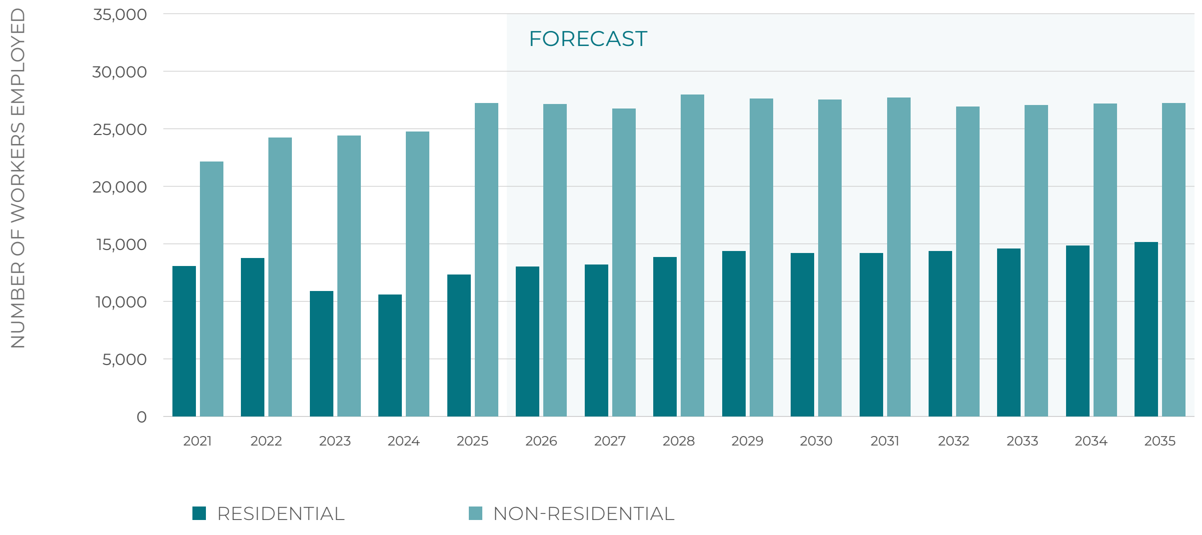
7.7%
AVERAGE UNEMPLOYMENT RATE

POPULATION GROWTH AND DEMOGRAPHICS

Population growth in Saskatchewan saw a strong boost in 2023 and was further elevated in 2024 with an influx of international migration following the COVID-19 pandemic. Population growth declined in 2025 as the federal government enacted its plan to reduce immigration targets and decrease the number of non-permanent residents living in the country to 5% of the country's population.

Immigration numbers and population levels are expected to decrease again in 2026 before remaining unchanged in 2027. Population growth returns to more historical levels thereafter as in-migration levels rise again, and remains elevated to the end of the forecast period. (See Figure 62.)

CONSTRUCTION EMPLOYMENT GROWTH OUTLOOK **SASKATCHEWAN**

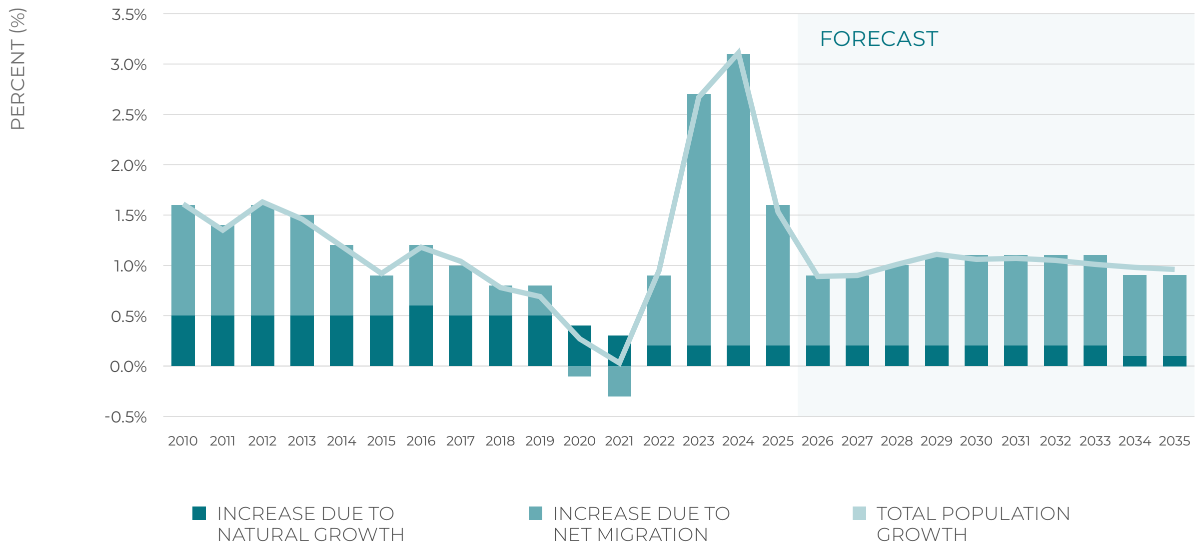


SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

Saskatchewan counts one of Canada's youngest populations. Its natural rate of population growth[53] has remained positive over the past 15 years. Although that rate has declined in recent years, it is expected to remain positive to the end of the decade with increased migration to the province, particularly among individuals in their prime working and childbearing years.

FIGURE 62

SOURCES OF POPULATION GROWTH (%) **SASKATCHEWAN**



SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

53 The 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.

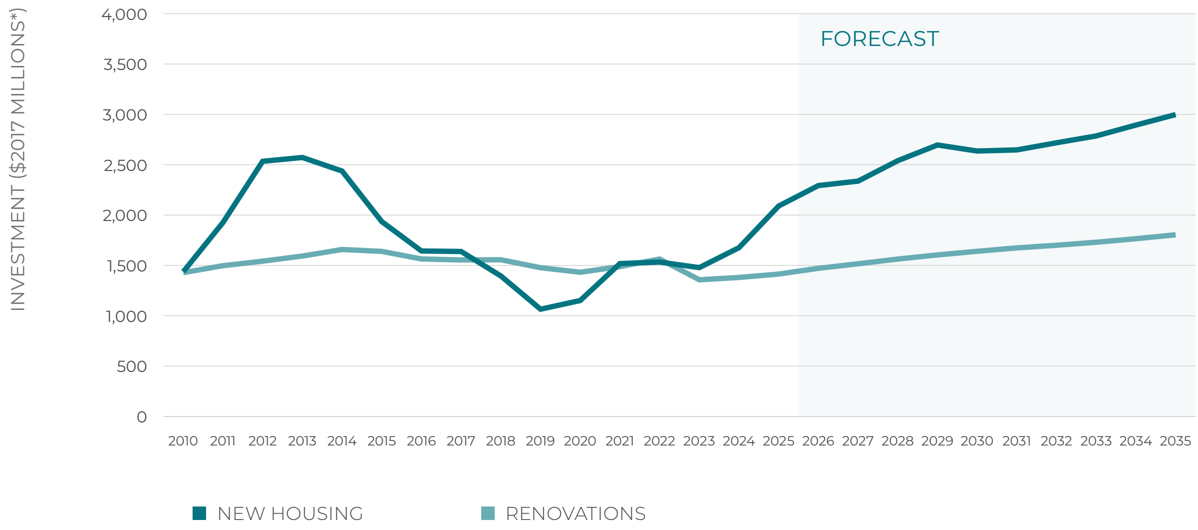
RESIDENTIAL CONSTRUCTION INVESTMENT

Residential construction investment levels are expected to trend strongly upward in Saskatchewan across the forecast period, driven by strong new-home construction activity. (See Figure 63.)

The combination of lowering interest rates and higher levels of household formations elevated housing starts to a 10-year high of more than 6,000 units in 2025, with increases in the construction of both single-detached[54] and multi-unit dwellings. The outlook calls for housing starts to soften modestly in the near term as population-driven demand eases and weaker rental demand slows multi-unit construction. Thereafter, housing starts are expected to rise into 2029 and through to 2035.

FIGURE 63

RESIDENTIAL CONSTRUCTION INVESTMENT **SASKATCHEWAN**



* $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 (2026–2035)

54 Single-detached (single) refers to a building containing only one dwelling unit that is completely separated on all sides from any other dwelling or structure.

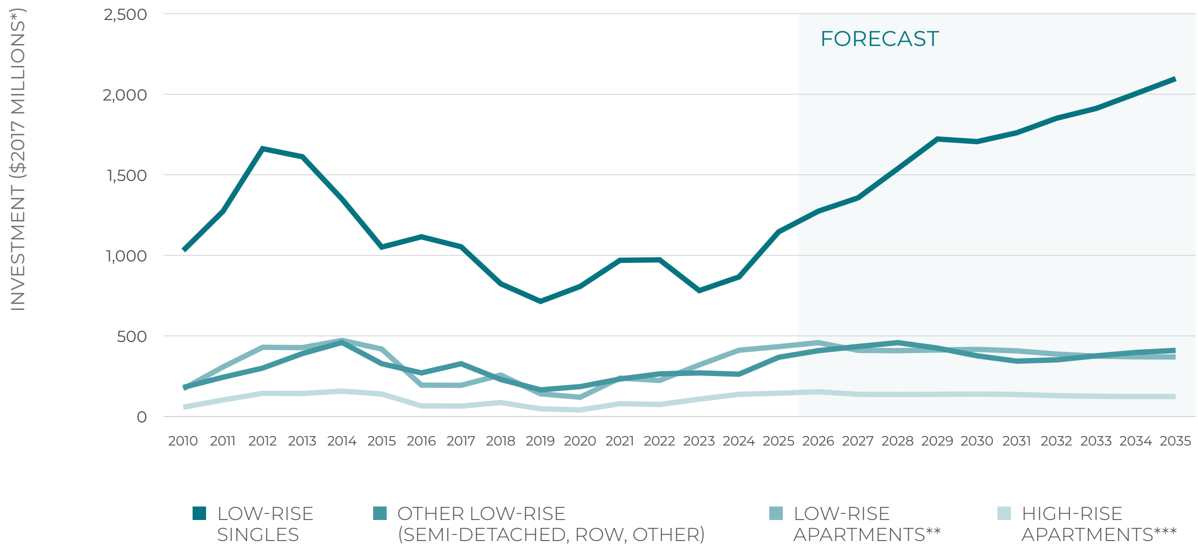
Driving the increase in housing starts across the forecast period will be renewed demand for single-detached housing. Anticipated interest rate stability and strong real income gains are expected to elevate starts for these comparatively more expensive unit types to the end of the decade, with levels nearly doubling over this period to approximately 3,700 units by 2035.

Demand for multi-unit residential construction, meanwhile, is expected to slow over the near term, due to lower levels of international migration, and stabilize thereafter. Apartment units in particular will be the most affected by changes in immigration policies, although the federal 100% GST rebate on residential rental properties should sustain construction of these unit types. Despite receding from the 2,900-units recent peak in 2025, construction of apartment buildings is projected to remain at near 2,300 units through most of the 2020s. (See Figure 64.)

Finally, stability in borrowing costs and steady economic growth are expected to lift investment in residential renovations across the forecast period. Also contributing to growth is the Provincial Housing Action Plan, which allocates millions of dollars toward renewing properties for affordable housing purposes.

FIGURE 64

NEW HOUSING CONSTRUCTION INVESTMENT **SASKATCHEWAN**



* $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.

** Low-rise apartments are buildings with four storeys or fewer.

*** High-rise apartments are buildings with five or more storeys.

SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

RESIDENTIAL CONSTRUCTION EMPLOYMENT

Following peak levels in 2022, residential construction employment receded in 2023 and 2024 before renewed demand for new housing led to strong growth in employment in 2025. This trend is expected to carry through across the forecast period. Growth in residential renovation employment is more modest over the outlook period, while employment relating to residential maintenance is almost unchanged.

By 2035, residential construction employment is expected to rise nearly every year in the forecast period and exceed 15,000 workers by 2035. That figure represents an increase of 23% over 2025 levels. Employment relating to new construction rises by 30% over the period, while employment relating to residential renovations and maintenance activity each increase by 15%.

Table 41 summarizes the estimated percent change in residential employment by sector across three periods: the short term (2026–2028), the medium term (2029–2031), and the long term (2032–2035).

TABLE 41

CHANGES IN RESIDENTIAL EMPLOYMENT BY SECTOR **SASKATCHEWAN**

SECTOR	% CHANGE **2026–2028**	% CHANGE **2029–2031**	% CHANGE **2032–2035**
RESIDENTIAL	12%	2%	7%
NEW HOUSING	18%	1%	9%
RENOVATIONS	7%	4%	4%
RESIDENTIAL MAINTENANCE	4%	5%	6%

Note that 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.

SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

RANKINGS, RISKS, AND MOBILITY: TRADES AND OCCUPATIONS

The BuildForce LMI system tracks supply and accounts for the change in the available labour force, including retirements, new entrants[55], and net mobility[56]. Based on currently known demands, industry recruitment and retirement estimates, the following ranks apply to the 16 covered trades in the province.

Labour market conditions were strained in 2025 due to the sharp increase in new-housing construction in the province. With further growth on the horizon, market conditions could remain tight until at least 2029 when the pace of growth slows and allows markets to return to balance. See Table 42.

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.

55 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.

56 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.

TABLE 42

RESIDENTIAL MARKET RANKINGS **SASKATCHEWAN**

TRADES AND OCCUPATIONS	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035
BRICKLAYERS											
CARPENTERS											
CONSTRUCTION ESTIMATORS											
CONSTRUCTION MANAGERS											
CONTRACTORS AND SUPERVISORS											
ELECTRICIANS											
FLOOR COVERING INSTALLERS											
HEAVY EQUIPMENT OPERATORS (EXCEPT CRANE)											
HOME BUILDING AND RENOVATION MANAGERS											

TRADES AND OCCUPATIONS	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035
PAINTERS AND DECORATORS (EXCEPT INTERIOR DECORATORS)											
PLASTERERS, DRYWALL INSTALLERS AND FINISHERS, AND LATHERS											
PLUMBERS											
RESIDENTIAL AND COMMERCIAL INSTALLERS AND SERVICERS											
ROOFERS AND SHINGLERS											
TRADES HELPERS AND LABOURERS											
TRUCK DRIVERS											

SOURCE: BuildForce Canada

BUILDING A SUSTAINABLE LABOUR FORCE

THE AVAILABLE RESIDENTIAL LABOUR FORCE

Given the projected rise in activity in the province over the 2026 to 2035 forecast period, Saskatchewan's residential construction sector may face recruiting challenges. Its labour force may need to increase by 3,500 workers by 2035 to keep up with demand. When added to the 3,400 workers (26% of the 2025 labour force) that are estimated to retire over the decade, the province could face a hiring requirement of as many as 6,900 workers.

Some of these hiring requirements could be met by an estimated 3,000 new-entrant workers under the age of 30 that are expected to join the labour force, but absent new approaches, the industry may need to recruit as many as 3,900 workers from outside traditional channels.

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 skill sets, and the recruitment of immigrants to Canada with skilled trades training and/or construction experience.

Figure 65 provides a summary of the estimated changes in the residential construction labour force across the forecast period.

FIGURE 65

CHANGES IN THE RESIDENTIAL LABOUR FORCE **SASKATCHEWAN**

13,000
LABOUR FORCE
2025

+3,500
WORKERS

16,500
LABOUR FORCE
2035

HIRING NEEDS

+3,500
WORKERS

+3,400
RETIREMENTS

OFFSET BY

-3,000
NEW ENTRANTS

+3,900
NET MOBILITY*

* 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 Saskatchewan's largest construction trades declined steadily over the previous decade after peaking in 2012. Following the pandemic, apprenticeship intake has rebounded strongly. In 2023, new registrations reached their highest level since 2014. Registrations rose across most trades. The strongest growth was concentrated in the construction electrician and plumber programs, which together accounted for roughly half of the increase in 2023. In 2024, apprenticeship intake remained strong at nearly 1,400 new registrations.

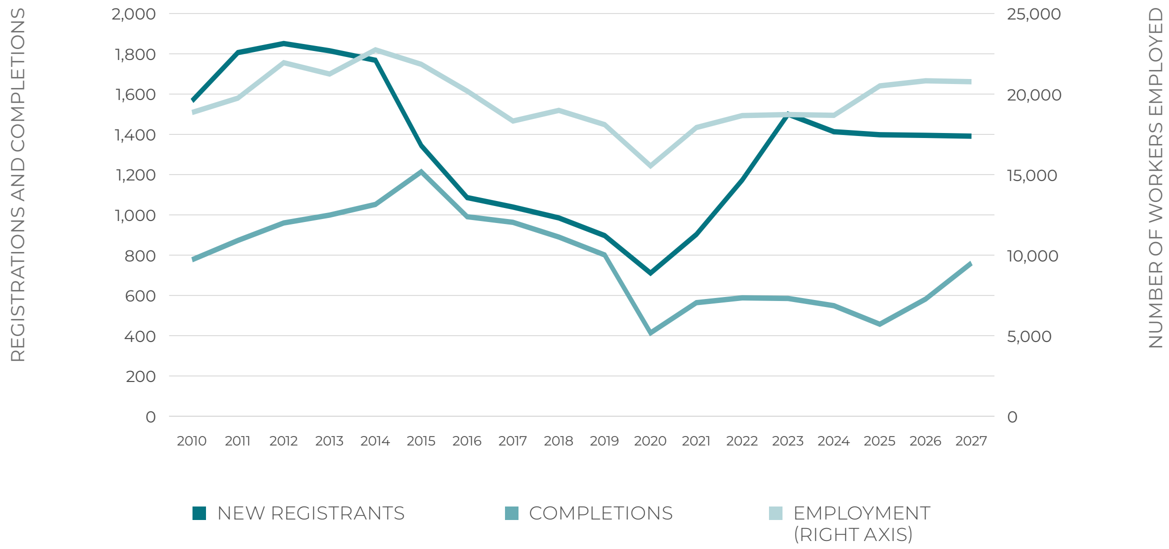
New apprenticeship registrations are expected to remain elevated, supported by the federal government's recently announced investment to recruit and train skilled trades workers under the Team Canada Strong initiative. In addition to supporting increased intake, the funding places a strong emphasis on improving completion outcomes through enhanced incentives and employer supports.[57]

Completions remained relatively unchanged in 2023 and declined in 2024, remaining well below pre-pandemic levels of newly certified journeypersons. This reflects the lower number of apprentices entering the system in the years leading up to and during the pandemic. Stronger intake in recent years is expected to support higher completions in the near term. The extent of this increase will depend on employer capacity and timely access to technical training. (See Figure 66.)

57 Prime Minister Carney announces Team Canada Strong – a nationwide plan to recruit up to 100,000 skilled trades workers

FIGURE 66

NEW APPRENTICESHIP REGISTRATIONS, COMPLETIONS, AND TRADE EMPLOYMENT **SASKATCHEWAN**



SOURCE: BuildForce Canada

Table 43 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.[58] Based on projected new registrations, the carpenter trade is at risk of completions not keeping pace with the number of new journeypersons required over the outlook period. Construction electricians currently appear balanced, but even modest economic shifts could lead to supply challenges for this trade.

TABLE 43

ESTIMATED CONSTRUCTION CERTIFICATION DEMAND AND PROJECTED TARGET OF NEW ENTRANTS BY TRADE **SASKATCHEWAN***

TRADE	**TOTAL CERTIFICATION DEMAND** CONSTRUCTION	**TARGET NEW REGISTRANTS** CONSTRUCTION	**APPRENTICE CERTIFICATION SUPPLY RISK** ALL INDUSTRIES
CARPENTER	1,259	645	■
CONSTRUCTION ELECTRICIAN	1,429	1,688	■
INDUSTRIAL MECHANIC (MILLWRIGHT)	61	129	■
MOBILE CRANE OPERATOR	35	58	■
PLUMBER	497	1,172	■
POWERLINE TECHNICIAN	97	272	■
REFRIGERATION AND AIR CONDITIONING MECHANIC	150	262	■
SHEET METAL WORKER	85	207	■
STEAMFITTER/PIPEFITTER	81	110	■
WELDER	119	318	■
HEAVY-DUTY EQUIPMENT TECHNICIAN	61	211	■

■ CERTIFICATIONS REQUIRED EXCEED PROJECTED COMPLETIONS

■ CERTIFICATIONS REQUIRED IN LINE WITH PROJECTED COMPLETIONS

■ PROJECTED COMPLETIONS EXCEED CERTIFICATIONS REQUIRED

* This analysis does not account for existing labour market imbalances at the 2025 starting point.

SOURCE: BuildForce Canada

58 Trades with fewer than 10 completions per year were excluded from the analysis.

UNDER-REPRESENTED GROUPS OF WORKERS

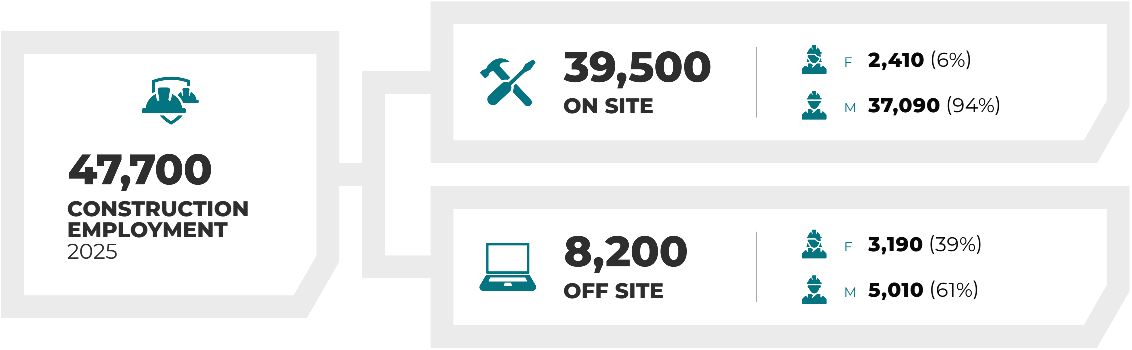
Canada's labour force is being reshaped by long-term demographic trends, including declining fertility rates and smaller family sizes over the past several decades. As a result, the pool of younger workers entering the workforce has been shrinking. This pressure will increase as the baby boomer generation continues to retire, intensifying competition for new talent. To respond to these challenges, the construction industry must broaden its recruitment efforts. Strengthening the workforce will require greater engagement with traditionally under-represented groups, including women, Indigenous Peoples, and newcomers to Canada.

WOMEN

In 2025, there were approximately 5,600 women employed in Saskatchewan's construction industry, of which 43% worked on site, directly on construction projects, while the remaining 57% worked off site, primarily in administrative and management-related occupations. Of the 39,500 on-site tradespeople employed in the industry, women made up 6%. (See Figure 67).

FIGURE 67

DETAILED CONSTRUCTION EMPLOYMENT BY GENDER **SASKATCHEWAN**

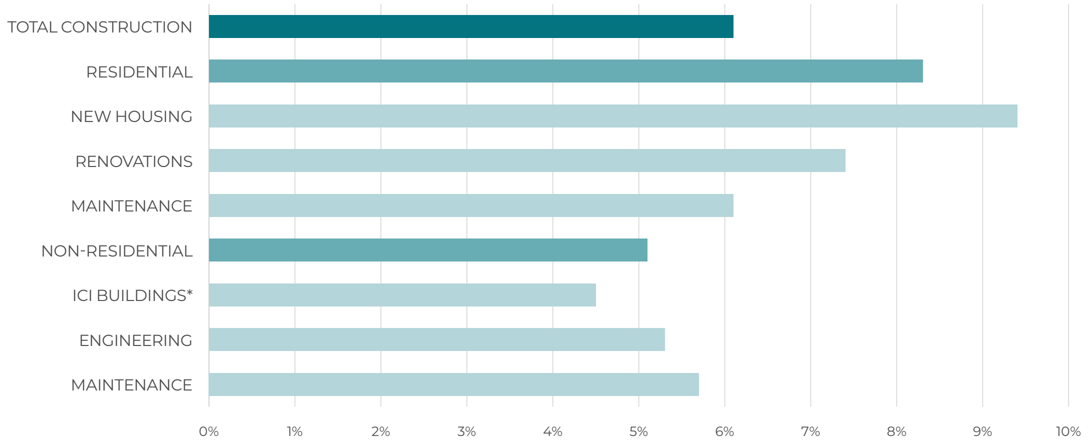


SOURCE: BuildForce Canada calculations based on Statistics Canada's Labour Force Survey and 2021 Census of the Population

The estimated 2,410 on-site tradeswomen in Saskatchewan 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 in residential construction (8.3%) than non-residential (5.1%) construction. Across sectors, new-housing construction has the highest representation of women, accounting for 9.4% of the workforce. (See Figure 68.) The top five trades and occupations in which women tend to be employed are trade helpers and labourers (20% of all tradeswomen), construction managers (17%), carpenters (15%), electricians (9%), and contractors and supervisors (6%).

FIGURE 68

WOMEN'S SHARE OF TOTAL DIRECT TRADES AND OCCUPATIONS (ON SITE) SASKATCHEWAN



* industrial, commercial, institutional

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

INDIGENOUS PEOPLES

The Indigenous population is the fastest growing population in Canada and therefore presents recruitment opportunities for Saskatchewan's construction industry. In 2025, Indigenous Peoples made up 3.5% of Canada's workforce and 4.8% of the national construction workforce. In Saskatchewan, Indigenous Peoples represented 11.5% of the provincial labour force and 13.1% of the construction labour force, more than double the national share. Since 2016, Indigenous representation has increased across the broader workforce and in the construction sector. (See Table 44).

As the Indigenous population continues to expand, the sector must continue its successful recruitment efforts and engage in initiatives that promote retention.

TABLE 44

REPRESENTATION OF INDIGENOUS POPULATION IN PROVINCIAL CONSTRUCTION WORKFORCE SASKATCHEWAN

INDUSTRY	INDIGENOUS	NON-INDIGENOUS	TOTAL	INDIGENOUS SHARE OF TOTAL WORKFORCE, %
CONSTRUCTION				
2016	6,600	50,400	57,000	11.6%
2025	6,500	43,000	49,500	13.1%
ALL INDUSTRIES				
2016	58,000	540,300	598,300	9.7%
2025	74,200	573,700	647,900	11.5%

SOURCE: Statistics Canada, Labour Force Survey, Custom Data Request 2025

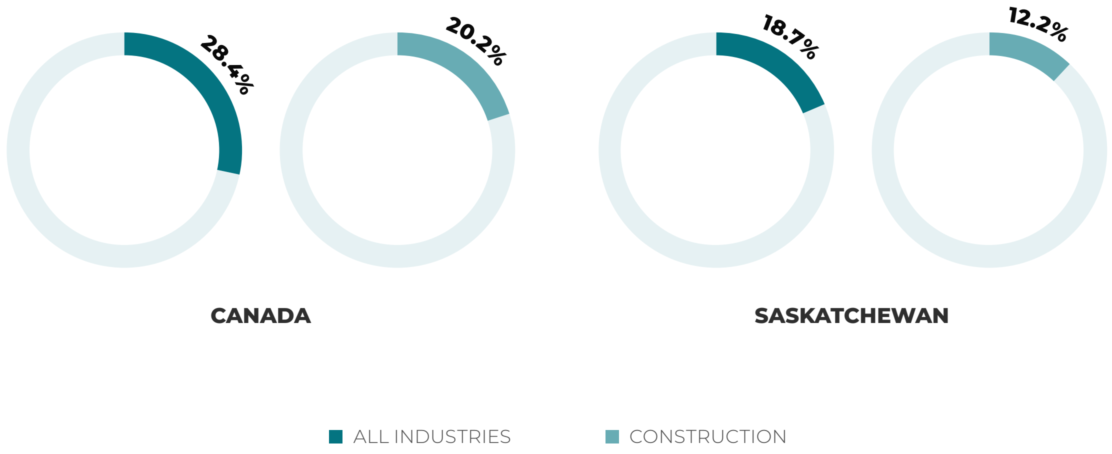
NEWCOMERS

Saskatchewan's construction industry may also leverage newcomers (new immigrants) to Canada over the forecast period to meet labour requirements. Due to the declining natural rate 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 increasing from 12.9% in 2016 to 18.7% in 2025. While the province has been successful in attracting and integrating immigrants into the labour force, its share of immigrants is notably below the share in Canada overall. The share of immigrants in the construction labour force was 12.2% in 2025, which is notably lower than the share in the overall provincial labour force and significantly lower than the share in Canada's construction industry. (See Figure 69.)

Based on historical settlement trends, the province is expected to welcome more than 143,600 new immigrants between 2026 and 2035. 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 69

SHARE (%) OF NEWCOMERS IN THE CONSTRUCTION LABOUR FORCE (2025) **SASKATCHEWAN**



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

PROVINCIAL INSIGHTS

ALBERTA

ECONOMIC OUTLOOK

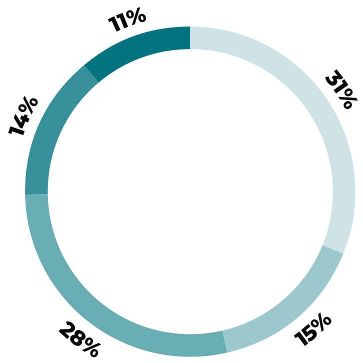
At 2.7%, Alberta recorded one of the highest rates of GDP growth in Canada in 2025. The province's oil and natural gas exports were elevated while its agricultural industry experienced a bumper crop. Recent population growth, too, has been a driver of growth in the private service sectors, as well as public-sector investments. Tempering these trends somewhat was the effects of export tariffs imposed by the United States on the manufacturing sector.

The forecast calls for Alberta to sustain growth through the medium term. The province is expected to see increasing export levels, while excess pipeline capacity is expected to maintain growth in oil and natural gas production over the decade.

Investment in residential construction is expected to slow through the forecast period, initially in response to changes to the federal government's immigration policy, which slow demand for new-housing construction. Business investment, meanwhile, is expected to be sustained across the private and public sectors.

The combination of these factors is expected to yield average annual GDP growth rates of 2.1% over the next five years, making Alberta's among the fastest-growing provincial economies in the country.

DISTRIBUTION OF CONSTRUCTION EMPLOYMENT IN 2025 **ALBERTA**



10-YEAR WORKFORCE OUTLOOK FOR **ALBERTA**

43,700
RETIREMENTS

+43,500
NEW ENTRANTS

593
EMPLOYMENT CHANGE
(0.3%)

7.8%
AVERAGE UNEMPLOYMENT RATE

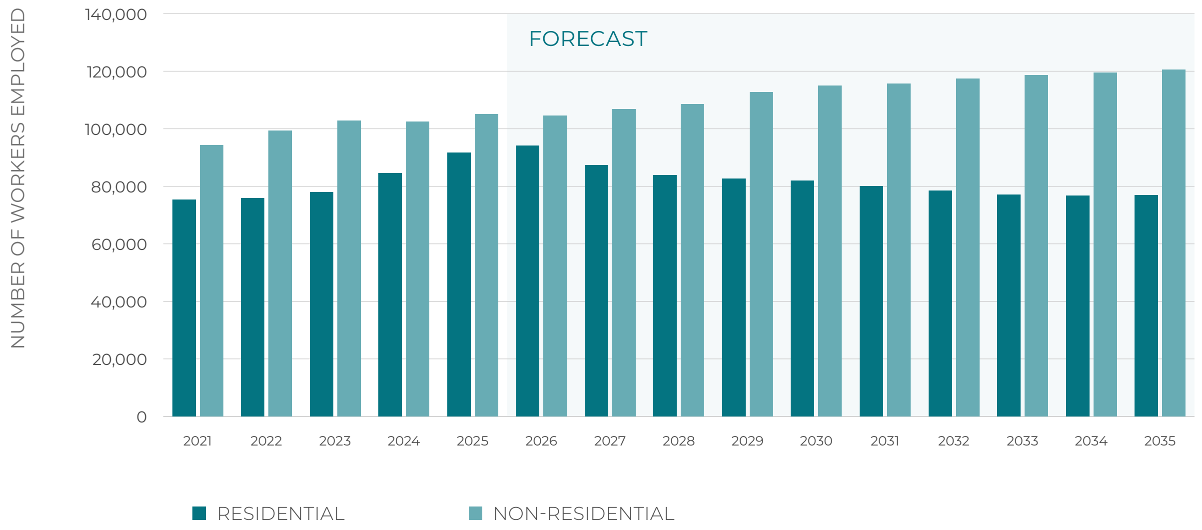
POPULATION GROWTH AND DEMOGRAPHICS

Alberta reported strong population growth between 2022 and 2024, peaking at 4.7% in 2024. It has begun to slow since, in line with the federal government's plan to reduce immigration targets and decrease the number of non-permanent residents to 5% of the overall population by 2027. Net international in-migration to the province is expected to slow notably again in 2026 as a result before trending upward again into the middle years of the forecast.

Alberta is considered to have one of the younger populations in Canada. Although its natural rate of population growth[59] has been notably positive in the past 15 years, that figure is contracting as the population ages. International migration is therefore a key driver of population growth in the province. (See Figure 70.)

59 The 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.

CONSTRUCTION EMPLOYMENT GROWTH OUTLOOK **ALBERTA**



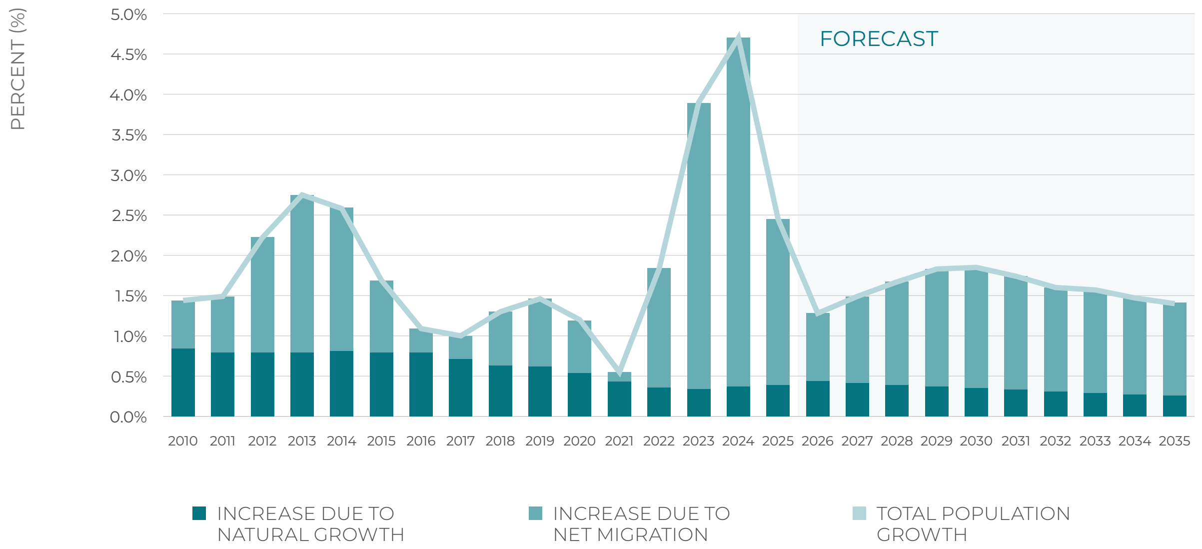
SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

The growth in population that was seen in the province between 2022 and 2024 is expected to help elevate fertility rates in the forecast short term. Over the longer run, rates are projected to continue to slow.

Overall population growth rates are expected to weaken in 2026 before rebounding to between 1.5% and 1.9% annually into 2030, and cycling down again in the longer run.

FIGURE 70

SOURCES OF POPULATION GROWTH (%) **ALBERTA**



SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

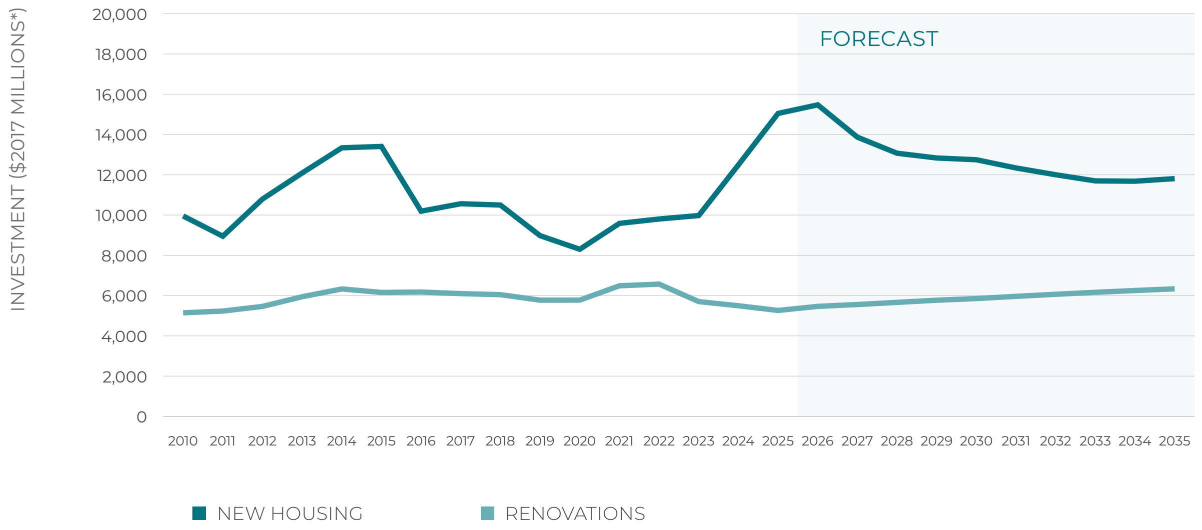
RESIDENTIAL CONSTRUCTION INVESTMENT

Residential construction investment levels have been rising notably in Alberta since 2023, driven by strong growth in the provincial new-housing market. Investment is expected to rise to a peak in 2026 before receding through 2027 and 2028 as lower demand for new-housing construction outweighs modest growth in demand for residential renovations. Moderate declines in overall investment levels are projected into the early 2030s, again with slowing demand for new housing, before an upward cycle re-emerges and carries through to the end of the decade. (See Figure 71.)

Housing starts peaked at almost 55,000 units in 2025, driven by the recent surge in international migration. Levels are expected to moderate through to 2033, driven initially by reductions in international migration, and later by slowing growth in the construction of multi-unit residential properties. The recently confirmed federal rebate of the GST for first-time home buyers is expected to mitigate this pressure somewhat, however.

FIGURE 71

RESIDENTIAL CONSTRUCTION INVESTMENT **ALBERTA**



* $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 (2026–2035)

The construction of single-detached[60] homes in Alberta has been largely unaffected by high interest rates in recent years. As rates eased from their peak in 2023, demand for the construction of new single-detached dwellings increased. Levels are expected to remain elevated across the forecast period, rising to almost 18,000 units by 2030 and then mostly sustained to the end of the decade. Growth is being driven by pent-up consumer demand and reduced borrowing costs. Additionally, Alberta is seen to be among the more affordable markets for housing, making it an attractive destination for international migrants and those seeking to relocate from elsewhere in Canada.

Demand for the construction of multi-unit dwellings surged to a peak in 2025, driven again by the influx of international migrants to the province in the years prior, as well as a reduction in interest rates, and government policies aimed at creating more rental housing. Growth was particularly strong over this period among the most affordable housing units, specifically apartment units and row housing units.

60 Single-detached (single) refers to a building containing only one dwelling unit that is completely separated on all sides from any other dwelling or structure.

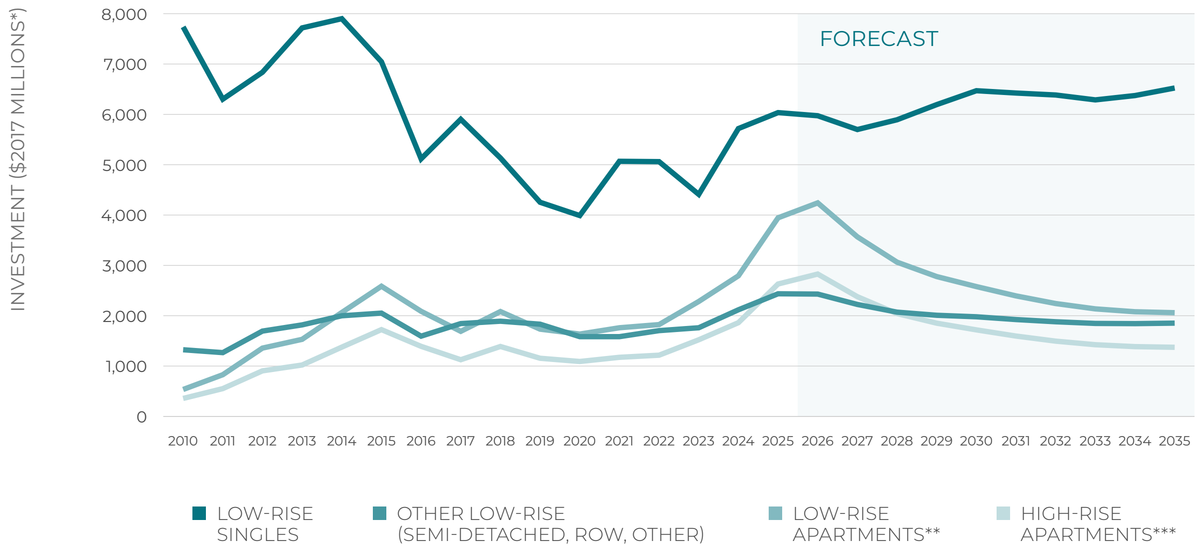
Construction of new multi-unit residential housing is projected to recede from its recent peak, but remains elevated relative to levels seen between 2016 and 2020. Near-term declines are driven by lower levels of in-migration and slower population growth. Additionally, rental vacancy rates across the province, and in Calgary and Edmonton in particular, have increased over the past two years. This fact suggests that these cities may be experiencing an oversupply of rental stock.

With provincial and federal incentives expected to help sustain the construction of multi-unit residential dwellings over the forecast period, starts for these unit types are expected to remain above historically normal levels of around 15,000 units annually by the end of the decade. (See Figure 72.)

Finally, the outlook for residential renovations calls for modest growth to the end of the forecast period as wages and incomes grow through the forecast period, and as the recent growth in the provincial housing stock will require modernization by the mid 2030s.

FIGURE 72

NEW HOUSING CONSTRUCTION INVESTMENT **ALBERTA**



* $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.

** Low-rise apartments are buildings with four storeys or fewer.

*** High-rise apartments are buildings with five or more storeys.

SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

RESIDENTIAL CONSTRUCTION EMPLOYMENT

The recent demand for new-home construction has led to an increase of 22% in residential construction employment since 2021. Employment increased to almost 92,000 workers in 2025.

Employment is projected to rise again in 2026, given the high volume of multi-unit starts, and apartment starts in particular, underway in the province. Employment, however, is projected to recede across the forecast period as new-home construction slows.

Renovation activity slowed in recent years, as demand for new housing rose. Many workers in residential renovations may have shifted their focus to meeting new residential construction demands over this period. However, as demand for new construction slows, the outlook suggests demand for residential renovation and maintenance activity is expected to return to growth.

Specific to the types of residential construction, the largest component of employment in the province is expected to be concentrated in single-detached dwellings. Although employment relating to the construction of low-rise apartments (i.e., structures of five storeys or fewer) accounted for the majority of growth in employment in recent years, that level is expected to contract across the forecast period as starts for this unit type decline. The outlook for employment relating to high-rise apartments is projected to follow a similar trend.

Across the scenario, overall residential employment is projected to contract by 16% compared to 2025 levels. New-home construction is expected to contract by 28% over this period, but remain elevated compared to historical levels. This decline is expected to be moderated by a rise in employment relating to renovation and maintenance activity of 9% and 10%, respectively, compared to 2025 levels.

Table 45 summarizes the estimated percent change in residential employment by sector across three periods: the short term (2026–2028), the medium term (2029–2031), and the long term (2032–2035).

TABLE 45

CHANGES IN RESIDENTIAL EMPLOYMENT BY SECTOR **ALBERTA**

SECTOR	% CHANGE **2026–2028**	% CHANGE **2029–2031**	% CHANGE **2032–2035**
RESIDENTIAL	-9%	-4%	-4%
NEW HOUSING	-15%	-8%	-8%
RENOVATIONS	4%	2%	2%
RESIDENTIAL MAINTENANCE	5%	3%	2%

Note that 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.

SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

RANKINGS, RISKS, AND MOBILITY: TRADES AND OCCUPATIONS

The BuildForce LMI system tracks supply and accounts for the change in the available labour force, including retirements, new entrants[61], and net mobility[62]. Based on currently known demands, industry recruitment and retirement estimates, the following ranks apply to the 26 covered trades in the province. See Table 46.

Record levels of activity tightened labour market conditions in 2025 and the high volume of work is expected to carry over into 2026. Conditions are projected to weaken to 2028 as activity slows from the 2026 peak. Markets return to balance by 2030 as any further declines are moderate and partly offset by increased renovation and maintenance work.

61 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.

62 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.

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

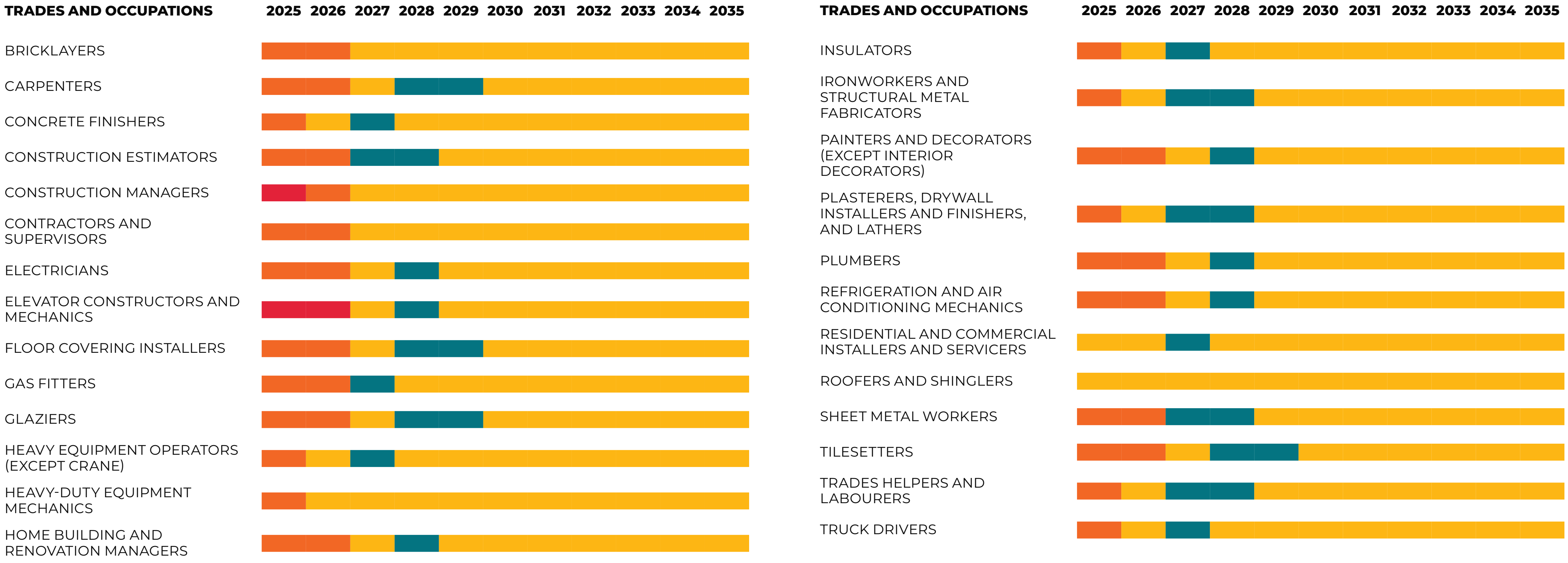
Workers meeting qualifications are generally not available in local markets to meet any increase. Employers will need to compete to attract additional workers. Recruiting and mobility may extend beyond traditional sources and practices.

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 46

RESIDENTIAL MARKET RANKINGS **ALBERTA**



SOURCE: BuildForce Canada

BUILDING A SUSTAINABLE LABOUR FORCE

THE AVAILABLE RESIDENTIAL LABOUR FORCE

The volume of residential construction activity in Alberta is expected to slow across the 2026 to 2035 forecast period, bringing with it an anticipated labour force reduction of 13,100 workers. When added to the need to replace as many as 19,600 workers, or 20% of the 2025 labour force, who are expected to exit the industry due to retirement by 2035, the industry may face a hiring requirement of 6,500 workers.

This requirement is expected to be more than offset by the recruitment of 16,700 first-time new entrants under the age of 30 from the local population, and could create a surplus of 10,200 workers by 2035. These workers may choose to seek employment in the province's non-residential construction sector. There is, however, a risk that some may exit the province's construction sector or pursue employment in other provinces.

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 skill sets, and the recruitment of immigrants to Canada with skilled trades training and/or construction experience.

Figure 73 provides a summary of the estimated changes in the residential construction labour force across the forecast period.

FIGURE 73

CHANGES IN THE RESIDENTIAL LABOUR FORCE **ALBERTA**

97,000
LABOUR FORCE
2025

-13,100
WORKERS

83,900
LABOUR FORCE
2035

HIRING NEEDS

-13,100
WORKERS

+19,600
RETIREMENTS

OFFSET BY

-16,700
NEW ENTRANTS

-10,200
NET MOBILITY*

* 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.

Apprenticeship intake in Alberta has risen considerably in recent years, outpacing employment growth. In 2024, new registrations in the largest construction programs increased by more than 20%, surpassing 18,000 and setting a new provincial record. Over the past five years, average intake has increased across most trades, with notable exceptions of hoist operator (wellhead) and ironworker (reinforcing). Intake in construction electrician, steamfitter/pipefitter, and plumber programs have more than doubled over this period.

New registrations are projected to moderate slightly in the near-term, returning to levels more closely aligned with historical intake relative to industry employment. However, new apprenticeship registrations are expected to remain above historical averages, supported by the federal government's recently announced investment to recruit and train skilled trades workers under the Team Canada Strong initiative. In addition to supporting increased intake, the funding places a strong emphasis on improving completion outcomes through enhanced incentives and employer supports.[63]

Completions have trended downward following the rebound observed in 2021 after the pandemic. Completion levels remain below the average recorded over the previous decade, reflecting the earlier decline in new registrations that followed the collapse of the resource expansion. Stronger intake in recent years is expected to support higher completions in the near term. The extent of this increase will depend on employer capacity and timely access to technical training. (See Figure 74.)

63 Prime Minister Carney announces Team Canada Strong – a nationwide plan to recruit up to 100,000 skilled trades workers

FIGURE 74

NEW APPRENTICESHIP REGISTRATIONS, COMPLETIONS, AND TRADE EMPLOYMENT **ALBERTA**

SOURCE: BuildForce Canada

Table 47 provides a trade-by-trade breakdown of anticipated certification requirements to meet the construction industry's share of employment and replacement demand over the scenario period.[64] Based on projected new registrations, ironworker (reinforcing) and boilermaker are at risk of completions not keeping pace with the number of new journeypersons required over the outlook period. While several other trades currently appear balanced, even modest economic shifts could lead to supply challenges.

- CERTIFICATIONS REQUIRED EXCEED PROJECTED COMPLETIONS
- CERTIFICATIONS REQUIRED IN LINE WITH PROJECTED COMPLETIONS
- PROJECTED COMPLETIONS EXCEED CERTIFICATIONS REQUIRED

TABLE 47

ESTIMATED CONSTRUCTION CERTIFICATION DEMAND AND PROJECTED TARGET OF NEW ENTRANTS BY TRADE **ALBERTA***

TRADE	**TOTAL CERTIFICATION DEMAND** CONSTRUCTION	**TARGET NEW REGISTRANTS** CONSTRUCTION	**APPRENTICE CERTIFICATION SUPPLY RISK** ALL INDUSTRIES
IRONWORKER (REINFORCING)	187	132	
BOILERMAKER	866	634	
ROOFER	193	170	
CARPENTER	3,075	2,968	
INSULATOR (HEAT AND FROST)	587	590	
INDUSTRIAL MECHANIC (MILLWRIGHT)	364	441	
WELDER	963	1,203	
CONSTRUCTION ELECTRICIAN	8,719	11,326	
POWERLINE TECHNICIAN	314	423	
HOIST OPERATOR (BOOM TRUCK)	269	457	

64 Trades with fewer than 100 new registrations per year were excluded from the analysis.

TRADE	**TOTAL CERTIFICATION DEMAND** CONSTRUCTION	**TARGET NEW REGISTRANTS** CONSTRUCTION	**APPRENTICE CERTIFICATION SUPPLY RISK** ALL INDUSTRIES
STEAMFITTER/PIPEFITTER	1,309	2,445	
HOIST OPERATOR (WELLHEAD)	316	590	
INSTRUMENTATION AND CONTROL TECHNICIAN	203	381	
SHEET METAL WORKER	423	851	
REFRIGERATION AND AIR CONDITIONING MECHANIC	1,062	2,255	
IRONWORKER (STRUCTURAL/ ORNAMENTAL)	107	265	
SPRINKLER FITTER	75	197	
PLUMBER	2,438	6,730	
MOBILE CRANE OPERATOR	237	719	

* This analysis does not account for existing labour market imbalances at the 2025 starting point.

SOURCE: BuildForce Canada

UNDER-REPRESENTED GROUPS OF WORKERS

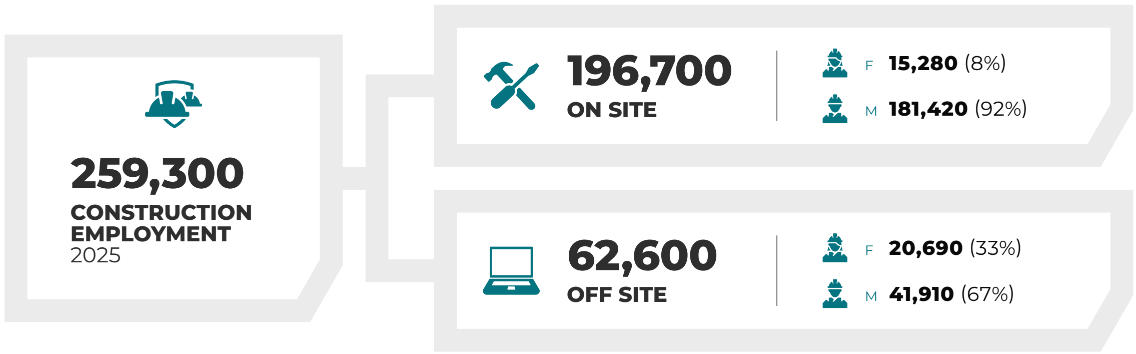
Canada's labour force is being reshaped by long-term demographic trends, including declining fertility rates and smaller family sizes over the past several decades. As a result, the pool of younger workers entering the workforce has been shrinking. This pressure will increase as the baby boomer generation continues to retire, intensifying competition for new talent. To respond to these challenges, the construction industry must broaden its recruitment efforts. Strengthening the workforce will require greater engagement with traditionally under-represented groups, including women, Indigenous Peoples, and newcomers to Canada.

WOMEN

In 2025, there were approximately 35,970 women employed in Alberta's construction industry, of which 42% worked on site, directly on construction projects, while the remaining 58% worked off site, primarily in administrative and management-related occupations. Of the 196,700 on-site tradespeople employed in the industry, women made up 8%. (See Figure 75).

FIGURE 75

DETAILED CONSTRUCTION EMPLOYMENT BY GENDER **ALBERTA**

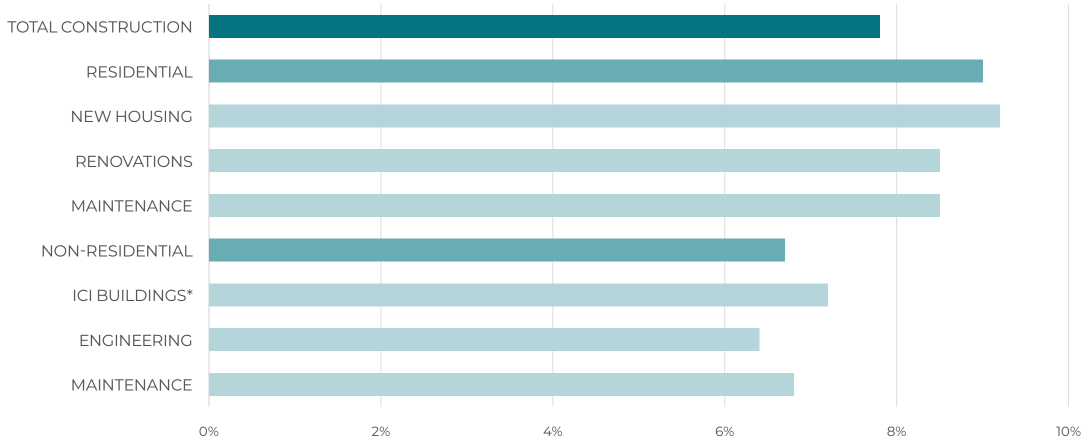


SOURCE: BuildForce Canada calculations based on Statistics Canada's Labour Force Survey and 2021 Census of the Population

The estimated 15,280 on-site tradeswomen in Alberta 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 in residential construction at 9.0% (compared to non-residential at 6.7%). Across sectors, new-housing construction has the highest representation of women, accounting for 9.2% of the workforce. (See Figure 76.) The top five trades and occupations in which women tend to be employed are trade helpers and labourers (20% of all tradeswomen), construction managers (14%), painters and decorators (8%), construction estimators (8%), and contractors and supervisors (8%).

FIGURE 76

WOMEN'S SHARE OF TOTAL DIRECT TRADES AND OCCUPATIONS (ON SITE) **ALBERTA**



* industrial, commercial, institutional

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

INDIGENOUS PEOPLES

The Indigenous population is the fastest growing population in Canada and therefore presents recruitment opportunities for Alberta's construction industry. In 2025, Indigenous Peoples made up 3.5% of Canada's workforce and 4.8% of the national construction workforce. In Alberta, Indigenous Peoples represented 5.2% of the provincial labour force and 6.5% of the construction labour force, both above the national share. Since 2016, Indigenous representation has increased in the overall workforce while remaining relatively stable in construction. (See Table 48).

As the Indigenous population continues to grow, the sector must continue its recruitment efforts and invest in initiatives that foster long-term retention.

TABLE 48

REPRESENTATION OF INDIGENOUS POPULATION IN PROVINCIAL CONSTRUCTION WORKFORCE **ALBERTA**

INDUSTRY	**INDIGENOUS**	**NON-INDIGENOUS**	**TOTAL**	**INDIGENOUS SHARE OF TOTAL WORKFORCE,** %
CONSTRUCTION				
2016	17,700	250,600	268,300	6.6%
2025	17,800	254,800	272,500	6.5%
ALL INDUSTRIES				
2016	112,700	2,280,200	2,392,900	4.7%
2025	143,600	2,642,900	2,786,600	5.2%

SOURCE: Statistics Canada, Labour Force Survey, Custom Data Request 2025

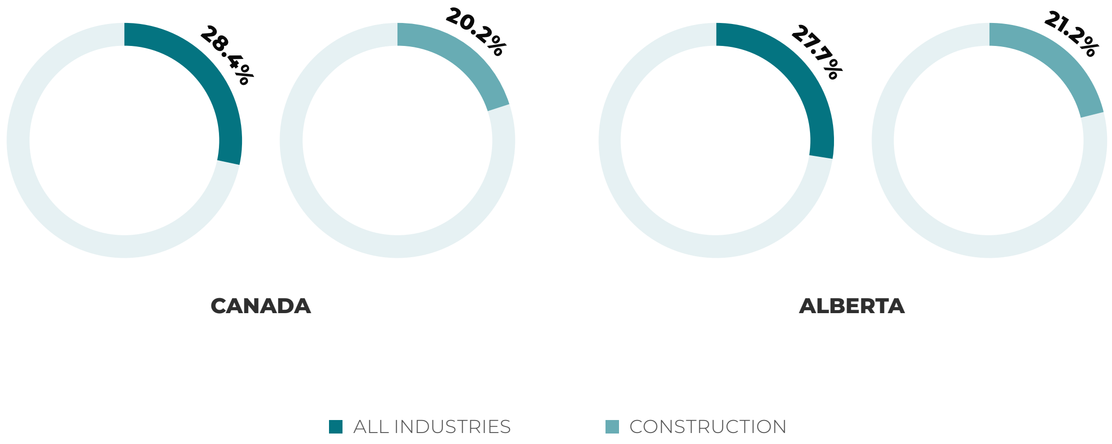
NEWCOMERS

Alberta's construction industry may also rely on newcomers to meet labour demand over the coming years. Immigration continues to support workforce growth in the province, particularly during periods of economic expansion. The share of immigrants increased from 23.0% in 2016 to 27.7% in 2025, bringing Alberta close to the national share (28.4%). In construction, immigrants accounted for 21.2% of the workforce in 2025, slightly above the national construction share (20.2%), indicating relatively strong representation in the sector. (See Figure 77.)

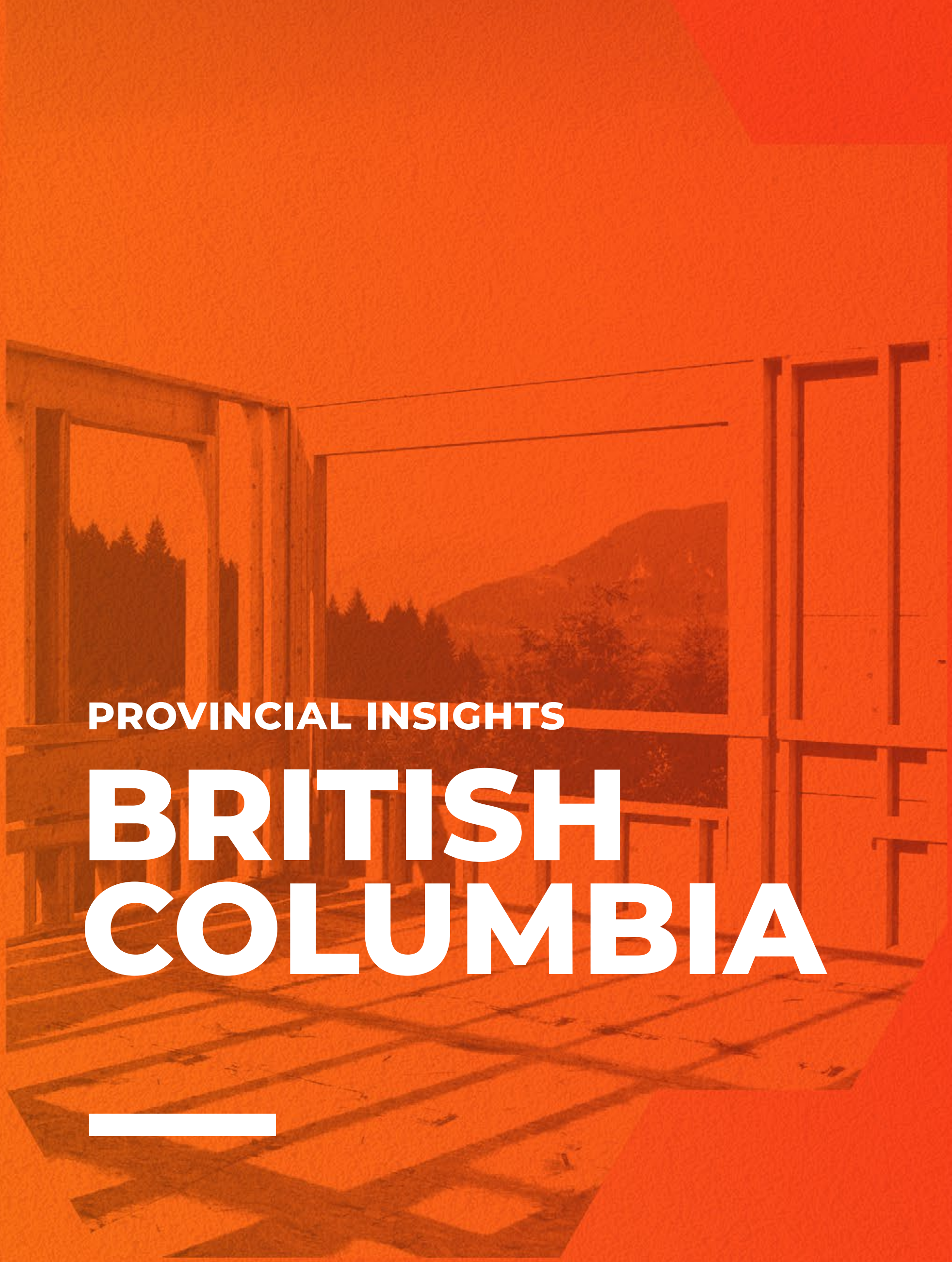
Based on historical settlement patterns, the province is expected to welcome more than 512,300 new immigrants between 2026 and 2035. As these individuals will make up an increasing share of the province's core working-age population, additional recruitment efforts will be required to ensure the construction industry recruits its share of newcomers into the labour force.

FIGURE 77

SHARE (%) OF NEWCOMERS IN THE CONSTRUCTION LABOUR FORCE (2025) **ALBERTA**



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



PROVINCIAL INSIGHTS

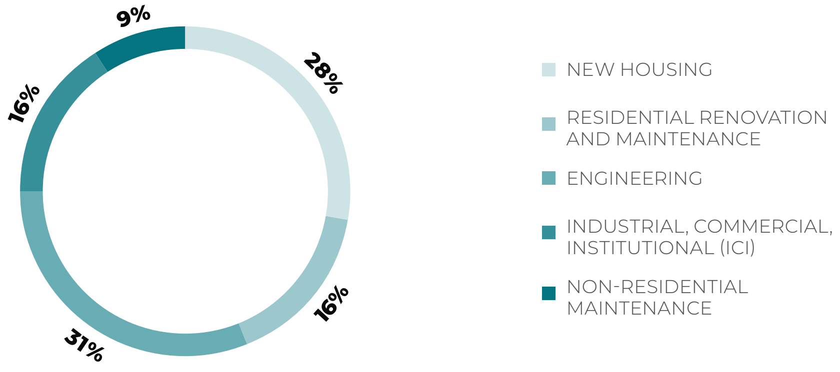
BRITISH COLUMBIA

ECONOMIC OUTLOOK

British Columbia's economy grew at a rate of just under 2% in 2025. Although growth was constrained somewhat by the impacts of tariffs imposed on Canada by the United States administration, many of the goods exported from British Columbia were protected under the Canada-United States-Mexico Agreement. Impacted to a greater degree were consumer confidence and business investment.

Initial production of natural gas at the first phase of the LNG Canada project is expected to contribute to greater levels of economic growth in 2026. Coupled with an escalation in investment in several large-scale mining, utilities, and transportation projects, as well as high levels of investment in the institutional sector, these projects are expected to sustain growth over the near term. These projects help to offset the effects of two years of projected negative population growth between 2026 and 2027 due to reductions in the number of both inter-provincial and international migrants to the province.

DISTRIBUTION OF CONSTRUCTION EMPLOYMENT IN 2025 **BRITISH COLUMBIA**



10-YEAR WORKFORCE OUTLOOK FOR **BRITISH COLUMBIA**

46,800
RETIREMENTS

+40,800
NEW ENTRANTS

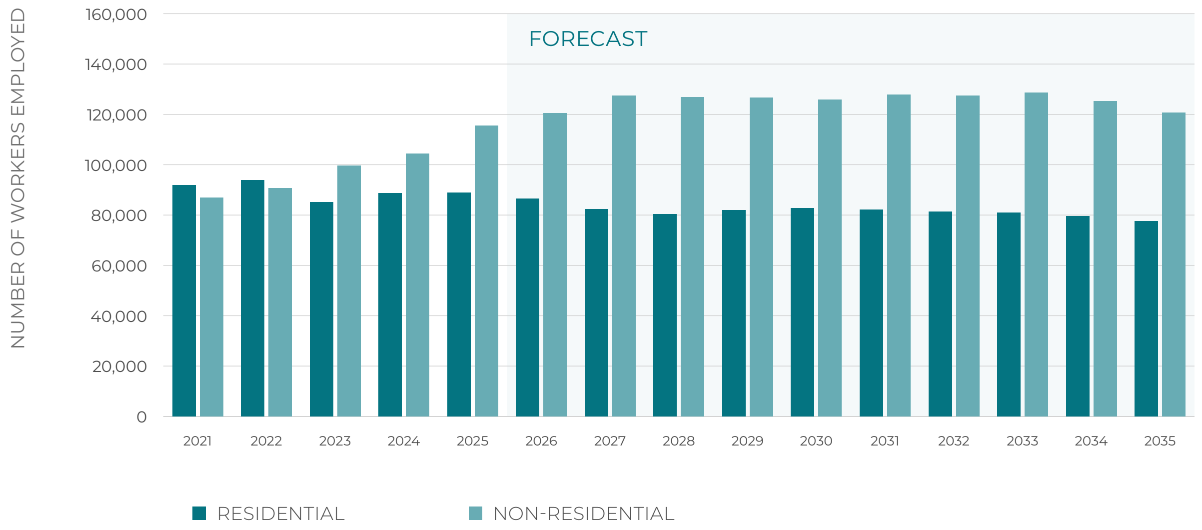
-6,079
EMPLOYMENT CHANGE
(-3.0%)

5.6%
AVERAGE UNEMPLOYMENT RATE

Economic growth is expected to moderate into the early 2030s as current and proposed major capital projects recede. Output increases again toward the latter part of the forecast period as population growth returns to closer to historical levels and demand for residential construction increases.

For the period of 2029 to 2035, annual GDP growth in British Columbia is expected to average close to 2% annually.

CONSTRUCTION EMPLOYMENT GROWTH OUTLOOK **BRITISH COLUMBIA**



SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

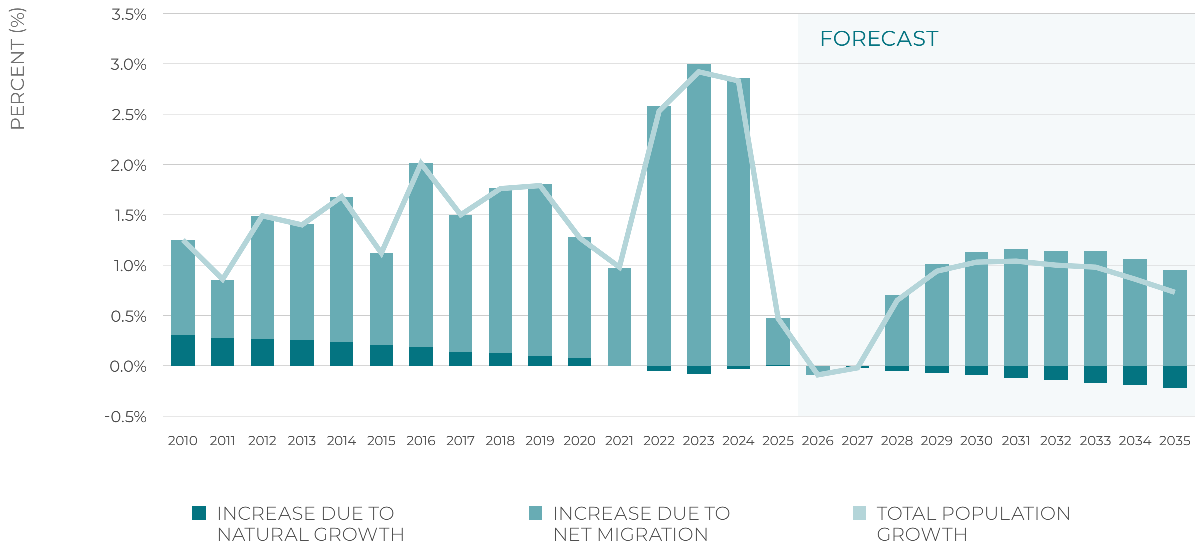
POPULATION GROWTH AND DEMOGRAPHICS

British Columbia benefitted from a surge in population growth in the immediate post-pandemic period that was driven by an influx of international migrants. Net migration levels to the province reached more than 160,000 people in each of 2023 and 2024.

The federal government's announcement to reduce the number of non-permanent residents to 5% of the Canadian population by late 2027, coupled with a relatively high cost of living that has deterred some inter-provincial migrants, caused net migration levels to drop significantly in 2025. Population growth is expected to stagnate in 2026 and 2027 before federal international migration levels return to closer to historic norms. Population growth in later years is sustained at an average of approximately 1%. (See Figure 78.)

FIGURE 78

SOURCES OF POPULATION GROWTH (%) **BRITISH COLUMBIA**



SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

RESIDENTIAL CONSTRUCTION INVESTMENT

Residential construction investment levels are expected to decline across the forecast period as a contraction in new-home construction is only partially offset by increased residential renovation and maintenance activity. (See Figure 79.)

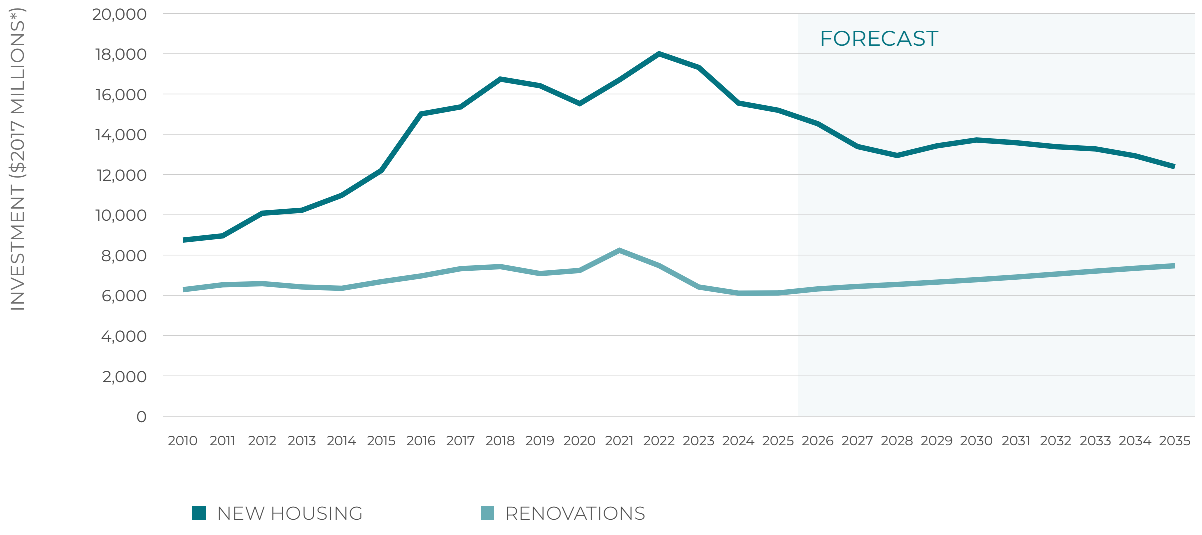
Housing starts reached a peak in 2023, driven by elevated levels of international migration. Levels are expected to trend down throughout the forecast period. This is driven in the short term by reductions in international migration targets. After 2030, housing starts fall gradually to a level of approximately 35,000 units annually, which is in line with population growth and household formations expected later in the forecast period.

By unit type, housing start contractions are expected to be greatest, initially, among single-detached[65] dwellings. Starts were elevated at above 10,000 units annually in the early 2020s due to low interest rates. They contracted to just over 5,400 units in 2025 due to increased borrowing costs, lower levels of migration, and affordability challenges.

65 Single-detached (single) refers to a building containing only one dwelling unit that is completely separated on all sides from any other dwelling or structure.

FIGURE 79

RESIDENTIAL CONSTRUCTION INVESTMENT **BRITISH COLUMBIA**



* $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 (2026–2035)

Starts for single-detached units are expected to remain around 5,000 units annually through 2028, after which they are expected to rebound to between 7,000 and 8,000 units annually as migration-driven population growth increases again. Demand for other low-rise housing structures, i.e., semi-detached and row units, is expected to stabilize near 2025 levels across the forecast period.

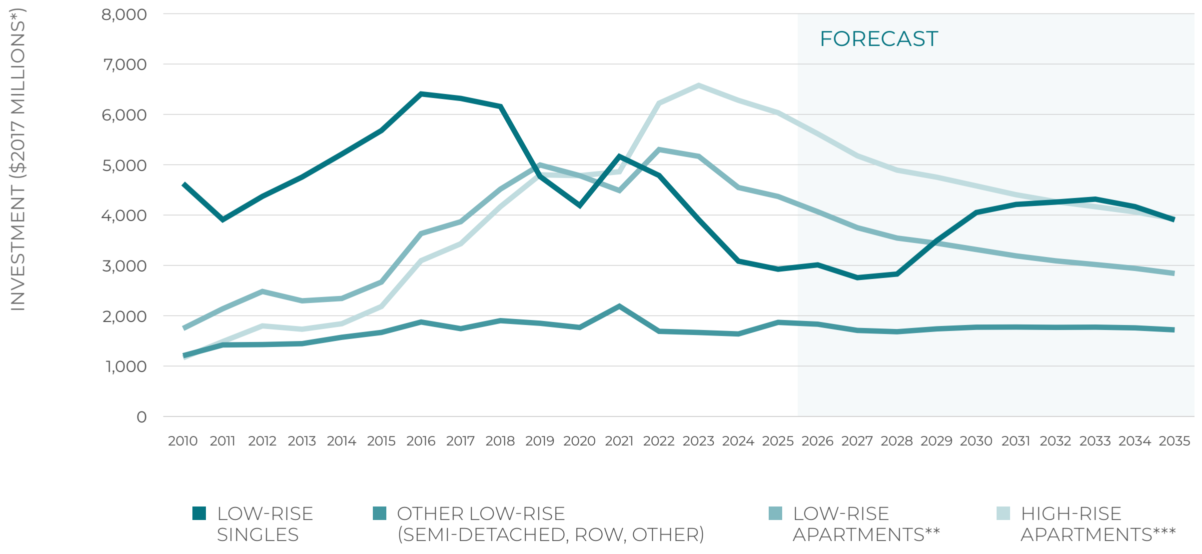
Leading into the forecast period, British Columbia's vacancy rate among rental housing units was among the lowest in the country. This factor helped to stimulate demand for more multi-unit residential construction. Reductions to the number of non-permanent residents since have elevated this rate, and reduced demand for multi-unit construction – and apartment buildings in particular. This trend is expected to continue over the near term as population growth slows. Later years see contractions less pronounced as international migrants return to the province and rental vacancy rates tighten again.

Apartment housing starts are expected to contract continuously through the forecast period, with sharper near-term declines projected among high-rise buildings (i.e., structures of five or more storeys). (See Figure 80.)

Investment in residential renovations is expected to increase across the forecast period. These gains are supported by a stable labour market, lower interest rates, rising disposable incomes, and an increasing need to upgrade the housing stock. Additionally, older residents are expected to invest in home improvements to enable them to age in place.

FIGURE 80

NEW HOUSING CONSTRUCTION INVESTMENT **BRITISH COLUMBIA**



* $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.

** Low-rise apartments are buildings with four storeys or fewer.

*** High-rise apartments are buildings with five or more storeys.

SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

RESIDENTIAL CONSTRUCTION EMPLOYMENT

Residential construction employment in British Columbia is expected to trend lower across the forecast period, as demand for new-housing activity recedes from the peaks it experienced in 2022 and 2023.

Employment declines are concentrated between 2026 and 2028, after which a brief growth cycle emerges that is driven by renewed new-home construction but recedes again later in the period to 2035.

By 2035, residential construction employment is expected to contract by 13% compared to 2025 levels. Employment losses are exclusive to new-home construction, which contracts by 26%. This loss outweighs gains of 10% and 13% in renovation and maintenance employment, respectively, that are driven by the need to maintain a large provincial housing stock.

Table 49 summarizes the estimated percent change in residential employment by sector across three periods: the short term (2026–2028), the medium term (2029–2031), and the long term (2032–2035).

TABLE 49

CHANGES IN RESIDENTIAL EMPLOYMENT BY SECTOR **BRITISH COLUMBIA**

SECTOR	% CHANGE **2026–2028**	% CHANGE **2029–2031**	% CHANGE **2032–2035**
RESIDENTIAL	-10%	2%	-6%
NEW HOUSING	-17%	2%	-12%
RENOVATIONS	4%	2%	4%
RESIDENTIAL MAINTENANCE	5%	3%	4%

Note that 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.

SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

RANKINGS, RISKS, AND MOBILITY: TRADES AND OCCUPATIONS

The BuildForce LMI system tracks supply and accounts for the change in the available labour force, including retirements, new entrants[66], and net mobility[67]. Based on currently known demands, industry recruitment and retirement estimates, the following ranks apply to the 27 covered trades in the province. See Table 50.

Labour market conditions remained tight for several trades and occupations in 2025. They are projected to weaken for some trades and occupations over the near term as high-rise construction slows before tightening again in 2029 and 2030 with renewed growth in single-detached new-home construction.

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

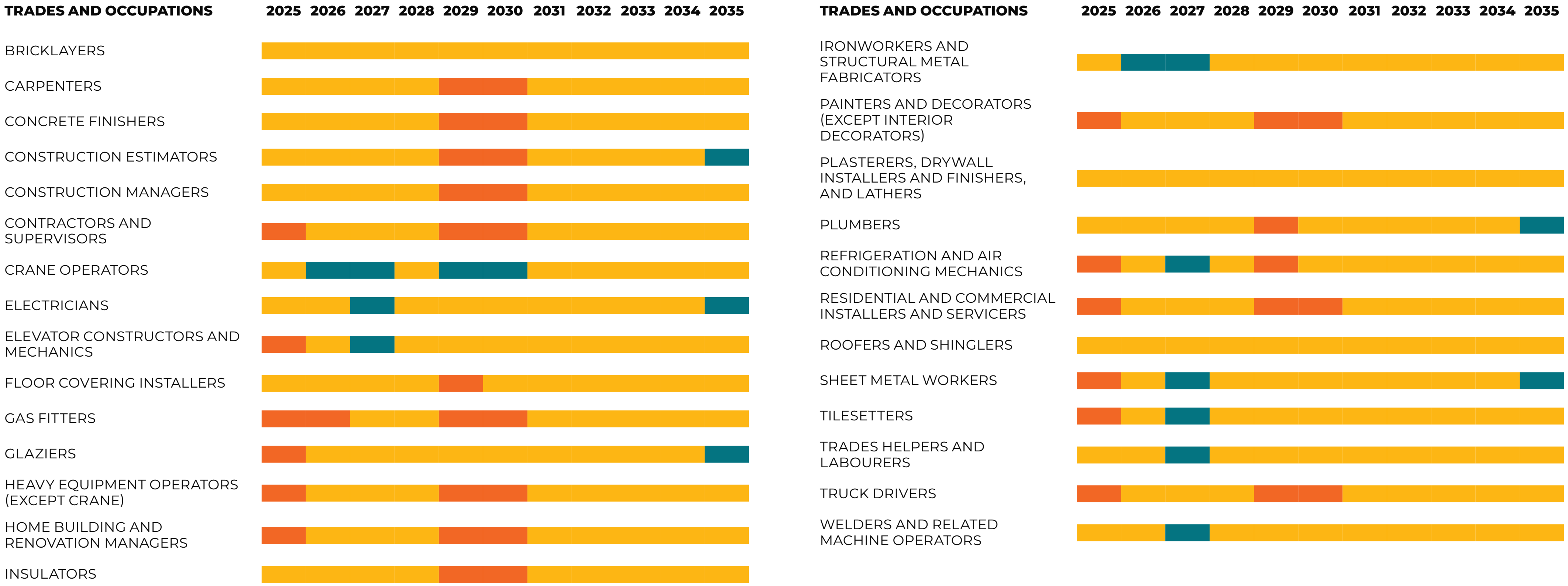
Needed workers meeting employer qualifications are not available in local markets to meet current demand so that projects or production may be delayed or deferred. There is excess demand, competition is intense and recruiting reaches to remote markets.

66 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.

67 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.

TABLE 50

RESIDENTIAL MARKET RANKINGS **BRITISH COLUMBIA**



SOURCE: BuildForce Canada

BUILDING A SUSTAINABLE LABOUR FORCE

THE AVAILABLE RESIDENTIAL LABOUR FORCE

The projected slowdown in activity in the province over the 2026 to 2035 forecast period may contract the residential labour force by as many as 10,000 workers. When added to the 20,500 workers (22% of the 2025 labour force) that are estimated to retire over the decade, British Columbia's residential construction sector could face a hiring requirement of as many as 10,500 workers.

These hiring requirements are expected to be more than offset by an estimated 14,900 new-entrant workers under the age of 30 that are expected to join the labour force, leaving the sector with a potential surplus of 4,400 workers. Given the volume of work anticipated in the province's non-residential sector over the forecast period, there is the potential for some of these workers to transition away from work in the residential sector. There is a further risk that some may seek opportunities in other provinces, or exit the industry altogether.

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 skill sets, and the recruitment of immigrants to Canada with skilled trades training and/or construction experience.

Figure 81 provides a summary of the estimated changes in the residential construction labour force across the forecast period.

FIGURE 81

CHANGES IN THE RESIDENTIAL LABOUR FORCE
BRITISH COLUMBIA

93,600
LABOUR FORCE
2025

-10,000
WORKERS

83,600
LABOUR FORCE
2035

HIRING NEEDS

-10,000
WORKERS

+20,500
RETIREMENTS

OFFSET BY

-14,900
NEW ENTRANTS

-4,400
NET MOBILITY*

* 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 apprenticeship registrations in British Columbia's largest construction trades rose sharply in 2023, increasing by 35% from the previous year. More than half of this growth was concentrated in the construction electrician and plumber programs. The surge was largely driven by the introduction of compulsory certification for seven electrical and mechanical trades in 2023. As a result, workers who were previously unregistered were required to either register as apprentices or pursue certification, leading to a significant one-time increase in registrations.

Although growth in new registrations has slowed since, levels remained elevated in 2024, bringing the province to a record number of registered apprentices. While this represents a positive development for the skilled trades workforce, it also places increased pressure on the apprenticeship system to train, retain, and certify apprentices to ensure training investments translate into completed certifications.

New registrations are expected to remain above historical averages, supported by the federal government's recently announced investment to recruit and train skilled trades workers under the Team Canada Strong initiative. In addition to supporting intake, the funding places a strong emphasis on improving completion outcomes through enhanced incentives and employer supports.[68]

Although completions rose in 2024, the elevated intake observed in recent years – combined with the implementation of compulsory certification and increased government investment – is expected to support greater numbers of completions over the outlook period. (See Figure 82.)

FIGURE 82

NEW APPRENTICESHIP REGISTRATIONS, COMPLETIONS, AND TRADE EMPLOYMENT **BRITISH COLUMBIA**

SOURCE: BuildForce Canada

68 Prime Minister Carney announces Team Canada Strong – a nationwide plan to recruit up to 100,000 skilled trades workers

Table 51 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.[69] Based on projected new registrations, a handful of 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 heavy equipment operator, carpenter, mobile crane operator, painter and decorator, and welder. While several other trades currently appear balanced, even modest economic shifts could lead to supply challenges.

- ■ (red) CERTIFICATIONS REQUIRED EXCEED PROJECTED COMPLETIONS
- ■ (yellow) CERTIFICATIONS REQUIRED IN LINE WITH PROJECTED COMPLETIONS
- ■ (green) PROJECTED COMPLETIONS EXCEED CERTIFICATIONS REQUIRED

TABLE 51

ESTIMATED CONSTRUCTION CERTIFICATION DEMAND AND PROJECTED TARGET OF NEW ENTRANTS BY TRADE **BRITISH COLUMBIA***

TRADE	**TOTAL CERTIFICATION DEMAND** CONSTRUCTION	**TARGET NEW REGISTRANTS** CONSTRUCTION	**APPRENTICE CERTIFICATION SUPPLY RISK** ALL INDUSTRIES
HEAVY EQUIPMENT OPERATOR	254	104	■ (red)
CARPENTER	4,969	3,456	■ (red)
MOBILE CRANE OPERATOR	123	90	■ (red)
PAINTER AND DECORATOR	410	318	■ (red)
WELDER	296	240	■ (red)
GLAZIER	199	174	■ (yellow)
POWERLINE TECHNICIAN	292	264	■ (yellow)
ROOFER	317	305	■ (yellow)
INDUSTRIAL MECHANIC (MILLWRIGHT)	284	281	■ (yellow)

69 Trades with fewer than 100 new registrations per year were excluded from the analysis.

TRADE	**TOTAL CERTIFICATION DEMAND** CONSTRUCTION	**TARGET NEW REGISTRANTS** CONSTRUCTION	**APPRENTICE CERTIFICATION SUPPLY RISK** ALL INDUSTRIES
STEAMFITTER/PIPEFITTER	313	510	
HEAVY-DUTY EQUIPMENT TECHNICIAN	291	481	
METAL FABRICATOR (FITTER)	101	194	
CONSTRUCTION ELECTRICIAN	4,664	10,508	
PLUMBER	2,264	5,482	
INDUSTRIAL ELECTRICIAN	212	548	
SPRINKLER FITTER	176	533	
SHEET METAL WORKER	408	1,266	
REFRIGERATION AND AIR CONDITIONING MECHANIC	715	2,223	
IRONWORKER (GENERALIST)	47	169	

* This analysis does not account for existing labour market imbalances at the 2025 starting point.

SOURCE: BuildForce Canada

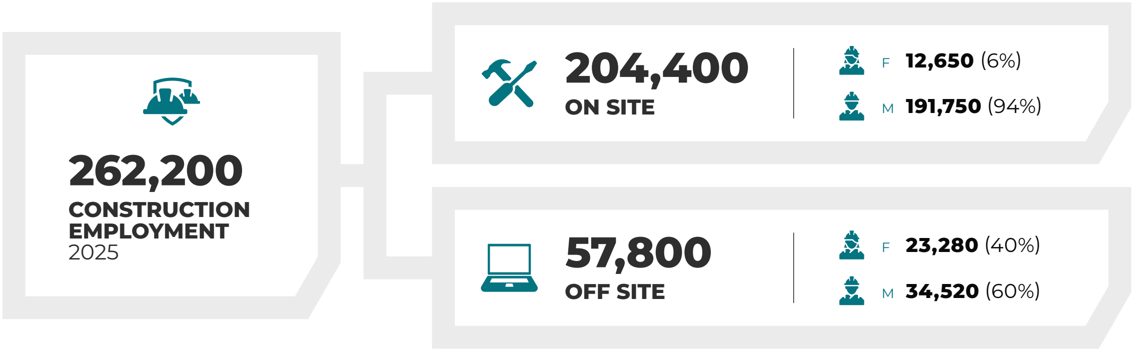
UNDER-REPRESENTED GROUPS OF WORKERS

Canada's labour force is being reshaped by long-term demographic trends, including declining fertility rates and smaller family sizes over the past several decades. As a result, the pool of younger workers entering the workforce has been shrinking. This pressure will increase as the baby boomer generation continues to retire, intensifying competition for new talent. To respond to these challenges, the construction industry must broaden its recruitment efforts. Strengthening the workforce will require greater engagement with traditionally under-represented groups, including women, Indigenous Peoples, and newcomers to Canada.

WOMEN

In 2025, there were approximately 35,930 women employed in British Columbia's construction industry, of which 35% worked on site, directly on construction projects, while the remaining 65% worked off site, primarily in administrative and management-related occupations. Of the 204,400 on-site tradespeople employed in the industry, women made up only 6%. (See Figure 83).

FIGURE 83
DETAILED CONSTRUCTION EMPLOYMENT BY GENDER **BRITISH COLUMBIA**



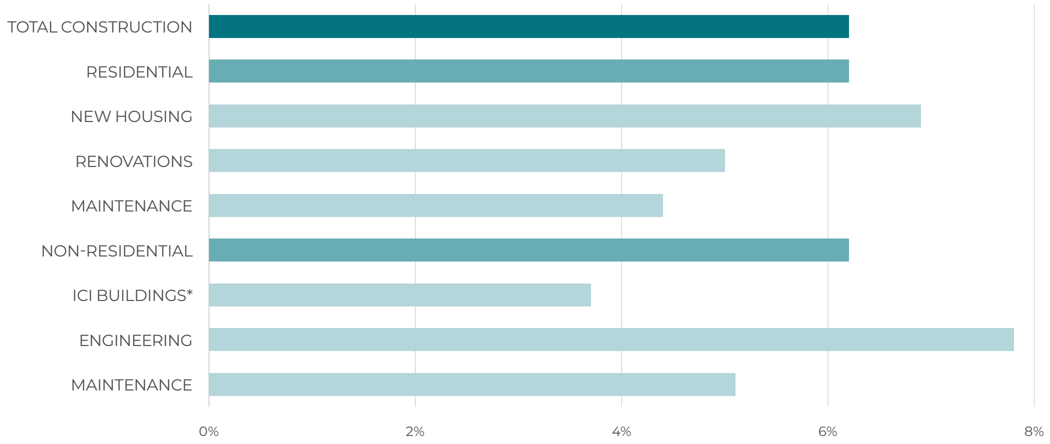
SOURCE: BuildForce Canada calculations based on Statistics Canada's Labour Force Survey and 2021 Census of the Population

The estimated 12,650 on-site tradeswomen in British Columbia are represented across all sectors of construction. Women account for an equal share of total tradespeople in the residential (6.2%) and non-residential (6.2%) construction sectors. Across sectors, engineering construction has the highest representation of women, accounting for approximately 7.8% of the workforce. (See Figure 84.)

The top five trades and occupations in which women tend to be employed are trade helpers and labourers (26% of all tradeswomen), construction managers (20%), contractors and supervisors (11%), carpenters (7%), and home building and renovation managers (6%).

FIGURE 84

WOMEN'S SHARE OF TOTAL DIRECT TRADES AND OCCUPATIONS (ON SITE) **BRITISH COLUMBIA**



* industrial, commercial, institutional

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

INDIGENOUS PEOPLES

The Indigenous population is the fastest growing population in Canada and therefore presents recruitment opportunities for British Columbia's construction industry. In 2025, Indigenous Peoples made up 3.5% of Canada's workforce and 4.8% of the national construction workforce. In British Columbia, Indigenous Peoples represented 4.2% of the provincial labour force and 4.6% of the construction labour force, with the overall workforce share above the national share and construction slightly below. Since 2016, Indigenous representation has declined across both measures. (See Table 52.)

As the Indigenous population continues to expand, sustained efforts in recruitment and retention will need to be made to increase the industry's share of the population into the labour force.

TABLE 52

REPRESENTATION OF INDIGENOUS POPULATION IN PROVINCIAL CONSTRUCTION WORKFORCE **BRITISH COLUMBIA**

INDUSTRY	**INDIGENOUS**	**NON-INDIGENOUS**	**TOTAL**	**INDIGENOUS SHARE OF TOTAL WORKFORCE,** %
CONSTRUCTION				
2016	12,900	220,700	233,500	5.5%
2025	12,600	258,900	271,500	4.6%
ALL INDUSTRIES				
2016	119,800	2,503,700	2,623,400	4.6%
2025	131,700	3,007,200	3,138,800	4.2%

SOURCE: Statistics Canada, Labour Force Survey, Custom Data Request 2025

NEWCOMERS

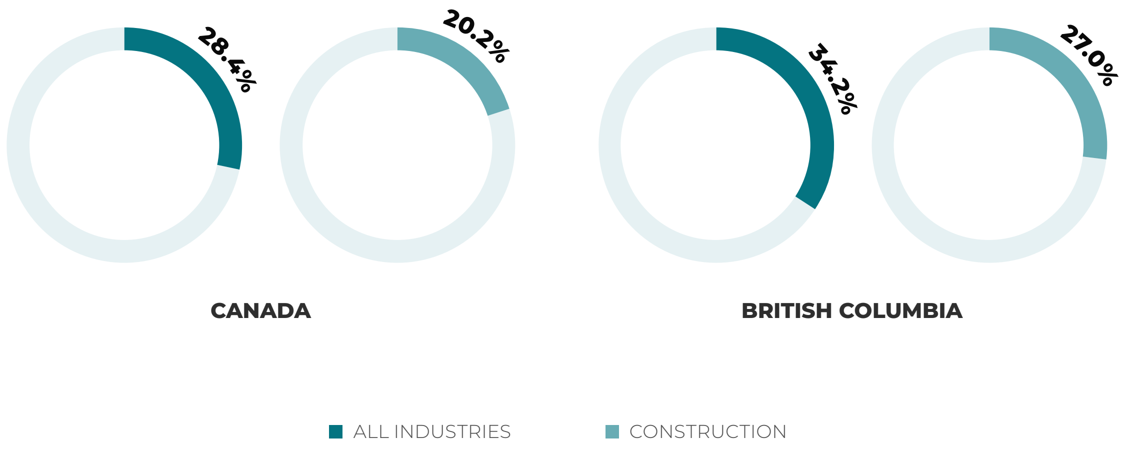
British Columbia's construction industry may also leverage newcomers (recently arrived immigrants) to Canada over the forecast period to meet labour requirements. Due to the declining natural rate of population growth[70], immigrants are the primary source of labour force growth in the province. The share of immigrants increased from 28.6% in 2016 to 34.2% in 2025, well above the national share. In construction, immigrants accounted for 27.0% of the workforce in 2025, also well above the national construction share (20.2%). The province has attracted and integrated a higher share of immigrants into the labour force compared to other provinces; however, immigrants remain under-represented in the provincial construction industry compared to the broader provincial workforce. (See Figure 85.)

Based on historical settlement patterns, British Columbia is expected to welcome more than 371,100 new immigrants between 2026 and 2035. 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.

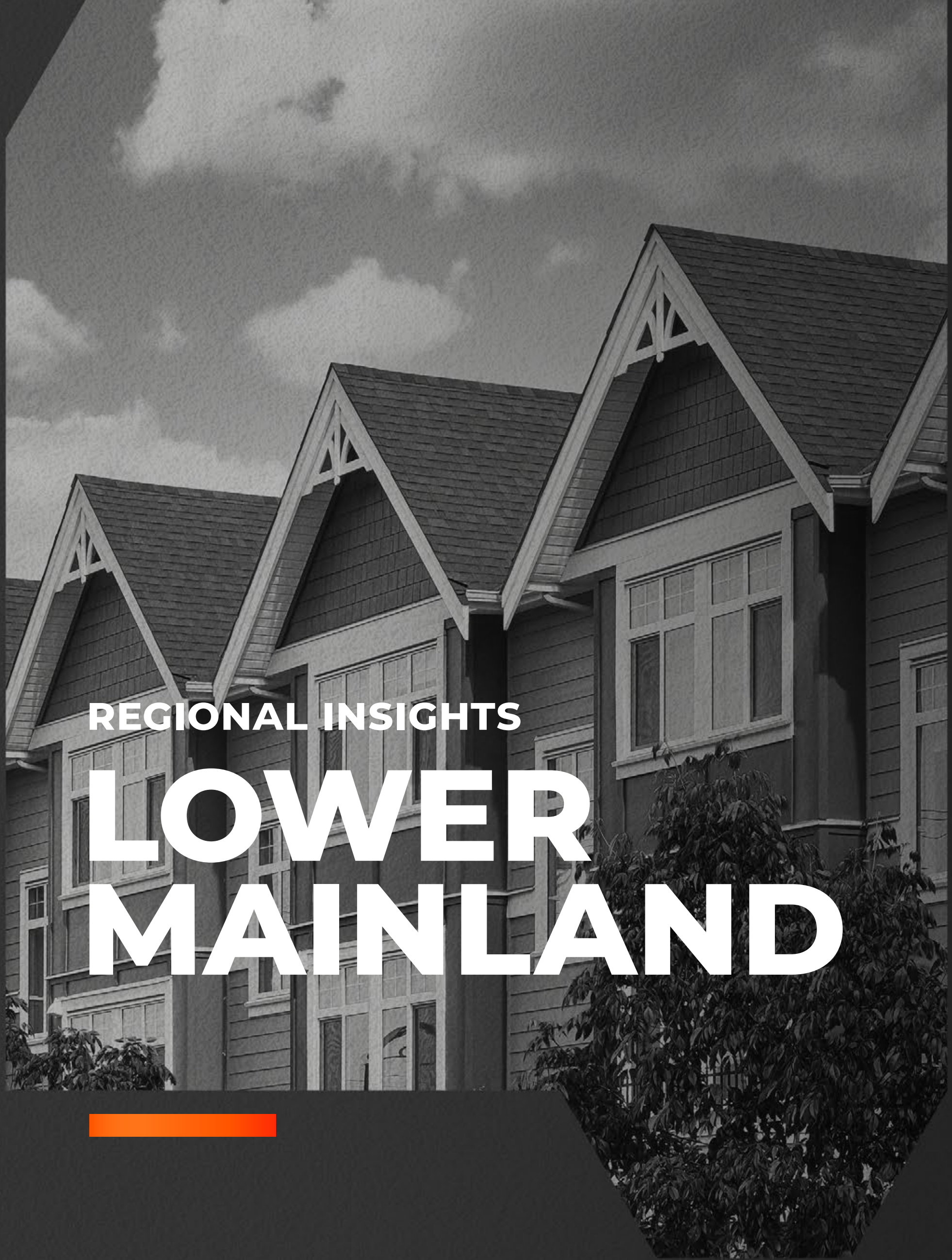
70 The natural rate of population growth refers to the growth in the population due to the number of births relative to the number of deaths, which leads to a positive or negative natural rate.

FIGURE 85

SHARE (%) OF NEWCOMERS IN THE CONSTRUCTION LABOUR FORCE (2025) **BRITISH COLUMBIA**



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



REGIONAL INSIGHTS

LOWER MAINLAND

BRITISH COLUMBIA – LOWER MAINLAND

The Lower Mainland[71] construction market reported a small overall gain in residential construction activity in 2025. Investment in both new-home construction and renovation work recorded modest increases.

Investment in new-home construction is expected to generally trend down across the forecast period to 2035, driven by declines in housing starts from recent peak levels of activity among multi-unit housing – particularly construction of apartment buildings.

Housing starts for single-detached[72] units are expected to rise modestly in 2026 before slowing in 2027 and remaining muted in 2028 in response to affordability challenges and slowing population growth. Starts for these unit types are projected to rebound as population growth accelerates into 2029.

Demand for multi-unit residential buildings is expected to trend downward across the forecast period. Initially, it is driven by an oversupply of high-rise apartments. Later, activity slows in line with population growth.

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

72 Single-detached (single) refers to a building containing only one dwelling unit that is completely separated on all sides from any other dwelling or structure.

As interest rates stabilize and incomes adjust to higher construction costs, residential renovation activity benefits from the comparatively lower cost of upgrading existing homes relative to new purchases, as well as from the region's growing housing stock.

As a result of these factors, residential construction employment in the region is expected to contract by 15% compared to 2025 levels by 2035. This decline is primarily driven by declines in new-home construction (-29%). Renovation-related employment (+20%) and maintenance-related employment (+6%) only partially offset new-housing-related declines.

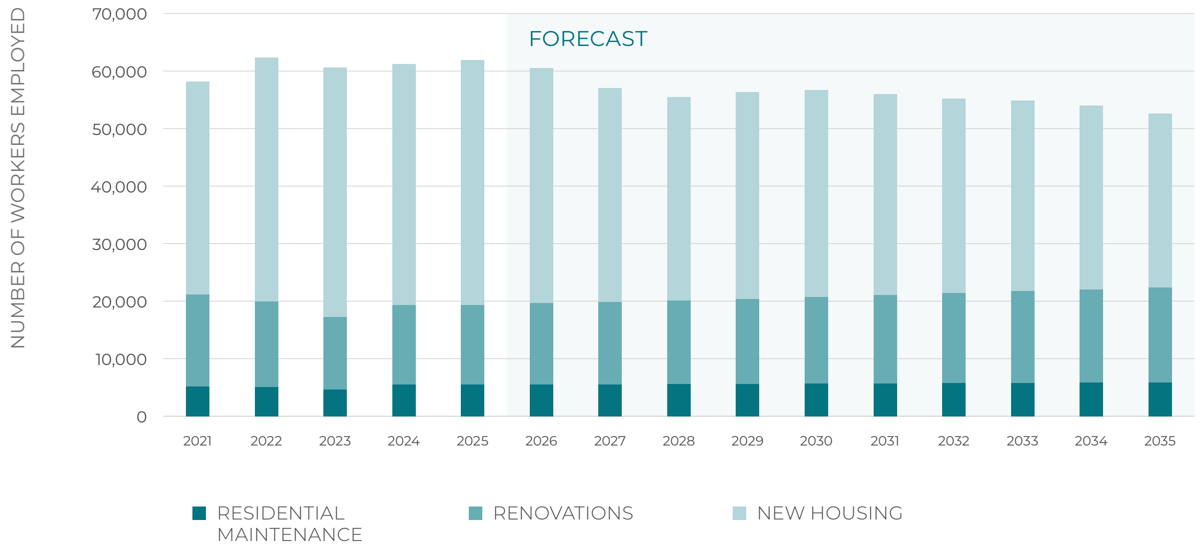
Figure 86 shows anticipated employment trends by sector for residential construction across the forecast.

Note that 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.

FIGURE 86

RESIDENTIAL CONSTRUCTION EMPLOYMENT GROWTH OUTLOOK

LOWER MAINLAND, BRITISH COLUMBIA



SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

THE AVAILABLE LABOUR FORCE

As investment recedes from recent highs, the residential construction labour force in the Lower Mainland falls by 8,500 workers by 2035. The expected retirement of 11,800 workers over the same period will bring hiring requirements to 3,300 workers. Meanwhile, residential construction is expected to add as many as 9,300 new-entrant workers from the local population under the age of 30. Given these factors, the industry may face a surplus of as many as 6,000 workers by 2035.

RANKINGS, RISKS, AND MOBILITY: TRADES AND OCCUPATIONS

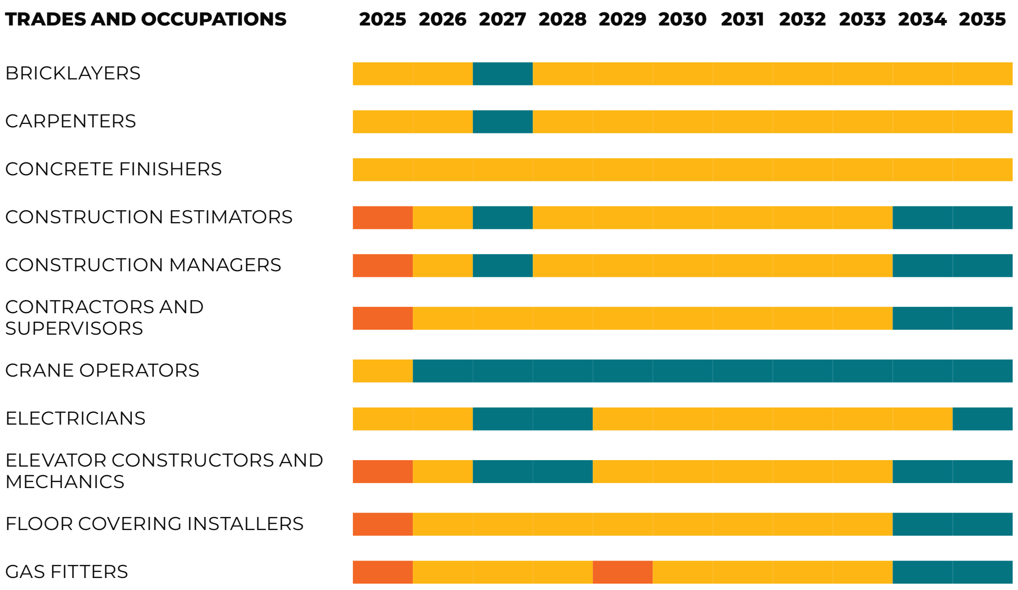
The BuildForce LMI system tracks supply and accounts for the change in the available labour force, including retirements, new entrants[73], and net mobility[74]. Based on currently known demands, industry recruitment and retirement estimates, the following ranks apply to the 27 covered trades in the region. See Table 53.

Labour market conditions were tight in 2025 for several trades and occupations, but are expected to weaken into 2027 and 2028 as overall activity slows. Conditions return to balance by 2029 driven by renewed growth in single-detached housing but weaken again later in the period as activity cycles down by 2034 and 2035.

TABLE 53

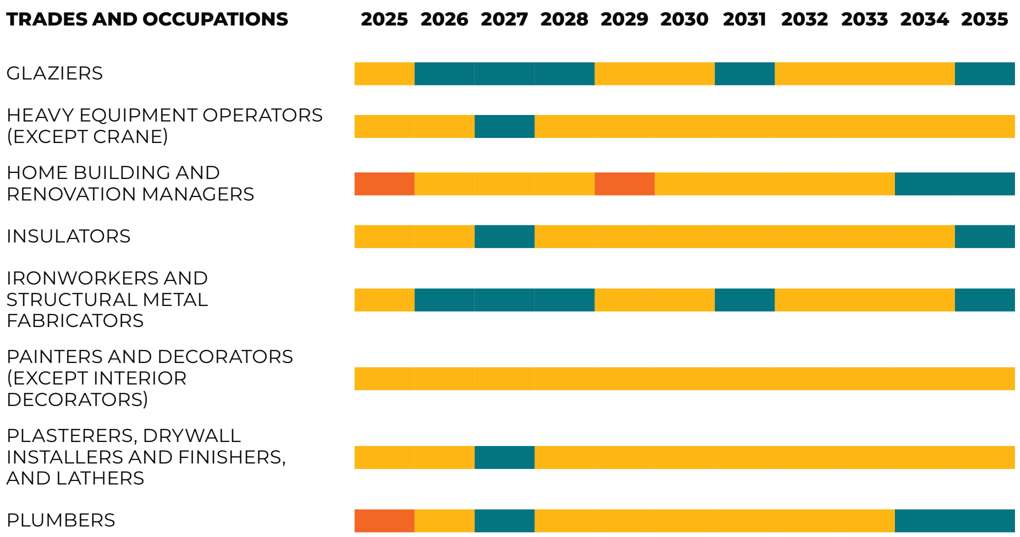
RESIDENTIAL MARKET RANKINGS

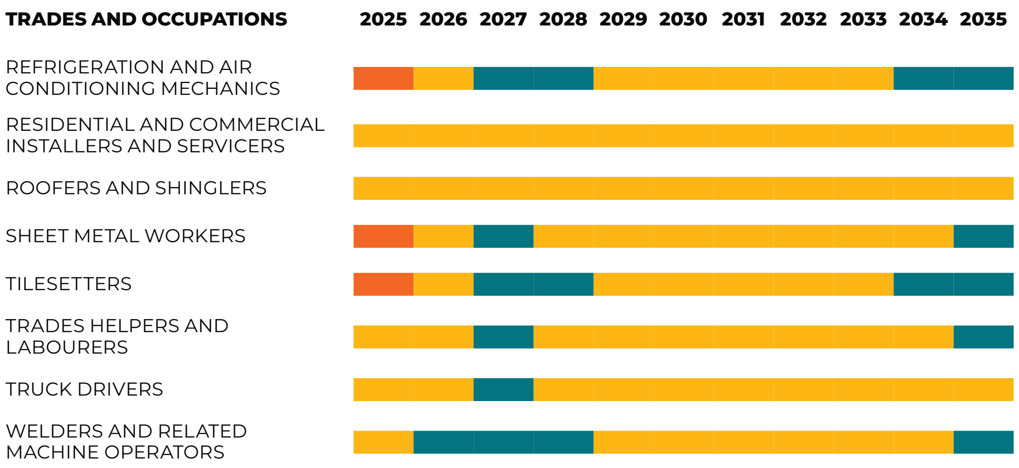
LOWER MAINLAND, BRITISH COLUMBIA



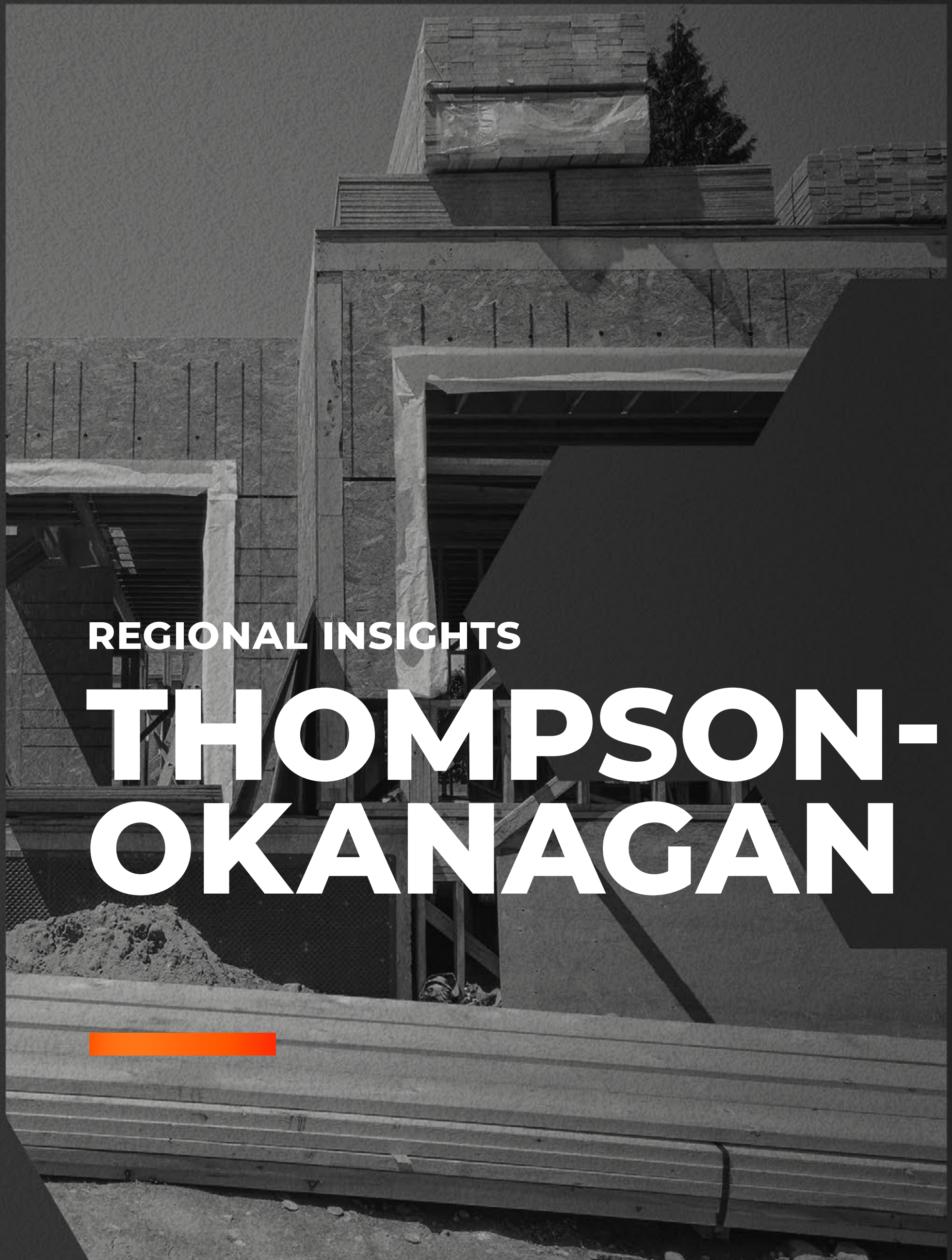
73 New entrants are measured by applying the traditional proportion of the provincial labour force that enters the construction industry. The projected estimate across the forecast period assumes that the construction industry can recruit this group in competition with other industries.

74 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.





SOURCE: BuildForce Canada



REGIONAL INSIGHTS

THOMPSON-OKANAGAN

BRITISH COLUMBIA – THOMPSON-OKANAGAN

Residential construction activity in the Thompson-Okanagan[75] region declined in 2025 as contractions in new-home construction outweighed minor gains in residential renovations activity. Investment in new-housing construction is expected to trend lower into 2028 as population growth slows in the region, before a modest increase carries through into the later years of the forecast period.

Housing starts in the region declined by 20% in 2025 as slower population growth weakened the demand for new-housing construction. The downward trend is projected to continue into 2028 as population growth slows further. Housing starts are projected to stabilize around 3,700 units at the end of the forecast period, as population growth and subsequently household formations rebound.

Single-detached[76] housing starts have been particularly affected by affordability pressures, contracting by roughly 70% since reaching a recent peak of nearly 2,200 units in 2021. Elevated interest rates and rising home prices have generally deterred buyers from these higher-priced unit types. As population growth strengthens in 2029 and beyond, starts are projected to recover, averaging around 1,100 units annually between 2032 and 2035 but remaining below historical norms.

After reaching record levels in 2024, starts for multi-unit dwellings declined in 2025 and are projected to continue easing as migration recedes from record highs. While multi-unit dwellings continue to account for the majority of new units over the outlook, their share declines gradually as demand for single-detached units regains some momentum. The forecast projects a downward trend in the construction of new, low-rise apartment units across the region.

75 The Thompson-Okanagan region includes the following regional districts: Kelowna, Kamloops, Penticton, Salmon Arm, Vernon, Golden, and Revelstoke.

76 Single-detached (single) refers to a building containing only one dwelling unit that is completely separated on all sides from any other dwelling or structure.

Residential renovation activity has slowed in the region since it reached a recent peak in 2021. Investment stabilized in 2025 and is projected to rise steadily across the forecast period, driven by an aging housing stock, higher property prices, and a population that chooses to age in place.

By 2035, residential construction employment in the Thompson-Okanagan region is projected to contract by 11%. The expected decline in new-home construction employment (-24%) outpaces gains in employment relating to renovation activity (10%) and an unchanged residential maintenance employment outlook.

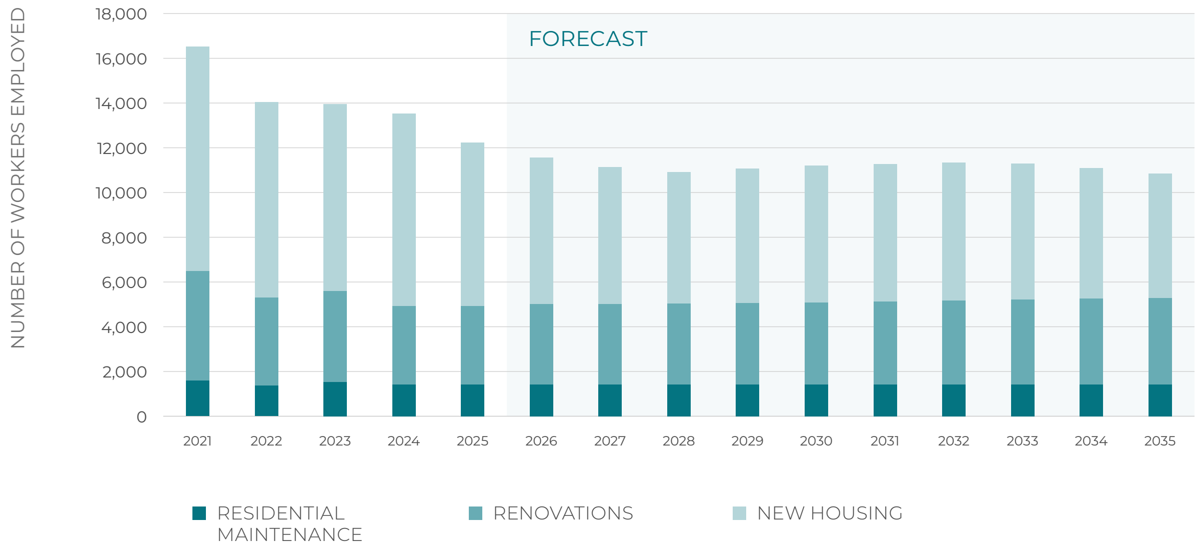
Figure 87 shows anticipated employment trends by sector for residential construction across the forecast.

Note that 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.

FIGURE 87

RESIDENTIAL CONSTRUCTION EMPLOYMENT GROWTH OUTLOOK

THOMPSON-OKANAGAN, BRITISH COLUMBIA



SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

THE AVAILABLE LABOUR FORCE

The downward trend in new-home construction relative to recent elevated levels of activity translates into an expected decline in the region's residential construction labour force of 1,400 workers by 2035. The expected retirement of 3,400 workers over the same period will bring hiring requirements to 2,000 workers. This requirement should be met by the anticipated recruitment of 2,000 new-entrant workers from the local population under the age of 30, bringing the region's residential labour market into balanced conditions.

RANKINGS, RISKS, AND MOBILITY: TRADES AND OCCUPATIONS

The BuildForce LMI system tracks supply and accounts for the change in the available labour force, including retirements, new entrants[77], and net mobility[78]. Based on currently known demands, industry recruitment and retirement estimates, the following ranks apply to the 16 covered trades in the region. See Table 54.

As overall residential activity declines, labour market conditions weakened in 2025. These conditions are projected to carry over into 2026 before more stable levels of activity return markets to more balanced conditions over the medium term. Later in the period, conditions weaken again as projected population growth slows, and new-home construction decelerates.

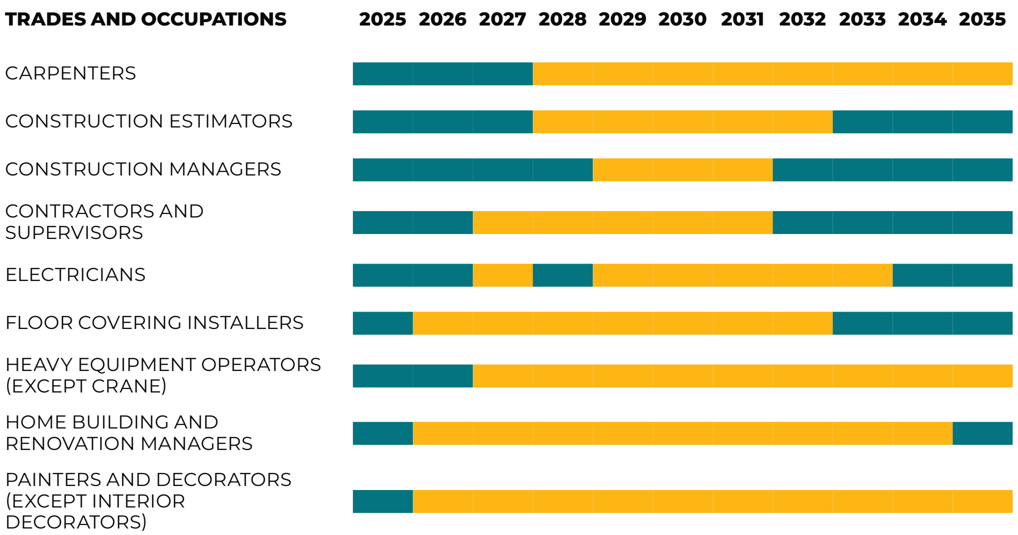
77 New entrants are measured by applying the traditional proportion of the provincial labour force that enters the construction industry. The projected estimate across the forecast period assumes that the construction industry can recruit this group in competition with other industries.

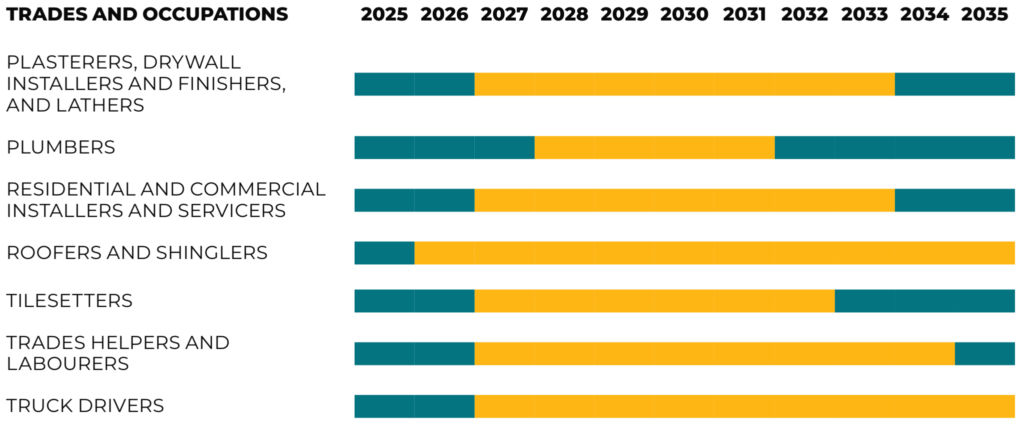
78 Net mobility refers to the movement of labour in and out of the local construction industry labour force. In-mobility captures the movement into the labour force of out-of-province industry workers and/or workers from outside the industry. Many members of this group will move quickly out of the provincial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

TABLE 54

RESIDENTIAL MARKET RANKINGS

THOMPSON-OKANAGAN, BRITISH COLUMBIA





SOURCE: BuildForce Canada

REGIONAL INSIGHTS

VANCOUVER ISLAND

BRITISH COLUMBIA – VANCOUVER ISLAND

Residential construction activity in the Vancouver Island region[79] has eased from the elevated levels recorded earlier in the decade. Housing starts more than doubled between 2015 and 2021, peaking at more than 9,100 units. Activity has since trended lower due to slowing population growth. Housing starts are expected to decline through 2028, stabilizing at around 6,000 units over the medium term to 2033, before easing further later in the period as population growth moderates.

Starts for single-detached[80] dwellings have fallen by almost 60% between 2021 and 2025, due in large part to affordability challenges and elevated interest rates. Activity is expected to remain subdued through 2028 despite some easing in borrowing costs. Over the longer term, single-detached starts are projected to recover noticeably as more of the region's population enters the ages where they have a greater preference for these units and the financial means to purchase this comparatively more expensive housing.

Multi-unit residential construction activity was elevated between 2021 and 2024, supported by strong apartment construction, particularly purpose-built rentals. As international migration slows and household formations weaken, demand for these units is projected to trend downward across the forecast period. Multi-unit starts are expected to decline by 30% by the early 2030s. Most affected over this period is demand for low-rise apartment units (i.e., those with five or fewer storeys), which contracts significantly from the 2021 peak. Demand for low-rise single-detached units, meanwhile, is projected to rise between 2028 and 2033.

Residential renovation activity is expected to rise steadily across the forecast period, supported by an aging housing stock, high property values, and a growing tendency for residents to renovate and age in place rather than move.

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

80 Single-detached (single) refers to a building containing only one dwelling unit that is completely separated on all sides from any other dwelling or structure.

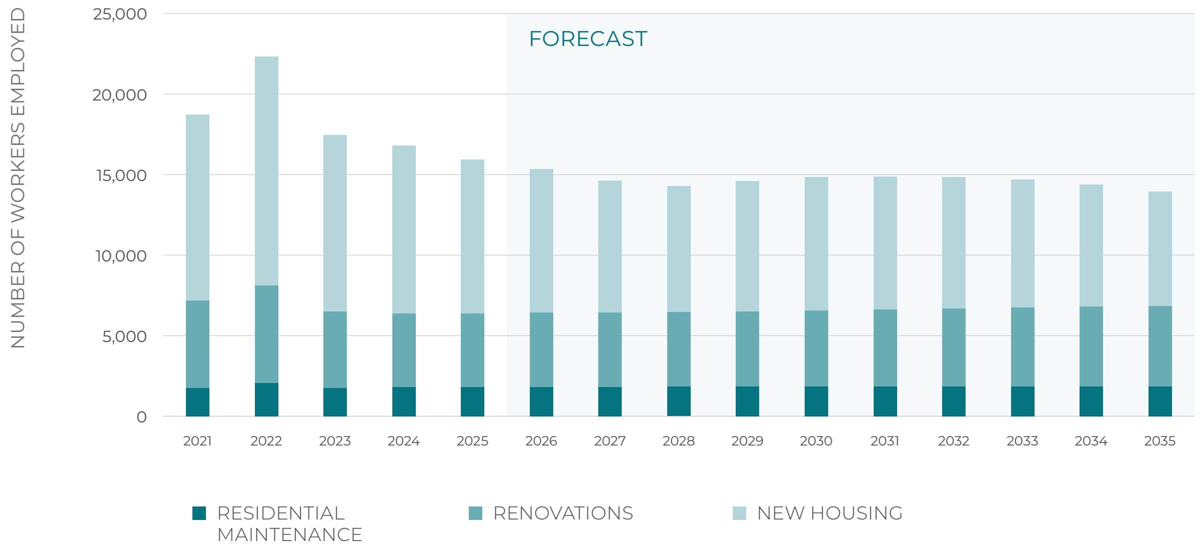
By 2035, employment relating to residential construction activity in the region is projected to contract by 13% compared to 2025 levels. Employment declines are concentrated in new-home construction (-26%) and are only partially offset by gains in employment relating to residential renovations (+10%) and residential maintenance (+2%).

Figure 88 shows anticipated employment trends by sector for residential construction across the forecast.

Note that 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.

FIGURE 88

RESIDENTIAL CONSTRUCTION EMPLOYMENT GROWTH OUTLOOK
VANCOUVER ISLAND, BRITISH COLUMBIA



SOURCE: Statistics Canada, BuildForce Canada (2026–2035)

THE AVAILABLE LABOUR FORCE

Reduced demand for residential construction activity across the forecast in the region is expected to contract the labour force by 1,900 workers by 2035. When this figure is combined with the projected retirement of some 3,800 workers, it leads to a total hiring requirement of 1,900 workers. The industry is expected to add as many as 2,500 new-entrant workers from the local population under the age of 30 and, as a result, may face a surplus of as many as 600 workers by 2035. Some of these workers may choose to pursue employment in the region's non-residential sector, or elsewhere in the province, as a result.

RANKINGS, RISKS, AND MOBILITY: TRADES AND OCCUPATIONS

The BuildForce LMI system tracks supply and accounts for the change in the available labour force, including retirements, new entrants[81], and net mobility[82]. Based on currently known demands, industry recruitment and retirement estimates, the following ranks apply to the 17 covered trades in the region. See Table 55.

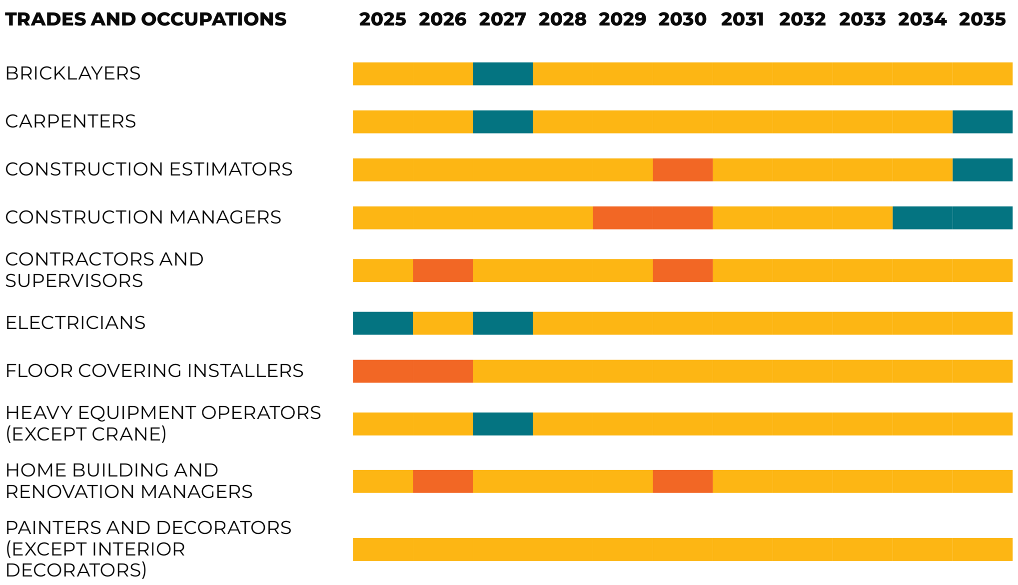
As new-housing construction continues to decline, market conditions weaken briefly in 2027. They are expected to return to balance in 2028 and then tighten for some trades and occupations with the additional construction of new single-detached units. Later in the period, conditions are mostly balanced.

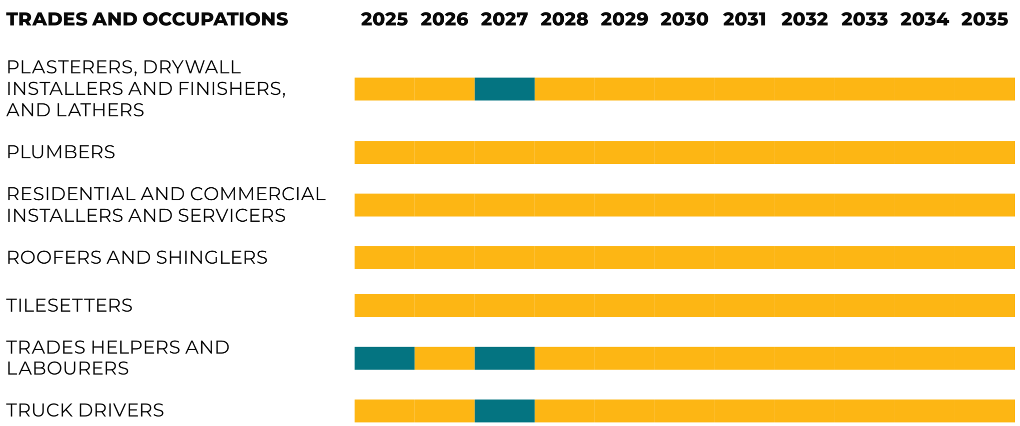
81 New entrants are measured by applying the traditional proportion of the provincial labour force that enters the construction industry. The projected estimate across the forecast period assumes that the construction industry can recruit this group in competition with other industries.

82 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.

TABLE 55

RESIDENTIAL MARKET RANKINGS
VANCOUVER ISLAND, BRITISH COLUMBIA





SOURCE: BuildForce Canada

CONCLUSION AND IMPLICATIONS

CONCLUSION AND IMPLICATIONS

The 2026–2035 BuildForce Canada Residential Construction and Maintenance Looking Forward forecast calls for modest growth in the sector across the decade.

Residential construction activity has slowed significantly since reaching a peak in 2021. Investment enters the forecast period on a downward trend that is driven by a projected reduction in demand for new housing, which in turn is linked to planned reductions in the number of non-permanent residents admitted to Canada through to late 2027.

Investment levels are projected to rise in 2028 and through to the end of the forecast period. Initially, growth is greatest in demand for new housing as immigration levels are restored. In later years (i.e., 2031 and beyond), as population growth slows, investment growth is driven mostly by steady gains in demand for residential renovations. This occurs given the relative affordability of this activity compared to new-home purchasing, and due to the fact that older Canadians may choose to remain in their homes as they age.

Although initially, some trades and occupations within the residential construction sector may experience softening, or even surplus, labour conditions, this trend is unlikely to last beyond 2028, creating a risk that some workers may exit the sector in the short term. Labour market challenges are complicated by the retirement of an estimated 135,000 workers, or 21% of the 2025 labour force by 2035. This represents a significant loss of skills and experience that is unmatched by new workers entering the labour force.

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

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

ABOUT THE BUILDFORCE CANADA LABOUR MARKET INFORMATION SYSTEM

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

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

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

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

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

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

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

Rankings for some trades or occupations may be suppressed in some provinces and regions due to the small size of the workforce (i.e., fewer than 100 workers) and limited statistical reliability when assessing labour market conditions at the sector level. Some trades are also excluded because they typically do not work in the sector being assessed (e.g., boilermakers and millwrights typically do not work in residential construction, nor do homebuilding and renovation managers work in non-residential construction).

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

APPENDIX: COMMITTEE PARTICIPANTS

The production of Construction and Maintenance Looking Forward 2026–2035 would not have been possible without valuable input from the following organizations:

NEWFOUNDLAND AND LABRADOR

- Canada's Building Trades Unions
- Canadian Construction Association
- Canadian Home Builders' Association – Newfoundland and Labrador
- Construction Labour Relations Association of Newfoundland and Labrador
- Heavy Civil Association of Newfoundland and Labrador
- Housing, Infrastructure and Communities Canada
- Newfoundland and Labrador Construction Association
- Newfoundland and Labrador Finance
- Newfoundland & Labrador Hydro
- Newfoundland and Labrador Jobs, Growth and Rural Development
- Service Canada
- Trades NL

PRINCE EDWARD ISLAND

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

NOVA SCOTIA

- Canada's Building Trades Unions
- Canadian Construction Association
- Canadian Home Builders' Association – Nova Scotia
- Construction Association of Nova Scotia
- Housing Construction Council of Nova Scotia
- Housing, Infrastructure and Communities Canada
- Merit Nova Scotia
- NexGold Mining Corp

- Nova Scotia Construction Labour Relations Association Limited
- Nova Scotia Construction Sector Council
- Nova Scotia Department of Finance
- Nova Scotia Road Builders Association
- Service Canada - Atlantic Region

NEW BRUNSWICK

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

QUEBEC

- Not applicable

ONTARIO

- Black and MacDonald
- Bruce Power
- Canada Mortgage and Housing Corporation
- Canada's Building Trades Unions
- Canadian Construction Association
- Canadian Home Builders' Association
- Central Ontario Building Trades
- CLAC
- Construction Association of Thunder Bay
- Construction Employers Coordinating Council of Ontario
- Construction Labour Relations Association of Ontario
- Council of Ontario Construction Associations
- Drywall, Acoustic Lathing & Insulation, Local 675
- Eastern Ontario and Western Quebec Building Trades Council
- Electrical Power Systems Construction Association
- Employment and Social Development Canada
- Essex and Kent Building Trades Council
- General Contractors' Association of Toronto
- General Presidents' Maintenance Committee for Canada

- Grand Valley Construction Association
- Greater Ottawa Home Builders’ Association
- Hamilton-Brantford Building & Construction Trades Council
- Hamilton-Halton Construction Association
- Housing, Infrastructure and Communities Canada
- Hydro One
- IBEW Local 28
- IBEW 115
- IBEW Local 120
- IBEW Local 303
- Infrastructure Ontario
- Ironworkers Local 700
- Ironworkers Local 765
- J-AAR Excavating/AAROC Aggregates
- Kingston Construction Association
- LiUNA Ontario Provincial District Council
- London and District Construction Association
- Mechanical Contractors Association of Ontario
- Merit Ontario
- Millwright Regional Council of Ontario
- National Capital Heavy Construction Association
- Niagara Construction Association
- Niagara-Haldimand Building and Construction Trades Council
- Northeastern Ontario Construction Association
- Ontario Construction Secretariat
- Ontario Construction User Council
- Ontario Formwork Association
- Ontario General Contractors Association
- Ontario Home Builders’ Association
- Ontario Masonry Contractors’ Association
- Ontario Power Generation
- Ontario Road Builders’ Association
- Ontario Sewer and Watermain Construction Association
- Ottawa Electrical Contractors Association
- Ottawa Construction Association
- Progressive Contractors Association of Canada
- Provincial Building and Construction Trades Council of Ontario
- RESCON
- Residential Framing Contractors Association
- Sarnia Construction Association
- Sarnia-Lambton Building & Construction Trades Council
- Sarnia Heavy Construction Association
- Sault Ste. Marie Construction Association
- Service Canada
- Sheet Metal Workers Local 47
- Sheet Metal Workers Local 235
- Sheet Metal Workers Local 397
- Toronto Construction Association

- UA Local 71
- UA Local 527
- UA Local 628
- UA Local 787
- UA Local 800
- UBC Local 2486
- Waterloo, Wellington, Dufferin and Grey Building Trades Council
- Windsor Construction Association
- Workforce Planning for Sudbury & Manitoulin

MANITOBA

- Apprenticeship Manitoba
- Canada's Building Trades Unions
- Canadian Construction Association
- Canadian Home Builders Association
- Construction Association of Rural Manitoba
- Construction Labour Relations Association of Manitoba
- Electrical Contractors Association of Manitoba
- Housing, Infrastructure and Communities Canada
- Manitoba Building Trades
- Manitoba Construction Sector Council
- Manitoba Economic Development, Investment, Trade and Natural Resources
- Manitoba Finance
- Manitoba Heavy Construction Association
- Manitoba Home Builders' Association
- Manitoba Hydro
- Mechanical Contractors Association of Manitoba
- Merit Contractors Association of Manitoba
- Northern Manitoba Sector Council
- Service Canada
- Winnipeg Construction Association

SASKATCHEWAN

- Canada's Building Trades Unions
- Canadian Construction Association
- Canadian Home Builders' Association – Regina
- Canadian Home Builders' Association – Saskatoon
- CLAC
- Construction Association of Saskatchewan
- Construction Labour Relations Association of Saskatchewan
- Housing, Infrastructure and Communities Canada
- Mechanical Contractors Association of Saskatchewan
- Merit Contractors Association Saskatchewan
- Saskatchewan Apprenticeship and Trade Certification Commission
- Saskatchewan Building Trades

- Saskatchewan Heavy Construction Association
- Saskatchewan Finance
- Saskatchewan Immigration and Career Training
- Saskatchewan SaskBuilds and Procurement
- Saskatchewan Public Safety Agency
- Saskatchewan Construction Safety Association
- SaskPower
- Service Canada – Saskatchewan

ALBERTA

- Air Products
- Alberta Advanced Education
- Alberta Construction Association
- Alberta Council of Turnaround Industry Maintenance Stakeholders
- Alberta Jobs, Economy, Trade and Immigration
- Alberta Roadbuilders and Heavy Construction Association
- Association of Maintenance Contractors of Canada
- Building Trades of Alberta
- Canada Mortgage and Housing Corporation
- Canada's Building Trades Unions
- Canadian Construction Association
- Canadian Home Builders' Association
- Canadian Home Builders' Association – Alberta
- Canadian Natural Resources Limited
- Cenovus Energy
- CLAC
- Construction Labour Relations – Alberta
- Enbridge Inc.
- Energy Safety Canada
- Housing, Infrastructure and Communities Canada
- Independent Contractors and Businesses Association
- National Construction Council
- OpenCircle
- PCL Constructors Inc.
- Progressive Contractors Association of Canada
- Service Canada
- Shell Canada
- Suncor Energy Inc.
- Syncrude Canada Ltd.

BRITISH COLUMBIA

- BC Building Trades
- BC Hydro
- BC Ministry of Post-Secondary Education and Future Skills
- BC Road Builders and Heavy Construction Association
- BC Transportation Investment Corporation

- British Columbia Construction Association
- British Columbia Insulation Contractors Association
- Canada's Building Trades Unions
- Canadian Construction Association
- Canadian Home Builders' Association
- Canadian Home Builders' Association – British Columbia
- CLAC
- Construction Foundation of British Columbia
- Construction Labour Relations Association of BC
- Cross Fraser Partnership
- Housing, Infrastructure and Communities Canada
- LNG Canada
- Mechanical Contractors Association of BC
- National Construction Council
- Northern Regional Construction Association
- PCL Constructors Inc.
- Progressive Contractors Association of Canada
- Roofing Contractors Association of British Columbia
- Service Canada – BC
- Southern Interior Construction Association
- Teck Resources
- Vancouver Island Construction Association
- Vancouver Regional Construction Association
- Western Economic Diversification Canada

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