

MANITOBA

Extended slowdown following two decades of strong growth

HIGHLIGHTS 2020–2029

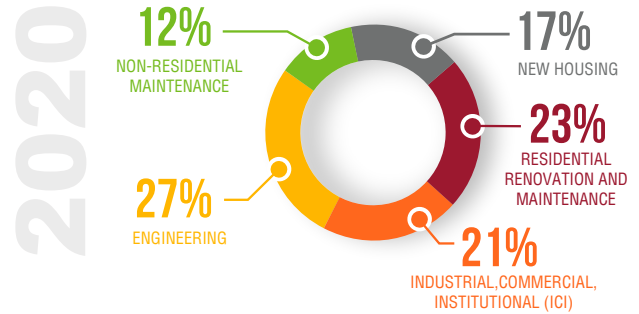
Manitoba's construction demands were bolstered in 2019 by higher major project requirements, including peak levels of activity reached on the Manitoba Hydro Keeyask dam, but overall construction employment growth was held back by declines in new-housing construction.

The wind down of activity on the Keeyask Project, lower levels of road, highway, and bridge work, and a continued downward trend in new-housing construction are expected to lead construction employment moderately lower between 2020 and 2024, marking the end of an upward trend that endured for the better part of the past two decades.

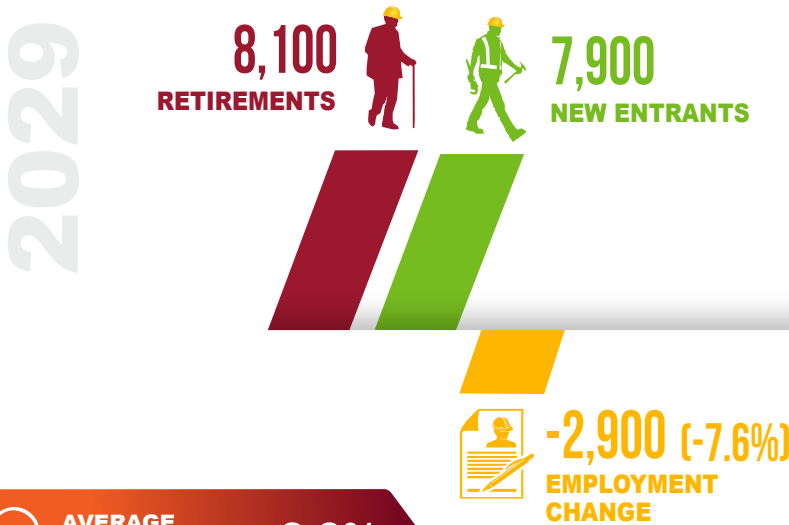
Construction employment is projected to recede by close to 4,000 workers, or a 10% decline over the next five years to 2024. A modest recovery is expected to follow thereafter, driven by increased demands for industrial, commercial, and institutional (ICI) building construction and infrastructure projects.

As requirements recede from peak levels over the coming decade, industry must remain focused on hiring, training, and retaining workers to replace 8,100 workers expected to retire by 2029. Manitoba's younger population should help to meet hiring needs, assuming the industry can attract its historical share of new entrants to the labour force from the local population.

DISTRIBUTION OF CONSTRUCTION EMPLOYMENT IN 2020, MANITOBA



10-YEAR WORKFORCE OUTLOOK FOR MANITOBA



AVERAGE UNEMPLOYMENT RATE 8.6%

HIGHLIGHTS

- Construction markets soften between 2020 and 2024 with the completion of the Keeyask hydroelectric dam and a down-cycle in new-housing construction.
- Total construction employment recedes by nearly 4,000 workers by 2024 as key major projects end – down 10% compared to 2019.
- New-home construction recedes through 2026 but is partially offset by renovation and maintenance work.
- Between 2020 and 2029, total construction employment declines by close to 2,900 workers, with the largest declines concentrated in 2020 and 2021.

BuildForce's LMI System

BuildForce Canada uses a scenario-based forecasting system to assess future construction labour requirements in the heavy industrial, residential, and non-residential construction markets. This labour market information (LMI) system tracks 34 trades and occupations. To further improve the robustness of the system, BuildForce consults with industry stakeholders, including owners, contractors, and labour groups, to validate the scenario assumptions and construction project lists, and seeks input from government on related analysis. The information is then distilled into labour market condition rankings to help industry employers with the management of their respective human resources.

MANITOBA CONSTRUCTION OUTLOOK

Manitoba has reached the summit of an extended construction expansion that has been driven by major hydro-related projects, infrastructure investments, and immigration-driven population growth over the last decade. Between 2009 and 2019, the industry added more than 10,000 new workers, accounting for a 26% increase over the period. Construction employment was held back in 2019, as new-housing construction continued to recoil following a strong surge in 2017.

The overall rise in employment requirements in 2019, despite weaker residential activity, was driven by a pronounced increase in concurrent major projects, including peaks in activity on Manitoba Hydro's Keeyask hydroelectric dam, Enbridge's Line 3 pipeline replacement, several commercial towers and food processing facilities, and Winnipeg's Southwest Rapid Transitway. The expected wind down and completion of major projects between 2020 and 2021, alongside anticipated declines in the construction of ICI buildings, is expected to release more than 3,200 workers – a 14% decline over the next two years.

Over the latter part of the scenario period, employment is projected to rise modestly, driven by stable population growth and an anticipated expansion of manufacturing driven by export growth. The addition of an estimated 1,100 workers between 2025 and 2029 leaves construction employment lower by close to 2,900 workers by 2029 – or down 8% from the 2019 starting point. Modest but steady increases in renovation and non-residential maintenance requirements are likely to shift the nature of demand requirements, which may have implications on the mix of required trades and occupations and the associated skills and experience.

SECTOR INSIGHTS

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

The BuildForce LMI system tracks labour supply and accounts for the change in the available labour force, including retirements, new entrants¹ and net mobility².

BuildForce assesses market conditions for 34 construction trades and occupations using a ranking system that combines measures of the change in employment, unemployment, net mobility and adjustments based on industry input. The rankings reflect residential and non-residential market conditions unique to the province

based on current and proposed construction activity. In addition, assumptions on regional economic and population growth, new entrants to the labour force, and migration patterns (interprovincial and international) are built into the forecast scenario and included in the ranking assessments.

The rankings for some trades are suppressed due to the small size of the workforce (<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 in residential construction, and homebuilding and renovation managers in non-residential).

For Manitoba, rankings are reported for 17 residential and 27 non-residential trades and occupations.

RESIDENTIAL SECTOR

Housing starts, which spiked in 2017 and were sustained in 2018, began moderating in 2019 and are expected to recede over the medium term, falling to 6,200 units by 2026 from a high of 7,500 in 2017. New-housing declines were tempered by a steady but moderate rise in renovation and maintenance construction.

Employment related to the construction of new homes is expected to decline by 1,000 workers over the coming decade, while moderate growth in renovation and maintenance work should add nearly 800 workers, leaving overall residential employment down a modest 2% over the scenario period.

Figure 1 shows the employment trends by sector for residential construction.

THE AVAILABLE LABOUR FORCE

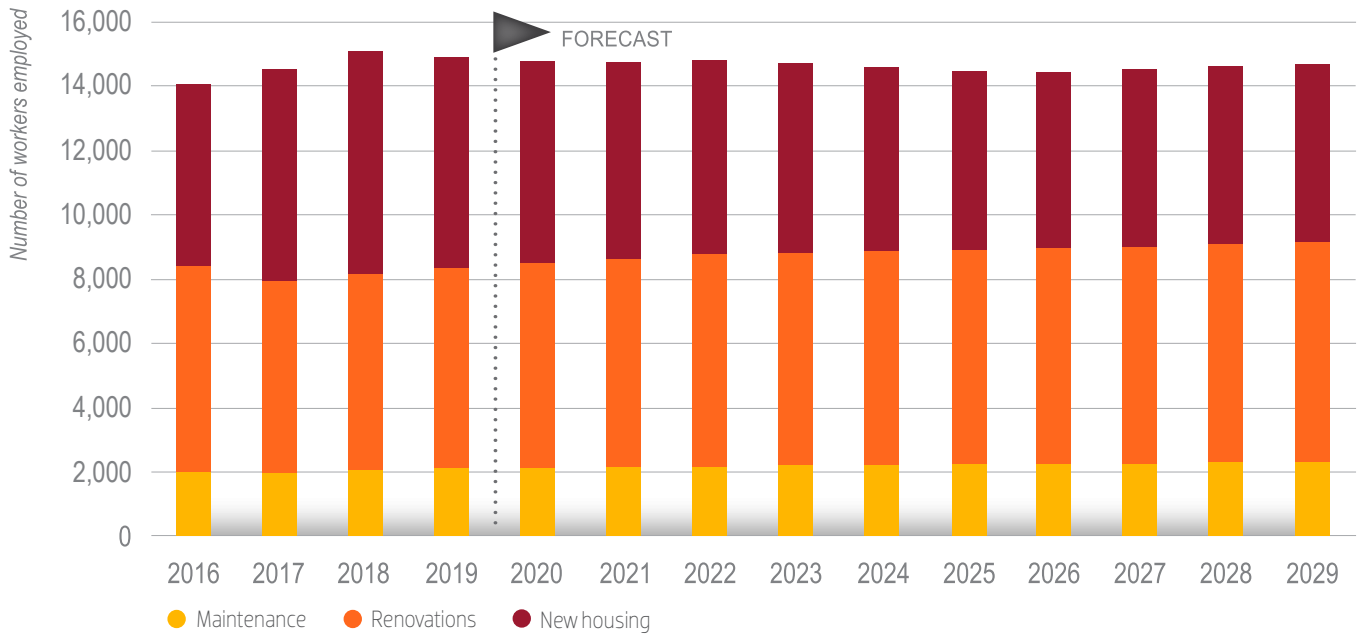
Though long-term demands are expected to recede, the construction industry will need to contend with an aging labour force and the anticipated retirement of an estimated 3,400 residential workers over the next decade. Meeting these requirements will depend on industry's ability to attract 3,000 first-time new entrants expected to be drawn from the local population aged 30 and younger.

Figure 2 provides a summary of the estimated changes in the residential labour force across the full 2020–2029 scenario period.

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

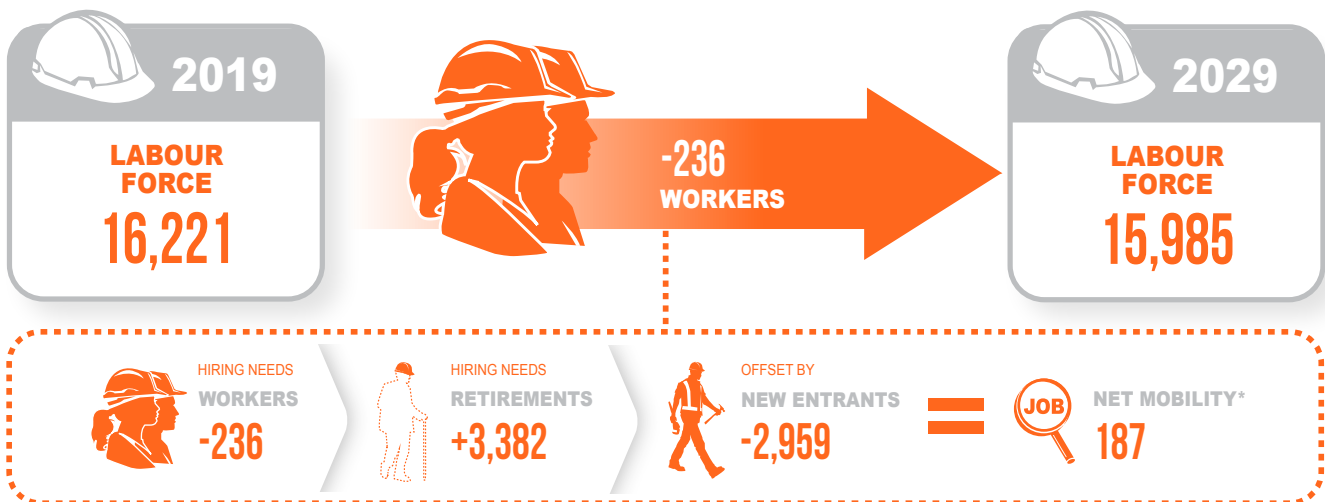
² **Net mobility** refers to the movement of labour in and out of the local construction industry labour force. In-mobility captures the movement into the labour force of out-of-province industry workers and/or workers from outside the industry. Many members of this group will move quickly out of the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

Figure 1: Residential construction employment growth outlook, Manitoba



Source: Statistics Canada, BuildForce Canada (2020-2029)

Figure 2: Changes in the residential labour force, Manitoba



* Net mobility refers to the number of workers needed to be brought into the industry from other industries or other provinces to meet rising demands or the number of workers that exit the industry in downturns. Positive net mobility means that industry must attract workers, while negative net mobility arises from an excess supply of workers in the local construction labour force.

Note: Due to rounding, numbers may not add up to the totals indicated.

Source: BuildForce Canada

RESIDENTIAL RANKINGS, RISKS, AND MOBILITY

Table 1 shows mostly balanced residential labour markets over the coming decade, as declines in new homebuilding are partially offset by gains in renovation and maintenance work. Slowing demand for new homes between 2020 and 2026 weakens market conditions for some trades and occupations more concentrated in the construction of new homes. Renovation construction, however, is expected to add to job opportunities and sustain related employment across the decade.

MARKET RANKINGS

| | |
|---|--|
| 1 | Workers meeting employer qualifications are available in local markets to meet an increase in demand at the current offered rate of compensation and other current working conditions. Excess supply is apparent and there is a risk of losing workers to other markets. |
| 2 | Workers meeting employer qualifications are available in local markets to meet an increase in demand at the current offered rate of compensation and other working conditions. |
| 3 | The availability of workers meeting employer qualifications in the local market may be limited by large projects, plant shutdowns or other short-term increases in demand. Employers may need to compete to attract needed workers. Established patterns of recruiting and mobility are sufficient to meet job requirements. |
| 4 | Workers meeting employer 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 1: Residential market rankings, Manitoba

| TRADES AND OCCUPATIONS – RESIDENTIAL | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 |
|---|------|------|------|------|------|------|------|------|------|------|------|
| Bricklayers | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Carpenters | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Concrete finishers | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Construction estimators | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Construction managers | 3 | 3 | 3 | 3 | 2 | 2 | 2 | 2 | 3 | 3 | 3 |
| Contractors and supervisors | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Electricians | 3 | 3 | 3 | 3 | 2 | 2 | 2 | 3 | 3 | 3 | 3 |
| Floor covering installers | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Homebuilding and renovation managers | 4 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Painters and decorators | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Plasterers, drywall installers and finishers, and lathers | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Plumbers | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Residential and commercial installers and servicers | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Roofers and shinglers | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Sheet metal workers | 3 | 3 | 3 | 3 | 2 | 2 | 2 | 3 | 3 | 3 | 3 |
| Trades helpers and labourers | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Truck drivers | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |

Source: BuildForce Canada

NON-RESIDENTIAL SECTOR

Non-residential construction requirements have continued to rise steadily, boosted by major hydro development, transmission, and infrastructure projects. In 2019, employment requirements at Manitoba Hydro's Keeyask hydroelectric dam hit peak levels, as did requirements for the Enbridge Line 3 pipeline expansion, Winnipeg's Southwest Rapid Transitway, J.R. Simplot Co.'s potato processing plant, the ARTIS 40-storey development, and several road and highway projects.

Employment demands decline in 2020, as work winds down on the Keeyask dam, and road, highway, and bridge infrastructure declines, resulting in a 6% decline in non-residential employment. Figure 3 tracks the distribution of non-residential employment by sector between 2019 and 2029.

After 2022, when most tracked major projects are completed, employment requirements are driven by moderate gains in the construction of ICI buildings and maintenance work. Engineering construction should cycle down between 2021 and 2024 as several projects wind down, before stabilizing over the latter part of the scenario period. Construction of industrial buildings is projected to continue leading growth, driven by the projected expansion in the manufacturing and agricultural sectors. Non-residential employment rose to a record high in 2019 but should decline by 3,200 workers through to 2022 as major projects are completed. Modest gains in

ICI building construction are expected to drive employment in the non-residential sector between 2025 and 2029.

Table 2 summarizes the percent change in non-residential employment by sector across two periods: the first captures the near-term trends to 2024, and the second, across the remainder of the scenario period.

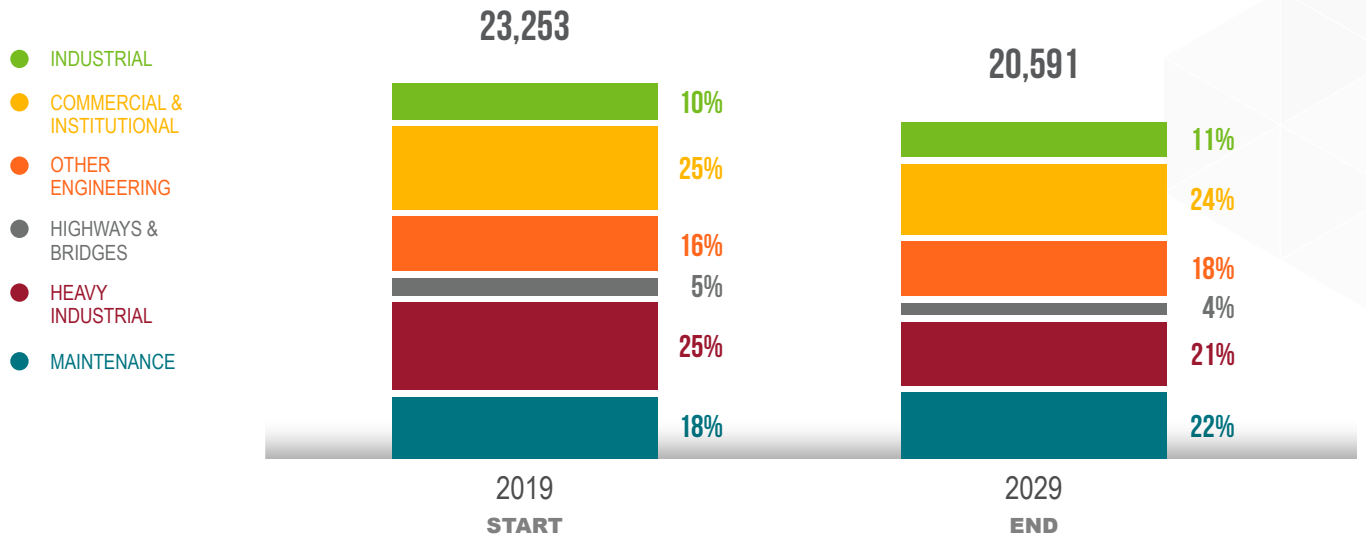
Figure 4 shows the employment trends by sector for non-residential construction.

Table 2: Changes in non-residential employment by sector, Manitoba

| SECTOR | | % CHANGE 2020–2024 | % CHANGE 2025–2029 |
|----------------------------------|---|-----------------------|-----------------------|
| Total non-residential employment | | -16% | 5% |
| ICI buildings | Industrial | -12% | 7% |
| | Commercial, institutional, and government | -15% | 1% |
| Engineering | Highways and bridges | -29% | -3% |
| | Heavy and other engineering | -25% | 10% |
| Maintenance | | 6% | 1% |

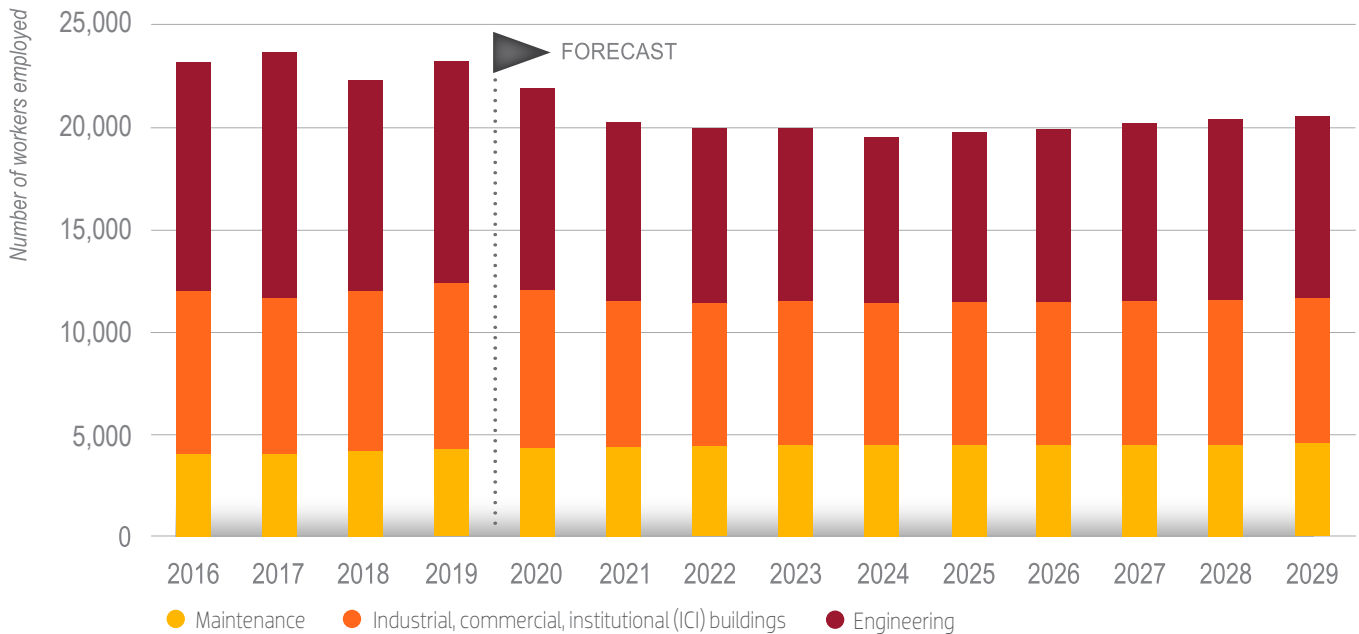
Source: Statistics Canada, BuildForce Canada (2020-2029)

Figure 3: Non-residential employment distribution by sector, Manitoba, 2019 and 2029



Source: Statistics Canada, BuildForce Canada (2020-2029)

Figure 4: Non-residential construction employment growth outlook, Manitoba



Source: Statistics Canada, BuildForce Canada (2020-2029)

THE AVAILABLE LABOUR FORCE

Manitoba has built up a relatively young labour force by training new entrants and attracting large numbers of skilled workers into the province. While the most significant growth has already occurred, changing demographics and declining employment requirements may make recruiting new workers a challenge.

An estimated 4,700 non-residential workers are expected to retire over the coming decade. This replacement demand is anticipated to be met by an estimated 4,900 first-time new entrants aged 30 and younger expected to be drawn into construction from the local population. Slower growth trends in the general population, however, may pose barriers to attracting young workers. Manitoba’s population has a younger age profile than most other provinces, but the pool of youths entering the labour force is declining while retirements are on the rise.

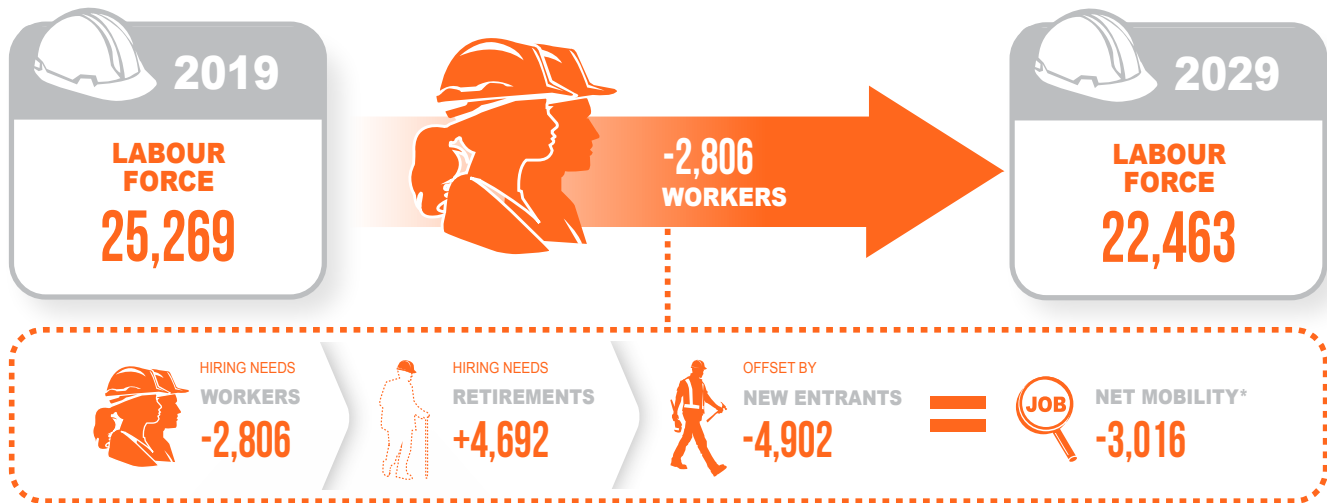
Figure 5 provides a summary of the estimated changes in the non-residential labour force across the full 2020–2029 scenario period.

NON-RESIDENTIAL RANKINGS, RISKS, AND MOBILITY

Table 3 shows that trades and occupations more involved in major engineering projects continued to experience tighter markets in 2019, driven primarily by the Keeyask hydro development project. The winding down of major projects weakens labour market conditions between 2020 and 2024. Market conditions vary over the medium term to 2024, but overall non-residential labour markets return to balance later in the scenario period, as a large number of workers in selected trades and occupations are expected to exit to other industries or provinces.

As employment passes peak construction demands, market conditions are expected to return to balance, signalled by a rank of 3.

Figure 5: Changes in the non-residential labour force, Manitoba



* Net mobility refers to the number of workers needed to be brought into the industry from other industries or other provinces to meet rising demands or the number of workers that exit the industry in downturns. Positive net mobility means that industry must attract workers, while negative net mobility arises from an excess supply of workers in the local construction labour force.

Note: Due to rounding, numbers may not add up to the totals indicated.

Source: BuildForce Canada

Table 3: Non-residential market rankings, Manitoba

| TRADES AND OCCUPATIONS – NON-RESIDENTIAL | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 |
|--|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| Boilermakers | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Bricklayers | 3 | 3 | 2 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Carpenters | 3 | 2 | 2 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Concrete finishers | 4 | 2 | 2 | 3 | 3 | 2 | 3 | 3 | 3 | 3 | 3 |
| Construction estimators | 3 | 3 | 2 | 3 | 3 | 2 | 3 | 3 | 3 | 3 | 3 |
| Construction managers | 3 | 3 | 2 | 3 | 3 | 2 | 3 | 3 | 3 | 3 | 3 |
| Construction millwrights and industrial mechanics | 4 | 4 | 2 | 2 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Contractors and supervisors | 3 | 2 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Crane operators | 3 | 2 | 2 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Electricians | 3 | 3 | 2 | 2 | 3 | 2 | 3 | 3 | 3 | 3 | 3 |
| Floor covering installers | 3 | 2 | 2 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Glaziers | 3 | 2 | 2 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Heavy equipment operators (except crane) | 4 | 3 | 2 | 2 | 3 | 2 | 3 | 3 | 3 | 3 | 3 |
| Heavy-duty equipment mechanics | 4 | 3 | 2 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Insulators | 3 | 3 | 2 | 3 | 3 | 2 | 3 | 3 | 3 | 3 | 3 |
| Ironworkers and structural metal fabricators | 3 | 2 | 2 | 3 | 3 | 2 | 3 | 3 | 3 | 3 | 3 |
| Painters and decorators | 3 | 3 | 2 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Plasterers, drywall installers and finishers, and lathers | 3 | 3 | 2 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Plumbers | 3 | 3 | 2 | 2 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Refrigeration and air conditioning mechanics | 3 | 2 | 2 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Residential and commercial installers and servicers | 3 | 2 | 2 | 2 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Roofers and shinglers | 3 | 3 | 2 | 3 | 3 | 2 | 3 | 3 | 3 | 3 | 3 |
| Sheet metal workers | 3 | 3 | 2 | 2 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Steamfitters, pipefitters, and sprinkler system installers | 3 | 2 | 2 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Trades helpers and labourers | 3 | 2 | 2 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |
| Truck drivers | 4 | 2 | 2 | 3 | 3 | 2 | 3 | 3 | 3 | 3 | 3 |
| Welders and related machine operators | 4 | 3 | 2 | 3 | 3 | 3 | 3 | 3 | 3 | 3 | 3 |

Source: BuildForce Canada

BUILDING A SUSTAINABLE LABOUR FORCE

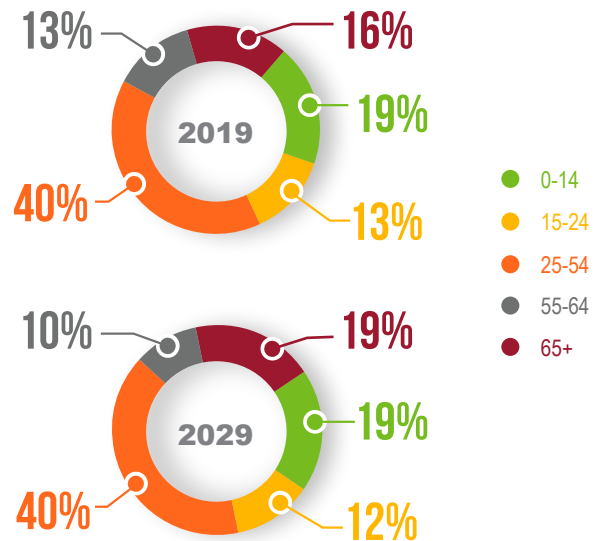
Despite receding demands in the province, Manitoba must remain focused on building a sustainable labour force, as the province is faced with increasing retirements. Over the scenario period, an estimated 8,100 workers are expected to retire, creating a skills vacuum that will require proactive planning. Due to this loss of skills, the construction industry must remain focused on attracting, training, and retaining qualified workers.

Even though Manitoba enjoys a relatively younger population, all industries are faced with an aging population, which is likely to increase competition for qualified workers. Over the next 10 years, the share of the population in the older age bracket (65 years and over) is expected to increase, and at the same time, the share of the youth population (15-24 years old) is expected to decline (see Figure 6). These demographic shifts have the potential to tighten labour markets, as labour force participation by older workers is much lower than that of their younger counterparts.

Manitoba's rate of population growth, which has been elevated recently due to high levels of immigration, is expected to recede modestly over the next five years. This decline is driven in part by a modest decrease in net international migration, back to more normal levels, and increased out-of-province migration as economic growth slows over the medium term. Over the long term, net in-migration is expected to improve but overall population growth only improves modestly, as aging dynamics reduce the natural rate of population growth (births less deaths) and mutes resumed population growth. Components of population growth for Manitoba are presented in Figure 7.

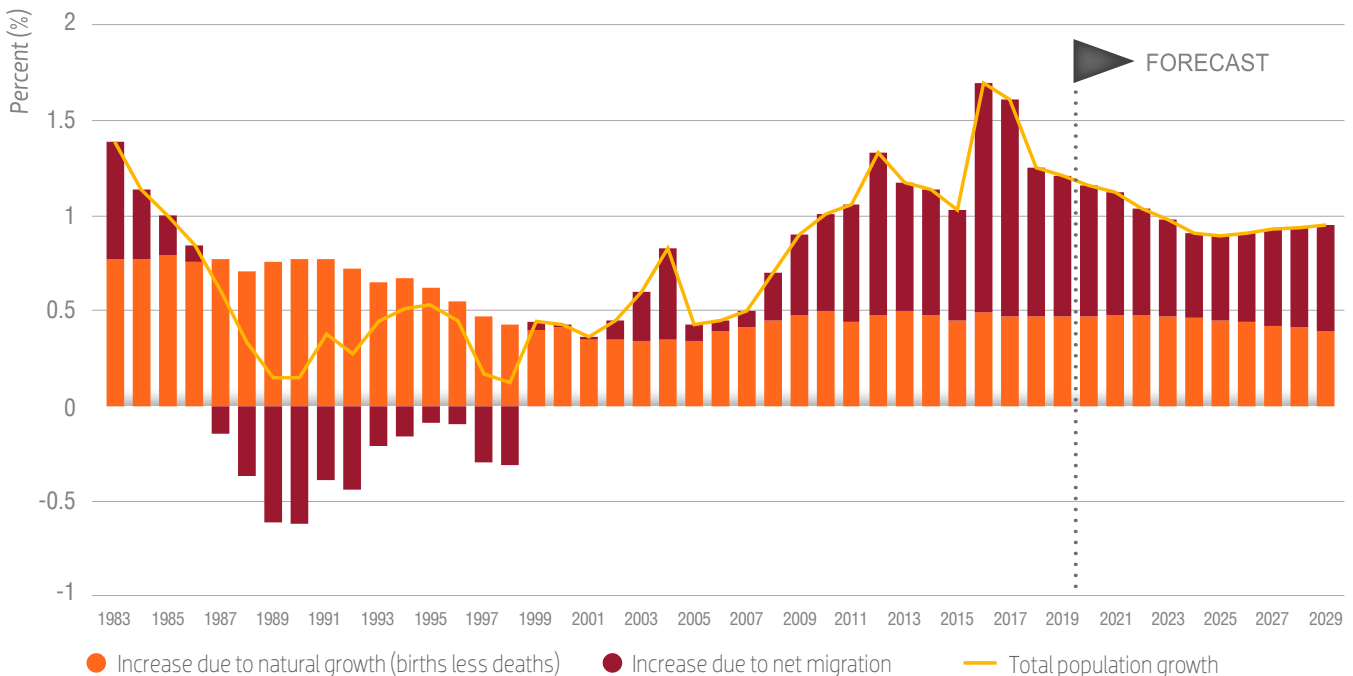
Based on historical trends, Manitoba's construction industry is expected to draw an estimated 7,900 first-time new entrants aged 30 and younger from the local population over the next decade. In the scenario period, the pace of retirements exceeds the number of youth coming into construction, forcing the industry to look to other industries, other provinces, and other countries for additional new workers to augment the available pool of local new entrants.

Figure 6: Population age distribution, Manitoba



Source: BuildForce Canada

Figure 7: Sources of population growth (%), Manitoba



Source: Statistics Canada, BuildForce Canada (2020–2029)

APPRENTICESHIP

More than 9,200 apprentices registered in the 16 largest construction trade programs (see Table 5) in Manitoba between 2013 and 2019³, with 4,330 completions registered during this period. Apprenticeship data from Statistics Canada's Registered Apprenticeship Information System (RAIS) show annual new registrations decreased by 22% from 2013 to 2019; a significant decline compared to construction employment, which only decreased by 3%. New registrations steadily declined; reaching a low of 1,190 in 2018, down from 1,551 in 2013. New registrations increased slightly in 2019 but remain well below the number of registrations prior to 2014. Manitoba is projected to require more than 1,370 newly certified journeypersons to sustain the current workforce share of certifications and keep pace with employment and replacement demands across all industries over the scenario period.

Table 4 provides an overview of the anticipated certification requirements for the 16 largest construction trade programs in all industries and in construction. The table also provides the target number of new entrants required to fulfill demand requirements over the scenario period, taking into account trends in program completion rates.

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 and the likely targeted number of new registrants required. Based on projected new registrations, all trades are expected to meet or exceed the number of newly certified journeypersons required by 2029, with the exception of Boilermaker, Industrial Electrician, and

Table 4: Estimated construction certification demand and projected target of new entrants, Manitoba, 2020 to 2029

| | 2020 | 2021 | 2022 | 2023 | 2024 | Total 2020–2024 | Total 2025–2029 |
|---|------|------|------|------|------|--------------------|--------------------|
| Total certification demand – all industries | 58 | -34 | 266 | 274 | 235 | 799 | 1,870 |
| Total certification demand – construction | -20 | -86 | 143 | 152 | 116 | 305 | 1,066 |
| Construction certification share (%) | -34% | 253% | 54% | 55% | 49% | 38% | 57% |
| Target new registrants – construction | 281 | 412 | 427 | 503 | 483 | 2,106 | 2,317 |

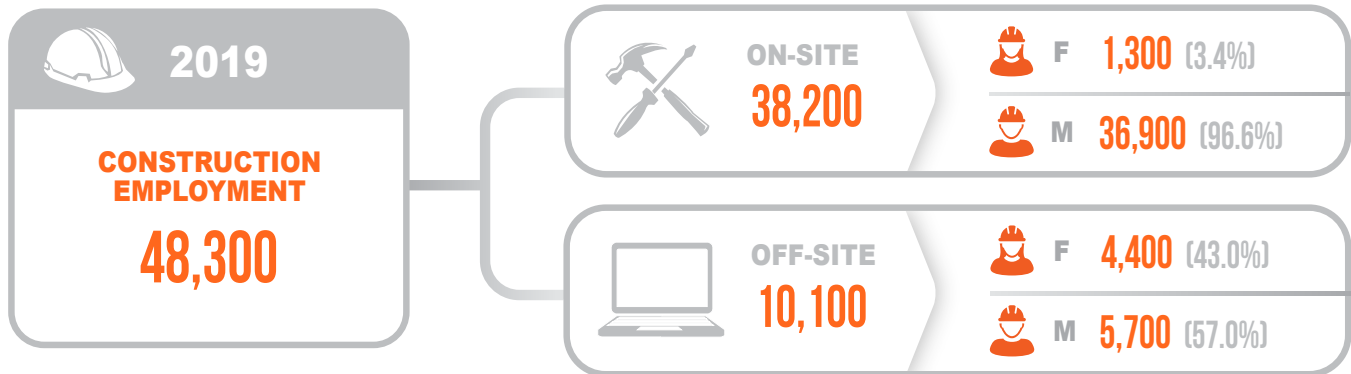
Source: BuildForce Canada

Table 5: Estimated construction certification demand and projected target of new entrants by trade, Manitoba, 2020 to 2029

| Trade | Total certification demand – construction | Target new registrants – construction | Apprentice certification supply risk – all industries |
|---|--|--|--|
| Boilermaker | 67 | 122 | At-risk supply |
| Carpenter | 409 | 1,418 | Ample supply |
| Construction Electrician | 297 | 893 | Ample supply |
| Gasfitter | 4 | 7 | Ample supply |
| Heavy-Duty Equipment Technician | 53 | 106 | Ample supply |
| Industrial Electrician | 39 | 64 | At-risk supply |
| Industrial Mechanic (Millwright) | 12 | 24 | Ample supply |
| Insulator (Heat and Frost) | 18 | 68 | Ample supply |
| Ironworker (Generalist) | 12 | 93 | Ample supply |
| Mobile Crane Operator | 12 | 31 | Ample supply |
| Plumber | 231 | 784 | Ample supply |
| Refrigeration and Air Conditioning Mechanic | 71 | 242 | Ample supply |
| Sheet Metal Worker | 61 | 178 | Balanced supply |
| Sprinkler System Installer | 17 | 68 | Ample supply |
| Steamfitter/Pipefitter | 29 | 211 | Ample supply |
| Welder | 39 | 113 | At-risk supply |
| Total | 1,371 | 4,423 | |

Source: BuildForce Canada

Figure 8: Detailed construction employment by gender, Manitoba, 2019



Source: BuildForce Canada calculations based on Statistics Canada's Labour Force Survey (LFS) and 2016 Census of the Population.

Welder trades, which are likely to be undersupplied. It is important to note that the analysis compares the projected supply of new journeypersons and certification requirements across all industries. It does not account for existing imbalances at the 2019 starting point.

UNDERREPRESENTED GROUPS OF WORKERS

Building a sustainable workforce will require the construction and maintenance industry to increase recruitment from groups traditionally underrepresented in the current construction labour force, including women, Indigenous people, and new Canadians.

In 2019, there were approximately 5,700 women employed in Manitoba's construction industry, of which 23% worked on-site, directly on construction projects, while the remaining 77% worked off-site, primarily in administrative and management-related occupations. Of the 38,200 tradespeople employed in the industry, women made up only 3.4% (see Figure 8).

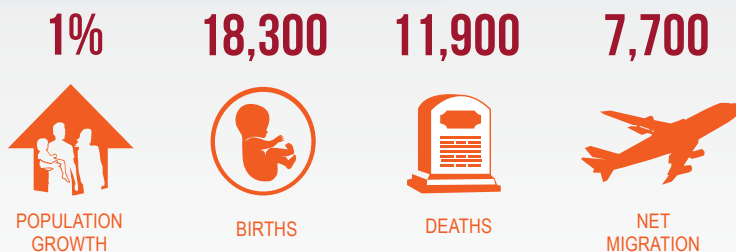
The estimated 1,300 tradeswomen in Manitoba are represented across all sectors of construction, but they tend to be employed

in occupations highly demanded by residential and ICI building construction, as close to 70% of tradeswomen are employed in these sectors. Moreover, the representation of women is higher in the residential sector, with women accounting for 4.2% of tradespeople involved in new homebuilding, renovations, and maintenance (see Figure 9). The top five trades in which women tend to be employed are trades helpers and labourers (28% of all tradeswomen), construction managers (13%), painters (12%), carpenters (12%), and contractors and supervisors (10%).

Another underrepresented group in the construction industry is Indigenous peoples, of whom 12% reside in Manitoba. The Indigenous population is the fastest growing in Canada and has a higher propensity to choose the construction industry as a career choice. In 2016, an estimated 7.6% of non-Indigenous Canadians were employed in the construction industry, compared to 9.6% for the Indigenous population.

Manitoba has done exceptionally well at attracting Indigenous peoples into the construction industry, as approximately 16% of the province's construction labour force is made up of Indigenous people – well above the national average of 7%, of which about 81%

10-YEAR AVERAGE



BY 2029

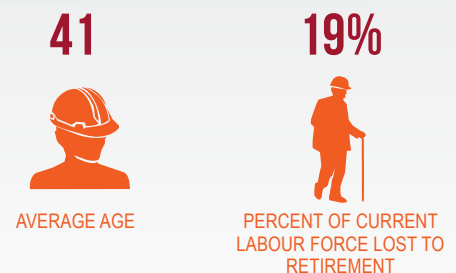
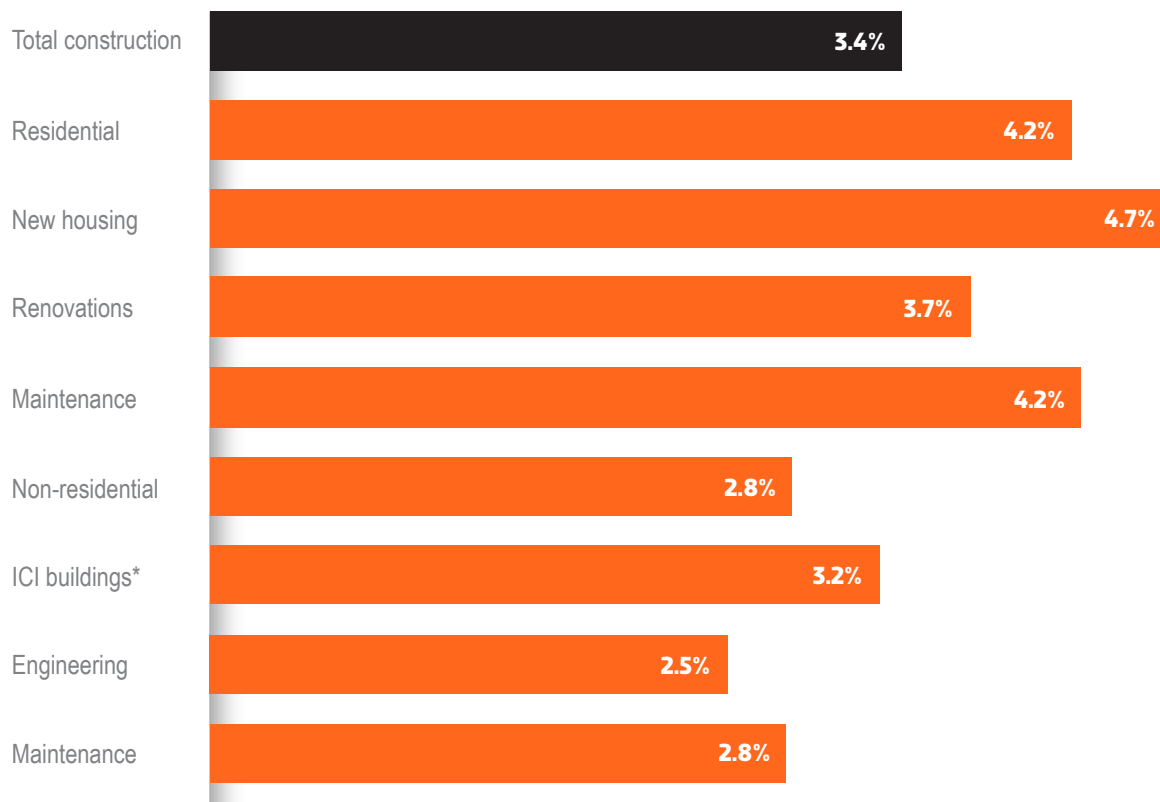


Figure 9: Women's share of total direct trades and occupations (on-site), Manitoba



* industrial, commercial, institutional

Source: BuildForce Canada calculations based on Statistics Canada's Labour Force Survey (LFS) and the 2016 Census of the Population.

work directly on construction projects, while the remaining 19% work primarily in administrative and management-related occupations.

Meeting the labour force needs of tomorrow may also require Manitoba's construction industry to count on new Canadians (immigrants). Between 2020 and 2029, the province is expected to welcome 155,500 newcomers, making the immigrant population a key driver of labour force growth.

Manitoba's construction labour force is made up of approximately 15% new Canadians. Historically, a significant share of landed immigrants were European, who tended to have a higher inclination for the construction industry. A shift is currently underway that has seen a significant rise in immigrants from Asia (primarily the Philippines, India, and China), whose citizens may have a lower tendency to join construction. Approximately 73% of recent immigrants were from Asia, while only 8% were from Europe.

CONCLUSIONS AND IMPLICATIONS

Manitoba's construction industry is coming off a significant period of expansion, driven by a strong housing market that peaked in 2017 and major hydro-related projects and infrastructure investments that

are now winding down. By 2023, most of the current tracked major projects are complete and no new major projects are proposed. As population growth slows, new-housing investment declines, which is mostly offset by increasing renovation work. Overall labour markets weaken over the next few years, followed by an extended period of more moderate residential and non-residential construction growth and mostly balanced markets later in the scenario period.

Even as growth slows, Manitoba must remain focused on building a long-term sustainable labour force as retirements increase to an estimated 8,100 workers, which translates into a significant loss of skilled, experienced workers over the next decade. Addressing this demographic crunch will depend on industry's ability to attract new young workers into construction.

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 can potentially alter anticipated labour market conditions.

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