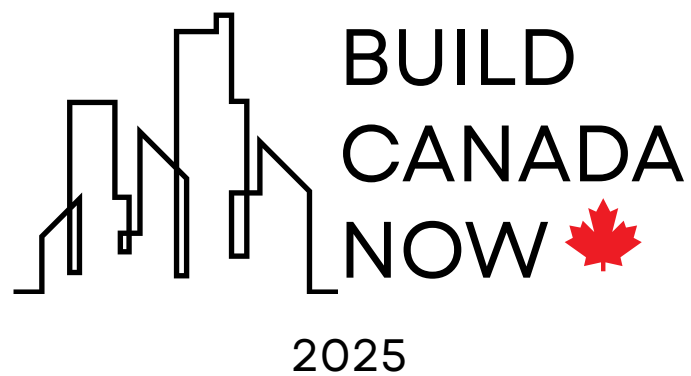




BUILD CANADA NOW:

The Economic Impact of Mechanical Contracting in Canada



Build Canada Now:
The Economic Impact of Mechanical
Contracting in Canada

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INTRODUCTION

The purpose of this study is to examine the economic contributions of the building equipment contractors (BEC) industry, particularly the mechanical contractor sector, as classified under the North American Industry Classification System (NAICS).

The mechanical contractor sector makes substantial contributions to Canada's economy and plays a critical role across the residential, non-residential, engineering construction, and repair and maintenance sectors. This report, prepared by BuildForce Canada and Prism Economics and Analysis on behalf of the Mechanical Contractors Association of Canada, highlights the sector's significant contributions to economic growth, employment generation, wages, and salaries. The analysis provides estimates of both direct and indirect contributions of the mechanical contracting sector to employment, economic output (GDP), wages, and salaries at national and provincial levels. Furthermore, the report offers insights into the number of mechanical contractors operating within Canada and profiles the sector's workforce.

Economic impacts are categorized as direct activities, attributable to employers and workers directly involved in the mechanical contracting sector, and indirect activities, arising from industries supplying products and materials to this sector.

Estimates presented in this report utilize a methodology based on Statistics Canada's Supply-Use Tables for 2021, the 2021 Census, the Survey of Employment, Payrolls, and Hours (SEPH), and Canadian Business Counts (CBC). A comprehensive description of the data sources and methodology is detailed in the methodology section.

It is important to recognize certain limitations inherent in the data. For example, the mechanical contracting sector's contribution to overall construction sector output was assembled from a combination of Statistics Canada input-output tables, estimates of employment based on the 2021 census numbers and growth from SEPH employment. The data is aggregated in a manner that does not correspond to traditional industry definitions of subsector activity. For example, industrial facilities maintenance is aggregated under engineering construction rather than in a distinct maintenance and repair category. Repair construction, therefore, refers only to restoration of existing assets to previous performance, whereas facilities maintenance work conducted annually to ensure assets are functioning as intended will be aggregated with other engineering construction services.

Firm size data may also vary from employment numbers reported by individual companies and Statistics Canada data, particularly as it relates to larger firms exceeding 500 employees. Furthermore, estimates of the number and size of mechanical contractor establishments are based on detailed business counts provided at the five-digit NAICS. While this data is central to estimating the number of mechanical contractors, it may exclude some larger contractors categorized as general or other types of contractors that may also directly engage in mechanical work.

METHODOLOGY

This analysis draws on several data sources to capture the characteristics and economic contributions of mechanical contractors in Canada. The Canadian System of National Accounts (SNA) provides comprehensive industry- and product-level data on construction expenditures and aggregate wages across the Canadian economy. For this analysis, the construction sector is categorized into four segments: residential, non-residential, engineering, and repair construction. The SNA also includes data at both the provincial and national levels and is current up to 2021. Notably, the SNA uses a distinct classification system—the Canadian Classification of Institutional Units and Sectors (CCIUS)—which differs from the North American Industry Classification System (NAICS). Although mechanical and electrical contractors cannot be isolated within any single SNA industry, a reliable correspondence between SNA and NAICS classifications allows for effective data aggregation.

The 2021 Canadian census contributes detailed labour market insights by intersecting industry classifications (i.e., NAICS 23 for construction and its four-digit subsectors) with occupational data. This intersection provides labour force counts and average annual incomes by National Occupational Classification (NOC), as opposed to NAICS, at both provincial and national levels. While the census is labelled as 2021, the labour market data used in this analysis was collected in 2020.

Additional employment insights are provided by the Survey of Employment, Payrolls, and Hours (SEPH), which offers annual employment data by NAICS industry classification up to 2023. This data is also available at the national and provincial levels, enabling more recent trend analysis and validation of workforce changes post-2021.

Firm-level information is sourced from the Canadian Business Counts (CBC), which includes detailed business counts up to the five-digit NAICS level as of June 2023. This dataset includes both mechanical and electrical contractors and categorizes firms by size (i.e., employee counts), enabling the development of employment estimates at more granular industry levels. CBC data is available at the provincial level, offering further regional context.

Finally, while much of the publicly available data from Statistics Canada is reported at the four-digit NAICS level, mechanical contractors fall under the building equipment contractors' subsector within NAICS. Although the SNA cannot isolate these contractors precisely, the alignment between NAICS and SNA classifications allows for consistent analysis. Despite the SNA data only being available through 2021, this study requires extension to 2023 to meet the reporting needs of the Mechanical Contractors Association of Canada (MCAC). The integration of SEPH and CBC data helps bridge this gap.

NATIONAL OVERVIEW

Mechanical contractors in Canada play a critical role in the construction sector, specializing in the installation, maintenance, and repair of mechanical systems essential to building functionality and occupant comfort. Their work encompasses heating, ventilation, and air conditioning (HVAC), plumbing, fire protection, refrigeration, and gas systems across residential, commercial, institutional, and industrial settings. Operating under federal and provincial regulations, mechanical contractors are responsible for ensuring that mechanical systems meet performance, safety, and energy efficiency standards. These firms are often engaged at various stages of a construction project, from design coordination and system layout to commissioning and ongoing service. According to the North American Industry Classification System (NAICS), mechanical contracting activities are primarily captured under codes 238220 (Plumbing, Heating, and Air-Conditioning Contractors), placing them within the broader specialty trade contractors' subsector. The work of mechanical contractors is integral not only to the delivery of complex construction projects but also to the ongoing operation and sustainability of Canada's built environment.

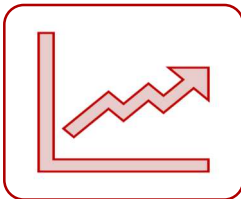
DIRECT AND INDIRECT IMPACTS



205,000

On- and off-site jobs

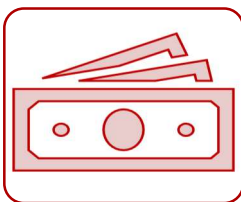
- 13% of construction jobs
- An additional 150,000 in indirect employment



\$33 Billion

GDP

- 20% of construction
- \$17 billion in indirect impacts



\$14.3 Billion

Wages

- 14% of construction wages
- \$2.8 billion in indirect wages



16,000

Contractor establishments

- 16% of construction establishments
- 76% of contractors have fewer than 10 employees

GROSS DOMESTIC PRODUCT CONTRIBUTION

Canada's construction industry's contribution to national GDP in 2023 was 7.4% or approximately \$166 billion. The mechanical contracting sector's contribution was \$33 billion or just under 20% of the \$166 billion total. As a share of total national GDP, mechanical contractors account for approximately 1.5%. These facts highlight the critical economic role mechanical contracting plays within both the construction sector and the broader Canadian economy.

Table 1: Mechanical contractors' contributions to the economy

Region	2023 GDP by Region (2017 \$ millions)	2023 Construction Industry GDP by Region (2017 \$ millions)	Construction % Share GDP by Region	2023 Mechanical Contribution to GDP by Region (2017 \$ million)	Mechanical % Share of GDP by Region	Mechanical % Share of Construction GDP by Region
CA	\$2,232,505	\$165,805	7.4%	\$32,968	1.5%	19.9%
NL	\$28,953	\$2,463	8.5%	\$513	2.9%	20.8%
PE	\$7,339	\$516	7.0%	\$64	1.7%	12.4%
NS	\$44,453	\$2,874	6.5%	\$421	1.7%	14.6%
NB	\$35,207	\$2,480	7.0%	\$356	1.9%	14.4%
QC	\$437,231	\$29,554	6.8%	\$4,323	1.7%	14.6%
ON	\$865,860	\$59,079	6.8%	\$9,589	2.0%	16.2%
MB	\$70,528	\$4,135	5.9%	\$717	1.6%	17.3%
SK	\$77,896	\$5,639	7.2%	\$1,671	2.8%	29.6%
AB	\$344,149	\$27,819	8.1%	\$8,268	3.2%	29.7%
BC	\$309,420	\$30,250	9.8%	\$7,188	3.4%	23.8%

* CA included GDP contributions from Canada's Territories

SECTORAL DISTRIBUTION

Mechanical contractors play a vital role in Canada's construction sector, accounting for approximately 20% of the country's total construction output. Their contributions span all major construction subsectors, including new construction and sustaining maintenance activities across engineering construction, non-residential buildings, repair construction, and residential buildings. Specifically, mechanical contractors are responsible for 35% of total engineering construction, 21% of non-residential building construction, 7% of repair construction, and 12% of residential building construction.

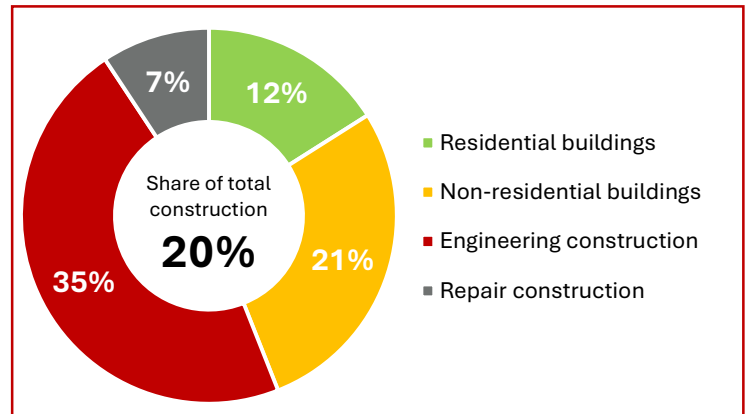


Figure 1: Mechanical% share contributions to economic output of construction subsectors

In the engineering construction segment, mechanical contractors carry out a wide range of core activities. These include the installation of HVAC systems; water, wastewater, gas, and steam distribution networks; fire suppression systems; and industrial piping and process systems. They also frequently provide ongoing maintenance for industrial and infrastructure facilities once operational. Much of this work directly supports the development and transportation of Canada's natural resources—including offshore oil and gas, hydroelectricity, and mining—highlighting the sector's close alignment with provincial economic priorities.

In the non-residential building segment, mechanical contractors are responsible for 23% of total output. They oversee the design, installation, and servicing of internal mechanical systems that ensure building functionality, safety, and regulatory compliance. These systems include potable water and wastewater systems, HVAC systems and air handling units, natural gas and fuel distribution lines, and fire protection systems. Their work spans a broad range of assets, from industrial facilities and commercial spaces—such as office towers, shopping centres, restaurants, and retail outlets—to institutional buildings, including hospitals, schools, post-secondary institutions, and government facilities.

The mechanical sector also contributes significantly to repair construction, accounting for 12% of total activity in this segment. This work typically involves the restoration or replacement of existing mechanical systems, as distinct from routine maintenance. Projects may be initiated in response to system failures, updates to meet regulatory standards, or retrofitting aging infrastructure.

Within the residential construction segment, mechanical contractors represent 11% of total output. They are engaged in the installation and servicing of mechanical systems in both single-detached homes and multi-unit dwellings. Their responsibilities include installing plumbing and HVAC systems, gas lines, and fire protection systems, all of which are essential to ensuring safety, energy efficiency, and code compliance in residential buildings.

Taken together, the role of mechanical contractors in the construction sector extends well beyond individual job sites. Their work underpins critical infrastructure, enables the delivery of public and private services, and supports industrial operations that are foundational to the country’s economy. Their significant share of construction activity highlights the strategic importance of the mechanical sector within the broader built environment.

EMPLOYMENT CONTRIBUTION

In 2023, Statistics Canada reported total construction employment of approximately 1.58 million workers. Of this total, an estimated 857,000 individuals—about 54%—were employed in the Specialty Trades segment, making it the largest component of construction industry employment.

Within the specialty trades, the Building Equipment Contractors (BEC) subsector—which includes both mechanical and electrical contractors—accounted for approximately 440,000 workers, representing 51% of all specialty trades employment.

Of those employed in the BEC subsector, the mechanical contracting segment employed an estimated 205,000 individuals, or 52% of the BEC workforce. This translates to roughly 26% of total specialty trades employment, highlighting the mechanical sector’s essential role in supporting residential, commercial, and industrial construction activity across Canada.

Table 2: Mechanical sector employment composition

Occupation	Size of total workforce	Occupation % share of total mechanical workforce	Mechanical occupation % share of total occupations in the construction workforce
Core trades	128,889	63%	45%
Managerial and administrative	25,012	12%	14%
Other trades	50,651	25%	15%
Total	204,585	100%	

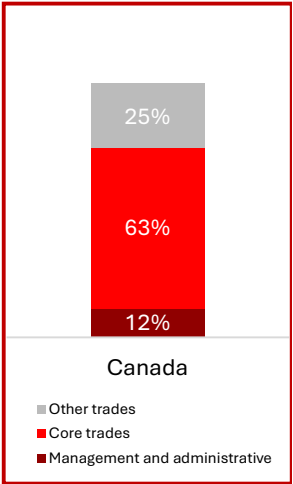


Figure 2: Percentage share of industry employment by profession category

CORE TRADES

Core trades make up the majority of employment within the building equipment contracting industry. Plumbers are the largest trade within this category at 54,255 workers. That figure accounts for 29% of mechanical sector total employment, and 94% of all plumbers employed in the construction industry.

Table 3: Mechanical core trades employment

Core Trade	Total Employed by Mechanical Sector in Core Trade	Core Trade Share of Total Mechanical Workforce	Mechanical Core Trade Workforce as Share of Total in Construction Workforce
Plumbers	54,255	29%	94%
Heating, refrigeration and air conditioning mechanics	28,697	15%	97%
Steamfitters, pipefitters and sprinkler system installers	12,075	6%	75%
Sheet metal workers	10,781	6%	65%
Contractors and supervisors, mechanic trades	7,921	4%	87%
Contractors and supervisors, pipefitting trades	7,123	4%	88%
Construction millwrights and industrial mechanics	4,783	3%	58%
Gas fitters	4,172	2%	92%
Welders and related machine operators	3,622	2%	25%
Oil and solid fuel heating mechanics	1,149	1%	93%
Insulators	871	0.5%	10%
Boilermakers	556	0.3%	41%

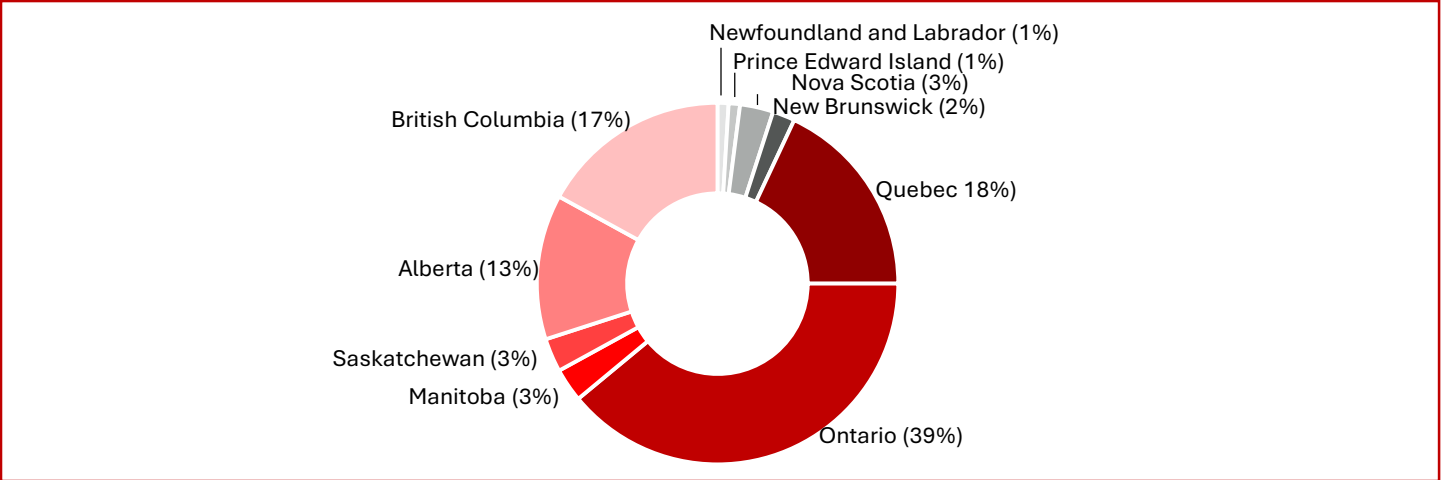
APPRENTICESHIP DEVELOPMENT

Mechanical trades—specifically millwrights; plumbers, pipefitters, and steamfitters; refrigeration and air conditioning mechanics; and sheet metal workers—play a leading role in Canada’s apprenticeship system. According to Statistics Canada data, these trades accounted for approximately 26% of total registrations and 27% of certifications across key construction trades in 2023. This reflects a consistent upward trend over the past three years, rising from 24% in 2021. The data signals growing demand for mechanical trades and underscores their foundational role in maintaining and advancing the skilled workforce within Canada’s construction industry.

NUMBER OF BUSINESSES

In 2023, there were 16,119 mechanical contractors across Canada. The sector accounted for 51% of the total number of contractors within the BEC sector. Ontario reported the largest share of contractors in the country at 39% of the total. Quebec, British Columbia, and Alberta followed at 18%, 17%, and 13% respectively.

Figure 3: Mechanical businesses by geographic distribution



SIZE OF BUSINESSES

Of the 16,119 businesses operating in the mechanical sector, just under 9,000, or 55.5%, had fewer than four employees. Approximately 76% of mechanical contracting businesses employed fewer than 10 people, and 15,890 firms, or 98.6% of the total, had fewer than 100 employees. Only 226 businesses employed between 100 and 500 workers; three had more than 500 employees.

Table 4: Mechanical contractors by business size

Employee Range	Total	Percentage Share of Total
Fewer than 4	8,948	55.5%
Fewer than 10	12,308	76.4%
Fewer than 40	15,501	96.2%
Fewer than 100	15,890	98.6%
More than 100	229	1.4%

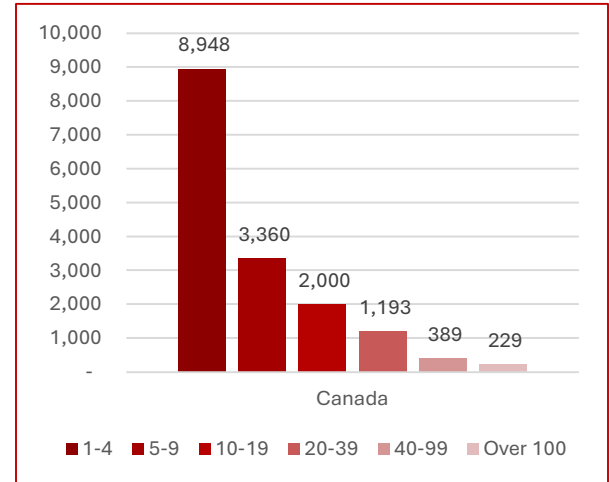


Figure 3: Number of businesses by size of firm

AVERAGE INCOME

Among the mechanical trades, contractors and supervisors, pipefitting trades earned the highest annual incomes at just under \$83,000 in 2021. Oil and solid fuel heating mechanics were paid the least at approximately \$50,500. The core mechanical trades earned an annual average income of \$70,500 in 2021. Plumbers make up the most significant proportion of the workforce at 41% while earning the second-lowest income at approximately \$55,000. In contrast, the highest-earning occupation, contractors and supervisors, pipefitting trades, comprises only 5% of the workforce.

NOTE: These numbers represent the average for each trade across the entire construction sector, including full-time and part-time employees, self-employed individuals and new entrants to the industry. Experienced journeypersons and those working in the non-residential sector typically earn wages well in excess of the average, particularly experienced workers or those with specialized training.

Table 5: Average income by core mechanical trade in 2021

Mechanical Trades	Income
Contractors and supervisors, pipefitting trades	\$ 82,600
Contractors and supervisors, mechanic trades	\$ 79,800
Construction millwrights and industrial mechanics	\$ 77,900
Steamfitters, pipefitters and sprinkler system installers	\$ 68,900
Boilermakers	\$ 68,400
Heating, refrigeration and air conditioning mechanics	\$ 62,450
Gas fitters	\$ 61,500
Sheet metal workers	\$ 54,600
Plumbers	\$ 54,150
Welders and related machine operators	\$ 53,800
Insulators	\$ 51,800
Oil and solid fuel heating mechanics	\$ 50,440

Table 6: Core mechanical income versus the rest of building equipment in 2021

Trade Grouping	Income
Mechanical trades	\$ 64,395
Construction overall	\$ 55,950
Total, all industries	\$ 55,150

Source: 2021 Census, Statistics Canada

HEAVY INDUSTRIAL MAINTENANCE, REPAIR, AND OVERHAUL IN CANADA

Canada’s heavy-industrial maintenance, repair, and overhaul (MRO) relies on a core group of mechanical and electrical contractors that keep critical assets operating safely and efficiently across oil sands, oil refining, petrochemicals, mining, electricity generation, pulp and paper, natural-gas processing, steel production, and related sectors.

While MRO is smaller than new construction in annual output, its function is essential. Multi-trade mechanical and electrical contractors—principally steamfitters/pipefitters, boilermakers, millwrights, electricians, insulators, sheet-metal workers, operating engineers (crane/equipment), carpenters/scaffolders, and construction craft labourers—execute the bulk of work during planned industrial outages (“turnarounds” and “shutdowns”) at refineries, petrochemical plants, pulp and paper mills, and power stations. In a representative pre-pandemic year (2019), the mechanical-and-electrical grouping accounted for roughly 62% of all reported maintenance craft-hours under national agreements—confirming these trades’ central role in turnarounds.

Turnarounds are planned, time-bound outages designed to inspect, repair, and upgrade process equipment. Their duration and workforce scale vary by facility and scope: for example, a large annual turnaround at the Co-op Refinery (Regina) ran 47 days and mobilized up to 3,200 workers at peak. In Alberta, seasonal oil-sands and refinery maintenance routinely requires thousands of skilled workers during peak periods.

Under the General Presidents’ Maintenance Committee and National Maintenance Council (GPMC|NMC) agreements, reported maintenance activity averages on the order of 23.5 million craft-hours per year, with totals fluctuating by cycle. In 2019, GMMA|NMC reported approximately 25.2 million hours across their agreements. The combined mechanical-and-electrical trades – pipefitters, electricians, boilermakers, millwrights, insulators, sheet-metal workers – accounted for approximately 15.7 million of 25.2 million hours or 62%.

These data illustrate the critical contribution of mechanical and electrical contractors to Canada’s industrial economy. Although the sector’s role is not as visible in high-level construction statistics, it is indispensable to the safe, reliable, and efficient operation of the country’s industrial infrastructure.


NEWFOUNDLAND AND LABRADOR

OVERVIEW

Mechanical contractors in Newfoundland and Labrador play a critical role in the construction sector, specializing in the installation, maintenance, and repair of mechanical systems essential to building functionality and occupant comfort. Their work encompasses heating, ventilation, and air conditioning (HVAC), plumbing, fire protection, refrigeration, and gas systems across residential, commercial, institutional, and industrial settings. A small number are also engaged in annual maintenance activities related to oil and gas and pulp and paper facilities.

The mechanical sector employed almost 2,100 people in the province 2023, which equates to \$126 million in wages and salaries. The sector is composed of an estimated 175 contractors with a collective output estimated at \$513 million, or 21% of the total construction industry in the province.

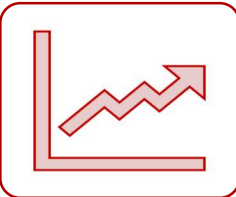
DIRECT AND INDIRECT IMPACTS



2,100

On- and off-site jobs

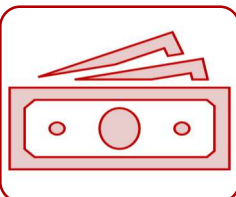
- 11% of construction jobs
- An additional 1,500 in indirect employment



\$513 Million

GDP


- 21% of total construction output
- \$216 million in indirect impacts



\$126 Million

Wages

- 14% of construction wages
- \$22 million in indirect wages



175

Contractor establishments

- 16% of construction establishments
- 76% of contractors have fewer than 10 employees

SECTORAL ECONOMIC OUTPUT SHARE

Mechanical contractors play a vital role in Newfoundland and Labrador's construction sector, accounting for approximately 21% of the province's total construction output. Their contributions span all major construction subsectors, encompassing both new construction and sustaining maintenance within engineering construction, non-residential buildings, repair, and residential construction.

- **Engineering construction (26% of segment output):** Although this figure is below the national average of 35%, Newfoundland and Labrador's engineering share for mechanical contractors is still substantially higher than most provinces, reflecting the strong presence of large-scale industrial infrastructure, particularly in resource extraction and energy. Activities are concentrated in oil and gas, hydroelectric projects, mining, and related facilities, which require complex mechanical systems and long-term operational support.

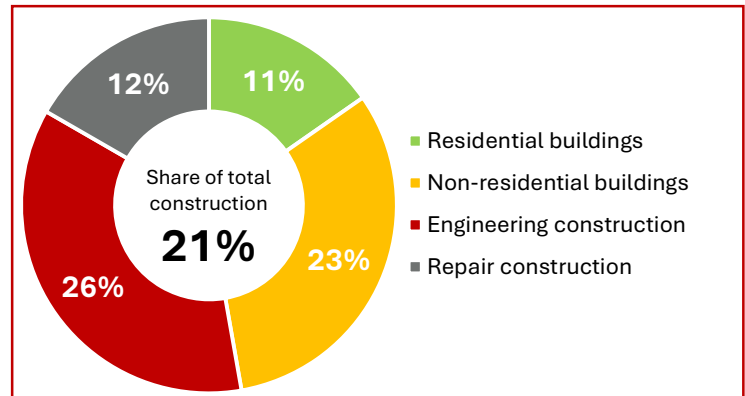


Figure 4: Mechanical share contributions (%) to the economic output of Newfoundland and Labrador's construction subsectors

- **Non-residential building construction (23% of segment output):** Slightly above the national average of 21%, this segment demonstrates the sector's active role in institutional and industrial development. Mechanical contractors are heavily involved in building systems for public infrastructure, hospitals, commercial centres, and government facilities, particularly in urban hubs like St. John's.
- **Repair construction (12% of segment output):** Newfoundland and Labrador exceeds the national benchmark of 7%, suggesting a greater share of activity is focused on restoration, retrofitting, and system upgrades, especially in aging buildings and facilities serving remote communities. The repair segment supports asset preservation, where full replacement or new builds may be less feasible.
- **Residential construction (11% of segment output):** This is just below the national average of 12%, consistent with a smaller-scale housing market and more moderate growth in residential construction relative to other provinces. Nonetheless, mechanical contractors continue to support essential housing needs across single- and multi-unit developments.

Mechanical contractors in Newfoundland and Labrador serve a province that is characterized by resource-driven infrastructure, significant non-residential demand, and a need for lifecycle support of both industrial and public assets. Their contributions are vital to supporting energy production, public services, and the longevity of the province's built environment.

EMPLOYMENT

As of 2023, the mechanical sector of Newfoundland and Labrador's construction industry employed an estimated 2,100 individuals. This represents a significant share (11%) of the total construction industry workforce, which totalled approximately 20,000 workers.

Table 7: Mechanical sector employment composition

Occupation	Size of Total Workforce	Occupation % Share of Total Mechanical Workforce	Mechanical Occupation % Share of Total Occupations in Construction Workforce
Core trades	1,403	68%	38%
Managerial and administrative	199	10%	14%
Other trades	462	22%	22%
Total	2,063	100%	11%

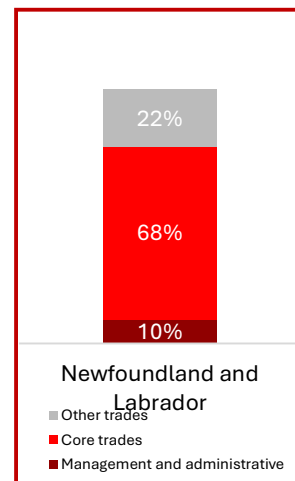


Figure 5: Percentage share of industry employment by profession category

CORE TRADES

Mechanical contractors employ nine key trades that make up 60% of their workforce.

Among these core trades, plumbers represent the largest group, with 442 individuals, accounting for 26% of employment in the mechanical sector. Notably, 94% of plumbers work within the construction industry.

Table 8: Core mechanical trades in 2023

	Total Employed by Mechanical Sector in Core Trade	Core Trade Share of Total Mechanical Workforce	Mechanical Core Trade Workforce as Share of Total in Construction Workforce
Mechanical Core Trades			
Plumbers	442	20%	94%
Steamfitters, pipefitters and sprinkler system installers	267	12%	66%
Sheet metal workers	158	7%	66%
Heating, refrigeration and air conditioning mechanics	147	7%	93%
Welders and related machine operators	115	5%	33%
Contractors and supervisors, mechanic trades	93	4%	85%
Construction millwrights and industrial mechanics	93	4%	49%
Oil and solid fuel heating mechanics	71	3%	100%
Contractors and supervisors, pipefitting trades	27	1%	63%
Insulators	27	1%	36%
Boilermakers	22	1%	50%
Gas fitters	11	0.5%	100%

APPRENTICESHIP DEVELOPMENT

Mechanical trades—sheet metal workers; plumbers; steamfitters, pipefitters and sprinkler system installers; gas fitters; construction millwrights and industrial mechanics; heating, refrigeration and air conditioning mechanics trades—play a central role in Newfoundland and Labrador’s apprenticeship system. According to Statistics Canada data, these trades accounted for approximately 25% of total registrations and 28% of certifications across key construction trades in 2023. This reflects an upward trend in registrations over the past three years, an increase from 24% in 2021.

SIZE OF BUSINESSES

In 2023, there were 175 mechanical contractors across Newfoundland and Labrador. The sector accounted for 45% of the total number of contractors within the BEC sector. Of the total number of mechanical contractors in the province, 174 have fewer than 100 employees.

Table 9: Mechanical contractors by business size

Employee Range	Total	Percentage Share of Total
Fewer than 4	92	52.6%
Fewer than 10	133	76.0%
Fewer than 40	172	98.3%
Fewer than 100	174	99.4%
100 to 499	1	0.1%

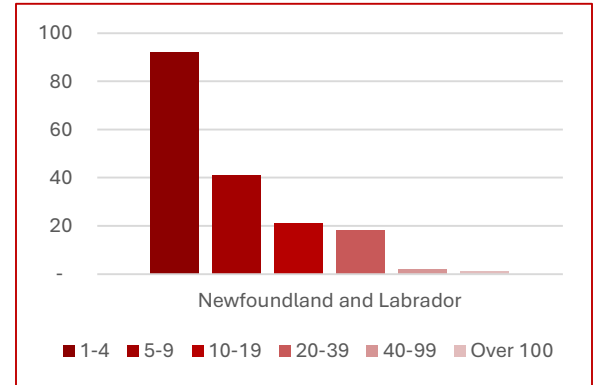


Figure 6: Number of businesses by size of firm

AVERAGE INCOME

Among the mechanical trades in Newfoundland and Labrador, pipefitting supervisors reported the highest average salaries, while sheet metal workers earned the lowest. In 2021, the average annual income across all mechanical trades in the province was just under \$70,000. Although certain occupations within the sector earn significantly more, these roles represent a relatively small share of the workforce.

Specifically, only 16% of core mechanical trade workers in Newfoundland and Labrador earned \$90,000 or more annually, while approximately 52% earned \$55,000 or less. By comparison, the average annual wage across all other construction trades in the province was slightly lower, at approximately \$52,000.

NOTE: These numbers represent the average for each trade across the entire construction sector, including self-employed individuals and new entrants to the industry. Experienced journeypersons and those working in the non-residential sector typically earn wages well in excess of the average, particularly experienced workers or those with specialized training.

Table 10: Average income by core mechanical trades in 2021

Mechanical Trades	Income
Contractors and supervisors, pipefitting trades	\$ 104,000
Contractors and supervisors, mechanic trades	\$ 95,000
Construction millwrights and industrial mechanics	\$ 91,800
Welders and related machine operators	\$ 64,700
Heating, refrigeration and air conditioning mechanics	\$ 64,000
Steamfitters, pipefitters and sprinkler system installers	\$ 63,800
Boilermakers	\$ 61,000
Insulators	\$ 57,200
Oil and solid fuel heating mechanics	\$ 55,000
Gas fitters	\$ 54,000
Plumbers	\$ 51,600
Sheet metal workers	\$ 46,800

Table 11: Core mechanical income versus the rest of building equipment in 2021

Trade Grouping	Income
Mechanical trades	\$ 67,994
Construction overall	\$ 52,069
Total, all industries	\$ 50,440

Source: 2021 Census, Statistics Canada


PRINCE EDWARD ISLAND

OVERVIEW

Mechanical contractors in Prince Edward Island serve a vital function within the construction sector. They specialize in the installation, maintenance, and repair of mechanical systems that are essential to building performance and occupant comfort. Their expertise spans a range of systems, including heating, ventilation, and air conditioning (HVAC), plumbing, fire protection, refrigeration, and gas systems, supporting projects across residential, commercial, institutional, and industrial settings.

In 2023, the mechanical contracting sector in the province employed approximately 800 individuals, generating an estimated \$39 million in wages and salaries. The sector consisted of approximately 95 firms that collectively produced an estimated \$64 million in economic output—representing roughly 12% of the total construction industry in Prince Edward Island.

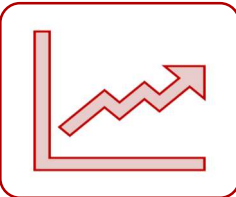
DIRECT AND INDIRECT IMPACTS



800

On- and off-site jobs

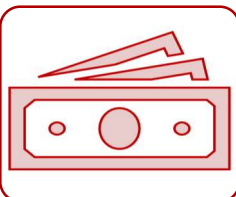
- 10% of construction jobs
- An additional 182 in indirect employment



\$64 Million

GDP


- 12% of total construction output
- \$13 million in indirect impacts



\$39 Million

Wages

- 12% of construction wages
- \$1.8 million in indirect wages



95

Contractor establishments

- 19% of construction establishments
- 26% of contractors have fewer than 10 employees

SECTORAL ECONOMIC OUTPUT SHARE

Mechanical contractors are a key contributor to Prince Edward Island's construction industry, representing approximately 12% of the province's total construction output. Their work extends across all major subsectors, including new construction and sustaining maintenance in engineering, non-residential buildings, repair construction, and residential buildings.

- **Engineering construction (8% of segment output):** Far below the national average of 35%, this percentage reflects Prince Edward Island's limited industrial and resource-based infrastructure. Mechanical contractor activity in this segment is mostly concentrated in municipal utilities and infrastructure upgrades, rather than in heavy or energy-intensive projects.

- **Non-residential building construction (15% of segment output):** While below the national benchmark of 21%, this figure aligns with Prince Edward Island's modest commercial and institutional building base. Mechanical contractors are primarily engaged in supporting community facilities, schools, small-scale commercial properties, and healthcare buildings, which still require essential systems such as HVAC and fire protection.

- **Repair construction (16% of segment output):** This is more than double the national average of 7%, indicating a strong focus on maintaining and upgrading existing systems. The high share suggests a built environment in which mechanical contractors are frequently engaged in modernization, compliance updates, and repair work, especially in older public and residential infrastructure.

- **Residential construction (11% of segment output):** Nearly on par with the national average of 12%, this share reflects a steady demand for mechanical systems in single-family homes and modest multi-unit developments. Population growth and housing activity in urban centres like Charlottetown drive service demand.

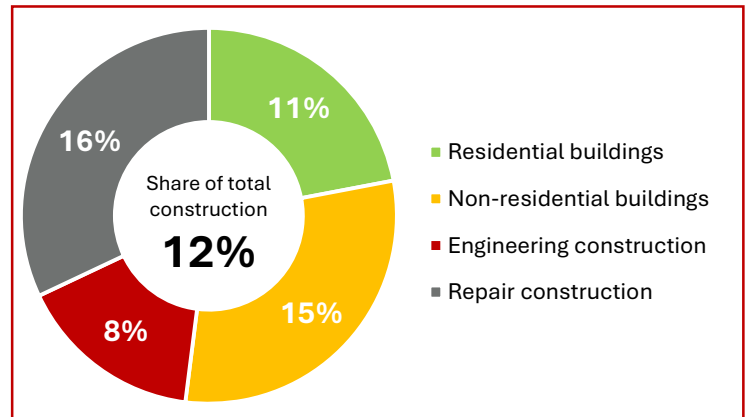


Figure 7: Mechanical share contributions (%) to the economic output of Prince Edward Island's construction subsectors

Overall, mechanical contractors in Prince Edward Island operate in a construction landscape that is defined by low industrial intensity, a concentrated but essential non-residential building stock, and a disproportionately high need for repair and system renewal. Their role is critical to ensuring the reliability and functionality of the province's infrastructure and housing systems.

EMPLOYMENT

As of 2023, the mechanical sector of Prince Edward Island's construction industry employed an estimated 800 individuals. This represents a significant share (10%) of the total construction industry workforce, which totalled approximately 8,600 workers.

Table 12: Mechanical sector employment composition

Summary by Occupation Group	Mechanical Workforce	Share of Mechanical Workforce	Share of Total Construction Workforce
Core trades	603	76%	48%
Managerial and administrative	58	7%	11%
Other trades	138	17%	6%
Total	798	100%	10%

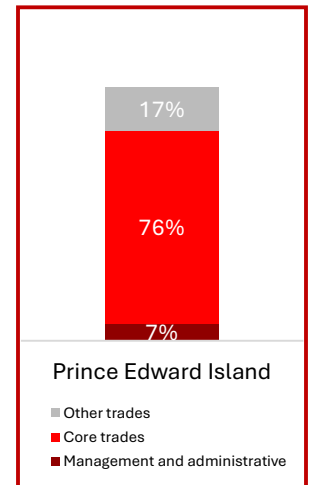


Figure 8: Percentage share of industry employment by profession category

CORE TRADES

Mechanical contractors employ seven key trades that were not suppressed by statistics, and which account for 94% of their workforce. Within these core trades, plumbers are the largest trade at 369 individuals, or 52% of the mechanical sector.

Table 13: Core mechanical trades in 2023

Mechanical Core Trades	Total Employed by Mechanical Sector in Core Trade	Core Trade Share of Total Mechanical Workforce	Mechanical Core Trade Workforce as Share of Total in Construction Workforce
Plumbers	369	46%	100%
Steamfitters, pipefitters and sprinkler system installers	74	9%	85%
Sheet metal workers	67	8%	100%
Heating, refrigeration and air conditioning mechanics	47	6%	88%
Contractors and supervisors, mechanic trades	40	5%	86%
Construction millwrights and industrial mechanics	40	5%	100%
Oil and solid fuel heating mechanics	34	4%	100%

APPRENTICESHIP DEVELOPMENT

Mechanical trades—specifically sheet metal workers; plumbers; steamfitters, pipefitters and sprinkler system installers; gas fitters; construction millwrights and industrial mechanics; and heating, refrigeration and air conditioning mechanics trades—play a central role in Prince Edward Island's apprenticeship system. According to Statistics Canada data, these trades accounted for approximately 19% of total registrations and 28% of certifications across key construction trades in 2023. This reflects a downward trend in registrations over the past three years, a decrease from the 20% recorded in 2021.

SIZE OF BUSINESSES

In 2023, there were 95 mechanical contractors across Prince Edward Island. The sector accounted for 52% of the total number of contractors within the BEC sector. Of the total number of mechanical contractors in the province, all have fewer than 100 employees.

Table 14: Mechanical contractors by business size

Employee Range	Total	Percentage Share of Total
Fewer than 4	53	55.8%
Fewer than 10	74	77.9%
Fewer than 40	93	97.9%
Fewer than 100	95	100%

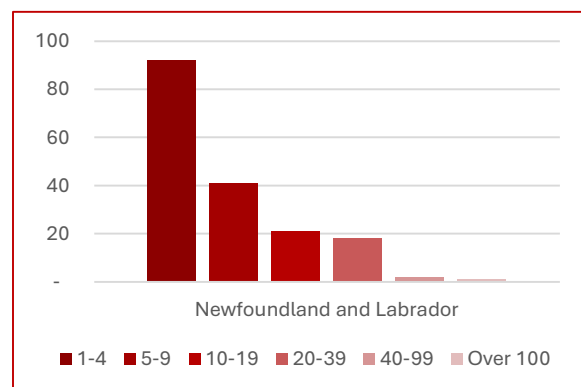


Figure 9: Number of businesses by size of firm

AVERAGE INCOME

Of the mechanical trades in Prince Edward Island, contractors and supervisors, pipefitting trades was the highest paying; the lowest paying was steamfitters, pipefitters and sprinkler system installers. The average annual income for the mechanical trades in 2021 was \$48,914.

NOTE: These numbers represent the average for each trade across the entire construction sector, including full-time and part-time employees, self-employed individuals and new entrants to the industry. Experienced journeypersons and those working in the non-residential sector typically earn wages well in excess of the average, particularly experienced workers or those with specialized training.

Table 15: Average income by core mechanical trades in 2021

Mechanical Trades	Income	
Contractors and supervisors, pipefitting trades	\$	64,000
Heating, refrigeration and air conditioning mechanics	\$	59,000
Contractors and supervisors, mechanic trades	\$	54,000
Oil and solid fuel heating mechanics	\$	52,000
Plumbers	\$	40,400
Sheet metal workers	\$	37,000
Steamfitters, pipefitters and sprinkler system installers	\$	36,000

Table 16: Core mechanical income versus the rest of building equipment in 2021

Trade Grouping	Income	
Mechanical trades	\$	48,914
Construction overall	\$	41,181
Total, all industries	\$	41,920

Source: 2021 Census, Statistics Canada


NOVA SCOTIA

OVERVIEW

In Nova Scotia, mechanical contractors are a cornerstone of the construction industry, delivering essential expertise in installing, servicing, and upgrading systems that ensure the safe and efficient operation of buildings. These systems include HVAC, plumbing, fire suppression, refrigeration, and gas infrastructure across the residential, commercial, institutional, and industrial landscape.

As of 2023, the mechanical contracting sector employed nearly 4,800 individuals, generating approximately \$300 million in wages and salaries. The industry is composed of an estimated 443 firms, collectively contributing around \$421 million in economic output. This represents roughly 15% of the province’s total construction activity.

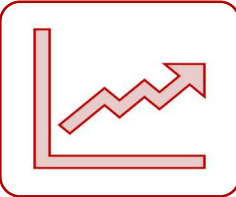
DIRECT AND INDIRECT IMPACTS



4,800

On- and off-site jobs

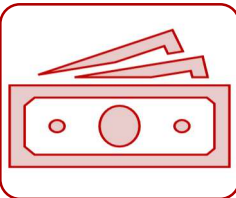
- 12% construction jobs
- An additional 1,400 in indirect employment



\$421 Million

GDP


- 15% of total construction output
- \$127 million in indirect impacts



\$300 Million

Wages

- 17% of construction wages
- \$18 million in indirect wages



443

Contractor establishments

- 17% of construction establishments
- 76% of contractors have fewer than 10 employees

SECTORAL ECONOMIC OUTPUT SHARE

Mechanical contractors are a significant contributor to Nova Scotia's construction industry, accounting for approximately 15% of the province's total construction output. Their work spans all key areas of the sector, supporting both new construction and ongoing maintenance across engineering, non-residential, repair, and residential segments.

- **Engineering construction (7% of segment output):** Mechanical contractors account for a relatively small share of engineering construction activity in Nova Scotia compared to the national average of 35%. This reflects the absence of large-scale industrial and heavy infrastructure projects typically found in resource-heavy provinces. In Nova Scotia, engineering work involving mechanical contractors tends to focus more on local utilities, water systems, and infrastructure upgrades—with fewer complex megaprojects requiring intensive mechanical inputs.

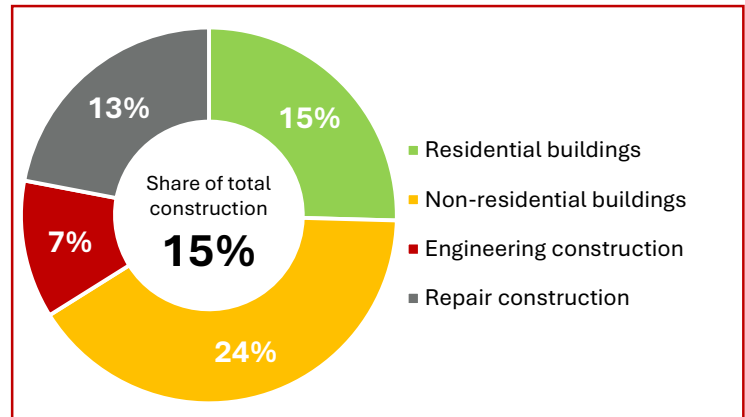


Figure 10: Mechanical share contributions (%) to the economic output of Nova Scotia's construction subsectors

- **Non-residential building construction (24% of segment output):** Nova Scotia exceeds the national average of 21% in this segment. This elevated share highlights the importance of institutional and commercial development in the province. Hospitals, schools, public buildings, and commercial facilities drive demand for advanced mechanical systems, including HVAC, water distribution, gas lines, and fire suppression systems.
- **Repair construction (13% of segment output):** Mechanical contractors' share of repair construction activity in Nova Scotia is significantly higher than the national average of 7%. This suggests a greater focus on system upgrades and restorations and is likely due to aging infrastructure and the need to modernize legacy mechanical systems across both public and private buildings. This trend also reflects a market in which maintaining and adapting existing systems is a priority.
- **Residential construction (15% of segment output):** Mechanical contracting activity in the residential sector also exceeds the national average of 12%, indicating robust housing construction and renovation trends in the province. With steady population growth in urban areas and increased multi-unit residential development, there is sustained demand for plumbing, heating, cooling, and fire protection systems in both new builds and retrofit projects.

Taken together, mechanical contractors in Nova Scotia contribute across all segments of the industry but with a distinct profile compared to national trends. The province exhibits greater reliance on building-focused activity—particularly non-residential and residential construction—while engineering construction plays a smaller role. The sector's strong presence in repair and maintenance also reflects the maturity of the built environment and the province's emphasis on extending the service life of existing assets. These patterns reinforce the strategic importance of mechanical contractors in supporting the province's infrastructure, public services, and housing stock.

EMPLOYMENT

As of 2023, the mechanical sector of Nova Scotia's construction industry employed an estimated 4,800 individuals. This represents a significant share (12%) of the total construction industry workforce, which totalled approximately 38,650 workers.

Table 17: Mechanical sector employment composition

Occupation	Size of Total Workforce	Occupation % Share of Total Mechanical Workforce	Mechanical Occupation % Share of Total Occupations in Construction Workforce
Core trades	3,079	64%	44%
Managerial and administrative	511	11%	15%
Other trades	1,206	25%	12%
Total	4,796	100%	12%

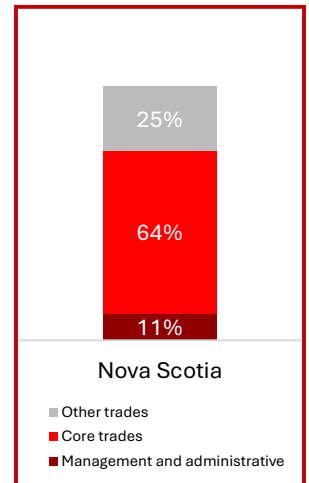


Figure 11: Percentage share of industry employment by profession category

CORE TRADES

Mechanical contractors employ 12 key trades which account for 86% of their workforce. Within these core trades, plumbers are the largest trade, numbering 1,256 workers, or 33% of the mechanical sector.

Table 18: Core mechanical trades in 2023

Mechanical Core Trades	Total Employed by Mechanical Sector in Core Trade	Core Trade Share of Total Mechanical Workforce	Mechanical Core Trade Workforce as Share of Total in Construction Workforce
Plumbers	1,256	27%	96%
Heating, refrigeration and air conditioning mechanics	656	14%	96%
Sheet metal workers	328	7%	68%
Steamfitters, pipefitters and sprinkler system installers	271	6%	75%
Contractors and supervisors, mechanic trades	234	5%	90%
Oil and solid fuel heating mechanics	208	4%	100%
Contractors and supervisors, pipefitting trades	177	4%	88%
Welders and related machine operators	114	2%	30%
Gas fitters	88	2%	82%
Construction millwrights and industrial mechanics	63	1%	59%
Insulators	50	1%	14%
Boilermakers	13	0.3%	40%

APPRENTICESHIP DEVELOPMENT

Mechanical trades—specifically sheet metal workers; plumbers; steamfitters, pipefitters and sprinkler system installers; gas fitters; construction millwrights and industrial mechanics; heating, refrigeration and air conditioning mechanics trades—play a central role in Nova Scotia's apprenticeship system. According to Statistics Canada data, these trades accounted for approximately 34% of total registrations and 37% of certifications across key construction trades in 2023. This reflects a downward trend in registrations over the past three years, a decrease from 35% in 2021.

SIZE OF BUSINESSES

In 2023, there were 443 mechanical contractors across Nova Scotia. The sector accounted for 48% of the total number of contractors within the BEC sector. Of the total number of mechanical contractors in the province, 441 have fewer than 100 employees.

Table 19: Mechanical contractors by business size

Employee Range	Total	Percentage Share of Total
Fewer than 4	248	56.0%
Fewer than 10	338	76.3%
Fewer than 40	430	97.1%
Fewer than 100	441	99.6%
100 to 499	2	0.1%

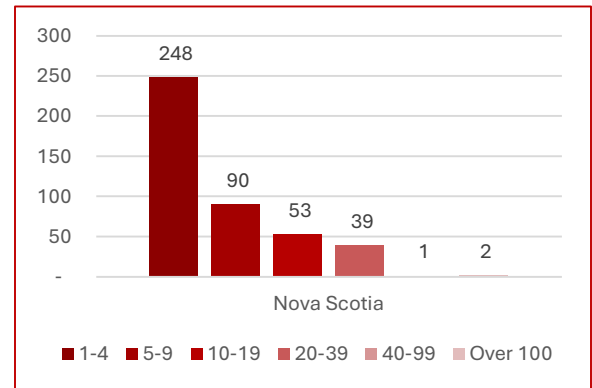


Figure 12: Number of businesses by size of firm

AVERAGE INCOME

Of the mechanical trades in Nova Scotia, contractors and supervisors, pipefitting trades was the highest paying, while the lowest paying occupation was sheet metal workers. In 2021, the average annual income for the mechanical trades was \$56,019, which was well above the aggregated average salary of \$46,078 for all construction trades.

NOTE: These numbers represent the average for each trade across the entire construction sector, including self-employed individuals and new entrants to the industry. Experienced journeypersons and those working in the non-residential sector typically earn wages well in excess of the average, particularly experienced workers or those with specialized training.

Table 20: Average income by core mechanical trades in 2021

Mechanical Trades	Income
Contractors and supervisors, pipefitting trades	\$ 80,000
Contractors and supervisors, mechanic trades	\$ 69,600
Construction millwrights and industrial mechanics	\$ 66,500
Gas fitters	\$ 59,000
Heating, refrigeration and air conditioning mechanics	\$ 56,300
Steamfitters, pipefitters and sprinkler system installers	\$ 54,600
Boilermakers	\$ 51,200
Oil and solid fuel heating mechanics	\$ 49,200
Welders and related machine operators	\$ 48,320
Plumbers	\$ 45,600
Sheet metal workers	\$ 42,800
Insulators	\$ 39,400

Table 21: Core mechanical income versus the rest of building equipment in 2021

Trade Grouping	Income
Mechanical trades	\$ 56,019
Construction overall	\$ 46,078
Total, all industries	\$ 47,040

Source: 2021 Census, Statistics Canada


NEW BRUNSWICK

OVERVIEW

Mechanical contractors in New Brunswick play a critical role in the construction sector, specializing in the installation, maintenance, and repair of mechanical systems essential to building functionality and occupant comfort. Their work encompasses HVAC, plumbing, fire protection, refrigeration, and gas systems across residential, commercial, institutional, and industrial settings. A small number are also engaged in annual maintenance activities related to the province’s oil and gas, utilities, and pulp and paper industries.

The mechanical sector employed 3,900 people in 2023, which equates to \$212 million in wages and salaries. The sector is comprised of an estimated 330 contractors with a collective output estimated at \$356 million, which accounts for 14% of the total construction industry in the province.


DIRECT AND INDIRECT IMPACTS



3,900

On- and off-site jobs

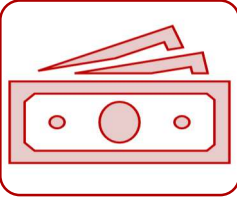
- 13% construction jobs
- An additional 1,300 in indirect employment



\$356 Million

GDP


- 14% of total construction output
- \$101 million in indirect impacts



\$212 Million

Wages

- 16% of construction wages
- \$13 million in indirect wages



330

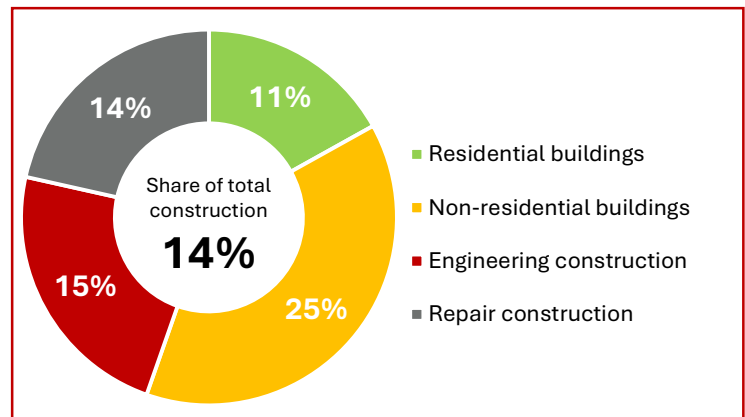
Contractor establishments

- 18% of construction establishments
- 71% of contractors have fewer than 10 employees

SECTORAL ECONOMIC OUTPUT SHARE

Mechanical contractors make a significant contribution to New Brunswick's construction sector, representing approximately 14% of total construction output. Their work spans across all major subsectors, including engineering construction, non-residential buildings, repair activities, and residential construction, supporting both new infrastructure development and system maintenance across the province.

- **Engineering construction (15% of segment output):** Although this figure is below the national average of 35%, it is higher than most Atlantic provinces and reflects New Brunswick's relatively balanced industrial base. Mechanical contractors in this segment support regional energy projects, public utilities, and civil infrastructure works. Large-scale heavy industrial projects are less prevalent in New Brunswick than in other, resource-dominant provinces.



- **Non-residential building construction (25% of segment output):** New Brunswick exceeds the national benchmark of 21%, indicating a strong role for mechanical contractors in institutional, commercial, and industrial building development. This includes significant involvement in mechanical systems for healthcare facilities, educational institutions, manufacturing plants, and government infrastructure, particularly in urban centres like Moncton, Saint John, and Fredericton.
- **Repair construction (14% of segment output):** At double the national average of 7%, this share suggests a mature and aging infrastructure profile, where mechanical contractors are often engaged in restorations, code compliance upgrades, and retrofits. The elevated level of activity in this segment points to a sustained demand for system rehabilitation in both public and private sector buildings.
- **Residential construction (11% of segment output):** Slightly below the national average of 12%, this share reflects New Brunswick's moderate residential growth rate. However, mechanical contractors remain active in delivering plumbing, HVAC, gas, and fire protection systems across a mix of urban infill projects and suburban housing developments, contributing to the safety and energy efficiency of the province's housing stock.

Figure 13: Mechanical share contributions (%) to the economic output of New Brunswick's construction subsectors

Together, these figures reflect a mechanical contracting sector in New Brunswick that is heavily oriented toward institutional and commercial buildings, with a notable role in system maintenance and infrastructure renewal. Although the province's engineering construction share is modest relative to the national average, mechanical contractors still play a vital role in supporting regional infrastructure, essential services, and the long-term performance of built assets throughout New Brunswick.

EMPLOYMENT

As of 2023, the mechanical sector of New Brunswick's construction industry employed an estimated 3,900 individuals. This represents a significant share (13%) of the total construction industry workforce, which totalled approximately 30,683 workers.

Table 22: Mechanical sector employment composition

Occupation	Size of Total Workforce	Occupation % Share of Total Mechanical Workforce	Mechanical Occupation % Share of Total Occupations in Construction Workforce
Core trades	2,544	65%	45%
Managerial and administrative	427	11%	16%
Other trades	964	24%	13%
Total	3,935	100%	13%

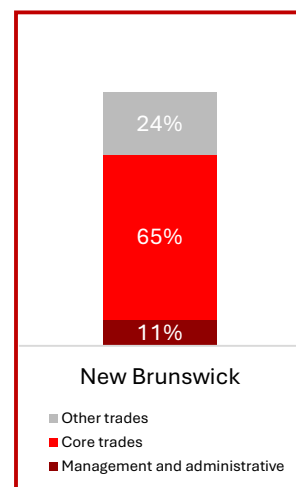


Figure 14: Percentage share of industry employment by profession category

CORE TRADES

Mechanical contractors employ nine key trades that make up 60% of their workforce. Among these core trades, plumbers represent the largest group, with just over 1,000 individuals, accounting for 36% of employment in the mechanical sector. Notably, 94% of plumbers work within the construction industry.

Table 23: Core mechanical trades in 2023

Mechanical Core Trades	Total Employed by Mechanical Sector in Core Trade	Core Trade Share of Total Mechanical Workforce	Mechanical Core Trade Workforce as Share of Total in Construction Workforce
Plumbers	1,042	28%	95%
Heating, refrigeration and air conditioning mechanics	481	13%	99%
Steamfitters, pipefitters and sprinkler system installers	331	9%	84%
Sheet metal workers	231	6%	76%
Welders and related machine operators	187	5%	44%
Construction millwrights and industrial mechanics	131	3%	72%
Contractors and supervisors, pipefitting trades	125	3%	91%
Contractors and supervisors, mechanic trades	81	2%	72%
Oil and solid fuel heating mechanics	62	2%	100%
Boilermakers	37	1%	55%
Gas fitters	31	1%	100%
Insulators	25	1%	9%

APPRENTICESHIP DEVELOPMENT

Mechanical trades—specifically sheet metal workers; plumbers; steamfitters, pipefitters and sprinkler system installers; gas fitters; construction millwrights and industrial mechanics; heating, refrigeration and air conditioning mechanics trades—play a central role in New Brunswick's apprenticeship system. According to Statistics Canada data, these trades accounted for approximately 32% of total registrations and 30% of certifications across key construction trades in 2023. There has been no change in registrations over the past three years.

SIZE OF BUSINESSES

In 2023, there were 330 mechanical contractors across New Brunswick. The sector accounted for 52% of the total number of contractors within the BEC sector. Of the total number of mechanical contractors in the province, 329 have fewer than 100 employees.

Table 24: Mechanical contractors by business size

Employee Range	Total	Percentage Share of Total
Fewer than 4	173	52.4%
Fewer than 10	235	71.2%
Fewer than 40	322	97.6%
Fewer than 100	329	99.7%
100 to 499	1	0.1%

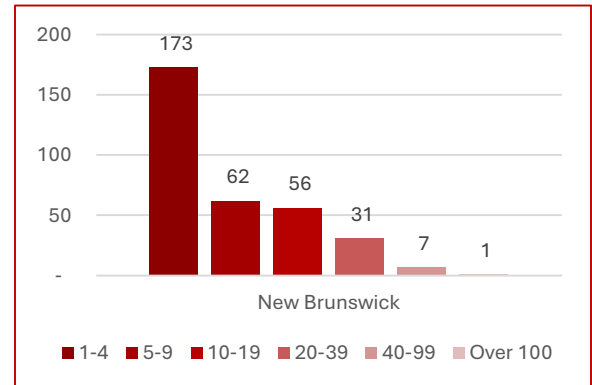


Figure 15: Number of businesses by size of firm

AVERAGE INCOME

Of the mechanical trades in New Brunswick, contractors and supervisors, mechanic trades was the highest paying, and the lowest paying occupation was sheet metal workers. The average annual income for the mechanical trades in 2021 was \$53,183.

NOTE: These numbers represent the average for each trade across the entire construction sector, including self-employed individuals and new entrants to the industry. Experienced journeypersons and those working in the non-residential sector typically earn wages well in excess of the average, particularly experienced workers or those with specialized training.

Table 25: Average income by core mechanical trades in 2021

Mechanical Trades	Income
Contractors and supervisors, mechanic trades	\$ 67,200
Contractors and supervisors, pipefitting trades	\$ 65,000
Construction millwrights and industrial mechanics	\$ 64,500
Gas fitters	\$ 61,000
Steamfitters, pipefitters and sprinkler system installers	\$ 56,800
Oil and solid fuel heating mechanics	\$ 54,000
Heating, refrigeration and air conditioning mechanics	\$ 53,800
Welders and related machine operators	\$ 43,720
Plumbers	\$ 42,700
Boilermakers	\$ 40,000
Sheet metal workers	\$ 38,600
Insulators	\$ 38,400

Table 26: Core mechanical income versus the rest of building equipment in 2021

Trade Grouping	Income
Mechanical trades	\$ 53,183
Construction overall	\$ 43,635
Total, all industries	\$ 45,080

Source: 2021 Census, Statistics Canada

QUEBEC

OVERVIEW

Mechanical contractors in Quebec play a critical role in the construction sector, specializing in the installation, maintenance, and repair of mechanical systems essential to building functionality and occupant comfort. Their work encompasses heating, ventilation, and air conditioning, plumbing, fire protection, refrigeration, and gas systems across residential, commercial, institutional, and industrial settings.

The mechanical sector employed almost 38,900 people in 2023, which equates to \$2.7 billion in wages and salaries. The sector is composed of an estimated 2,850 contractors with a collective output estimated at \$4.3 billion, which accounts for 15% of the provincial construction industry’s economic output.

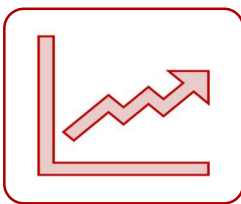
DIRECT AND INDIRECT IMPACTS



38,900

On- and off-site jobs

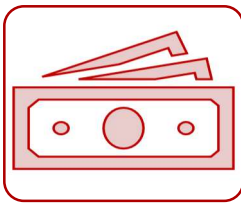
- 12% construction jobs
- An additional 13,000 in indirect employment



\$4.3 Billion

GDP

- 15% of total construction output
- \$2 billion in indirect impacts



\$2.7 Billion

Wages

- 13% of construction wages
- \$462 million in indirect wages



2,850

Contractor establishments

- 13% of construction establishments
- 74% of contractors have fewer than 10 employees

SECTORAL ECONOMIC OUTPUT SHARE

Mechanical contractors are a foundational component of Quebec's construction industry, accounting for approximately 15% of the province's total construction output. Their involvement spans the full spectrum of activity—from infrastructure development to ongoing maintenance—across engineering construction, non-residential buildings, repair work, and residential housing.

- **Engineering construction (18% of segment output):** Quebec's mechanical contractor share in engineering construction is well below the national average of 35%. This reflects the province's diverse infrastructure portfolio, which includes hydroelectric projects, transportation infrastructure, and regional utilities, but lacks the same concentration of heavy industrial megaprojects seen in resource-dominant regions.

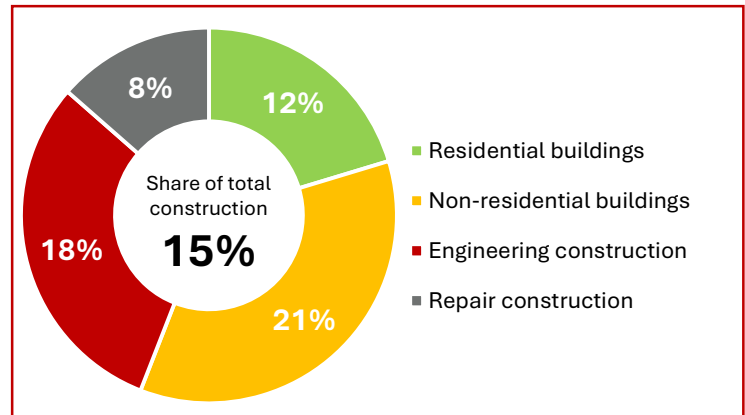


Figure 16: Mechanical share contributions (%) to the economic output of Quebec's construction subsectors

- **Non-residential building construction (21% of segment output):** This share matches the national average, demonstrating Quebec's robust demand for institutional and commercial infrastructure. Mechanical contractors are highly active in delivering systems for hospitals, universities, government facilities, industrial buildings, and retail developments—especially in high-density urban centres like Montreal and Quebec City.
- **Repair construction (8% of segment output):** Slightly above the national benchmark of 7%, this share reflects a well-established and aging building stock where mechanical contractors play a key role in system upgrades, retrofits, and code compliance work. It suggests a market that values the renewal and preservation of existing infrastructure alongside new construction.
- **Residential construction (12% of segment output):** On par with the national average, this share underscores the importance of mechanical contractors in Quebec's large and diverse housing sector. Activity spans multi-residential urban developments, social housing projects, and suburban single-family homes, with mechanical systems essential for maintaining energy efficiency, safety, and regulatory compliance.

Overall, Quebec's mechanical contracting sector mirrors the national profile more closely than most provinces, with balanced participation across all major segments. While its share in engineering construction is relatively modest in comparison to the national figure, its consistent engagement in non-residential, repair, and residential construction highlights the sector's integrated role in supporting Quebec's infrastructure, institutions, and housing stock.

EMPLOYMENT

As of 2023, the mechanical sector of Quebec's construction industry employed an estimated 39,000 individuals. This represents a significant share (12%) of the total construction industry workforce, which totalled approximately 320,300 workers.

Table 27: Mechanical sector employment composition

Occupation	Size of Total Workforce	Occupation% Share of Total Mechanical Workforce	Mechanical Occupation% Share of Total Occupations in Construction Workforce
Core trades	21,989	56%	43%
Managerial and administrative	6,099	16%	14%
Other trades	10,837	28%	14%
Total	38,926	100%	12%

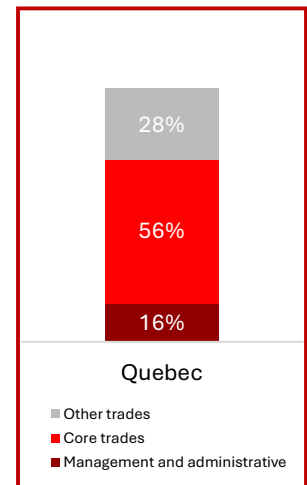


Figure 17: Percentage share of industry employment by profession category

CORE TRADES

Mechanical contractors employ 12 key trades, which collectively account for 55% of their workforce. Plumbers are the largest among these core trades, numbering 9,039 workers, or 31% of the mechanical sector.

Table 28: Core mechanical trades in 2023

Mechanical Core Trades	Total Employed by Mechanical Sector in Core Trade	Core Trade Share of Total Mechanical Workforce	Mechanical Core Trade Workforce as Share of Total in Construction Workforce
Plumbers	9,039	26%	94%
Heating, refrigeration and air conditioning mechanics	5,308	15%	96%
Steamfitters, pipefitters and sprinkler system installers	3,172	9%	88%
Sheet metal workers	2,818	8%	62%
Contractors and supervisors, pipefitting trades	962	3%	91%
Contractors and supervisors, mechanic trades	708	2%	66%
Welders and related machine operators	602	2%	22%
Construction millwrights and industrial mechanics	559	2%	31%
Oil and solid fuel heating mechanics	310	1%	85%
Gas fitters	180	1%	97%
Insulators	174	1%	13%
Boilermakers	56	0.2%	22%

APPRENTICESHIP DEVELOPMENT

Mechanical trades—specifically sheet metal workers; plumbers; steamfitters, pipefitters and sprinkler system installers; gas fitters; construction millwrights and industrial mechanics; heating, refrigeration and air conditioning mechanics trades—play a central role in Quebec's apprenticeship system. According to Statistics Canada data, these trades accounted for approximately 21% of total registrations and 18% of certifications across key construction trades in 2023. This reflects no change over the past three years.

SIZE OF BUSINESSES

In 2023, there were 2,843 mechanical contractors across Quebec. The sector accounted for 49% of the total number of contractors within the BEC sector. Of the total number of mechanical contractors in the province, only 49 have more than 100 employees.

Table 29: Mechanical contractors by business size

Employee Range	Total	Percentage Share of Total
Fewer than 4	1,518	53.4%
Fewer than 10	2,114	74.4%
Fewer than 40	2,718	95.6%
Fewer than 100	2,794	98.3%
100 to 499	49	0.4%

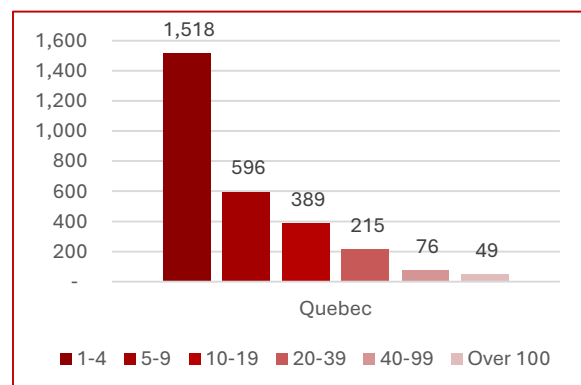


Figure 18: Number of businesses by size of firm

AVERAGE INCOME

Of the mechanical trades in Quebec, contractors and supervisors, pipefitting trades was the highest paying; the lowest paying occupation was oil and solid fuel heating mechanics. The average annual income for the mechanical trades in 2021 was \$59,236.

NOTE: These numbers represent the average for each trade across the entire construction sector, including self-employed individuals and new entrants to the industry. Experienced journeypersons and those working in the non-residential sector typically earn wages well in excess of the average, particularly experienced workers or those with specialized training.

Table 30: Average income by core mechanical trades in 2021

Mechanical Trades	Income
Contractors and supervisors, pipefitting trades	\$ 79,400
Gas fitters	\$ 65,600
Contractors and supervisors, mechanic trades	\$ 63,850
Construction millwrights and industrial mechanics	\$ 63,150
Steamfitters, pipefitters and sprinkler system installers	\$ 60,500
Heating, refrigeration and air conditioning mechanics	\$ 59,000
Boilermakers	\$ 56,800
Insulators	\$ 54,800
Plumbers	\$ 53,250
Sheet metal workers	\$ 51,300
Oil and solid fuel heating mechanics	\$ 50,800
Welders and related machine operators	\$ 45,520

Table 31: Core mechanical income versus the rest of building equipment in 2021

Trade Grouping	Income
Mechanical trades	\$ 59,236
Construction overall	\$ 53,052
Total, all industries	\$ 50,320

Source: 2021 Census, Statistics Canada


ONTARIO

OVERVIEW

Mechanical contractors in Ontario play a critical role in the construction sector, specializing in the installation, maintenance, and repair of mechanical systems essential to building functionality and occupant comfort. Their work encompasses heating, ventilation, and air conditioning, plumbing, fire protection, refrigeration, and gas systems across residential, commercial, institutional, and industrial settings.

The mechanical sector employed almost 85,000 people in 2023, which equates to \$5.6 billion in wages and salaries. The sector is comprised of an estimated 6,000 contractors with a collective output estimated at \$9.6 billion, which accounts for 16% of the provincial construction industry’s total output.

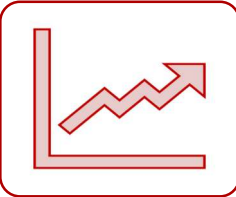
DIRECT AND INDIRECT IMPACTS



85,000

On- and off-site jobs

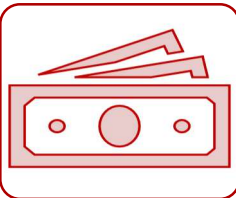
- 14% of construction jobs
- An additional 40,000 in indirect employment



\$9.6 Billion

GDP


- 16% of total construction output
- \$4.2 billion in indirect impacts



\$5.6 Billion

Wages

- 15% of construction wages
- \$785 million in indirect wages



6,300

Contractor establishments

- 18% of construction establishments
- 77% of contractors have fewer than 10 employees

SECTORAL ECONOMIC OUTPUT SHARE

Mechanical contractors are a central part of Ontario’s construction economy, contributing approximately 16% of total construction output. Their role spans a wide range of activity—from large-scale infrastructure and institutional buildings to system maintenance and residential building—across the engineering, non-residential, repair, and residential segments.

- **Engineering construction (25% of segment output):** Although Ontario’s share of mechanical contractor activity in engineering construction is below the national average of 35%, it nonetheless indicates a strong industrial and infrastructure base. Mechanical contractors in this segment are frequently involved in public transit systems, utilities, wastewater and water treatment, and major transportation projects.

- **Non-residential building construction (20% of segment output):**

Just under the national average of 21%, this share reflects Ontario’s high volume of institutional and commercial construction, including universities, hospitals, data centres, and office towers. Mechanical contractors are essential in the delivery of integrated building systems to support the province’s dense and growing urban landscape.

- **Repair construction (6% of segment output):**

Slightly below the national benchmark of 7%, the lower share in repair may reflect Ontario’s focus on new development and expansion, as well as a younger building stock in suburban growth areas. Still, mechanical contractors remain engaged in retrofit and upgrade work, especially in older institutional and industrial facilities.

- **Residential construction (14% of segment output):** Ontario exceeds the national average of 12% in this segment, which is consistent with its high rate of housing construction and renovation activity. Mechanical contractors support plumbing, heating, ventilation, and air conditioning, gas, and fire protection installations across a spectrum of housing types, from high-rise condominiums and urban townhomes to detached dwellings and custom homes.

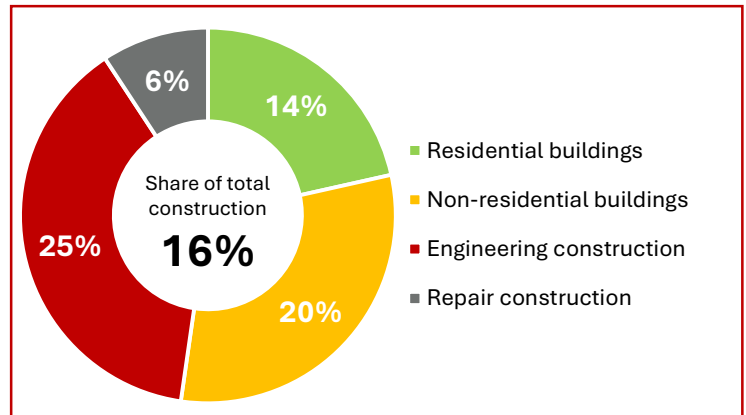


Figure 19: Mechanical share contributions (%) to the economic output of Ontario’s construction subsectors

Altogether, Ontario’s mechanical contracting sector shows a balanced distribution across segments, with notable strength in residential and engineering construction. The sector is closely tied to the province’s urban growth, infrastructure expansion, and institutional development, reinforcing its vital role in maintaining Ontario’s position as the country’s economic engine.

EMPLOYMENT

As of 2023, the mechanical sector of Ontario's construction industry employed an estimated 85,000 individuals. This represents a significant share (14%) of the total construction industry workforce, which totalled approximately 605,442 workers.

Table 32: Mechanical sector employment composition

Occupation	Size of Total Workforce	Occupation% Share of Total Mechanical Workforce	Mechanical Occupation% Share of Total Occupations in Construction Workforce
Core trades	53,759	64%	49%
Managerial and administrative	10,507	12%	16%
Other trades	20,828	24%	18%
Total	85,094	100%	14%

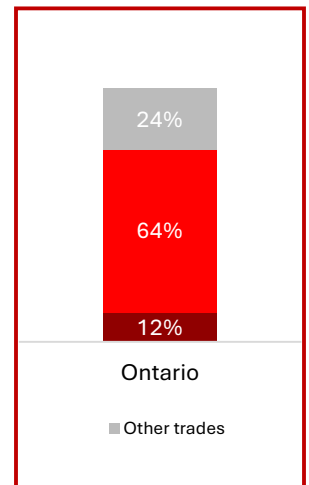


Figure 20: Percentage share of industry employment by profession category

CORE TRADES

Mechanical contractors employ 12 key trades which collectively account for 61% of their workforce. Plumbers are the largest among these core trades, numbering 18,236 workers, or 30% of the mechanical sector.

Table 33: Core mechanical trades in 2023

	Total Employed by Mechanical Sector in Core Trade	Core Trade Share of Total Mechanical Workforce	Mechanical Core Trade Workforce as Share of Total in Construction Workforce
Mechanical Core Trades			
Plumbers	18,236	25%	94%
Heating, refrigeration and air conditioning mechanics	14,413	20%	97%
Contractors and supervisors, mechanic trades	4,073	6%	93%
Steamfitters, pipefitters and sprinkler system installers	3,769	5%	82%
Sheet metal workers	3,542	5%	66%
Gas fitters	2,677	4%	92%
Construction millwrights and industrial mechanics	2,516	4%	73%
Contractors and supervisors, pipefitting trades	2,421	3%	90%
Welders and related machine operators	1,533	2%	33%
Oil and solid fuel heating mechanics	286	0.4%	98%
Insulators	215	0.3%	8%
Boilermakers	191	0.3%	43%

APPRENTICESHIP DEVELOPMENT

Mechanical trades—specifically sheet metal workers; plumbers; steamfitters, pipefitters and sprinkler system installers; gas fitters; construction millwrights and industrial mechanics; heating, refrigeration and air conditioning mechanics trades—play a central role in Ontario's apprenticeship system. According to Statistics Canada data, these trades accounted for approximately 34% of total registrations and 38% of certifications across key construction trades in 2023. This reflects no change in registrations over the past three years.

SIZE OF BUSINESSES

In 2023, there were 6,329 mechanical contractors across Ontario. The sector accounted for 52% of the total number of contractors within the BEC sector. Of the total number of mechanical contractors in the province, only 97 have more than 100 employees.

Table 34: Mechanical contractors by business size

Employee Range	Total	Percentage Share of Total
Fewer than 4	3,500	55.3%
Fewer than 10	4,873	77.0%
Fewer than 40	6,065	95.8%
Fewer than 100	6,232	98.5%
100 to 499	95	0.4%
Larger than 500	2	0.01%

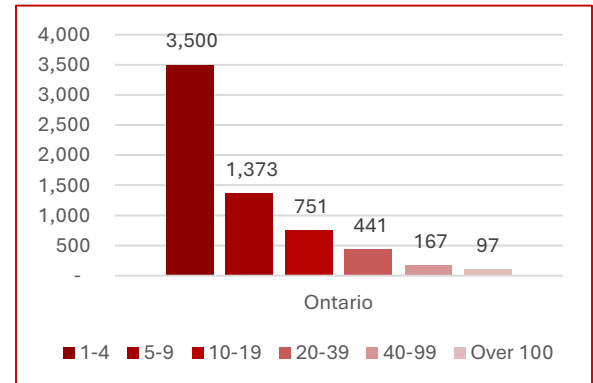


Figure 21: Number of businesses by size of firm

AVERAGE INCOME

Of the mechanical trades in Ontario, contractors and supervisors, pipefitting trades was the highest paying, and the lowest paying occupation was oil and solid fuel heating mechanics. The average annual income for the mechanical trades in 2021 was \$64,691.

NOTE: These numbers represent the average for each trade across the entire construction sector, including self-employed individuals and new entrants to the industry. Experienced journeypersons and those working in the non-residential sector typically earn wages well in excess of the average, particularly experienced workers or those with specialized training.

Table 35: Average income by core mechanical trades in 2021

Mechanical Trades	Income
Contractors and supervisors, pipefitting trades	\$ 84,000
Contractors and supervisors, mechanic trades	\$ 82,300
Boilermakers	\$ 80,000
Construction millwrights and industrial mechanics	\$ 78,700
Steamfitters, pipefitters and sprinkler system installers	\$ 72,800
Heating, refrigeration and air conditioning mechanics	\$ 60,600
Sheet metal workers	\$ 57,450
Plumbers	\$ 56,650
Gas fitters	\$ 54,050
Welders and related machine operators	\$ 51,080
Insulators	\$ 50,800
Oil and solid fuel heating mechanics	\$ 43,800

Table 36: Core mechanical income versus the rest of building equipment in 2021

Trade Grouping	Income
Mechanical trades	\$ 64,691
Construction overall	\$ 55,627
Total, all industries	\$ 58,350


Source: 2021 Census, Statistics Canada

OVERVIEW

Mechanical contractors in Manitoba play a critical role in the construction sector, specializing in the installation, maintenance, and repair of mechanical systems essential to building functionality and occupant comfort. Their work encompasses heating, ventilation, and air conditioning, plumbing, fire protection, refrigeration, and gas systems across residential, commercial, institutional, and industrial settings.

The mechanical sector employed almost 8,100 people in 2023, which equates to \$405 million in wages and salaries. The sector comprises an estimated 509 contractors with a collective output estimated at \$717 million, which accounts for 17% of the provincial construction industry’s total economic output.

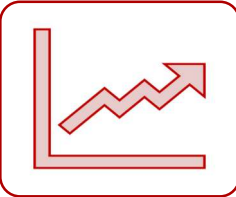
DIRECT AND INDIRECT IMPACTS



8,100

On- and off-site jobs

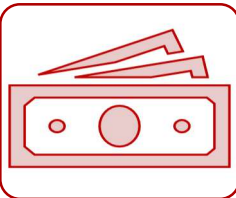
- 14% of construction jobs
- An additional 3,000 in indirect employment



\$717 Million

GDP


- 17% of total construction output
- \$271 million in indirect impacts



\$405 Million

Wages

- 17% of construction wages
- \$25 million in indirect wages



509

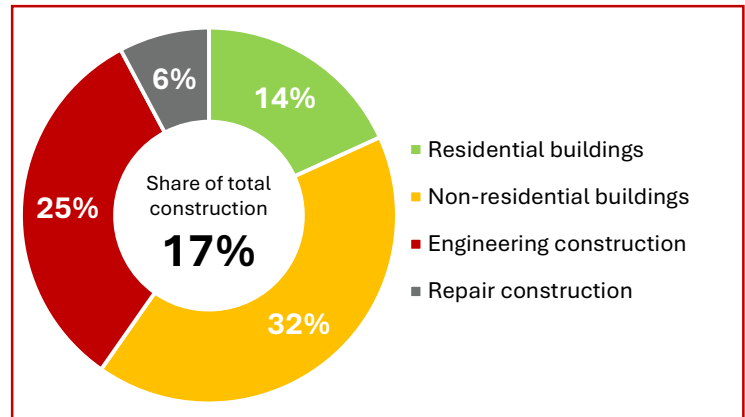
Contractor establishments

- 17% of construction establishments
- 71% of contractors have fewer than 10 employees

SECTORAL ECONOMIC OUTPUT SHARE

Mechanical contractors are a core part of Manitoba's construction industry, contributing approximately 17% of the province's total construction output. Their work spans across all major subsectors, including engineering infrastructure, non-residential buildings, repair construction, and residential development. This distribution reflects a well-diversified role for the sector across the built environment.

- **Engineering construction (25% of segment output):** Although this figure is below the national average of 35%, it still indicates a significant level of activity in infrastructure-related projects. Mechanical contractors in Manitoba support a range of facilities—including water and wastewater treatment, energy distribution, transportation, and public utility infrastructure—highlighting the sector's ongoing role in supporting regional growth and resource development.



- **Non-residential building construction (32% of segment output):** This share is substantially higher than the national average of 21%, marking Manitoba as a standout province for mechanical contracting in institutional and commercial buildings. The strong presence reflects demand for mechanical systems across hospitals, universities, civic infrastructure, and industrial facilities.
- **Repair construction (6% of segment output):** Slightly below the national benchmark of 7%, this figure suggests a construction environment with greater emphasis on new builds and capital projects, although there remains an ongoing need for system restoration and upgrades, particularly in older institutional buildings and public infrastructure.
- **Residential construction (14% of segment output):** This figure is above the national average of 12%, consistent with Manitoba's steady housing development trends. Mechanical contractors are involved in plumbing, heating, ventilation, and air conditioning, gas, and fire protection systems for both multi-unit and single-family housing, particularly in expanding urban communities and regional centres.

Figure 22: Mechanical share contributions (%) to the economic output of Manitoba's construction subsectors

Together, Manitoba's mechanical contractors demonstrate a strong institutional and infrastructure focus, with a particularly prominent role in non-residential building construction. Their diverse engagement across sectors positions them as essential contributors to the province's urban development, service delivery, and housing expansion—ensuring the reliability, efficiency, and sustainability of Manitoba's built environment.

EMPLOYMENT

As of 2023, the mechanical sector of Manitoba's construction industry employed an estimated 8,100 individuals. This represents a significant share (14%) of the total construction industry workforce, which totalled approximately 58,283 workers.

Table 37: Mechanical sector employment composition

Occupation	Size of Total Workforce	Occupation% Share of Total Mechanical Workforce	Mechanical Occupation% Share of Total Occupations in Construction Workforce
Core trades	4,748	59%	43%
Managerial and administrative	861	11%	16%
Other trades	2,440	30%	18%
Total	8,050	100%	14%

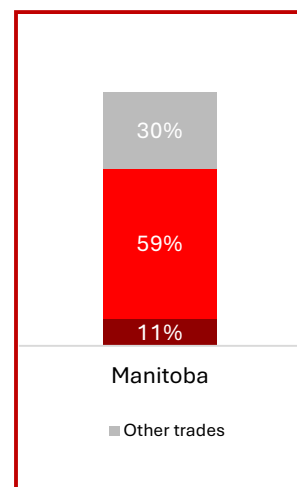


Figure 23: Percentage share of industry employment by profession category

CORE TRADES

Mechanical contractors employ 11 key trades that are not suppressed by Statistics Canada and which account for 57% of their workforce. Within these core trades, plumbers are the largest trade. Plumbers number 2,133 workers, or 40% of the mechanical sector.

Table 38: Core mechanical trades in 2023

Mechanical Core Trades	Total Employed by Mechanical Sector in Core Trade	Core Trade Share of Total Mechanical Workforce	Mechanical Core Trade Workforce as Share of Total in Construction Workforce
Plumbers	2,133	34%	96%
Heating, refrigeration and air conditioning mechanics	1,037	16%	99%
Sheet metal workers	401	6%	77%
Steamfitters, pipefitters and sprinkler system installers	383	6%	83%
Contractors and supervisors, mechanic trades	276	4%	94%
Contractors and supervisors, pipefitting trades	258	4%	98%
Construction millwrights and industrial mechanics	192	3%	60%
Gas fitters	126	2%	100%
Welders and related machine operators	120	2%	26%
Boilermakers	18	0.3%	60%
Insulators	18	0.3%	6%

APPRENTICESHIP DEVELOPMENT

Mechanical trades—sheet metal workers; plumbers; steamfitters, pipefitters and sprinkler system installers; gas fitters; construction millwrights and industrial mechanics; heating, refrigeration and air conditioning mechanics trades—play a central role in Manitoba's apprenticeship system. According to Statistics Canada data, these trades accounted for approximately 33% of total registrations and 37% of certifications across key construction trades in 2023. This reflects a downward trend in registrations over the past three years (34% in 2021).

SIZE OF BUSINESSES

In 2023, there were 509 mechanical contractors across Manitoba. The sector accounted for 53% of the total number of contractors within the BEC sector. Of the total number of mechanical contractors in the province, 502 have fewer than 100 employees.

Table 39: Mechanical contractors by business size

Employee Range	Total	Percentage Share of Total
Fewer than 4	254	49.9%
Fewer than 10	362	71.1%
Fewer than 40	485	95.3%
Fewer than 100	502	98.6%
100 to 499	7	0.3%

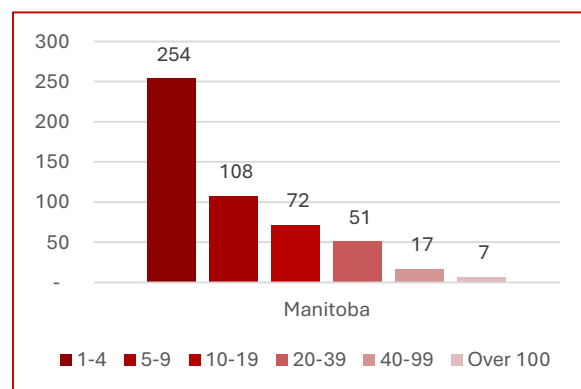


Figure 24: Number of businesses by size of firm

AVERAGE INCOME

Of the mechanical trades in Manitoba, contractors and supervisors, mechanic trades was the highest paying, whereas the lowest paying occupation was insulators. The average annual income for the mechanical trades in 2021 was \$63,832.

NOTE: These numbers represent the average for each trade across the entire construction sector, including self-employed individuals and new entrants to the industry. Experienced journeypersons and those working in the non-residential sector typically earn wages well in excess of the average, particularly experienced workers or those with specialized training.

Table 40: Average income by core mechanical trades in 2021

Mechanical Trades	Income
Contractors and supervisors, mechanic trades	\$ 81,600
Construction millwrights and industrial mechanics	\$ 79,900
Contractors and supervisors, pipefitting trades	\$ 78,000
Steamfitters, pipefitters and sprinkler system installers	\$ 72,800
Gas fitters	\$ 61,600
Boilermakers	\$ 59,000
Heating, refrigeration and air conditioning mechanics	\$ 58,400
Plumbers	\$ 52,500
Sheet metal workers	\$ 52,400
Welders and related machine operators	\$ 49,880
Insulators	\$ 42,800

Table 41: Core mechanical income versus the rest of building equipment in 2021

Trade Grouping	Income
Mechanical trades	\$ 63,832
Construction	\$ 51,832
Total, all industries	\$ 49,240

Source: 2021 Census, Statistics Canada

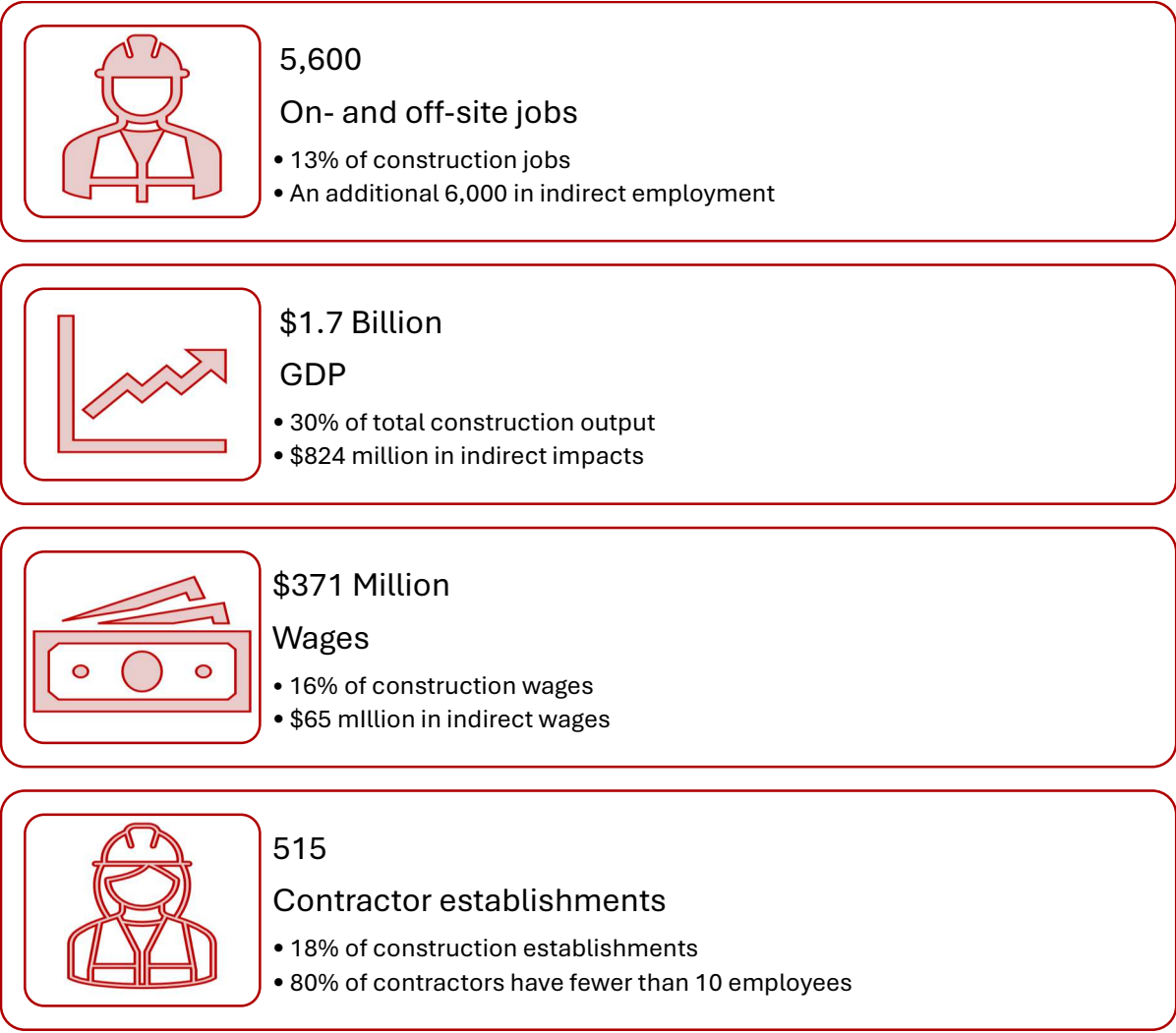
SASKATCHEWAN

OVERVIEW

Mechanical contractors in Saskatchewan play a critical role in the construction sector, specializing in the installation, maintenance, and repair of mechanical systems essential to building functionality and occupant comfort. Their work encompasses heating, ventilation, and air conditioning, plumbing, fire protection, refrigeration, and gas systems across residential, commercial, institutional, and industrial settings.

The mechanical sector employed almost 5,600 people in 2023, which equates to \$371 million in wages and salaries. The sector is comprised of an estimated 515 contractors with a collective output estimated at \$1.7 billion, which accounts for 30% of the provincial construction industry’s total economic output.

DIRECT AND INDIRECT IMPACTS



SECTORAL ECONOMIC OUTPUT SHARE

Mechanical contractors play a prominent and growing role in Saskatchewan's construction industry, accounting for approximately 30% of total construction output—one of the highest shares among provinces. This elevated figure reflects the sector's deep integration into the province's resource-based economy, infrastructure development, and building systems across all major construction segments.

- **Engineering construction (48% of segment output):** Significantly exceeding the national average of 35%, Saskatchewan's engineering share reflects the province's strong reliance on heavy infrastructure and industrial projects, particularly in the mining, oil and gas, and utility sectors. Mechanical contractors are essential to the development of complex systems for processing facilities, pipelines, power generation, and industrial utilities, as well as for ongoing maintenance across these assets.

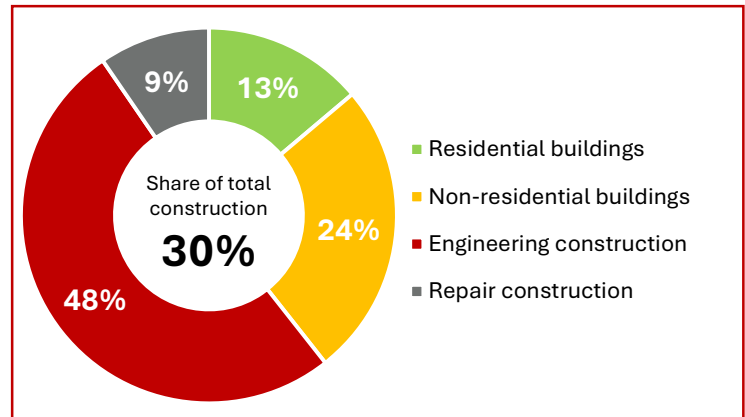


Figure 25: Mechanical share contributions (%) to the economic output of Saskatchewan's construction subsectors

- **Non-residential building construction (24% of segment output):** Above the national benchmark of 21%, this share highlights mechanical contractors' central role in institutional and industrial buildings, including healthcare, education, municipal services, and agri-food processing facilities. The sector is especially active in delivering mechanical systems to support large, technically demanding structures that are often tied to provincial service delivery or resource-sector support.
- **Repair construction (9% of segment output):** This figure is higher than the national average of 7%, reflecting increased investment in upgrading and extending the life of existing mechanical systems, particularly in legacy industrial facilities and public infrastructure. The higher share also points to the province's focus on modernizing systems to meet new performance and safety standards, particularly in rural and remote communities.
- **Residential construction (13% of segment output):** Slightly above the national average of 12%, Saskatchewan's residential mechanical activity reflects steady demand for new housing developments and system upgrades across both urban centres and rural areas. Mechanical contractors are active in delivering plumbing, heating, ventilation, and air conditioning, gas, and fire suppression systems, particularly as urbanization continues in growing municipalities.

In summary, Saskatchewan's mechanical contracting sector is highly industrialized and infrastructure-intensive, with a profile that is notably heavier in engineering and non-residential activity than the national average. The sector's strong position reflects its indispensable role in supporting the province's resource economy, institutional infrastructure, and growing housing needs, reinforcing its strategic importance in shaping Saskatchewan's built environment.

EMPLOYMENT

As of 2023, Saskatchewan's mechanical sector employed an estimated 5,600 individuals. This represents a significant share (13%) of the total construction industry workforce, which totalled approximately 42,717 workers.

Table 42: Mechanical sector employment composition

Occupation	Size of Total Workforce	Occupation% Share of Total Mechanical Workforce	Mechanical Occupation% Share of Total Occupations in Construction Workforce
Core trades	3,492	61%	43%
Managerial and administrative	596	11%	16%
Other trades	1,551	28%	16%
Total	5,638	100%	13%

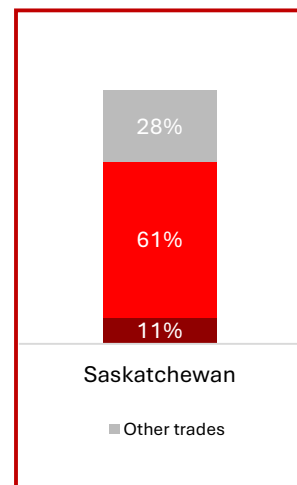


Figure 26: Percentage share of industry employment by profession category

CORE TRADES

Mechanical contractors employ 12 key trades which account for 60% of their workforce. Plumbers are the largest among these core trades, employing 2,211 people, or 48% of the mechanical sector.

Table 43: Core mechanical trades in 2023

Mechanical Core Trades	Total Employed by Mechanical Sector in Core Trade	Core Trade Share of Total Mechanical Workforce	Mechanical Core Trade Workforce as Share of Total in Construction Workforce
Plumbers	2,211	39%	96%
Heating, refrigeration and air conditioning mechanics	468	8%	98%
Sheet metal workers	379	7%	77%
Steamfitters, pipefitters and sprinkler system installers	326	6%	71%
Contractors and supervisors, pipefitting trades	314	6%	95%
Contractors and supervisors, mechanic trades	160	3%	87%
Welders and related machine operators	101	2%	16%
Construction millwrights and industrial mechanics	95	2%	46%
Insulators	18	0.3%	9%
Gas fitters	12	0.2%	50%
Boilermakers	12	0.2%	20%
Oil and solid fuel heating mechanics	12	0.2%	100%

APPRENTICESHIP DEVELOPMENT

Mechanical trades—specifically sheet metal workers; plumbers; steamfitters, pipefitters and sprinkler system installers; gas fitters; construction millwrights and industrial mechanics; and heating, refrigeration and air conditioning mechanics trades—play a central role in Saskatchewan's apprenticeship system. According to Statistics Canada data, these trades accounted for approximately 29% of total registrations and 25% of certifications across key construction trades in 2023. This reflects an upward trend in registrations over the past three years, increasing from 28% in 2021.

SIZE OF BUSINESSES

In 2023, there were 515 mechanical contractors across Saskatchewan. The sector accounted for 51% of the total number of contractors within the BEC sector. Of the total number of mechanical contractors in the province, 510 have fewer than 100 employees.

Table 44: Mechanical contractors by business size

Employee Range	Total	Percentage Share of Total
Fewer than 4	264	51.3%
Fewer than 10	378	73.4%
Fewer than 40	503	97.7%
Fewer than 100	510	99.0%
100 to 499	5	0.2%

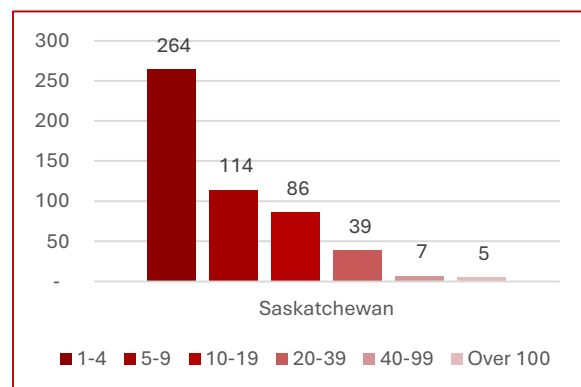


Figure 27: Number of businesses by size of firm

AVERAGE INCOME

Of the mechanical trades in Saskatchewan, construction millwrights and industrial mechanics was the highest paying, and the lowest paying occupation was sheet metal workers. The average annual income for the mechanical trades in 2021 was \$73,715.

NOTE: These numbers represent the average for each trade across the entire construction sector, including self-employed individuals and new entrants to the industry. Experienced journeypersons and those working in the non-residential sector typically earn wages well in excess of the average, particularly experienced workers or those with specialized training.

Table 45: Average income by core mechanical trades in 2021

Mechanical trades	Income
Construction millwrights and industrial mechanics	\$ 96,900
Oil and solid fuel heating mechanics	\$ 90,000
Contractors and supervisors, mechanic trades	\$ 88,200
Boilermakers	\$ 88,000
Gas fitters	\$ 88,000
Heating, refrigeration and air conditioning mechanics	\$ 73,600
Contractors and supervisors, pipefitting trades	\$ 70,500
Steamfitters, pipefitters and sprinkler system installers	\$ 68,600
Welders and related machine operators	\$ 58,900
Plumbers	\$ 54,400
Sheet metal workers	\$ 51,000
Insulators	\$ 47,600

Table 46: Core mechanical income versus the rest of building equipment in 2021

Trade Grouping	Income
Mechanical trades	\$ 73,715
Construction overall	\$ 54,758
Total, all industries	\$ 52,000


Source: 2021 Census, Statistics Canada

OVERVIEW

Mechanical contractors in Alberta play a critical role in the construction sector, specializing in the installation, maintenance, and repair of mechanical systems essential to building functionality and occupant comfort. Their work encompasses heating, ventilation, and air conditioning, plumbing, fire protection, refrigeration, and gas systems across residential, commercial, institutional, and industrial settings.

The mechanical sector employed almost 27,000 people in 2023, which equates to \$1.9 billion in wages and salaries. The sector is comprised of an estimated 2,041 contractors with a collective output estimated at \$8.3 billion, which accounts for just under 30% of the provincial construction industry’s total economic output.

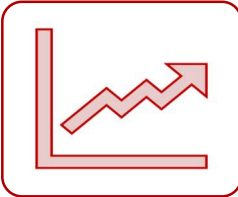
DIRECT AND INDIRECT IMPACTS



27,000

On- and off-site jobs

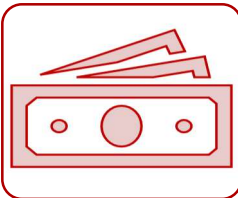
- 11% construction jobs
- An additional 44,000 in indirect employment



\$8.3 Billion

GDP


- 30% of total construction output
- \$6 billion in indirect impacts



\$1.9 Billion

Wages

- 10% of construction wages
- \$803 million in indirect wages



2,041

Contractor establishments

- 15% of construction establishments
- 77% of contractors have fewer than 10 employees

SECTORAL ECONOMIC OUTPUT SHARE

Mechanical contractors are a pillar of Alberta's construction economy, contributing approximately 30% of total construction output—one of the highest shares among all provinces. Their activity is particularly concentrated in engineering and industrial construction, where Alberta's resource-driven economy creates continuous demand for both new development and long-term facility maintenance.

- **Engineering construction (46% of segment output):** Alberta far exceeds the national average of 35%, underscoring the vital role of mechanical contractors in heavy industrial infrastructure. Much of this activity is tied to oil sands operations, petrochemical plants, pipeline systems, and processing facilities. A large share of the sector's work involves sustaining capital programs, plant turnarounds, and ongoing maintenance contracts, making it a vital contributor to Alberta's energy sector.

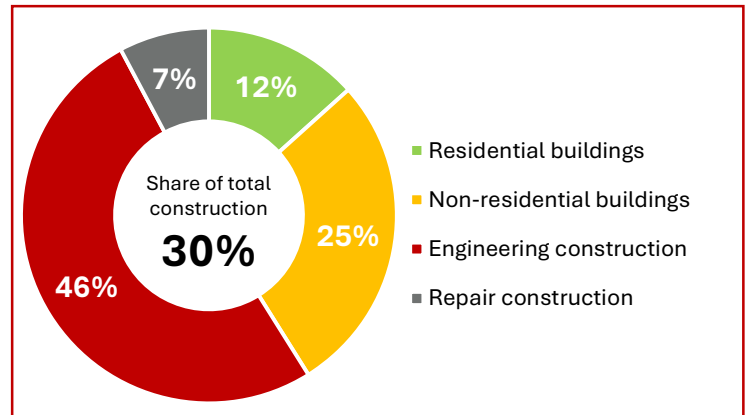


Figure 28: Mechanical share contributions (%) to the economic output of Alberta's construction subsectors

- **Non-residential building construction (25% of segment output):** Also above the national benchmark of 21%, Alberta's non-residential mechanical contracting reflects the province's substantial institutional and commercial development, including healthcare facilities, educational campuses, and logistics infrastructure. Mechanical contractors play a significant role in installing complex systems in large-scale facilities that serve both public and private sectors.
- **Repair construction (7% of segment output):** On par with the national average, Alberta's repair construction share reflects the ongoing need for system rehabilitation in both industrial and building contexts. Mechanical contractors are regularly engaged in modernizing mechanical systems in older commercial, municipal, and energy facilities to meet evolving performance, safety, and environmental standards.
- **Residential construction (12% of segment output):** Matching the national average, this share reflects Alberta's strong housing market, particularly in the Calgary-Edmonton corridor. Mechanical contractors are active in supporting residential HVAC, plumbing, and gas systems across single-detached homes, multi-unit developments, and suburban subdivisions, responding to population growth and high demand for energy-efficient housing.

Together, these figures reflect a mechanical contracting sector in Alberta that is highly industrial, technically advanced, and well-integrated across all major construction segments. The sector's elevated share of construction activity underscores its strategic importance in sustaining Alberta's energy economy, while also supporting institutional infrastructure and residential development. Mechanical contractors in Alberta are not only builders but also maintainers of some of the most complex and capital-intensive assets in the country.

EMPLOYMENT

As of 2023, the mechanical sector of Alberta's construction industry employed an estimated 27,000 individuals. This represents a significant share (11%) of the total construction industry workforce, which totalled approximately 253,000 workers.

Table 47: Mechanical sector employment composition

Occupation	Size of Total Workforce	Occupation% Share of Total Mechanical Workforce	Mechanical Occupation% Share of Total Occupations in Construction Workforce
Core trades	18,151	68%	39%
Managerial and administrative	2,732	10%	10%
Other trades	5,654	21%	12%
Total	26,537	100%	11%

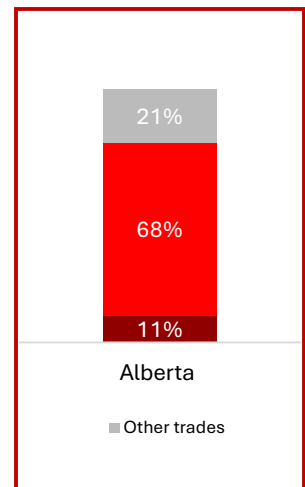


Figure 29: Percentage share of industry employment by profession category

CORE TRADES

Mechanical contractors employ 12 key trades which account for 66% of their workforce. Plumbers are the largest within these core trades. Plumbers number 8,533 workers, or 38% of the mechanical sector.

Table 48: Core mechanical trades in 2023

Mechanical Core Trades	Total Employed by Mechanical Sector in Core Trade	Core Trade Share of Total Mechanical Workforce	Mechanical Core Trade Workforce as Share of Total in Construction Workforce
Plumbers	8,533	28%	94%
Heating, refrigeration and air conditioning mechanics	2,838	9%	96%
Steamfitters, pipefitters and sprinkler system installers	1,864	6%	50%
Sheet metal workers	1,515	5%	74%
Contractors and supervisors, mechanic trades	992	3%	85%
Contractors and supervisors, pipefitting trades	938	3%	72%
Construction millwrights and industrial mechanics	607	2%	57%
Welders and related machine operators	547	2%	17%
Gas fitters	247	1%	85%
Boilermakers	114	0.4%	45%
Insulators	114	0.4%	5%
Oil and solid fuel heating mechanics	78	0.3%	87%

APPRENTICESHIP DEVELOPMENT

Mechanical trades—specifically sheet metal workers; plumbers; steamfitters, pipefitters and sprinkler system installers; gas fitters; construction millwrights and industrial mechanics; heating, refrigeration and air conditioning mechanics trades—play a central role in Alberta's apprenticeship system. According to Statistics Canada data, these trades accounted for approximately 32% of total registrations and 31% of certifications across key construction trades in 2023. This reflects an upward trend in registrations over the past three years, with an increasing from 30% in 2021.

SIZE OF BUSINESSES

In 2023, there were 2,041 mechanical contractors across Alberta. The sector accounted for 49% of the total number of contractors within the BEC sector. Of the total number of mechanical contractors in the province, only 34 had more than 100 employees.

Table 49: Mechanical contractors by business size

Employee Range	Total	Percentage Share of Total
Fewer than 4	1,240	60.8%
Fewer than 10	1,579	77.4%
Fewer than 40	1,954	95.7%
Fewer than 100	2,007	98.3%
100 to 499	33	0.4%
Larger than 500	1	0.01%

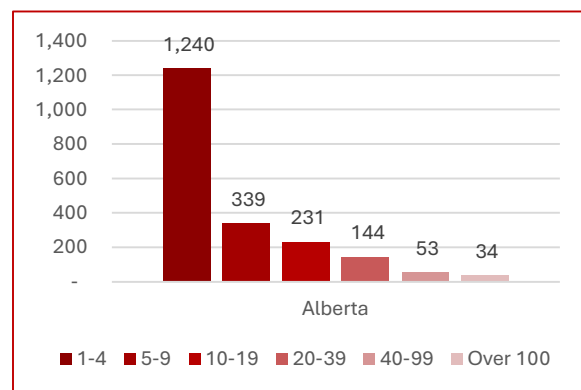


Figure 30: Number of businesses by size of firm

AVERAGE INCOME

Of the mechanical trades in Alberta, contractors and supervisors, mechanic trades was the highest paying, whereas the lowest paying occupation was oil and solid fuel heating mechanics. The average annual income for the mechanical trades in 2021 was \$73,486.

NOTE: These numbers represent the average for each trade across the entire construction sector, including self-employed individuals and new entrants to the industry. Experienced journeypersons and those working in the non-residential sector typically earn wages well in excess of the average, particularly experienced workers or those with specialized training.

Table 50: Average income by core mechanical trades in 2021

Mechanical Trades	Income
Contractors and supervisors, mechanic trades	\$ 99,000
Construction millwrights and industrial mechanics	\$ 98,400
Contractors and supervisors, pipefitting trades	\$ 88,300
Gas fitters	\$ 85,200
Steamfitters, pipefitters and sprinkler system installers	\$ 73,700
Heating, refrigeration and air conditioning mechanics	\$ 72,200
Boilermakers	\$ 69,400
Welders and related machine operators	\$ 65,900
Insulators	\$ 58,050
Plumbers	\$ 56,650
Sheet metal workers	\$ 55,000
Oil and solid fuel heating mechanics	\$ 51,000

Table 51: Core mechanical income versus the rest of building equipment in 2021

Trade Grouping	Income
Mechanical trades	\$ 73,486
Construction overall	\$ 65,147
Total, all industries	\$ 61,300

Source: 2021 Census, Statistics Canada


BRITISH COLUMBIA

OVERVIEW

Mechanical contractors in British Columbia play a critical role in the construction sector, specializing in the installation, maintenance, and repair of mechanical systems essential to building functionality and occupant comfort. Their work encompasses heating, ventilation, and air conditioning, plumbing, fire protection, refrigeration, and gas systems across residential, commercial, institutional, and industrial settings.

The mechanical sector employed more than 28,400 people in 2023, which equates to \$2.4 billion in wages and salaries. The sector is comprised of an estimated 2,800 contractors with a collective output estimated at \$7.2 billion, which accounts for 24% of the total construction industry in the province.


DIRECT AND INDIRECT IMPACTS



28,400

On- and off-site jobs

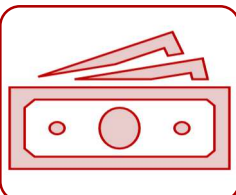
- 1 in 10 construction jobs
- An additional 25,000 in indirect employment



\$7.2 Billion

GDP


- 24% of total construction output
- \$2.8 billion in indirect impacts



\$2.4 Billion

Wages

- 12% of construction wages
- \$600 million in indirect wages



2,780

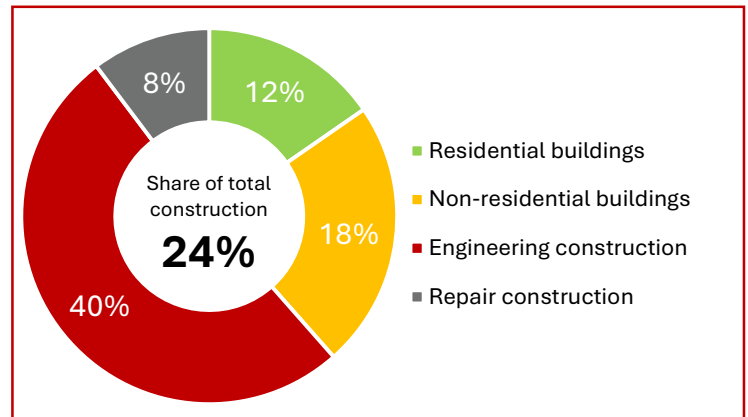
Contractor establishments

- 16% of construction establishments
- 76% of contractors have fewer than 10 employees

SECTORAL ECONOMIC OUTPUT SHARE

Mechanical contractors account for approximately 24% of total construction output in British Columbia, reflecting a strong and balanced role across major segments of the industry. With activity concentrated in engineering and residential construction, and a growing portfolio in urban infrastructure and public facilities, the sector is integral to supporting B.C.'s rapid growth and industrial expansion.

- **Engineering construction (40% of segment output):** Well above the national average of 35%, this figure highlights B.C.'s robust pipeline of resource, energy, and transportation infrastructure projects. Mechanical contractors are heavily involved in the delivery of large-scale projects such as liquefied natural gas terminals, hydroelectric developments, transmission systems, and port expansions, as well as the long-term maintenance of critical infrastructure.



- **Non-residential building construction (18% of segment output):** Slightly below the national average of 21%, this share reflects B.C.'s diverse but compact institutional and commercial construction market, which includes schools, hospitals, high-density office buildings, and mixed-use facilities, particularly in Greater Vancouver and Victoria. Mechanical contractors are active in delivering efficient, code-compliant systems tailored to the province's high sustainability standards.
- **Repair construction (8% of segment output):** Just above the national benchmark of 7%, this figure points to a moderate focus on maintaining and upgrading mechanical systems in both older urban buildings and aging infrastructure. Contractors are frequently engaged in retrofits for energy efficiency, system safety improvements, and code compliance across both the public and private sectors.
- **Residential construction (12% of segment output):** Aligned with the national average, this share reflects the intense pace of residential construction in the province, particularly in urban and suburban centres. Mechanical contractors support a vast number of multi-unit, high-rise, and mixed-use housing developments, as well as townhomes and detached dwellings. They install systems that ensure modern housing meets high standards for safety, energy performance, and occupant comfort.

Figure 31: Mechanical share contributions (%) to the economic output of British Columbia's construction subsectors

Taken together, B.C.'s mechanical contracting sector reflects a well-diversified and strategically positioned industry, with substantial contributions to industrial infrastructure, growing residential markets, and essential public buildings. Its high share of engineering activity in particular underscores the sector's importance to large capital projects and long-term infrastructure planning across the province.

EMPLOYMENT

As of 2023, the mechanical sector of British Columbia's construction industry employed an estimated 28,400 individuals. This represents a significant share (12%) of the total construction industry workforce, which totalled approximately 237,525 workers.

Table 52: Mechanical sector employment composition

Occupation	Size of Total Workforce	Occupation% Share of Total Mechanical Workforce	Mechanical Occupation% Share of Total Occupations in Construction Workforce
Core trades	19,422	68%	44%
Managerial and administrative	2,970	10%	12%
Other trades	5,962	21%	11%
Total	28,355	100%	12%

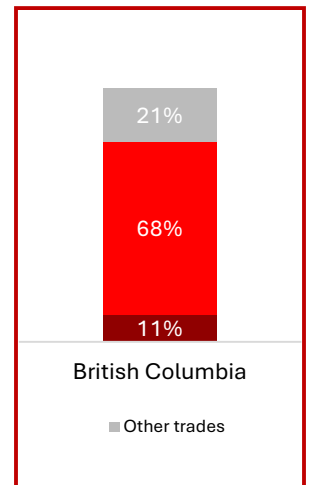


Figure 32: Percentage share of industry employment by profession category

CORE TRADES

Mechanical contractors employ 12 key trades which account for 67% of their workforce. Plumbers are the largest among these core trades, numbering 10,838 workers, accounting for 41% of the mechanical sector.

Table 53: Core mechanical trades in 2023

Mechanical Core Trades	Total Employed by Mechanical Sector in Core Trade	Core Trade Share of Total Mechanical Workforce	Mechanical Core Trade Workforce as Share of Total in Construction Workforce
Plumbers	10,838	36%	94%
Heating, refrigeration and air conditioning mechanics	3,225	11%	98%
Contractors and supervisors, pipefitting trades	1,854	6%	91%
Steamfitters, pipefitters and sprinkler system installers	1,665	5%	78%
Sheet metal workers	1,365	4%	54%
Contractors and supervisors, mechanic trades	1,193	4%	84%
Gas fitters	759	2%	92%
Construction millwrights and industrial mechanics	496	2%	57%
Welders and related machine operators	294	1%	15%
Insulators	233	1%	17%
Oil and solid fuel heating mechanics	73	0.2%	92%
Boilermakers	49	0.2%	32%

APPRENTICESHIP DEVELOPMENT

Mechanical trades—specifically millwrights; plumbers, pipefitters, and steamfitters; refrigeration and air conditioning mechanics; and sheet metal workers—play a central role in British Columbia's apprenticeship system. According to Statistics Canada data, these trades accounted for approximately 26% of total registrations and 27% of certifications across key construction trades in 2023. This reflects a slight downward trend over the past three years, with granted apprentice certifications rising from 28% in 2021.

SIZE OF BUSINESSES

In 2023, there were 2,780 mechanical contractors across British Columbia. The sector accounted for 51% of the total number of contractors within the BEC sector. Of the total number of mechanical contractors in the province, only 33 have more than 100 employees.

Table 54: Mechanical contractors by business size

Employee Range	Total	Percentage Share of Total
Fewer than 4	1,579	56.8%
Fewer than 10	2,178	78.4%
Fewer than 40	2,700	97.1%
Fewer than 100	2,747	98.8%
100 to 499	33	0.3%

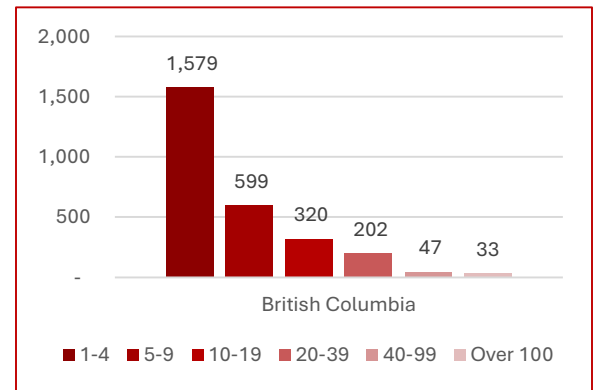


Figure 33: Number of businesses by size of firm

AVERAGE INCOME

Of the mechanical trades in British Columbia, contractors and supervisors, mechanic trades was the highest paying, while the lowest paying occupation was oil and solid fuel heating mechanics. The average annual income across the core mechanical trades in 2021 was \$67,456.

NOTE: These numbers represent the average for each trade across the entire construction sector, including self-employed individuals and new entrants to the industry. Experienced journeypersons and those working in the non-residential sector typically earn wages well in excess of the average, particularly experienced workers or those with specialized training.

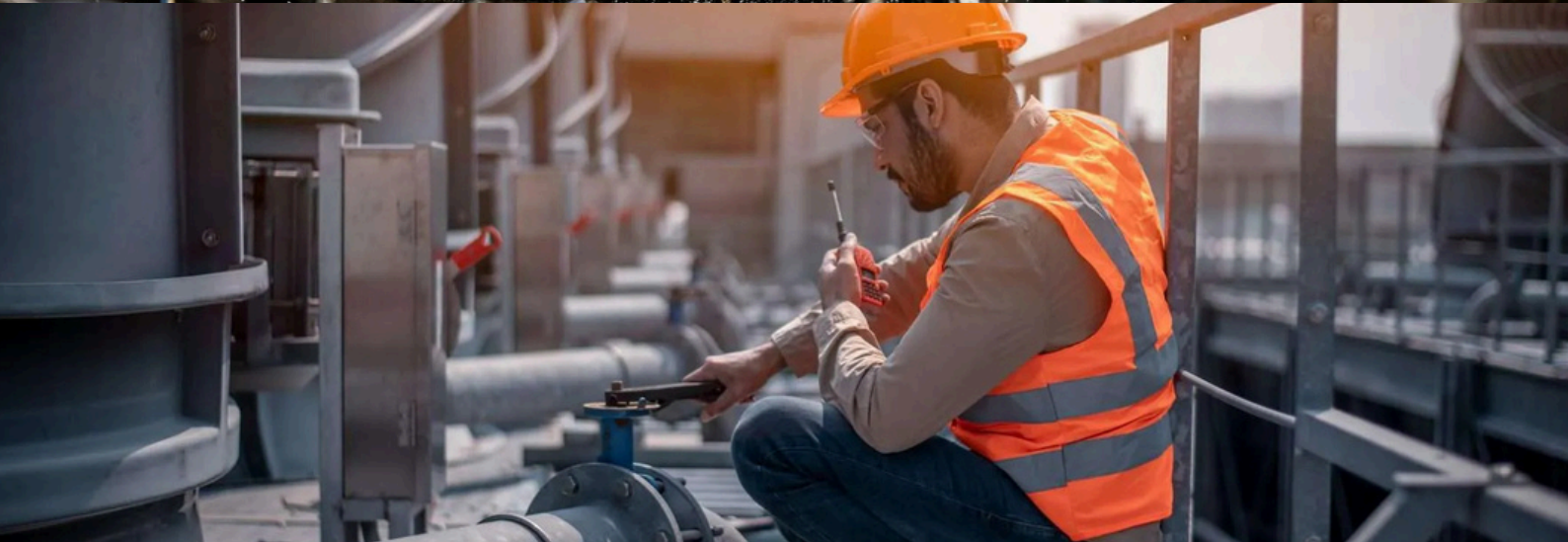
Table 55: Average income by core mechanical trades in 2021

Mechanical Trades	Income
Contractors and supervisors, mechanic trades	\$ 90,100
Construction millwrights and industrial mechanics	\$ 87,000
Contractors and supervisors, pipefitting trades	\$ 81,100
Boilermakers	\$ 72,800
Steamfitters, pipefitters and sprinkler system installers	\$ 69,700
Heating, refrigeration and air conditioning mechanics	\$ 68,600
Welders and related machine operators	\$ 63,350
Gas fitters	\$ 62,700
Sheet metal workers	\$ 59,900
Plumbers	\$ 51,350
Oil and solid fuel heating mechanics	\$ 50,000
Insulators	\$ 46,200

Table 56: Core mechanical income versus the rest of building equipment in 2021

Trade Grouping	Income
Mechanical trades	\$ 67,456
Construction	\$ 57,039
Total, all industries	\$ 55,100

Source: 2021 Census, Statistics Canada



Prepared by: