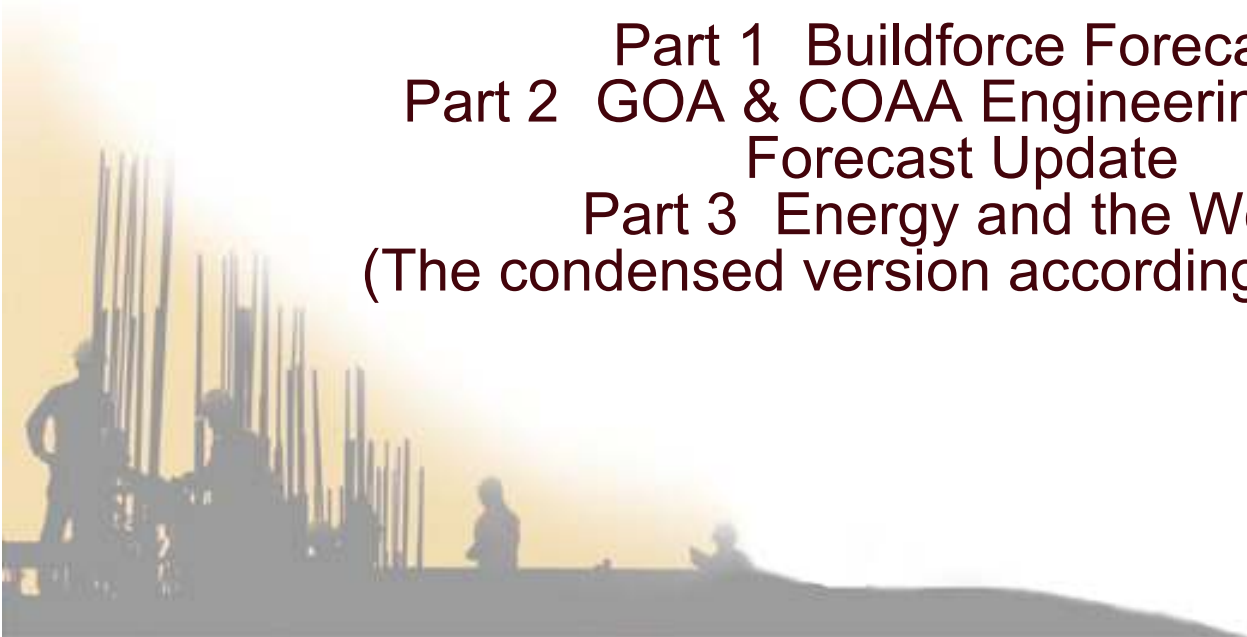




COAA Best Practices Forecast 2014

Part 1 Buildforce Forecast
Part 2 GOA & COAA Engineering Projects
Forecast Update
Part 3 Energy and the World
(The condensed version according to Holmes)





CONSTRUCTION AND MAINTENANCE LOOKING FORWARD

ALBERTA



For More Information Go To;

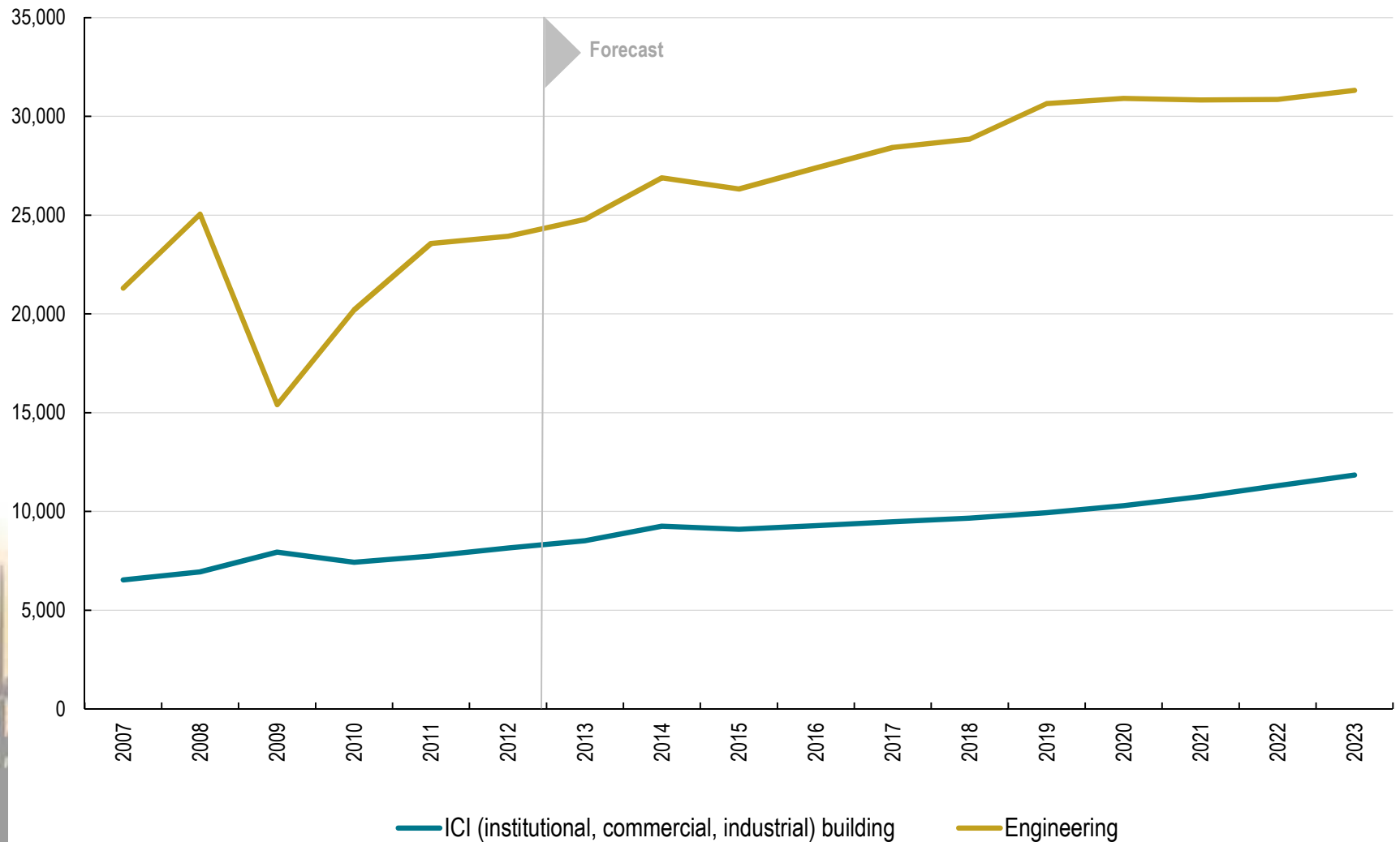
www.constructionforecasts.ca
www.buildforce.ca





Non-residential construction investment

\$2007 millions*



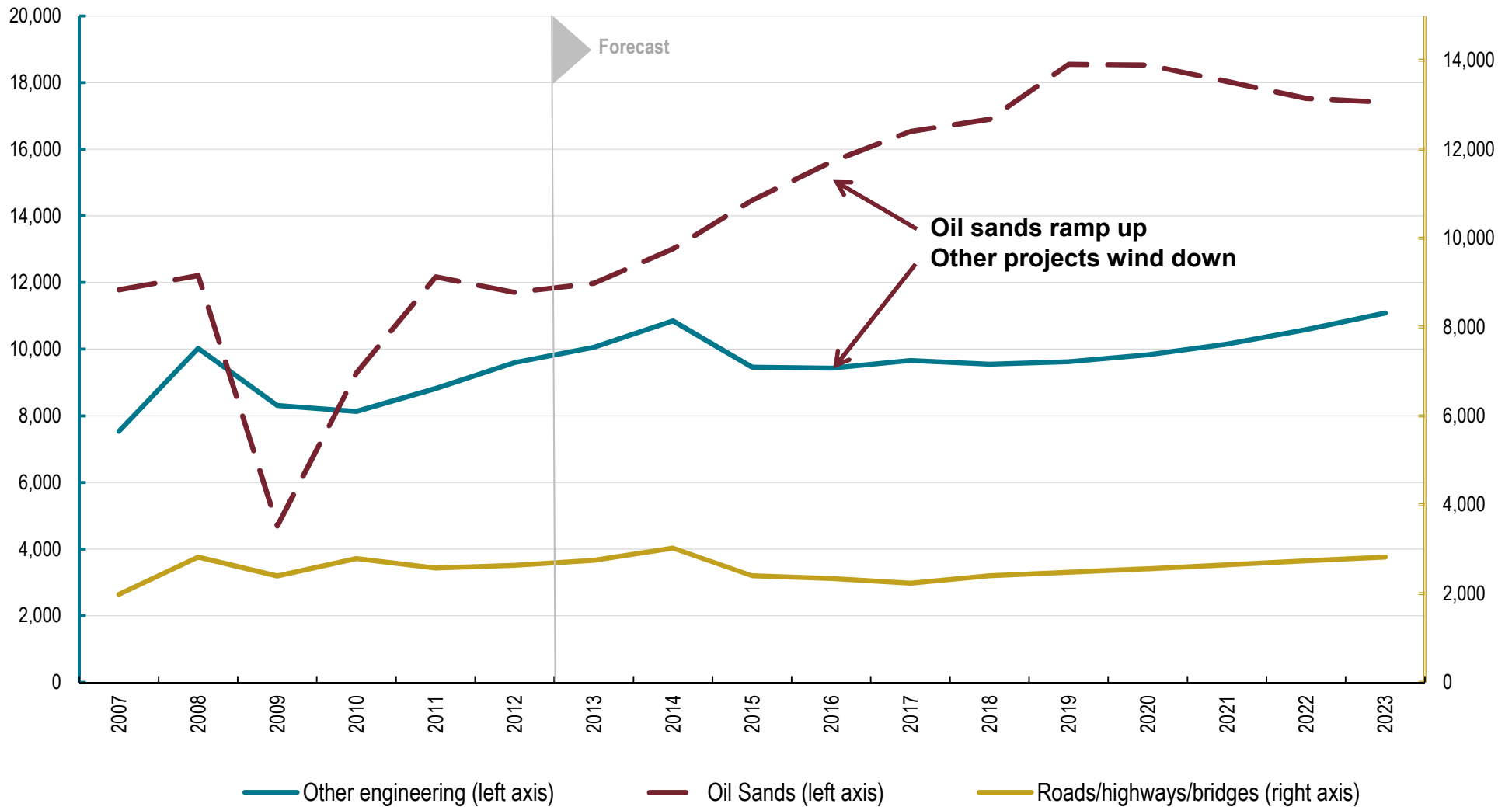
Source: BuildForce Canada





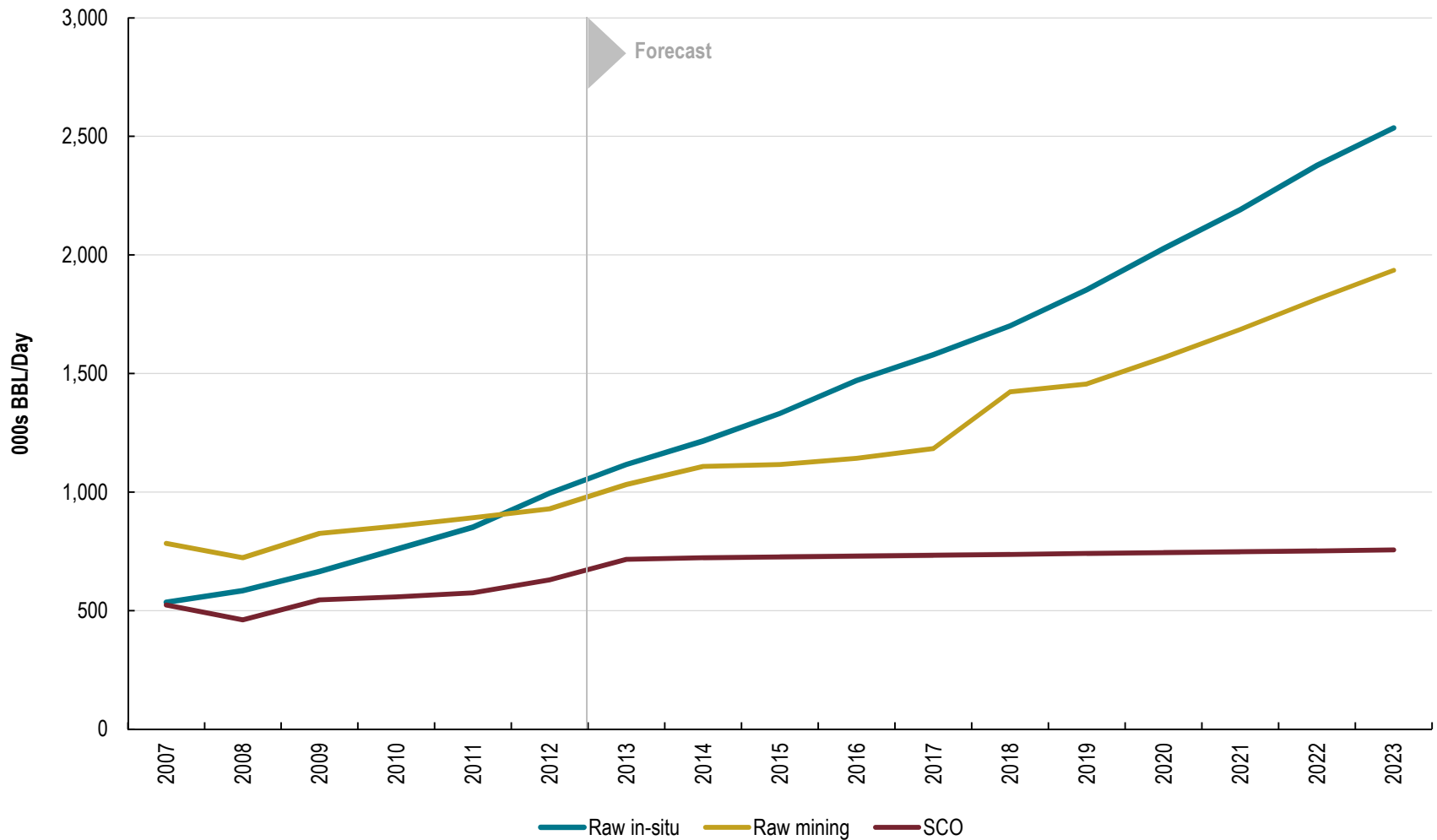
Engineering construction investment

\$2007 millions* (see relevant y-axis)



Source: BuildForce Canada

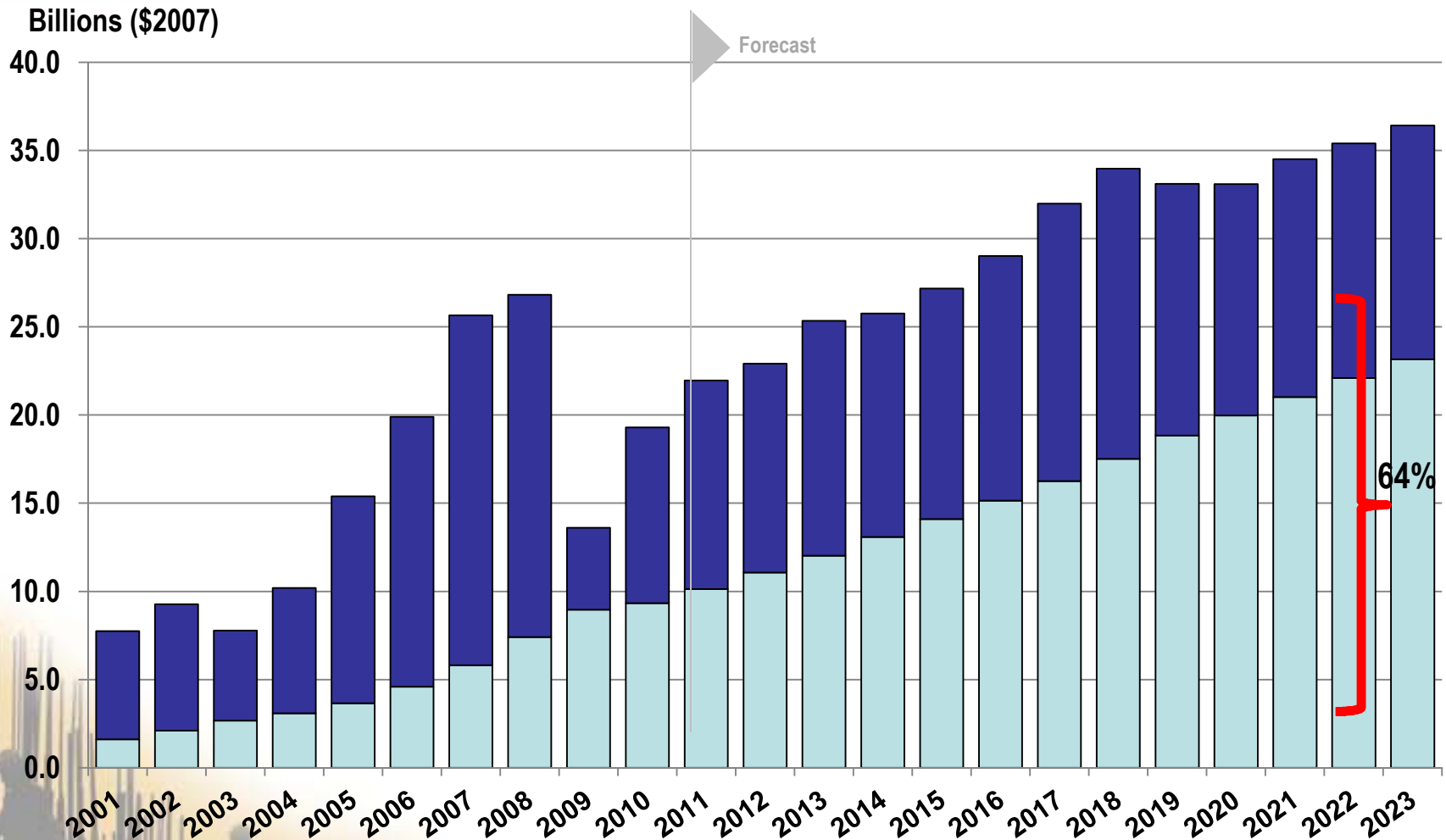
CAPP oil sands production (000s BBL/Day)



Source: BuildForce Canada based on Crude Oil Forecast, Markets and Transportation (CAPP, June 2013)



Oil Sands Investment



64%

Includes machinery and equipment

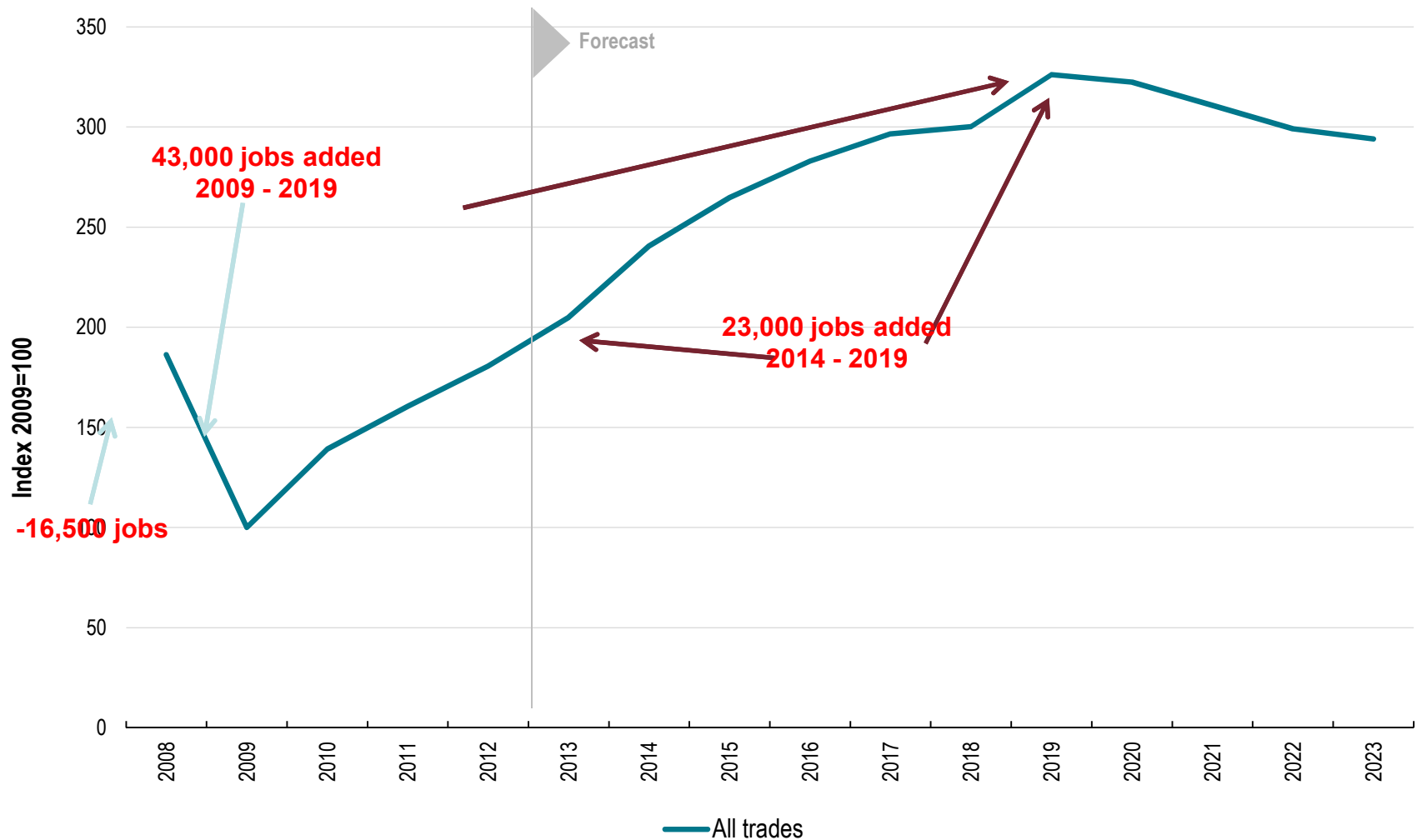
■ Sustaining Capital ■ New

Source: BuildForce Canada (2014 Scenario)



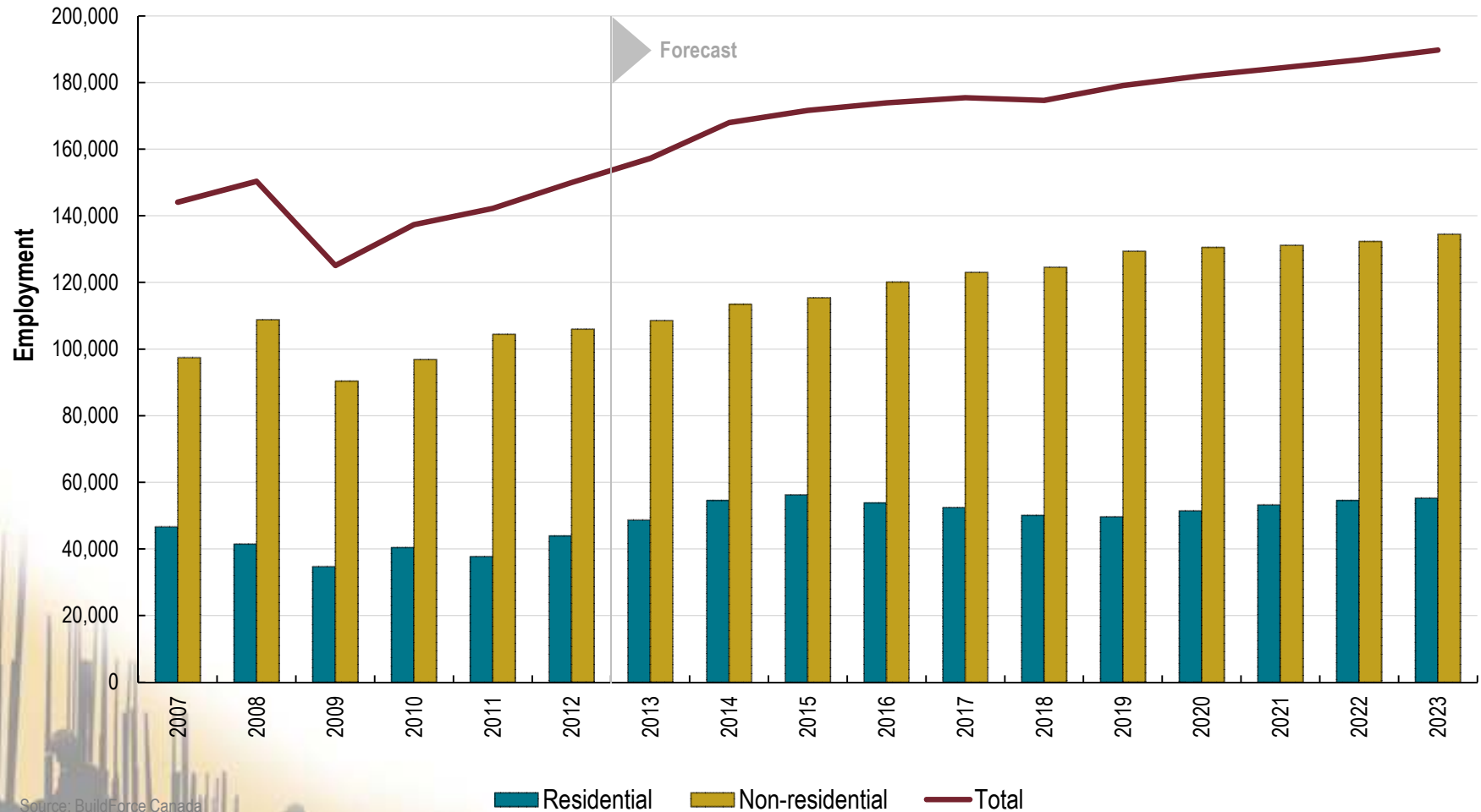
Oil sands construction employment index

Selected trades (Index 2009=100)



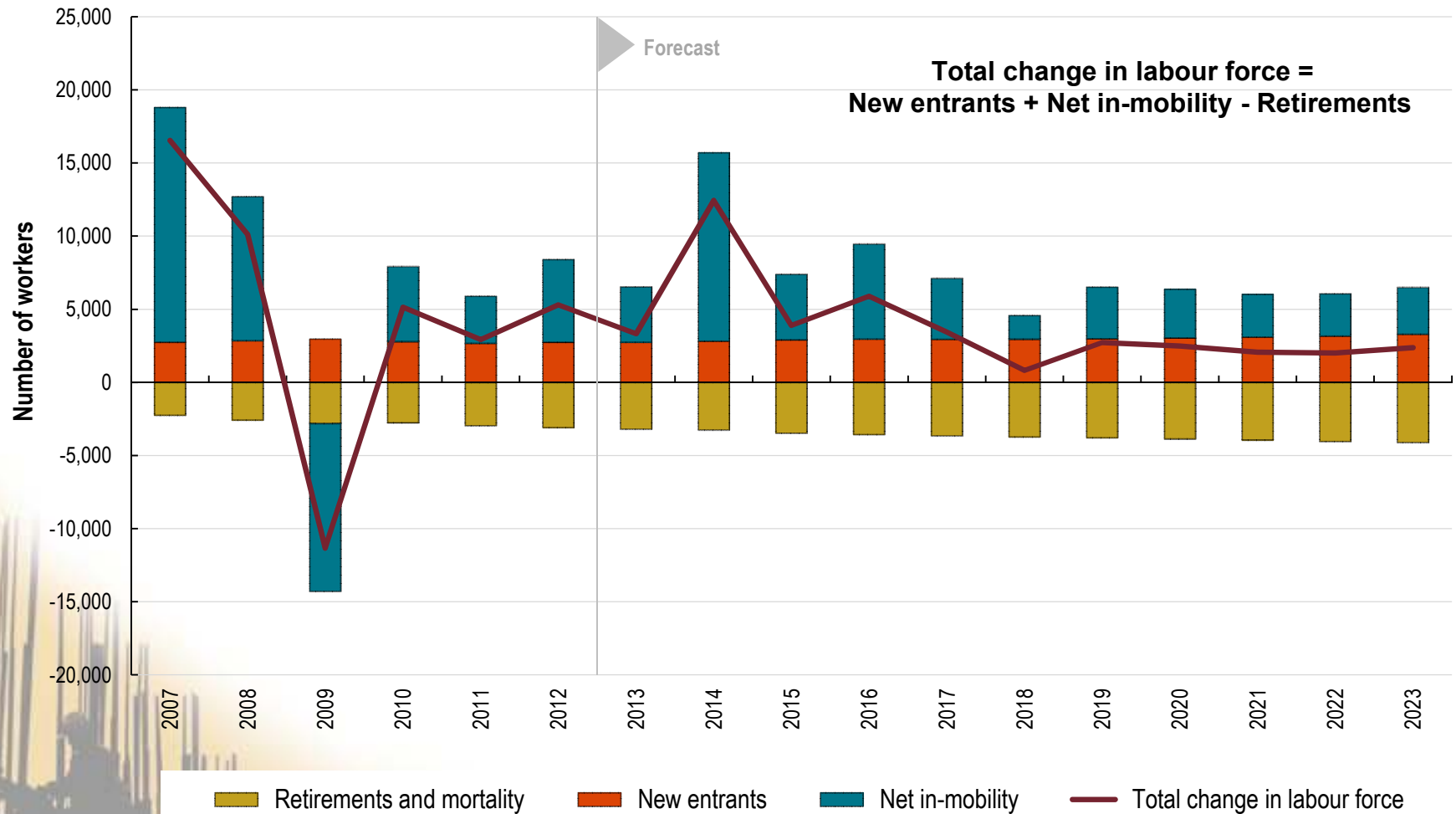
Source: BuildForce Canada

Construction labour requirements



Source: BuildForce Canada

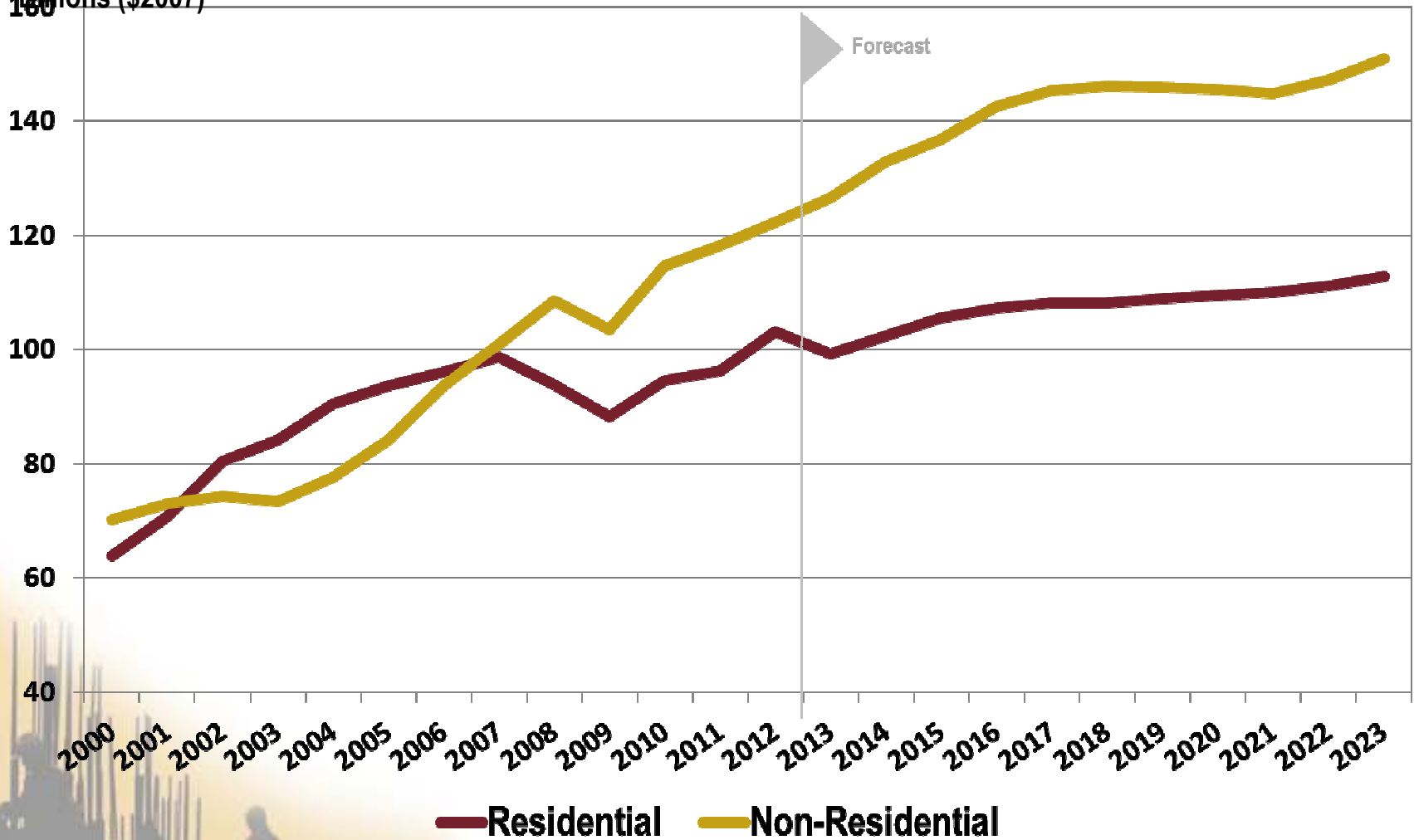
The available workforce



Source: BuildForce Canada

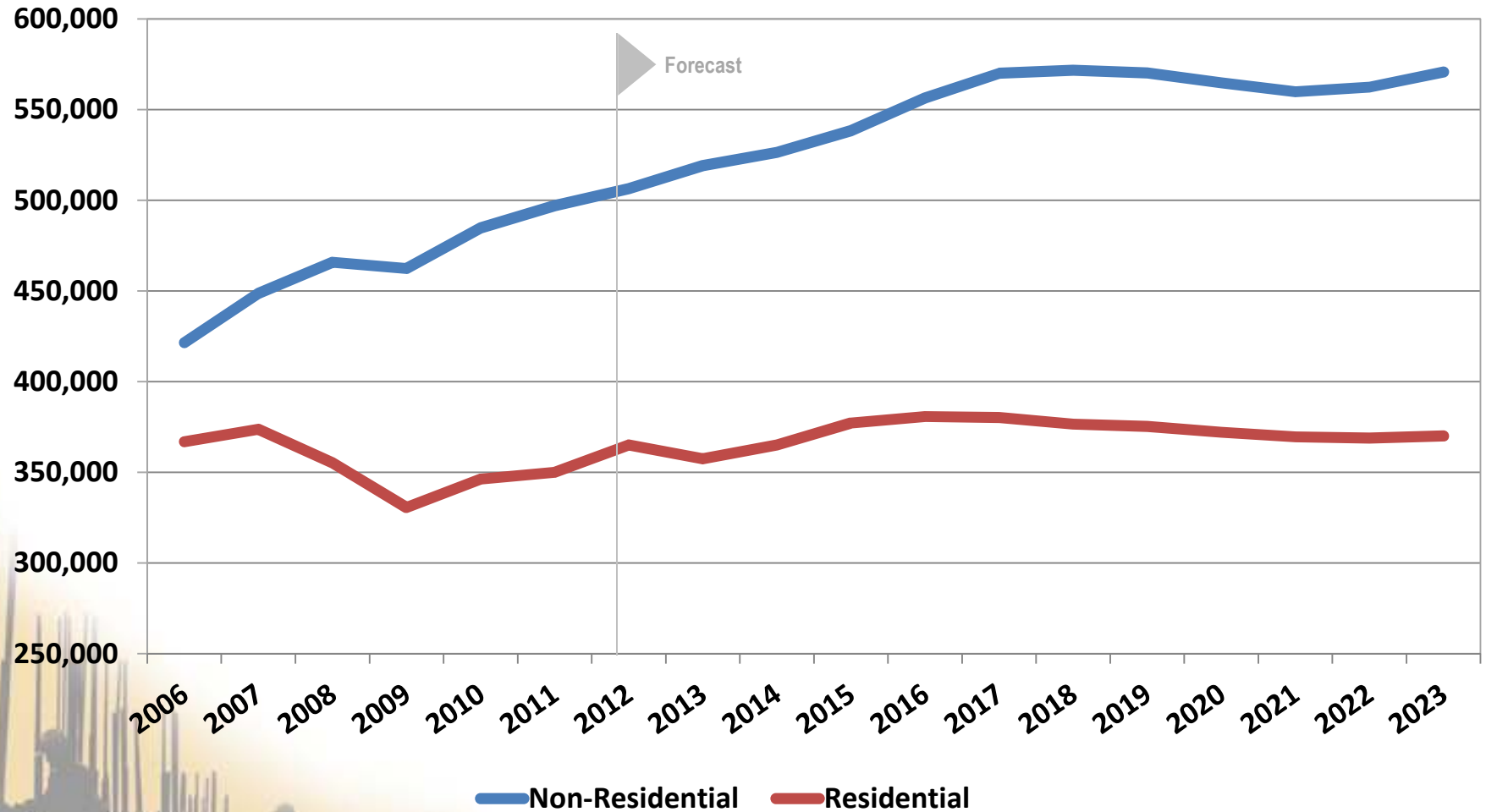
Construction Investment Canada

Billions (\$2007)





Construction Employment Canada

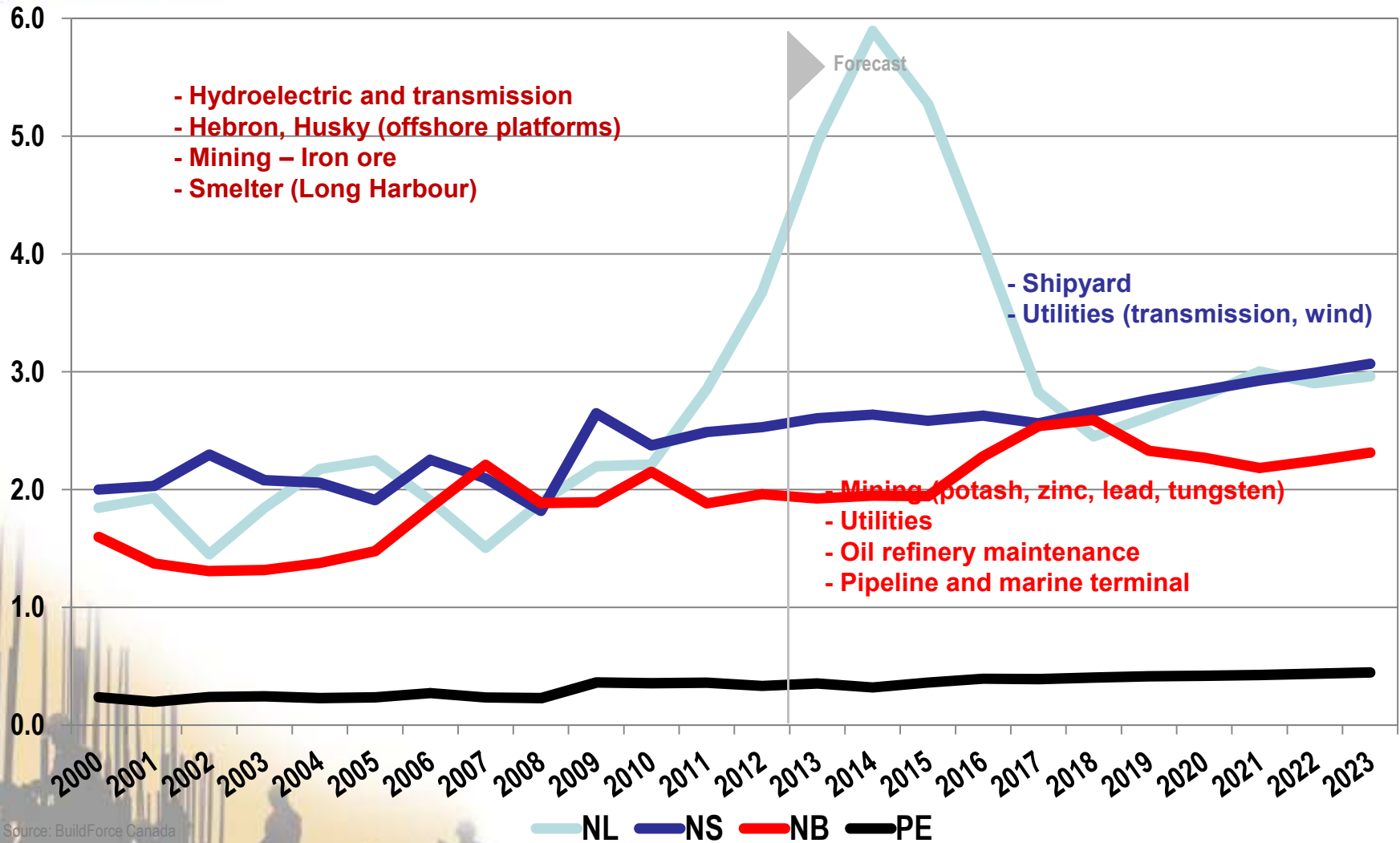


Source: BuildForce Canada (2014 Scenario)



Non-Residential Construction Atlantic Canada

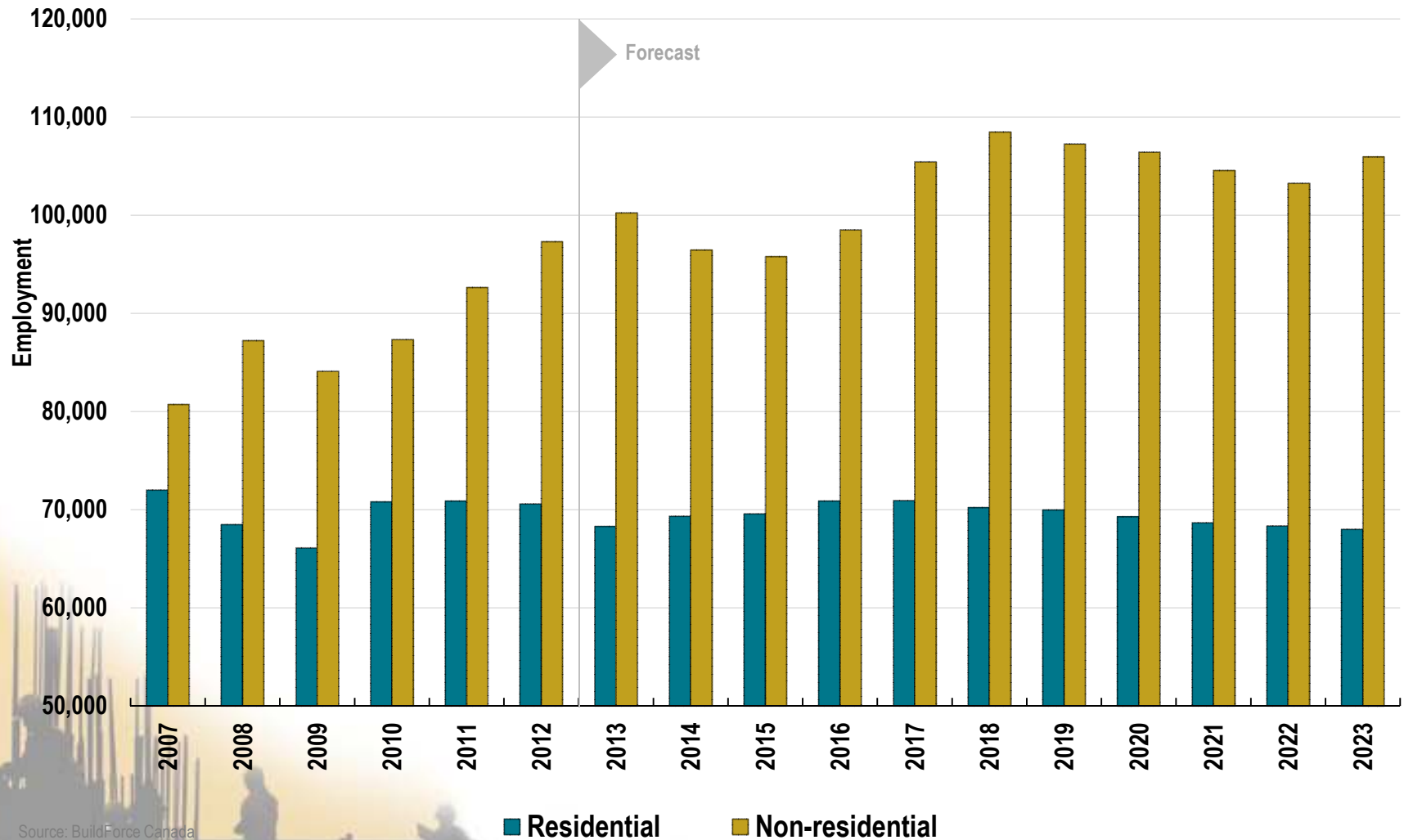
Billions (\$2007)



Source: BuildForce Canada

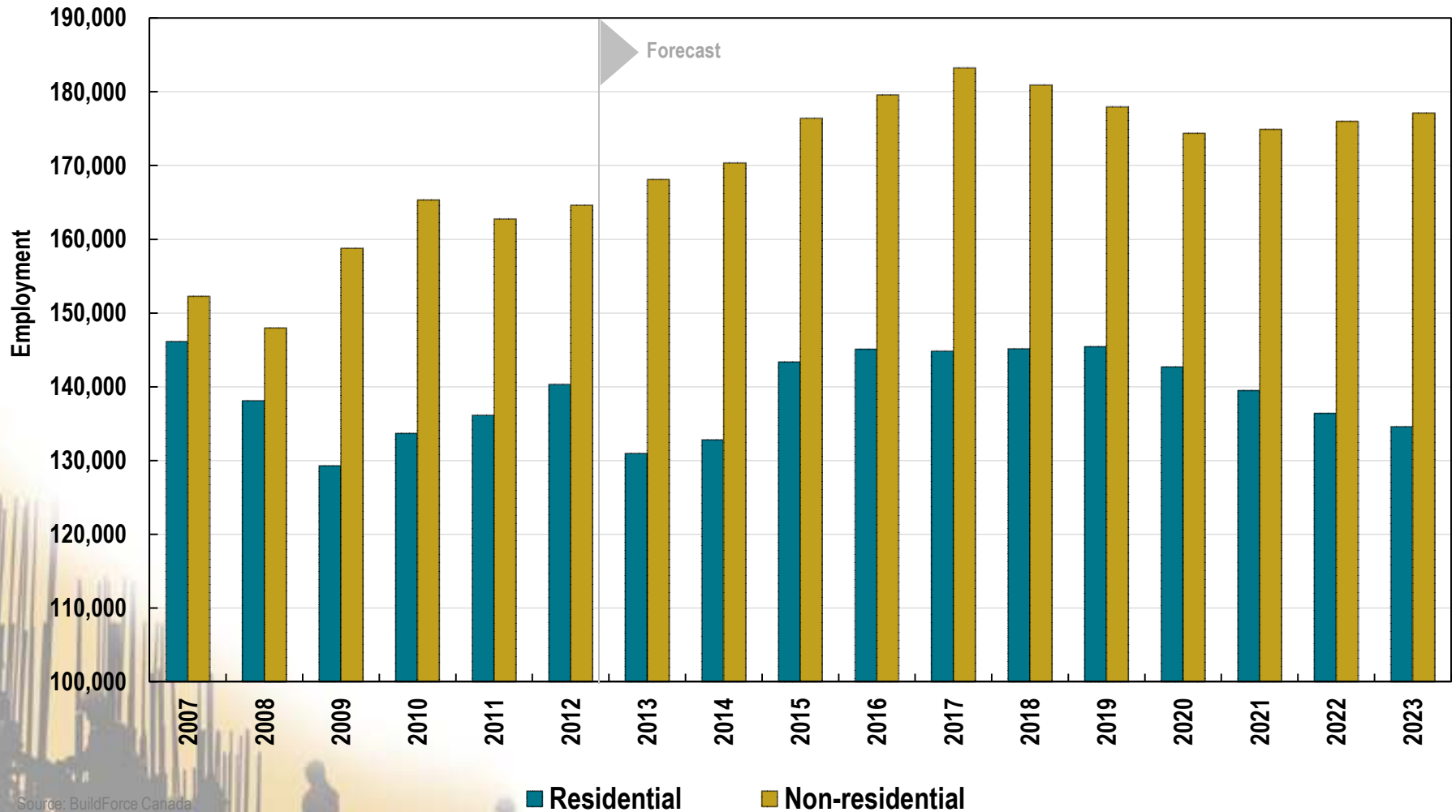
Source: BuildForce Canada (2014 Scenario)

Non-Residential Construction Employment – Quebec

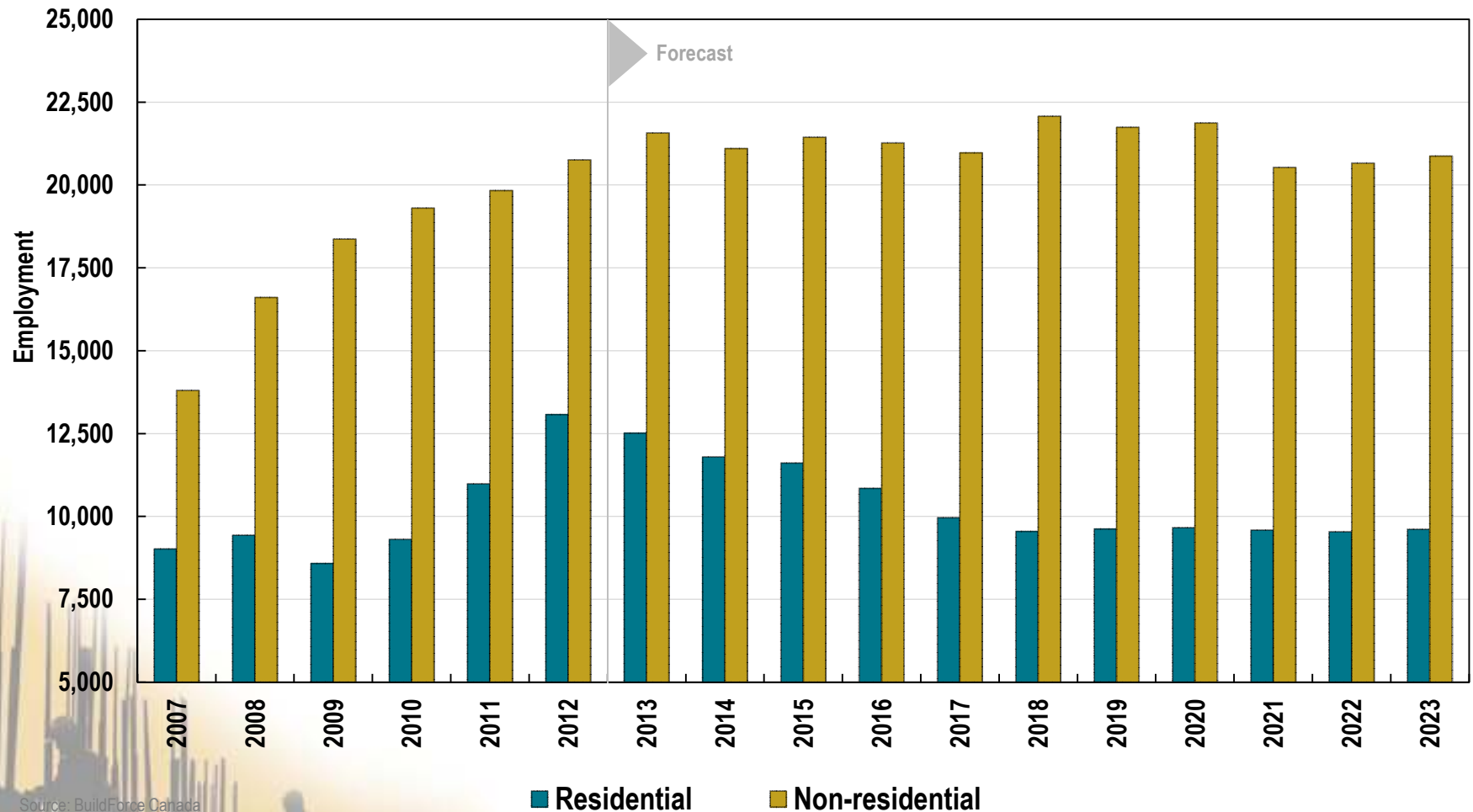


Source: BuildForce Canada

Non-Residential Construction Employment – Ontario

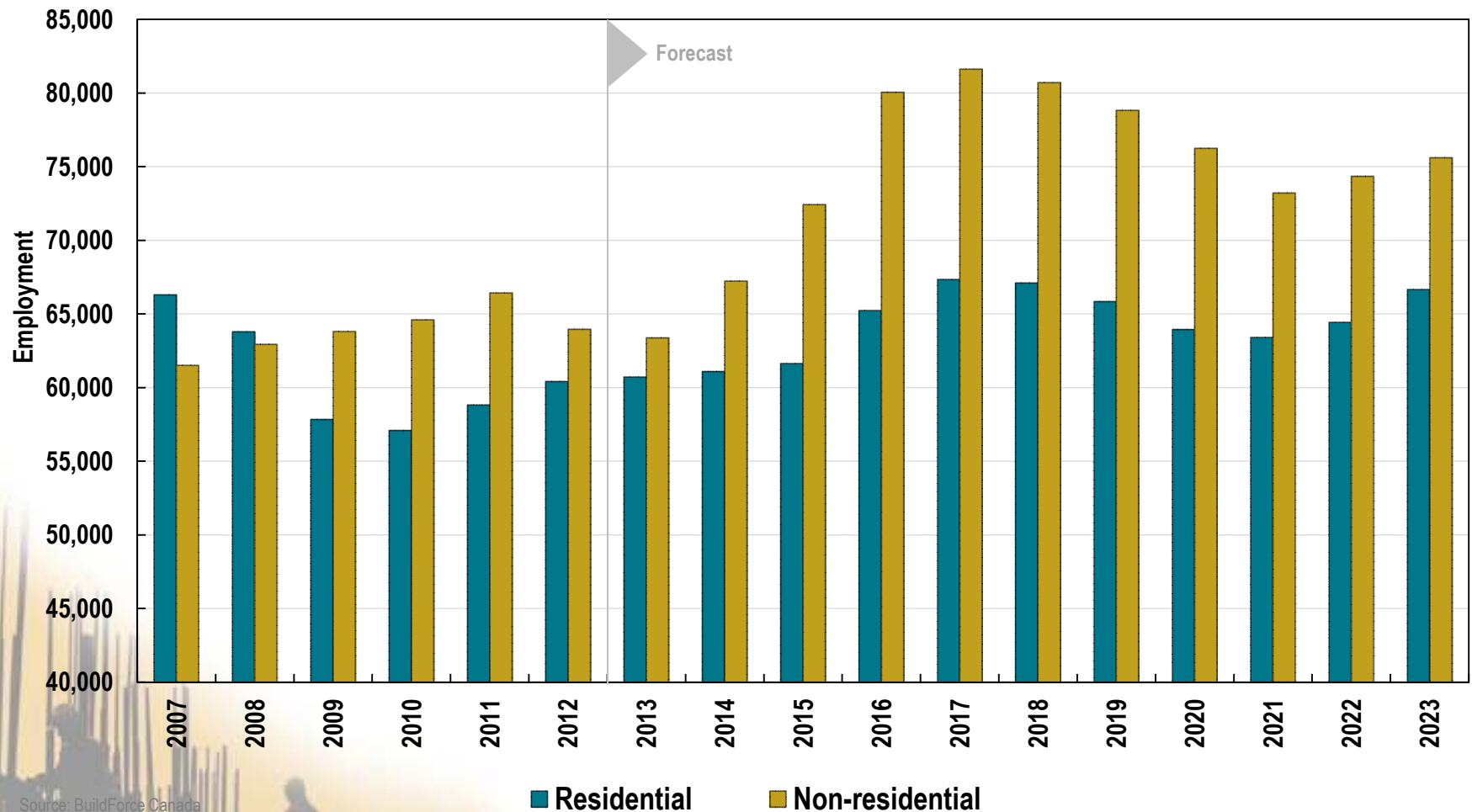


Non-Residential Construction Employment – Saskatchewan



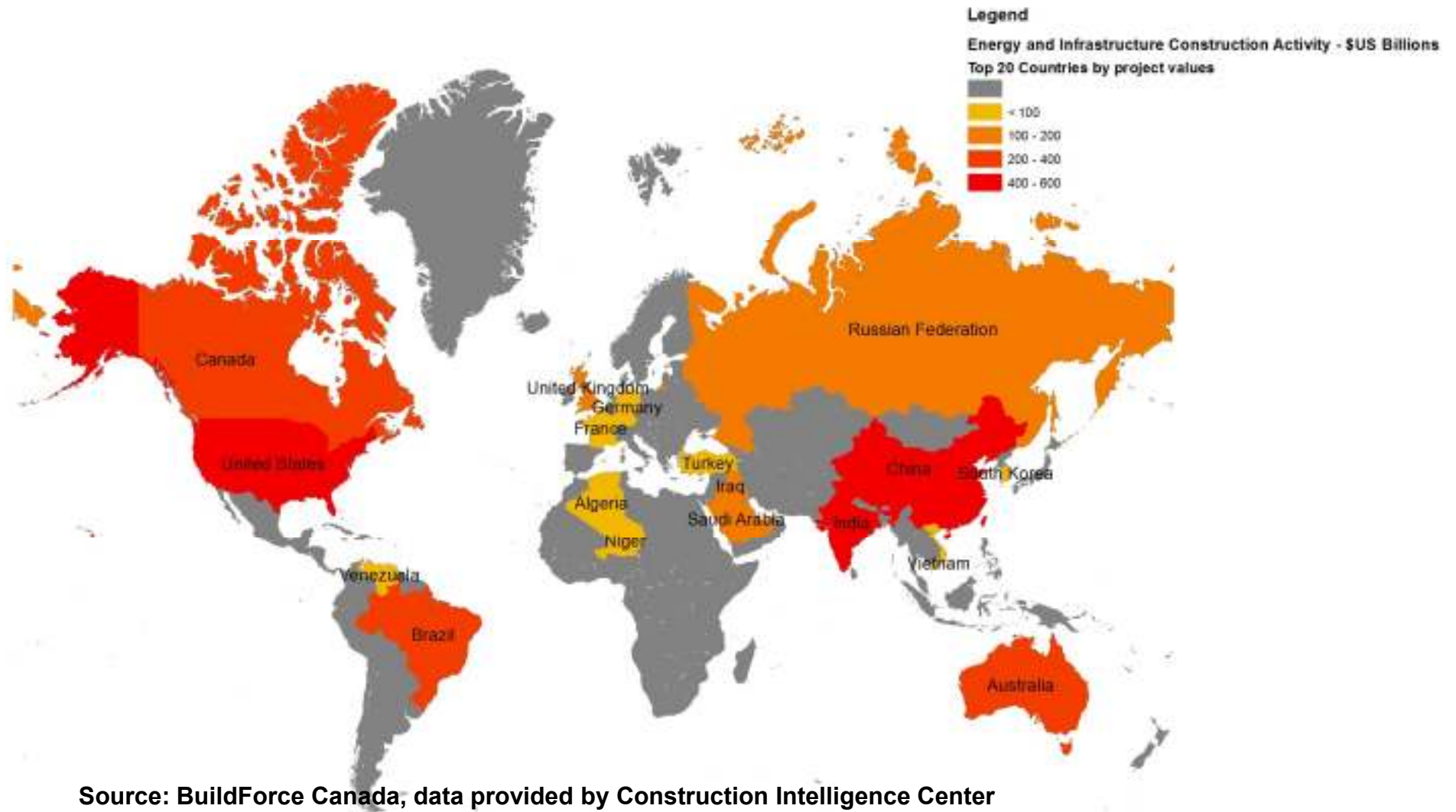
Source: BuildForce Canada

Non-Residential Construction Employment – British Columbia



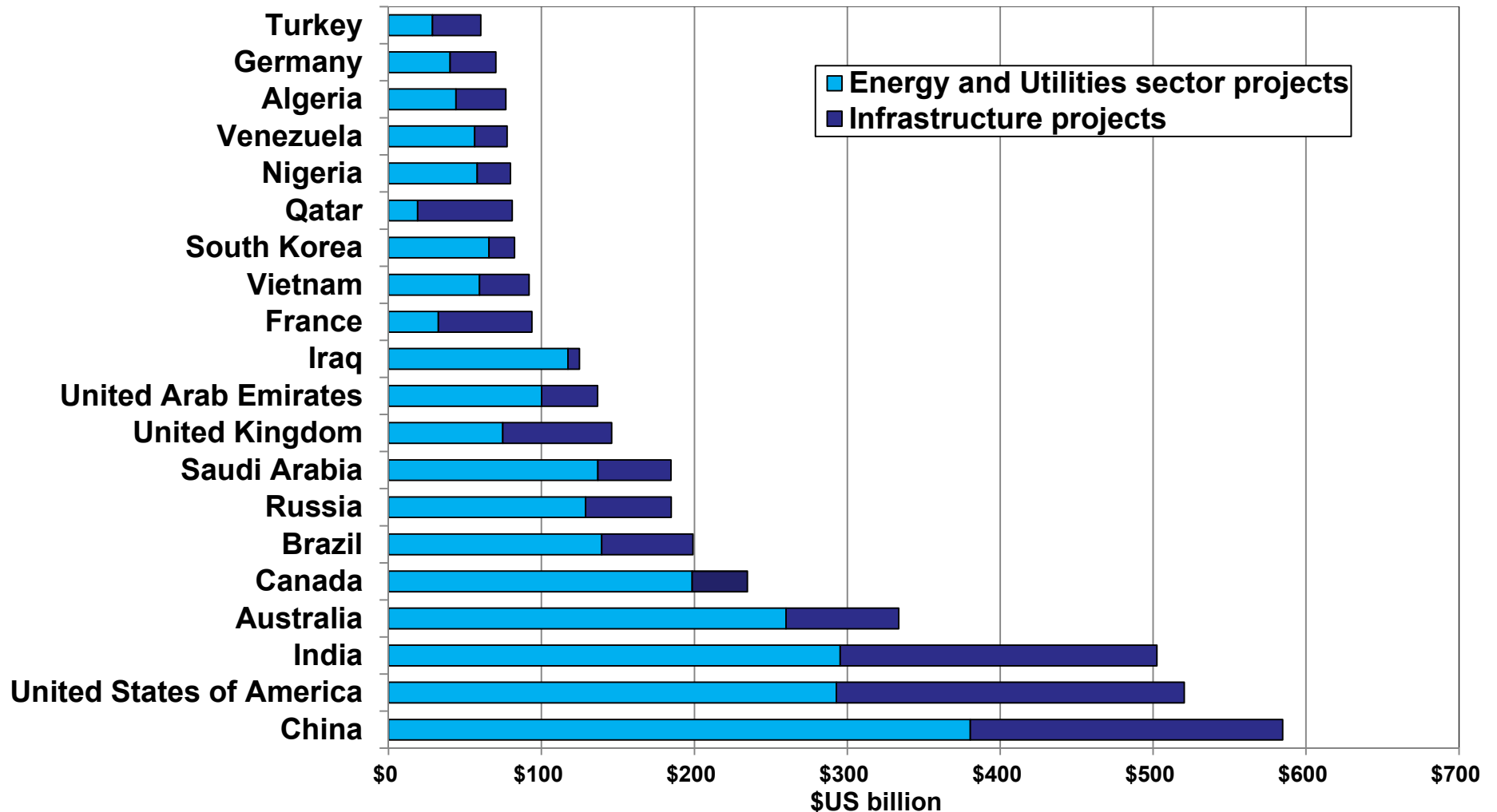
Source: BuildForce Canada

Global Energy and Infrastructure Hotspots Underway or Constructed by Country, 2013 (\$US Billions)



Global Energy and Infrastructure Hotspots

By type, by Country (\$US Billions)



Source: BuildForce Canada, data provided by Construction Intelligence Center