

EYE ON ICI NEWSLETTER

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2014 OCS State of the Industry and Outlook Conference - Hilton Toronto Hotel

EVENT RECAP

Focusing on Commercial Market Opportunities: The 2014 OCS Annual State of the Industry and Outlook Conference

On March 5th, the OCS hosted its 14th annual State of the Industry and Outlook Conference at the Hilton Toronto Hotel. Over 200 attendees had a chance to gain some insight into the fortunes of Ontario's economy and construction industry. This year's conference looked at opportunities in the commercial sector and the link between transit infrastructure and commercial development.

The Hon. Yasir Naqvi, Minister of Labour, kicked things off with a strong opening message on worker safety. He highlighted that accident prevention was a key goal and that the government's new integrated health and safety strategy would go a long way to achieving this end. He touched on the new regulation pertaining to mandatory health and safety training for workers and supervisors, which came into force on July 1st while also mentioning the government's new working at heights training standard, expected to become mandatory in the summer of 2014.

Next on the docket was Derek Burleton, Deputy Chief Economist at TD Bank, who delivered his take on future economic prospects. This was Derek's 2nd time at our event, and he delivered a clear and understandable message about the likely path of the economy. Specifically, he noted that the global economy will



Deputy Chief Economist Derek Burleton of TD Bank Financial Markets

continue to slowly heal from the financial crisis while moderate but improved growth was in the cards for Canada's and Ontario's economies. Regarding construction, he indicated that while the housing market would likely slow, non-residential construction would probably remain strong over the near term.

Katherine Jacobs, OCS Director of Research and Operations, then delivered the outlook for Ontario's ICI construction industry, drawing on insights from the annual *Survey of Ontario's ICI Construction Industry*. As Katherine indicated, contractors were more upbeat about prospects for 2014, particularly in the GTA, though increased input costs were anticipated and labour supply

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OCS Director of Research & Operations, Katherine Jacobs

concerns were still top of mind for companies. For 2014, she noted that the commercial sector has the greatest potential though industrial investment was also likely to grow. Conversely, institutional investment was projected to fall though at a slower rate than in 2013.

Carl Gomez - Chief Economist at commercial real estate firm Bentall Kennedy - delivered his take on the commercial market, with a particular focus on Toronto. He highlighted some interesting trends in the marketplace, including that cities are moving towards a "live, work, play" design paradigm where people can do all of these things in one area, facilitating increased construction of mixed-used developments. Carl mentioned that companies are increasingly moving to the downtown core to take advantage of population growth in the area and to avoid the cumbersome travel associated with being in the suburbs. Finally, he remarked that having a well-articulated transportation system is vital to continued commercial growth and economic productivity.



Chief Economist Carl Gomez of Bentall Kennedy

The presentations concluded with Jack Collins, Executive VP of Rapid Transit Implementation for Metrolinx. He focused on current projects under construction, like the Union-Pearson Express and the Eglinton Crosstown LRT, and the *Next Wave* of Metrolinx projects, indicating that \$34 billion worth of transportation infrastructure would be implemented in the second



Executive VP of Rapid Transit Implementation for Metrolinx, Jack Collins



MPP, Yasir Naqvi



Over 200 industry delegates attended the 14th annual State of the Industry & Outlook Conference

round. With these projects, Metrolinx hoped to reduce commute times to a more manageable level while decreasing greenhouse emissions and increasing the number of people who live close to rapid transit.

Overall the conference was very well received, with 90% of attendees finding it worthwhile and 100% indicating that they would recommend this event to others in the industry. Next year's conference will be held on March 3rd.

OCS



OCS Chief Executive Officer, Sean Strickland



(L to R) Derek Burleton (TD Bank) and Sean Strickland (OCS Chief Executive Officer) field questions from the audience



Joe Keyes (OCS President), Sean Strickland (OCS Chief Executive Officer), various OCS Board members and staff with Ironworker Local 721 apprentices

Photography courtesy of Janis Rees / Kaleidoscope Photography for 2014 State of the Industry & Outlook Conference

Future Building 2014 - Burlington, Ontario

Constructing Awareness, Building Interest:
Future Building 2014

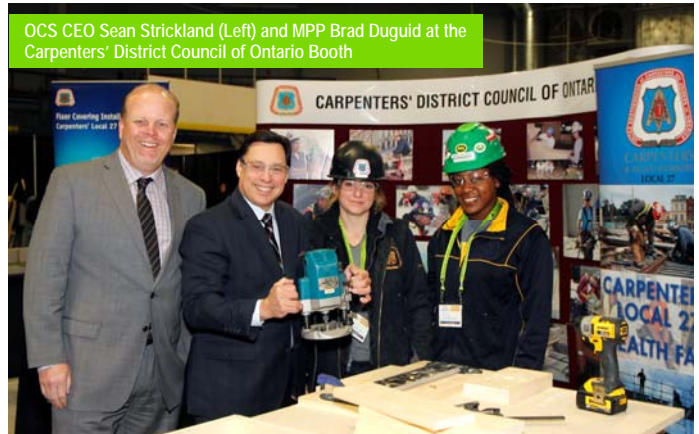
MPP Brad Duguid cuts the ceremonial sheet metal ribbon to start Future Building 2014 in Burlington, Ontario

With each passing day, it's becoming clearer that the construction industry must continue their efforts to attract young people to the industry, as construction will be competing with all other sectors for the workers of tomorrow. One of the ways that the OCS works to establish interest in the industry is by hosting *Future Building*. Always a popular event with stakeholders, youth and educators alike, this year it was held in Burlington at the Mainway Recreation Centre. Over 7,000 participants came to *Future Building* over a three day period from April 8th – 10th.

The uniqueness of the event is that it provides opportunities for youth to get some hands-on experience doing some of the work that tradespeople do. Exhibitors set up fun and interactive booths where kids get a chance to, for example, lay a brick, walk an I-beam, weld, or virtually spray paint a wall. All told, there were 29 exhibitors made up of a variety of industry stakeholders including the trades, contractors, safety and education, including those representing the aboriginal community.

The Hon. Brad Duguid, Minister of Training Colleges and Universities, was on hand to deliver opening remarks, along with OCS board members Pat Dillion and Ron Martin as well as Sean W. Strickland, CEO of the OCS. Mr. Duguid also had a chance to tour the facilities and liaise with stakeholders.

The event generated positive publicity for the unionized industry's role in construction trades training, as CHCH's "Morning Live" television show did seven separate live segments at the



Pipe Trades



Operating Engineers



event. Additionally, through social media we promoted *Future Building* through Facebook, Twitter and Instagram.

Overall, *Future Building* was a positive learning experience. As one teacher noted, *Future Building* was an "amazing event. The students loved it. We would participate again in a heartbeat." Students also enjoyed the festivities, with one remarking that "it was pretty cool" and another saying that they "learned so much about the trades available in Ontario".



Photography courtesy of Janis Rees / Kaleidoscope Photography and Ryan Isajima / OCS for Future Building 2014

CURRENT ANALYSIS AND NEAR TERM OUTLOOK: TRENDS IN INVESTMENT AND BUILDING PERMITS

Overall ICI Market

In the first quarter of the year, constant dollar, seasonally adjusted total ICI investment inched up 1% (q/q) across Ontario, lifted by increasing commercial expenditures and weighed on primarily by declining institutional investment. Industrial investment also dropped on a quarter-over-quarter basis.

Industrial Sector

Current Analysis

Constant dollar industrial investment dipped 1.2% (q/q) to \$494 million in the first quarter of the year, though this follows a 9% surge in 2013. The province dealt with an extremely harsh winter (think Polar Vortex) which negatively impacted the manufacturing and export sectors of the economy. As these two sectors strongly correlate with industrial investment, this leads one to believe that the weather weighed on industrial building as well. Therefore, the first quarter data was probably obscured by a temporary factor. We will need more data to truly assess the trend in industrial building in 2014. Taking a broader view, the level of industrial investment continues to grind higher, though has yet to reach its pre-recession level.

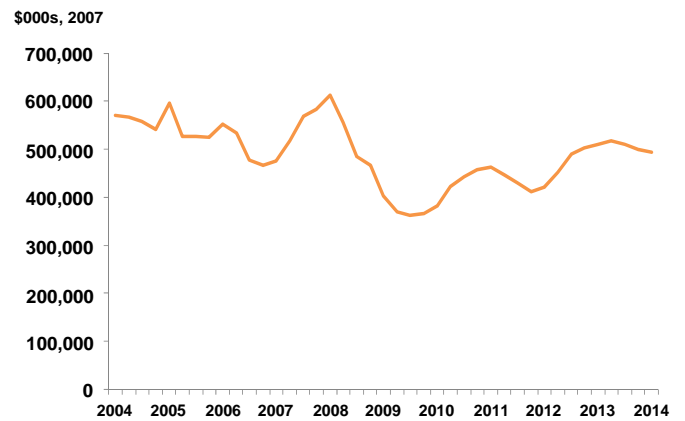
Regionally, 11 out of 15 Census Metropolitan Areas (CMAs) dropped in the first quarter. The CMAs which weighed on growth the most included Oshawa – where investment is unwinding from two huge years in 2012 and 2013, and Hamilton (Maple Leaf Foods project is gearing down). Conversely, by far the largest positive contribution to growth came courtesy of Toronto where investment jumped 12% to its highest level since 2008. There is also positive momentum in Brantford's industrial market, where industrial investment has increased every quarter since the beginning of 2012, spurred by investments in new facilities and expansions in its manufacturing sector.

Near-term Outlook

Industrial permit issuance was fairly weak in the first quarter, totalling a mere \$271 million. This raises the risk that industrial investment could be subdued in coming quarters, as building permits are indicators of future construction. Across building

types, permits were lower year-over-year for factories and plants as well as transportation (i.e. transit terminal) and utilities (i.e. water filtration) buildings while being higher for mining buildings.

Figure 1: Constant dollar industrial investment over the past ten years - Ontario



Source: Statistics Canada

Commercial Sector

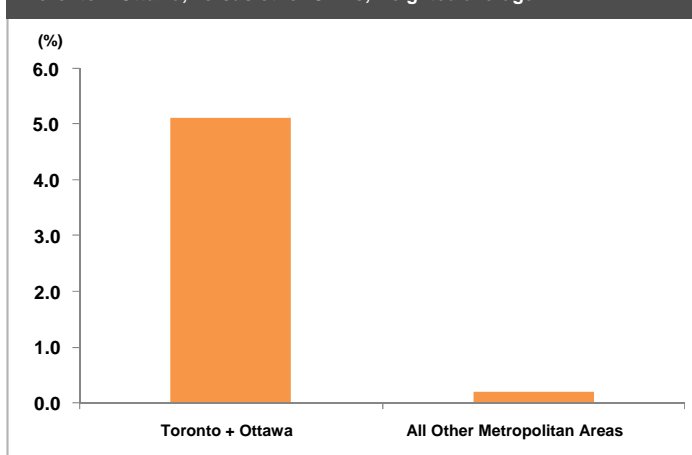
Current Analysis

The commercial market in the province just keeps humming along, as commercial investment increased a solid 4% (q/q) in the first three months of 2014. With the increase, the level of commercial investment was at its highest level in the history of the data (spanning back to 1997) and marked the 7th increase in the past 8 quarters.

Like the industrial market, the increase was largely (though not completely) at Toronto story, as investment advanced 5% (q/q) in the Toronto CMA. As has been well documented, the Toronto market is undergoing an office development cycle. Additionally, Toronto has adopted the "Live, Work, Play" city development model, similar to London England and New York City, where people can fulfill all of their needs in one area. This is helping to spur commercial investment, particularly for mixed-used (i.e. retail and residential) buildings. There was also a

substantial 16% gain in the Ottawa CMA, as investment increased to its highest level since 2002 in the first quarter. A major commercial project in Ottawa is the Landsdowne Park redevelopment which also adheres to the “Live, Work, Play” model, as the new mixed-use development boasts office, retail and residential space. Overall, 5 out of 15 CMAs saw increases in commercial investment. On the flip side, the largest negative contribution to commercial investment belonged to London, where investment fell 25%.

Figure 2: Quarterly increase in commercial investment - Toronto + Ottawa, versus other CMAs, weighted average



Source: Statistics Canada, OCS Calculations

Near-term Outlook

Commercial permit issuance jumped 35% year-over-year to a robust \$1.6 billion in the first quarter of 2014. As such, they are signalling that commercial prospects remain bright in the near term. Almost all major building types saw year-over-year gains, highlighted by permitting for office towers and hotels and restaurants.

Institutional Sector

Current Analysis

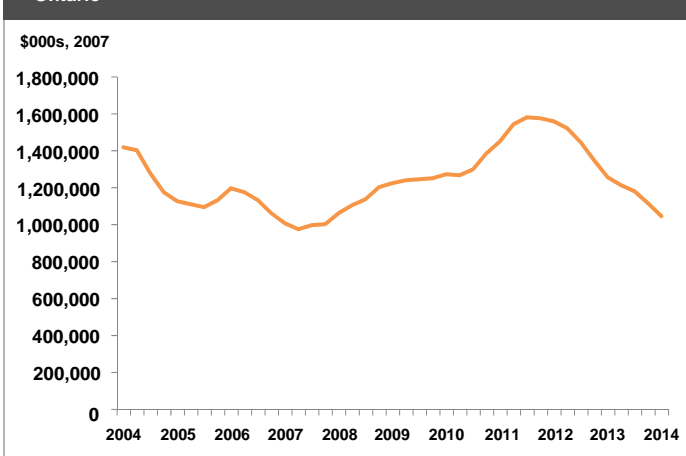
Last year, institutional investment cratered 19% - the single largest yearly drop since at least 1997, as the institutional market continued to unwind from the stimulus-assisted gains observed in 2010 and 2011. We are expecting a further drop this year, but by a more muted pace. In the first quarter institutional investment fell 6.2%, touching its lowest level since the last quarter of 2007. Only 4 out of 15 CMAs managed quarterly

increases, highlighted by the massive 94% gain in Kingston which may be related to the Providence Care Hospital project. There was notable weakness in institutional investment in both Ottawa and particularly London, where investment fell to its lowest level since 2006 in the first quarter.

Near-term Outlook

Institutional permits are very strong predictors of upcoming institutional investment. Fortunately, they advanced 44% year-over-year over Jan-March, driven by increased permitting for hospitals. Though there would need to be more than one quarter of strength before we were able to confidently declare that the freefall in institutional investment had stopped, positive growth in permits is welcomed.

Figure 3: Constant dollar institutional investment over the past ten years - Ontario



Source: Statistics Canada

Bottom Line

Total ICI investment nudged higher in the first quarter of 2014, driven by the commercial market while being weighed on by the institutional and industrial markets. Regionally, Toronto was the largest (but not only) contributor to the growth in ICI investment.

As for the near-term outlook, modest building permits raises the risk that industrial construction could be subdued in the near term. Meanwhile, solid commercial building intentions portend continued strength. Encouragingly, institutional permits were higher year-over-year, but more gains would be needed to confidently declare that institutional investment has ended its re-trenchment.

ONTARIO REGIONAL PERMITS UPDATE



NORTHERN ONTARIO

A modest \$9.5 million worth of **industrial** permits were issued in the first quarter of 2014, about 50% lower than the same period in 2013. Values were down in both Northwestern and Northeastern Ontario, though the latter accounted for 87% of first quarter permits. Such tame issuance suggests subdued industrial building construction in the near-term.

A solid but unspectacular \$33 million worth of **commercial** permits were issued in Jan-March 2014, driven higher on a year-over-year basis by Northeastern Ontario. Over the long-term, average growth in commercial permit values has been the strongest in Northern Ontario out of all the regions.

The value of **institutional** permits registered a strong \$49 million in the first quarter of 2014, up substantially year-over-year. In fact, they were at their highest first quarter value since 2010. The majority of the value was accounted for by Northeastern Ontario, particularly the City of Sudbury, where a \$26 million permit was issued for an addition to an institutional building on Elm Street.

Permit Values - January to March - 2014

Sector	Value (in 000s)	% Change
Industrial	\$9,536	▼ -51.6%
Commercial	\$33,369	▲ 17.5%
Institutional	\$48,502	▲ 187.3%
Total ICI	\$91,407	▲ 40.7%

Source: StatsCan



EASTERN ONTARIO

A well below-average \$21 million worth of **industrial** permits were issued in the first quarter of 2014, the second lowest amount over the past five years. Declines were observed in both Ottawa and Kingston-Pembroke. In Eastern Ontario, the industrial market comprises a relatively small amount of overall ICI investment.

About \$240 million worth of **commercial** permits were issued in over Jan-March, slightly above the historical norm. There was a solid gain in Ottawa and a huge gain in Kingston-Pembroke. The latter was buoyed by a permit for a retail addition in Kingston. Meanwhile, commercial investment is currently strong in Ottawa, though an above-average office vacancy rate does introduce some downside risk.

An enormous \$384 million worth of **institutional** permits were issued over Jan-March, blowing away the previous record for first quarter permit values. This is a massive amount and portends robust institutional construction work going forward. The primary cause of this spike in values is the Providence Care Hospital in Kingston, though there was also over \$100 million issued in Ottawa.

Permit Values - January to March - 2014

Sector	Value (in 000s)	% Change
Industrial	\$20,757	▼ -27.9%
Commercial	\$237,365	▲ 54.1%
Institutional	\$383,754	▲ 856.8%
Total ICI	\$641,876	▲ 187.9%

Source: StatsCan



GTA ONTARIO

In the first three months of 2014, **industrial** permit issuance downshifted to \$125 million – a relatively modest amount for the region which raises the risk of slower industrial construction going forward, at least with respect to new buildings. However, a low industrial availability rate, an improving U.S. economy and continued Metrolinx work mitigates this downside risk.

The GTA's **commercial** market continues to be very healthy, with a first-quarter record \$1 billion worth of permits issued over Jan-March. Though it may lose momentum in coming years, the GTA's commercial market currently remains strong. The building permit data so far is signalling that commercial activity still has room for growth.

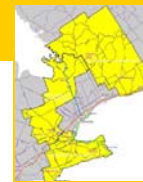
Institutional permit issuance continues to unwind from huge years in 2011 and 2012, clocking in at a rock-bottom \$113 million – the lowest first quarter level since at least 1998 (the first period for which data was collected). Though it's only one quarter of data, it raises at least some is a risk that institutional construction will be low not only this year, but possibly in 2015 as well, given that permits lead investment.

Permit Values - January to March - 2014

Sector	Value (in 000s)	% Change
Industrial	\$124,566	▼ -39.6%
Commercial	\$1,008,787	▲ 44.2%
Institutional	\$112,629	▼ -58.2%
Total ICI	\$1,245,982	▲ 6.0%

Source: StatsCan

CENTRAL ONTARIO



Permit Values - January to March - 2014

Sector	Value (in 000s)	% Change
Industrial	\$57,551	▼ -17.0%
Commercial	\$251,575	▲ 25.1%
Institutional	\$87,010	▼ -22.3%
Total ICI	\$396,136	▲ 3.6%

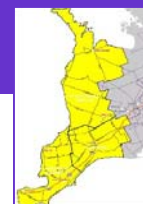
Source: StatsCan

Industrial permit issuance continued to drop in the first quarter of 2014, falling 17% from its year-ago level. The decline was concentrated in Hamilton-Niagara as the Maple Leaf Foods processing plant project is no longer juicing permits. More encouraging was the increase in permitting in Muskoka-Kawarthas and Kitchener-Waterloo-Barrie, though in the case of the latter values were still extremely low, meaning that the industrial building market is still weak.

A mediocre amount of **commercial** permits were issued over Jan-March, though there were year-over-year gains in both Hamilton-Niagara and Kitchener-Waterloo-Barrie (KWB). Hamilton-Niagara was boosted by permitting for the new Tim Hortons Field. Commercial permit values were still quite depressed in KWB, despite being higher than their year-ago level.

Institutional permit values were a mere \$88 million in the first quarter – the lowest such value since 2006. Activity in the institutional market continues to unwind from stimulus-assisted gains from 2010-2012. Permits were down year-over-year in Hamilton-Niagara and KWB, though they were higher in Muskoka-Kawarthas.

SOUTHWESTERN ONTARIO



Permit Values - January to March - 2014

Sector	Value (in 000s)	% Change
Industrial	\$57,929	▼ -40.0%
Commercial	\$101,569	▼ -12.3%
Institutional	\$49,016	▲ 41.3%
Total ICI	\$208,514	▼ -15.6%

Source: StatsCan

Industrial permit values sank 40% year-over-year to a relatively low \$58 million in the first quarter. The main culprit behind the decline was London. Industrial investment has declined in London for three straight years. Conversely, permit issuance was higher year-over-year in Windsor-Sarnia and Stratford-Bruce and was at reasonable levels in both areas.

Commercial building intentions clocked in at \$102 million through March of this year – basically right in-line with its recent first quarter average. A relatively healthy level of permits was issued in both Windsor-Sarnia and

especially Stratford-Bruce, while values dropped year-over-year in London.

Over Jan-March, **institutional** building intentions were higher than their floor scraping 2013Q1 level, though were still miles below average, pointing to subdued institutional construction going forward. It appears likely that investment will continue to unwind from big years in 2010-2012, though sustained increases in permits would suggest that any such slackening would end sooner rather than later.

TOP CONSTRUCTION PROJECTS STARTED - JANUARY TO MARCH 2014

PROJECT	CITY	VALUE
Waterloo LRT - Stage 1	Waterloo	\$583M
Power Plant - Green Electron Power Station	Sarnia	\$300M
Goshen Windfarm	Grand Bend	\$235M
Bluestwater Windfarm	Bayfield	\$136M
Cochrane Solar PV Project	Cochrane	\$120M
L'Orignal Steel Mill Modernization	L'Orignal	\$80M
Hollinger Gold Mine	Timmins	\$75M
Burgoyne Bridge	Niagara Regional Municipality	\$69M
Ford Plant Alterations	Oakville	\$50M
Freight Rail Upgrade / Rehabilitation - Vaughan Terminal	Vaughan	\$40M

Source: Reed Construction Data, Industrial Info Resources

SURVEYING THE PROVINCIAL LANDSCAPE: POST ELECTION ANALYSIS



Ontario voters surprised most political experts and observers by electing a majority Liberal government on June 12th. The governing Liberals, led by Liberal Leader Kathleen Wynne won 39% of the popular vote and 58 seats in the 107-seat legislature, up from the 48 seats it held prior to the election. The second-place PCs and their Leader Tim Hudak won 28 seats and 31% of the vote, and the NDP won 21 seats and 24% of the vote.

A new session began at Ontario's Legislature on July 2nd. Premier Kathleen Wynne named a new Cabinet, replacing Ministers who retired or were defeated in the June 12th election. Ministers with responsibilities of highest importance to construction would include Labour Minister Kevin Flynn, who kept his pre-election portfolio, new Training, Colleges and Universities Minister Reza Moridi, new Economic Development, Employment and Infrastructure Minister Brad Duguid, and new Transportation Minister Steven Del Duca.

On July 14th the government will reintroduce its May 1st Budget. That Budget contained a plan for a significant amount of infrastructure spending, including \$29 billion over 10 years on transit projects across the province -- part of a planned \$130 billion in total infrastructure spending over that same period.

The construction industry will want to look for a commitment to this infrastructure plan in light of the threat of downgrades from credit rating agencies that are concerned about the growth of Ontario's provincial debt and its plan to eliminate its annual deficit by 2017-18.

During the election campaign, the Liberal Party committed to a review of the scope of the College of Trades, and a moratorium on identifying new compulsory trades during that review. Another interesting commitment was made during the campaign to work with schools, business and labour in communities to identify Skills Champions to mentor students toward apprenticeships and careers.

Prior to the election, the government launched a review of the Construction Lien Act, meant to capture many of the issues raised during public hearings on the Prompt Payment Act this year; we can expect that review to resume as well.

For the Opposition parties, internal issues are likely to occupy a significant amount of attention. PC Leader Tim Hudak announced the night of the election that he would step down as Leader. The PC Caucus has chosen long-time MPP Jim Wilson to serve as interim leader, until a PC Leadership Convention is held. No date has been set by the Party for this Convention; it may want to take its time and give candidates more time to grow the party membership and campaign across the province. An early convention date would only benefit a front-running candidate from inside Caucus, so news that the PC Party Executive decided to defer a decision on a Convention date until later in the year may show that no PC MPP member has control of the process. The eventual date chosen could be about a year away -- former Leader John Tory was elected in September 2004, 10 months after the PCs lost the October 2003 election, and Hudak himself was chosen in June 2009, only three and a half months after John Tory stepped down as Leader after failing a second time to win a seat in the Legislature.

NDP Leader Andrea Horwath faces an automatic Leadership review vote at the Ontario NDP Annual General Meeting, expected in October of this year. The NDP's 2012 Convention included an automatic Leadership review vote that followed the 2011 election, where Ms. Horwath received support from 76% of delegates. Although the risk is low that Ms. Horwath would win less than the 67% that party leaders generally need to hold onto their position as Leader, she may need to devote a significant amount of time and energy toward winning over party members and delegates unhappy about seats the party lost in Toronto, or about the decision to not support the Liberal government's May Budget.



The table below shows the new Cabinet of the Ontario government.

Responsibility	Minister or Associate Minister
Premier	Kathleen Wynne
Aboriginal Affairs	David Zimmer
Agriculture, Food and Rural Affairs	Jeff Leal
Attorney General and Francophone Affairs	Madeleine Meilleur
Children and Youth Services; Women's Issues	Tracy MacCharles
Citizenship, Immigration and Trade	Michael Chan
Community and Social Services	Dr. Helena Jaczek
Community Safety and Correctional Services; House Leader	Yasir Naqvi
Consumer and Government Services	David Oraziatti
Economic Development, Employment and Infrastructure	Brad Duguid
Education	Liz Sandals
Energy	Bob Chiarelli
Environment and Climate Change	Glen Murray
Finance	Charles Souza
Health	Dr. Eric Hoskins
Labour	Kevin Flynn
Long-Term Care	Dipika Damerla (assoc. minister)
Municipal Affairs and Housing	Ted McMeekin
Natural Resources	Bill Mauro
Northern Affairs and Mines	Michael Gravelle
Ontario Retirement Pension Plan	Mitzie Hunter (assoc. minister)
Seniors	Mario Sergio
Tourism, Culture, Sports and Pan Am Games	Michael Coteau
Training Colleges and Universities; Research and Innovation	Reza Moridi
Transportation	Steven Del Duca
Treasury Board President and Deputy Premier	Deb Matthews
Chair of Cabinet	Jim Bradley

UPCOMING EVENTS

FOR MORE INFORMATION AND OTHER UPCOMING CONFERENCES & INDUSTRY EVENTS: www.iciconstruction.com

MARK THESE IMPORTANT DATES IN YOUR CALENDAR FOR 2014

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APPRENTICESHIP DATA
ECONOMIC DATA
REGIONAL ECONOMIC SNAPSHOTS
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2014 OCS EVENT CALENDAR

SEPT 29-30 OCS ANNUAL GENERAL MEETING
Westin Ottawa Hotel
Ottawa, Ontario

OCT 17-18 57th ANNUAL CONVENTION OF THE PROVINCIAL BUILDING & CONSTRUCTION TRADES COUNCIL OF ONTARIO
Hilton Fallsview Hotel
Niagara Falls, Ontario

FOR MORE INFO ON THESE EVENTS EMAIL US AT: info@iciconstruction.com

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