Ontario Construction Secretariat

EYE ON ICI NEWSLETTER

JANUARY 2015

CFMEU's Tom Roberts speaks at the 2014 OCS Labour Relations Symposium, Sheraton Toronto Airport Hotel, Toronto, Ontario

EVENT RECAP

The 2014 OCS Labour Relations Symposium

On November 13th and 14th, OCS hosted its 2nd Labour Relations Symposium. OCS previously held this event in 2012 which guided the assistance OCS provided to both labour and management in the 2013 bargaining period.

Management and labour representatives heard a number of presentations over one and a half days which outlined trends in labour relations as well as several tools that may help facilitate collective bargaining.

The first day started with an update from Katherine Jacobs on trends in work performed by the unionized ICI construction industry. Ontario Labour Relations Board (OLRB) Chair Bernard Fishbein provided a snapshot of ICI activity at the OLRB, plus a 2014 Top 10 List of cases at the OLRB. Following these updates, speakers provided attendees with advice on a number of tools for the industry to consider adopting, all with an eye to improving labour relations in the industry and directly or indirectly improving its competitiveness.

Jack Slaughter, a vice-chair of the Ontario Labour Relations Board, speaking on streamlining jurisdictional disputes and alternate dispute resolution, provided advice to delegates on ways of avoiding jurisdictional disputes, and avoiding costly and time-consuming hearings at the OLRB.

Alan Minsky, a well-known expert in construction labour relations and Partner at Koskie Minsky LLP, presented a paper outlining trends in the use of no-strike / no-lockout protocols. The paper also provided advice for the industry on how such protocols could be useful, and what aspects are usually included when they are written.

Rene Mulder, Toyota Canada's Manager of Construction, and Greg Bobier, Business Manager for Waterloo Wellington Dufferin and Grey Building and Construction Trades Council provided an overview of Toyota's Project Labour Agreement (PLA). Their presentation discussed Toyota's motivation for negotiating a PLA, the advantages of a PLA, and important factors that need to be in place when considering a PLA.

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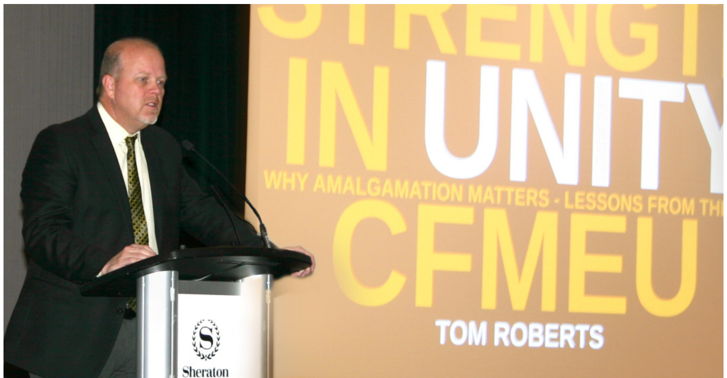

OCS CEO Sean Strickland addresses delegates

Alberta Labour Relations Panel featuring: (L to R) **Neil Tidsbury, Warren Fraleigh, and Lyle Kanee**

Delegates at the 2014 Labour Relations Symposium

(L to R) **OCS President Joe Keyes, CFMEU's Tom Roberts, Ontario Minister of Labour Kevin Flynn, OCS Chief Executive Officer Sean Strickland, OCS Board Member Patrick Dillon**

In certain cases, it may make sense for employers and contractors to work together to improve market share in a certain geographical region or sector. David Brisbin, former Executive Director of CECCO and Pat Dillon, Business Manager and Secretary Treasurer of the Provincial Building and Construction Trades Council of Ontario (PBTC), discussed Designated Regional Employers' Organizations, and Local Area Modifications to collective agreements – two tools that may improve the industry's ability to improve market share in certain conditions.

Day 2 started with Jim Hogarth, President of the PBTC and Ron Martin, Executive Director of CECCO providing a quick review of the 2013 bargaining period. Both characterized the 2013 round of bargaining as largely successful. In general, they supported a move away from an adversarial approach to bargaining, toward a mutual gains approach, with an understanding of the impact that job actions can have on the entire unionized ICI sector.

The Symposium also provided a view of construction labour relations innovations in other jurisdictions. A panel of speakers from Alberta, where most trades and registered employer organizations begin with a province-wide framework agreement before individual trade negotiations begin, provided some of the history behind that bargaining structure, plus an overview of the historical and industry conditions that led to the adoption of that structure.

From Australia's largest construction union, the Construction, Forestry, Mining and Energy Union, Senior National Legal Officer Tom Roberts discussed the conditions that led Australia's labour movement to adopt an industry-based model, where entire industries are represented by single union. The most appealing aspect of this structure would be the reduction of jurisdictional disputes. In Australia, according to Mr. Roberts, while jurisdictional disputes did continue in the years following the mergers, they are no longer a source of conflict in the industry.

Mr. Roberts' presentation provided attendees with a review of the impact of the changes on market share, which has declined – albeit within the context of an economy-wide decline in unionization – plus an overview of how disputes between formerly independent unions within the new union are resolved.

The Symposium was intended to provide our industry with a review of emerging issues in construction labour relations and collective bargaining, and tools to be considered by the industry for addressing these issues and improving performance. The dialogue at the Symposium provided clear direction on initiatives which OCS can undertake to support our labour and management stakeholders.

GROUNDBREAKING NEW STUDY LAUNCHED

OCS Long-Term Study of Apprentices

The Ontario Construction Secretariat (OCS) is committed to undertaking value-added research that provides insight into Ontario's construction industry and also helps inform public policy. Our 2013 report *"Completion Counts: Raising Apprenticeship Completion Rates in Ontario's Construction Industry"* highlighted the role the unionized construction industry plays in delivering high caliber apprenticeship training. With 95 labour-management training centres and a cumulative investment of $260 million, Ontario's unionized industry is a leader in the delivery of much-needed skills and safety training for Ontario's construction workforce.

We are now pleased to announce the next phase of this research in partnership with Employment Ontario, the Ministry of Training, Colleges and Universities (MTCU), Carleton University and IPSOS-REID. Over the next few weeks, we will be launching a study of construction apprentices in Ontario. By following construction industry apprentices over the course of their apprenticeship, we will develop a wealth of data to identify and analyze their experiences, successes, barriers and outcomes. This research will assist industry stakeholders to develop skills training materials, supports and mentorships to aid in the successful completion of apprenticeship programs in the construction industry.

We will be in direct contact with the joint labour-management training community to seek their cooperation in reaching as many apprentices as possible. We look forward to your participation and assistance in registering apprentices in the study. If you have any questions or suggestions for this ground-breaking research initiative, please contact Katherine Jacobs at 416-620-5210 x225 or kjacobs@iciconstruction.com.

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

Total ICI Investment

Over July-Sept 2014, the level of constant dollar ICI investment came in at $4 billion, essentially equalling its second quarter value. The amount of investment over the first nine months of the year ($12 billion) was the smallest since 2010.

Industrial Market

Current Trends

Third quarter industrial investment surged 8% (q/q) to $525 million – its highest level since 2008. This was a welcome gain and may have represented a partial payback from weather-depressed levels in the earlier part of the year. Over the first nine-months of 2014, industrial investment was $1.5 billion, slightly lower than in 2013.

Regionally, the quarterly gain was relatively broad-based with 9 out of 15 Census Metropolitan Areas (CMAs) posting increases

In terms of the amount of money invested, no region particularly stood out with the exception of Toronto where capital spending was at its highest level since 2008. Notably, spending increased in the relatively large industrial market of Kitchener for the second straight quarter. This is encouraging as perhaps it signals that the region's industrial market has found a bottom after retrenching for 2 years. Otherwise, there were strong quarter-over-quarter gains in Barrie and Peterborough. Investment was lower in Hamilton – another relatively large market – both compared to the second quarter and versus its year-ago level, as the Maple Leaf Foods project is no longer juicing investment figures.

Outlook

Building permit data – which is a leading indicator of investment – is pointing to lower capital expenditures over the next few quarters as intentions slipped 6% over the first nine-months of the year (compared to the same period in 2013). However,

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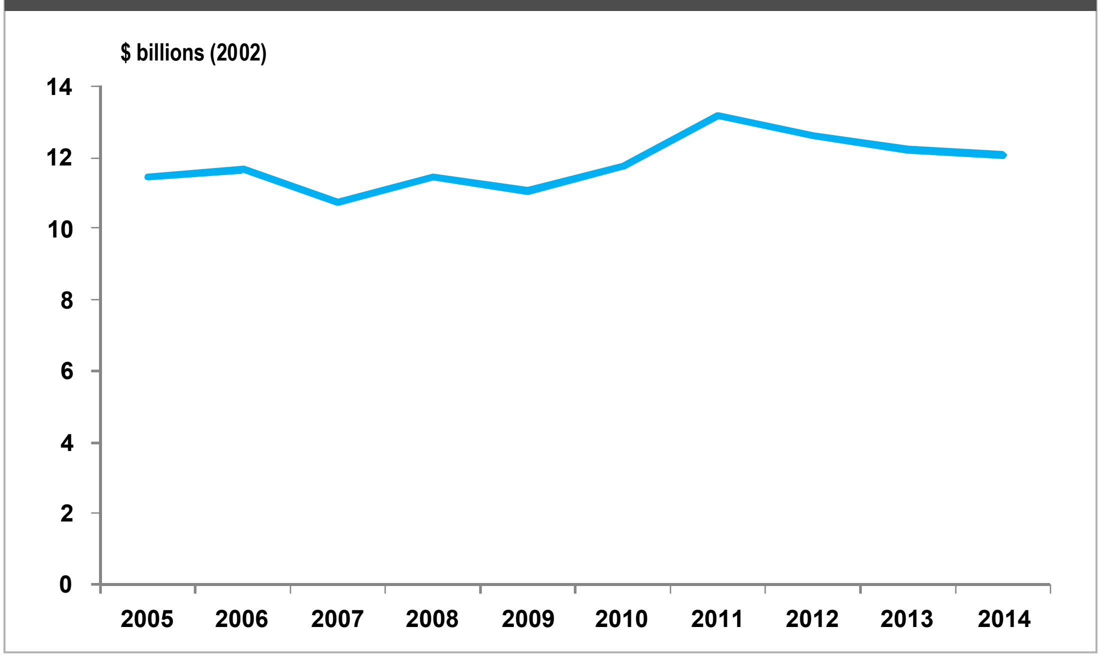
Figure 1: *Total ICI Investment: Jan-Sept of Each Year*



Source: Statistics Canada, OCS calculations

"Third quarter industrial investment surged 8% (q/q) to $525 million – its highest level since 2008"

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other indicators are suggesting a more favourable outcome for industrial capital spending going forward including: a firming U.S. economy, increasing merchandise exports, above-average capacity utilization and falling industrial availability. As such, further increases in industrial investment may be in the offing.

Commercial Market

Current Trends

Commercial investment dipped 1% over July-Sept 2014, the first decline in 4 quarters. Despite the drop, the level of investment was 6% above its year ago level. Over the first nine months of the year commercial investment totalled a record $7.4 billion.

Regionally, the quarter-over-quarter decline in commercial investment was relatively narrow as only 5 out of 15 CMAs had lower investment values. Hamilton weighed on quarterly investment the most out of all the regions.

For much of 2014, growth in the province's commercial market has essentially been a two-horse race – Ottawa and Toronto – with smaller but notable contributions coming from Barrie and St. Catharines-Niagara. Ottawa has been lifted by the Lansdowne Live project while investment in Toronto has been trending strongly higher since the end of the recession. Barrie has benefited from construction of new retail outlets as well as major alteration work. Meanwhile, St. Catharines-Niagara has enjoyed its best year in a decade.

Conversely, Hamilton, Kitchener and London – three relatively large commercial markets – have had lower investment through three-quarters of 2014 relative to the same period in 2013.

Outlook

Commercial permits increased 7% over Jan-Sept versus the same period in 2013. As such, they are pointing to continued solid commercial investment over the next few quarters, in-line with growing corporate profits and improving business confidence. However, higher office vacancy rates and record current investment levels may challenge growth prospects over the medium term.

Institutional Market

Current Trends

In the third quarter, institutional investment was slightly lower than its second quarter value, marking the 11th straight quarterly decline. On the bright side, the drop was the smallest since investment started retrenching in 2012. Of course, on a year-over-year basis and in the first nine months of 2014 (compared to the same period in 2013) institutional investment is down considerably.

Regionally, the decline was spread across 9 CMAs. Big decliners included Ottawa, Hamilton and Brantford. Conversely, investment was considerably higher in Kingston, fuelled by the Providence Care Hospital project. There was also a relatively respectable level of investment in Kitchener as well in the third quarter.

Outlook

Building permits, which have historically been a very good indicator of upcoming investment trends, are suggesting that future increases in institutional investment may be in the cards.

Through September of 2014, they were 21% higher than they were in 2013. The gains were driven by higher permitting for hospitals, long-term care facilities and churches. Large institutional projects on the books include the Mackenzie-Vaughan Hospital and the Milton-District Hospital redevelopment.

"Commercial permits increased 7% over Jan-Sept versus the same period in 2013. As such, they are pointing to continued solid commercial investment over the next few quarters"

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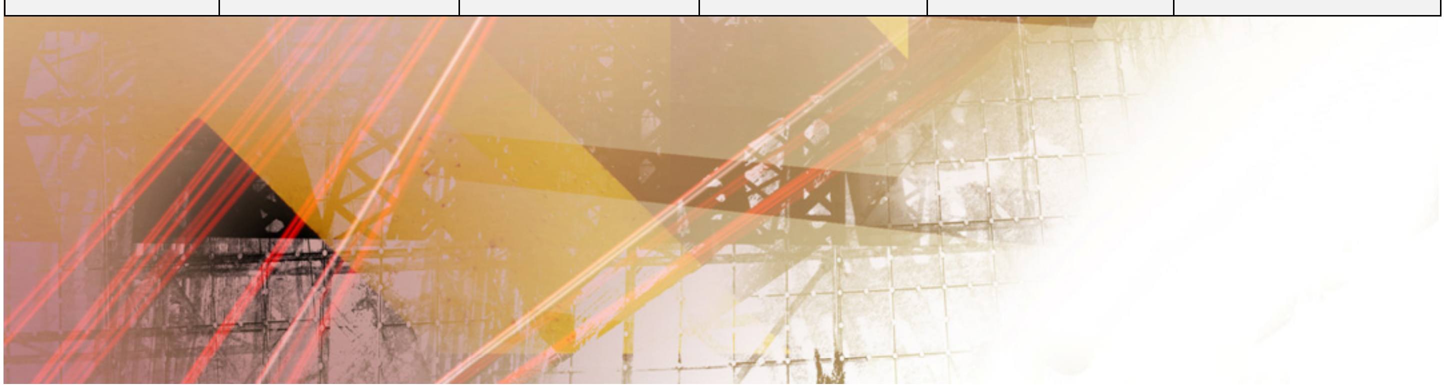
Bottom Line

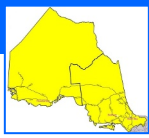
Third quarter ICI investment basically matched its second quarter level. Industrial investment surged higher, commercial investment dropped though was still solid and institutional investment declined by its smallest amount in 2 years. Building permits are pointing to continued growth in commercial and (encouragingly) institutional investment over the next few quarters though they are signalling subdued industrial investment. Fortunately, the economic backdrop seems favourable for continued growth in industrial capital spending going forward.

> ***"Building permits, which have historically been a very good indicator of upcoming investment trends, are suggesting that future increases in institutional investment may be in the cards."***

Table 1: *Ontario ICI Building Investment, Third Quarter Summary Table*

Sector	July-Sept Value	Versus Second Quarter of 2014	Versus Third Quarter of 2013	Jan-Sept of 2014 Versus Jan-Sept of 2013	Comments
Industrial	$525 million	8% higher	5% lower	1% lower	Q3 highest since 2008
Commercial	$2.5 billion	1% lower	6% higher	5% higher	Record level of investment over Jan-Sept
Institutional	$1.0 billion	0.6% lower	12% lower	14% lower	Smallest quarterly drop in 11 quarters
Total ICI	$4.0 billion	flat	1% higher	2% lower	Smallest Jan-Sept amount since 2010





NORTHERN ONTARIO

Permit Values - July to September - 2014		
Sector	Value (in 000s)	% Change
Industrial	$73,829	12.3%
Commercial	$193,140	-12.0%
Institutional	$120,835	-23.4%
Total ICI	$387,804	-12.5%

Source: StatsCan

Over Jan-September 2014, a decent $74 million worth of **industrial** permits were issued, higher than the same period in 2013. The gain was driven by Northeastern Ontario while permits were lower in the Northwestern region. Permit issuance tends to understate industrial activity in the North as it doesn't adequately capture the value of large-scale industrial projects like the Vale AER plant, which are boosting activity in the region.

A solid $193 million worth of **commercial** permits were issued over Jan-Sept 2014, only slightly smaller than the massive amount of permits issued in 2013. Northeastern Ontario accounted for 80% of permit issuance while permits were lower in Northwestern Ontario, despite a large portion of renovation work permitted for.

A mere $121 million of **institutional** building intentions were permitted for over Jan-Sept 2014, the lowest such level since 2005. It appears that 2014 has been a bit of a payback year for the institutional market with construction on the Thunder Bay courthouse ending last year and no major projects permitted for to take up the slack. Institutional permitting has been solid in the North since 2006.

EASTERN ONTARIO

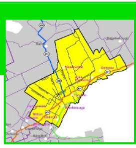
Permit Values - July to September - 2014		
Sector	Value (in 000s)	% Change
Industrial	$88,502	-49.4%
Commercial	$698,644	-4.1%
Institutional	$527,951	138.8%
Total ICI	$1,315,097	17.0%

Source: StatsCan

$89 million worth of **industrial** permits were issued over the first nine-months of 2014 – well below average. Through September, permit values were lower in both Ottawa and Kingston-Pembroke versus the same period in 2013. Generally speaking, the industrial market is the smallest one though TransCanada has some significant industrial work for the region scheduled over the next few years, including the Napanee Generating Station.

Over Jan-Sept 2014, **commercial** permit values dipped slightly versus their robust 2013 level but remained very solid at $699 million. The market was bolstered by the Kingston-Pembroke region, while permit issuance was lower, but still healthy in Ottawa. Over the longer-term Eastern Ontario's commercial construction market, as proxied by permit issuance, has been strongly upward trending for half a decade.

A massive $528 million worth of **institutional** permits were issued in Eastern Ontario through September of last year, the highest such value since 2005. The main driver of this gain is the Providence Care Hospital in Kingston though Ottawa was solid as well. Other major institutional projects in the region include the Hawkesbury & District General Hospital and the University of Ottawa Heart Institute redevelopment project.



GTA ONTARIO

Permit Values - July to September - 2014		
Sector	Value (in 000s)	% Change
Industrial	$522,628	-25.0%
Commercial	$3,151,020	18.8%
Institutional	$962,768	-0.4%
Total ICI	$4,636,416	7.4%

Source: StatsCan

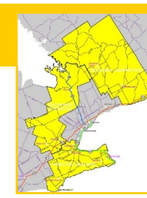
Industrial permit issuance slumped to $523 million through September 2014, the smallest nine-month value since the recession in 2009. This points to subdued industrial building over the next few quarters. However, a low industrial availability rate and increasing exports suggests that the environment will be supportive of continued industrial investment. The market is currently being buoyed by industrial warehouse construction in the west part of the GTA.

Commercial permit issuance was a record $3 billion through September 2014, pointing to continued strength in the market. Commercial construction remains strong, driven by the downtown core where over 5 million square feet of office space was under construction in the third quarter per CBRE (a commercial real estate services firm).

Institutional permits were valued at $963 million – a low amount for the region. This indicates that institutional investment is likely to remain subdued over the near term (it fell 17% year-over-year in the third quarter of 2014). The modest issuance represents payback from outsized gains in 2010-2012 when the stimulus funding was in full effect.

ONTARIO REGIONAL PERMITS UPDATE

CENTRAL ONTARIO



Permit Values - July to September - 2014

Sector	Value (in 000s)	% Change
Industrial	$480,418	▲ 42.3%
Commercial	$754,055	▼ -15.5%
Institutional	$633,989	▲ 29.0%
Total ICI	$1,868,462	▲ 8.6%

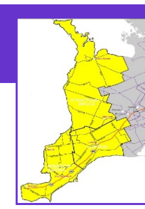
Source: StatsCan

A robust $480 million worth of **industrial** permits were issued through September of last year, the second highest such level on record (spanning back to 1998). This suggests that the industrial market could perk up over the next few quarters. The increase in permit issuance was driven by both the Muskoka-Kawarthas region and Kitchener-Waterloo-Barrie (KWB). Permit values were significantly lower in Hamilton-Niagara however.

A mere $754 million worth of **commercial** permits were issued over Jan-Sept 2014, the second lowest value since 2007. This relatively low level points to modest commercial investment in Central Ontario going forward. Like the industrial market permit issuance was higher in KWB, boosted by major commercial alteration work in Barrie, as well as Muskoka-Kawarthas but lower in Hamilton-Niagara.

Institutional permit issuance was a solid $634 million over Jan-Sept 2014, the highest value outside of the stimulus years since at least 1998 (first year of available data). Building intentions were boosted by permitting for the Cambridge Memorial Hospital as well as for a new retirement home in Hamilton. Going forward, the institutional market will be juiced by new construction at Joseph Brant Memorial Hospital.

SOUTHWESTERN ONTARIO



Permit Values - July to September - 2014

Sector	Value (in 000s)	% Change
Industrial	$394,099	▲ 5.8%
Commercial	$309,677	▼ 3.2%
Institutional	$200,619	▲ 4.7%
Total ICI	$904,395	▲ 4.6%

Source: StatsCan

Industrial permit issuance was valued at a healthy $394 million over the first nine months of 2014 which is the largest amount since 2007. The major driver was the Stratford-Bruce region, Large upcoming projects in Stratford-Bruce include OPG's Deep Geological Reserve Project and the Bruce Nuclear rebuild. Permits were lower in London and Windsor-Sarnia though in Windsor work is underway on a massive expansion and retool at the Chrysler plant.

Despite advancing modestly over 2013's level, the value of **commercial** building intentions was still relatively low over the first nine months of 2014. Permit values were modest in both London and Windsor-Sarnia, mirroring recent investment trends, despite improving labour markets in both areas. However, building intentions were somewhat stronger in Stratford-Bruce.

Institutional building intentions were a modest $201 million over Jan-Sept, signalling subdued institutional construction going forward. Through September, permit values were lower in Windsor-Sarnia and Stratford-Bruce than they were over the same period in 2013, though they were higher in London.

TOP CONSTRUCTION PROJECTS STARTED - JULY TO SEPTEMBER 2014

PROJECT	CITY	VALUE
Waterloo Region LRT	Waterloo	$818M
Providence Care Hospital	Kingston	$810M
Cambridge Memorial Hospital	Cambridge	$175M
Canadian Tire Warehouse and Distribution Centre	Caledon	$150M
Ruskview Road etc Watermains	Kitchener	$102M
Highway 427 Road, Bridge, Drainage Work	Toronto	$82M
Bow Lake Windfarm addition - Phase 2	Sault Ste. Marie	$82M
Georgetown South Corridor Noise Wall	Georgetown	$77M
Flaire Mixed Use Condo and Retail Building	Toronto	$40M
Gore Meadows Community Centre and Library	Brampton	$33M

Source: Reed Construction Data, Industrial Info Resources

MANUFACTURING SECTOR UPDATE:
Structural Decline, Cyclical Pickup

It's a well worn story that Ontario's manufacturing sector has been in decline as firms have been challenged by the high Canadian dollar, the Great Recession and low-cost competition. It's also well known by industry stakeholders that manufacturing activity and industrial investment are linked (see *Figure 1*). Whether driven by the desire to expand, routine maintenance, or a need to remain competitive, manufacturers tend to invest in their plants and facilities thereby generating work for contractors and tradespeople. With this relationship in mind, this article will give an update on conditions in Ontario's manufacturing sector using manufacturing sales data provided by Statistics Canada. Perhaps some silver linings can be found in the dark cloud which has hovered over this sector.

Long-Term Trends

Over the past 10 years, total manufacturing sales have been falling by 1%, on average, each year. As a result, they were 11% lower in 2013 than they were 10 years earlier. The pain has been widespread, with revenue in most major industries lower. In fact, there have been double-digit drops in all but 2 (machinery, chemicals) industries. The steepest decline has been in clothing manufacturing as the sector has fallen prey to low-cost competition. There have also been pronounced slumps in paper and wood product manufacturing as well as the manufacture of leather products. Of course, some industries are bigger than others and have thusly weighed on overall sales in a more severe manner. The 5 industries that have dragged total sales down the most over the past 10 years include: paper, fabricated metal products, computers and electronic products, motor vehicles and wood products.

So that's the bad news, the good news is that a select few industries (i.e. only 3) have managed to thrive, even against an extremely challenging backdrop. The petroleum and coal product manufacturing industry has experienced strong average growth over the past 10 years, stimulated by the run up in crude oil prices. This industry is involved in transforming crude petroleum and coal into intermediate and end products and involves work being done in petroleum refineries, asphalt paving, roofing

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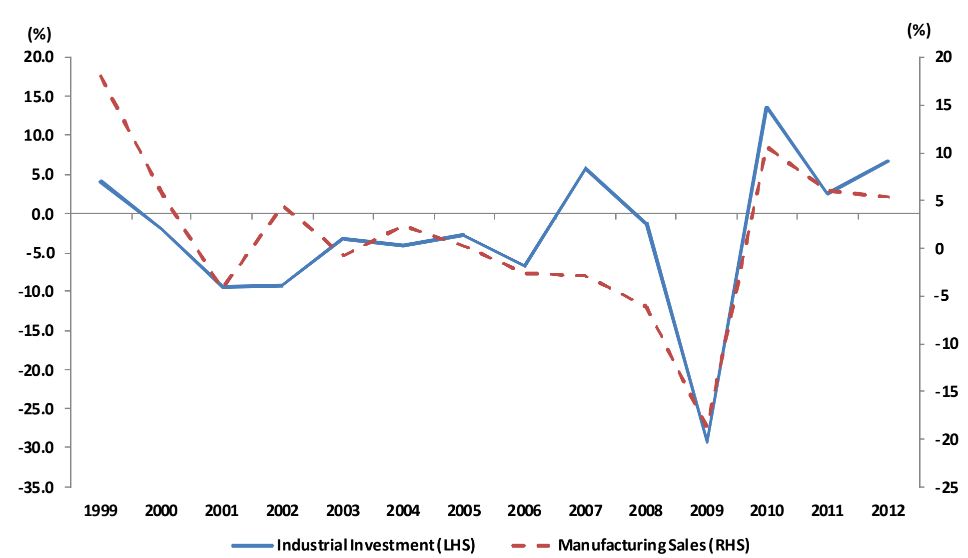
Figure 1: *Manufacturing sales and industrial investment, year-over-year growth*



Source: Statistics Canada, OCS calculations

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and saturated metals manufacturing as well the manufacture of coal products and other smaller petroleum-based goods. Though this sector is relatively small, it has grown in importance. In 1992, it comprised 4% of overall sales and that share has risen to around 8%. Like in Alberta, the fate of this industry hinges on the future path of energy prices.

“Miscellaneous manufacturing” is the second industry which has experienced positive growth over the past ten years. Establishments in this category manufacture a wide range of products such as medical equipment and supplies, jewellery, sporting goods, toys and office supplies. However, this category is relatively small, clocking in at about 2% of sales. As such, it can hardly be counted on to drive the industry into the future.

Food manufacturing is the final industry to buck the overall trend in sales, experiencing positive (and relatively strong) long-term growth. As the years have progressed, this industry has become more of a player in the manufacturing landscape, representing 14% of overall sales in 2013, nearly double its share in 2000. What’s also remarkable is that this industry was only 1 of 3 that had positive sales growth during the recession of 2009. If something like the Great Recession can’t slow food manufacturing down, it’s hard to picture what can.

Short-Term Trends

Since the recession, overall manufacturing sales have rebounded nicely (24% higher in 2013 and up 8% year-over-year as of September), though they remain below their peak levels. Every industry with the exception of clothing, paper and computer and electronics manufacturing has seen a cyclical pickup in sales from their recession lows, though some faster than others. The biggest driver of the increase in overall sales has been the motor vehicle industry, with manufacturer revenues 60% higher than their recession low. Unfortunately, increased sales activity has not necessarily flowed to increased production with industry data showing that in 2013 Canada’s share of North American automotive production sagged to its lowest level since 1987. The picture does not appear to have improved this year either as industry analysts have noted that General Motors plans to move production at its Oshawa and Ingersoll plants to Michigan and Mexico, respectively, as early as 2016.

Outside of the automotive sector it’s been food, petroleum and coal product and primary metal products manufacturing that have contributed the most to growth in overall sales. Notably, the food and petroleum and coal product manufacturing industries have been strong in both the short and long-term. Looking ahead to 2015, it’s not a too much of a stretch to see the manufacturing industry hold onto its momentum thanks to an improving U.S. economy and a faltering Canadian dollar.

Table 1: *Sales growth trends in selected manufacturing industries*

Selected Manufacturing Industries	Long-term Sales Growth (%)	Sales Growth since Recession (%)
Miscellaneous	82	43
Food	42	19
Petrochemical	36	34
Total Sales	**-11**	**24**
Motor Vehicle	-25	58
Paper	-38	-7
Wood	-46	13
Leather and Allied Product	-60	52
Clothing	-67	-1

Source: Statistics Canada, OCS calculations

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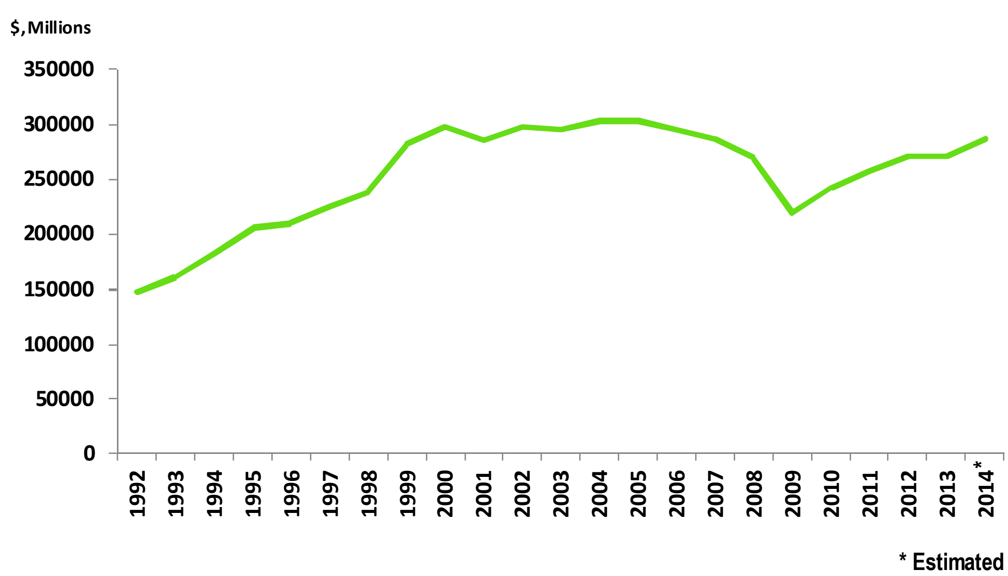
The Bottom Line

Ontario's manufacturing industry has been in long-term decline, challenged by the Great Recession, low cost competition and the higher Canadian dollar. Industry sales have fallen by 1% annually, on average, over the past 10 years. However, a few manufacturing categories have managed to post long-term sales gains: food, petroleum and coal product and miscellaneous product manufacturing. Of the three, food manufacturing has had the largest positive impact on sales. Shorter-term trends reveal that overall sales have been recovering, led by the automotive sector though again food and petroleum and coal product sales have been relatively healthy. Looking ahead to 2015, the manufacturing industry may keep its recent momentum against a backdrop of a growing U.S. economy and a softer Canadian dollar.

"Shorter-term trends reveal that overall sales have been recovering, led by the automotive sector. Food and petroleum and coal product sales have also been relatively healthy"

Figure 2: *Manufacturing sales in Ontario*



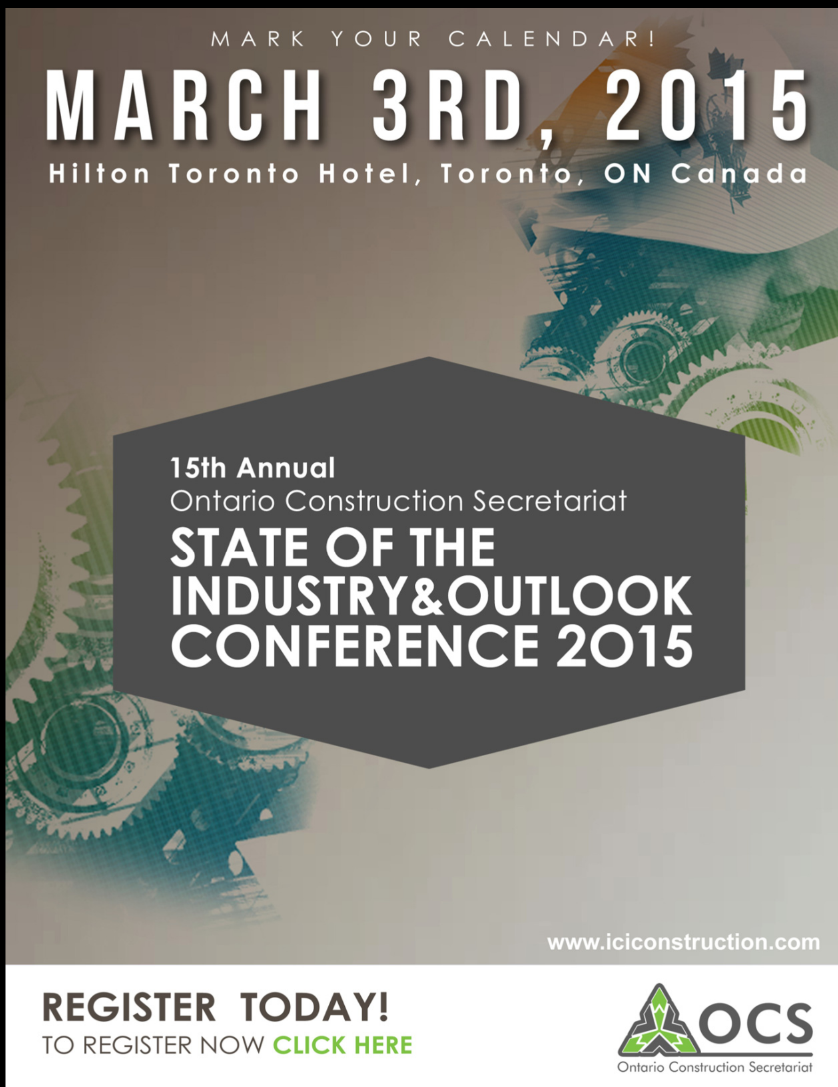
Source: Statistics Canada

Manufacturing Sales on Upswing Since 2008

UPCOMING EVENTS

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

MARK THESE IMPORTANT DATES IN YOUR CALENDAR FOR 2015



FOR INFORMATION ON THIS EVENT OR OTHERS:
Email: info@iciconstruction.com
www.iciconstruction.com

2015 OCS EVENT CALENDAR

MAR 3 — 2015 STATE OF THE INDUSTRY & OUTLOOK CONFERENCE
Hilton Toronto Hotel
Toronto, Ontario

APR 14-16 — FUTURE BUILDING 2015
Queen Elizabeth Building
Toronto, Ontario
www.futurebuilding.ca

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