



Sectoral Profile

Utilities
NAICS 22

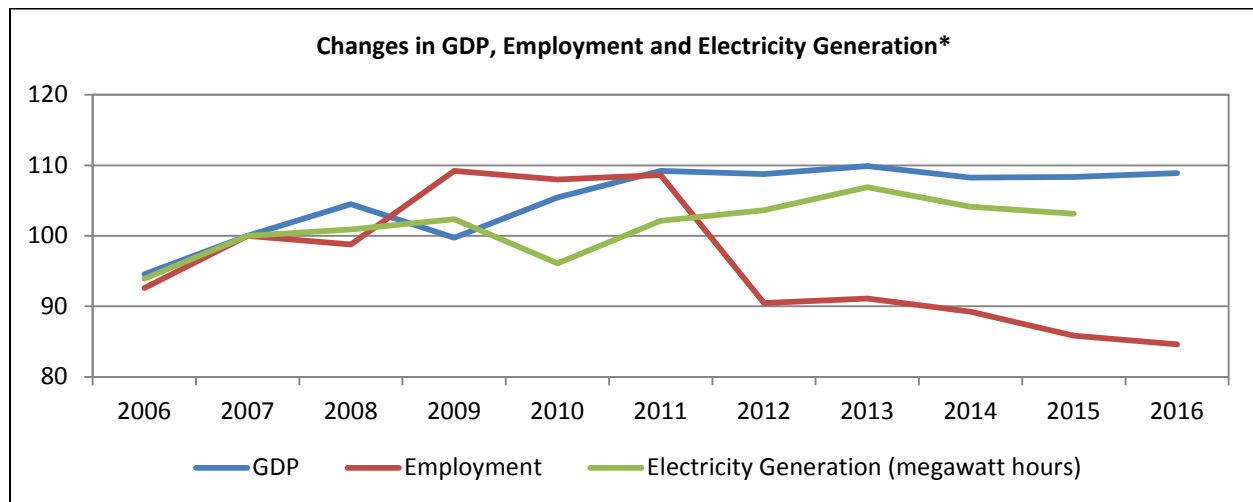
Quebec



2018-2020 Outlook*

- The dynamics in the utilities industry depend on growth in population, manufacturing production, and construction activities
- In Quebec, 92% of electricity production comes from hydraulic turbine plants and 5% from wind power—overall, 99% of electricity is produced from renewable energies
- In the province, 84% of electricity production comes from the public domain and 16% is private

Although it includes natural gas distribution as well as water and sewage, the Quebec utilities industry is mainly linked to the production, transportation and distribution of electricity, and thus to Hydro-Québec.



*Data are expressed as indices with 2007 = 100

Sources: Statistics Canada, GDP – CANSIM 379-0030, Employment – LFS, Electricity Generation – CANSIM 127-0008

Over the past ten years, electricity production has been slowly increasing, while domestic consumption has been slowly declining: this helped to boost sales outside Quebec. Shipments to other provinces and exports to the United States experienced a solid growth during this period. According to Hydro-Québec, foreign markets generate 28% of net profits, while accounting for 16% of sales volumes. Three quarters of sales outside Quebec go to New England (48%) and New York State (28%) in the United States. Foreign markets represent a significant growth potential for Hydro-Québec, who aims to double its revenues and grow its net income accordingly, between now and 2030.

* This document is the result of analyses performed using information available as at April 5, 2018.

A third of the electricity production capacity in Canada is in Quebec. Quebec accounts for slightly over half of hydroelectric power production and nearly 30% of wind power production in Canada. In the province, 92% of electricity production comes from hydraulic turbine plants and 5% from wind power. Hydro-Québec states that in total, 99% of electricity is produced through renewable energy. This is a significant element in a context where provinces and many American states are seeking to reduce the amount of greenhouse gases generated by their activities.

For Hydro-Québec, a responsible and energy-efficient consumption also entails energy efficiency. The crown corporation estimates that, between 2003 and 2015, thanks to awareness and program and building upgrade programs, energy savings accounted for the equivalent of the consumption of 500,000 households.

Despite considerable investments, the growth of the workforce in the utilities sector will be negligible, the reasons being that many jobs are created during design and construction phases but only a few of them remain after the commissioning of equipment, and efforts to increase efficiency and optimal cost management will result in the non-replacement of some retirees.

Sectoral Dynamics for Regions

Québec 2018-2020	In the Economic Regions	AAGR
Annual average growth: 0.1% Gain of approx.: 75 positions Yearly dynamics: 2018 : ↗ 2019 : ↗ 2020 : ↗	Laurentides	0.7%
	Côte-Nord / Nord-du-Québec	0.6%
	Saguenay–Lac-Saint-Jean	0.3%
	Lanaudière	0.3%
	Chaudière-Appalaches	0.2%
	QUÉBEC	0.1%
	Montréal CMA	0.1%
	Montréal	0.1%
	Mauricie	0.1%
	Capitale-Nationale	0.0%
	Outaouais	0.0%
	Abitibi-Témiscamingue	0.0%
	Bas-Saint-Laurent	0.0%
	Estrie	0.0%
	Gaspésie–Les-Îles	-0.3%
Centre-du-Québec	-0.7%	

n/a: not applicable

Source: 2018–2020 Sectoral Outlook annual exercise

Labour Market Analysis Directorate, Service Canada – Quebec Region, April 5, 2018.

The following occupations are the ones most likely to be affected by the anticipated dynamics (according to the occupation by industry matrix):

- 7243 Power system electricians
- 7244 Electrical power line and cable workers
- 2241 Electrical and electronics engineering technologists and technicians
- 2133 Electrical and electronics engineers
- 6552 Other customer and information services representatives

- 9243 Water and waste treatment plant operators
- 0912 Utilities managers
- 2171 Information systems analysts and consultants
- 9241 Power engineers and power systems operators
- 9212 Supervisors, petroleum, gas and chemical processing and utilities
- 7311 Construction millwrights and industrial mechanics
- 1122 Professional occupations in business management consulting
- 2132 Mechanical engineers
- 7202 Contractors and supervisors, electrical trades and telecommunications occupations
- 2131 Civil engineers.

SIZE AND DISTRIBUTION OF AND CHANGES IN EMPLOYMENT IN THE INDUSTRY IN QUEBEC

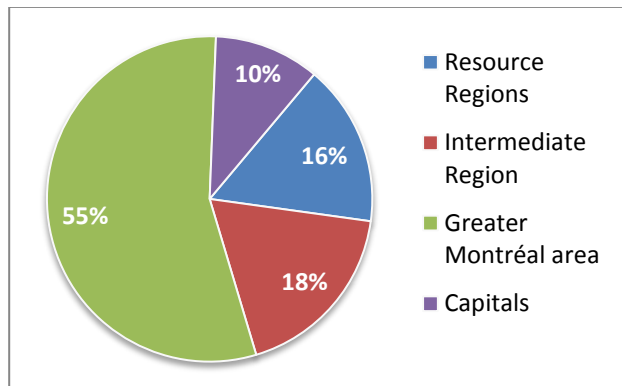
	Employment 20157–2017 Average			10-year Change in Employment	
	Employment In thousands	Provincial distribution	Regional employment share	In thousands	as a %
All of Quebec	26.9	100.0%	0.6%	-4.5	-14.3%
Resource Regions					
Abitibi-Témiscamingue	x	x	x	x	x
Bas-Saint-Laurent	x	x	x	x	x
Côte-Nord / Nord-du-Québec	1.5	5.6%	2.8%	0.2	12.5%
Gaspésie–Îles-de-la-Madeleine	x	x	x	x	x
Saguenay–Lac-Saint-Jean	1.9	7.2%	1.5%	0.2	11.5%
Intermediate Regions					
Centre-du-Québec	x	x	x	x	x
Chaudière-Appalaches	x	x	x	x	x
Estrie	x	x	x	x	x
Mauricie	1.6	6.0%	1.3%	-0.6	-27.3%
Greater Montréal area					
Lanaudière	x	x	x	x	x
Laurentides	2.4	9.1%	0.8%	0.2	10.6%
Laval	x	x	x	x	x
Montréal	6.2	23.0%	0.8%	-0.7	-10.2%
Montréal	3.4	12.8%	0.3%	-2.2	-38.7%
Capitals					
Capitale-Nationale	2.6	9.6%	0.6%	0.2	8.5%
Outaouais	x	x	x	x	x

x: confidential data, fewer than 1,500 people employed in this region

Source: Historical estimates based on Statistics Canada's Labour Force Survey

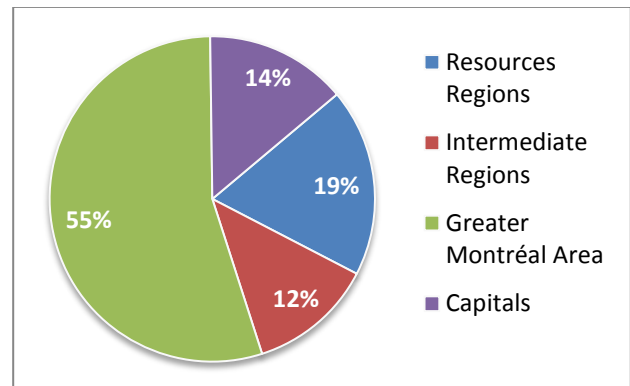
SOME CHARACTERISTICS OF THE INDUSTRY IN QUÉBEC

Establishment distribution by Region



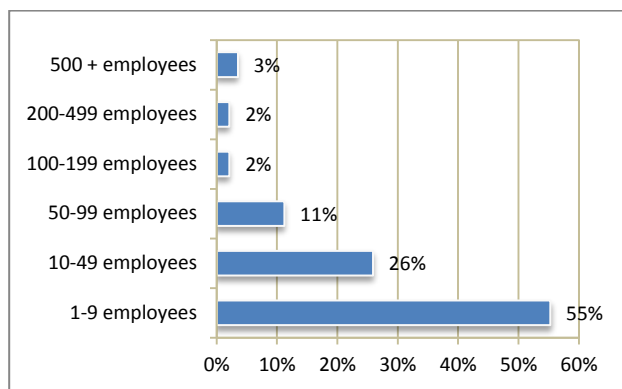
Source: Statistics Canada, Establishment Counts by Economic Region, industry, and Employee Size Ranges, December 2015

Employment distribution by Region



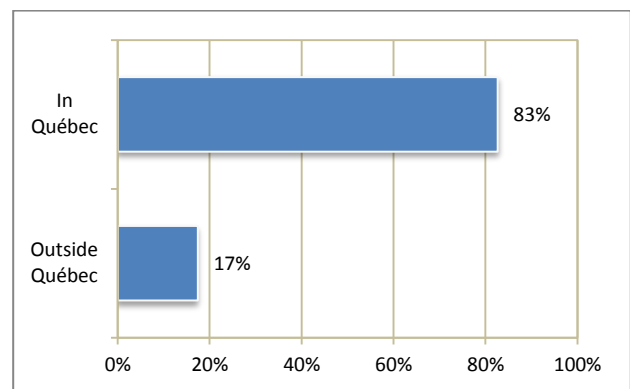
Source: Statistics Canada, Labour Force Survey; based on average employment in 2014-2016

Size of establishment



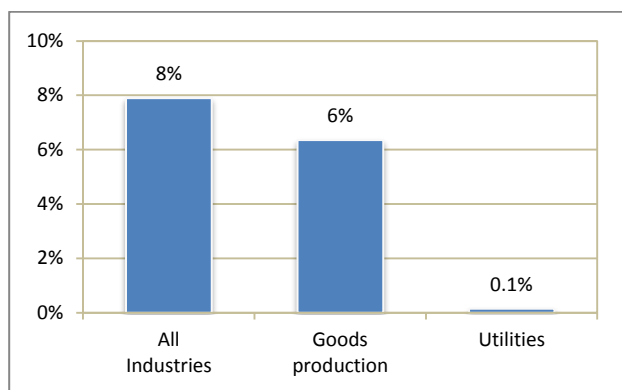
Source: Statistics Canada, Establishment Counts by Economic Region, industry, and Employee Size Ranges, December 2015

Sales of electricity, by market



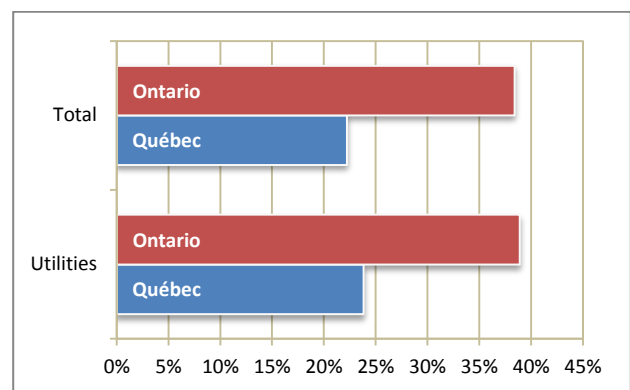
Source: Hydro-Québec, Rapport annuel 2016, ventes d'électricité en TWh selon la destination

Self-employed jobs compared to Total employment



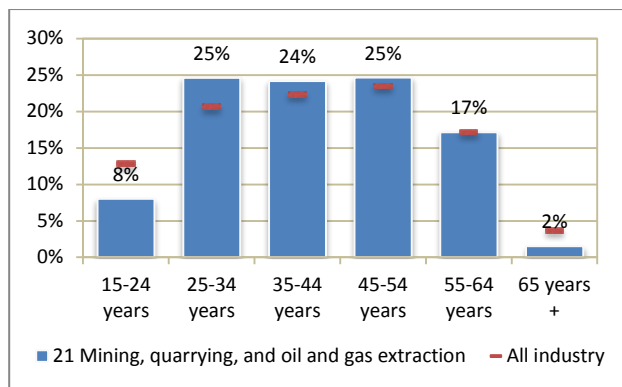
Source: Statistics Canada, CANSIM 383-0031 Labour statistics, based on average employment in 2014-2016

Share of total employment and industry in Canada



Source: Statistics Canada, Survey of Employment, Payrolls and Hours; based on average employment in 2014-2016

Employed Labour Force Aged 15 Years and Over



Source: Statistics Canada, 2016 Census, special tabulation for ESDC

Employment distribution by skill type

National Occupational Classification	
0. Management	7%
1. Business, finance and administration	20%
2. Natural and applied sciences and related	27%
3. Health	0%
4. Education, law and social, community and government services	4%
5. Art, culture, recreation and sport	0%
6. Sales and service	7%
7. Trades, transport and equipment operators	25%
8. Natural resources, agriculture and related production	0%
9. Manufacturing and utilities	9%

Source: Statistics Canada, 2016 Census, special tabulation for ESDC

FOR MORE INFORMATION

- Job Bank (Canada) – [Job Market Trends and News](#): Information on job, skills and local labour market trends is important for making career decisions. In addition, information on wages, labour supply, labour demand and other factors helps employers recruit, train and retain workers and make business and investment decisions.
- North American Industry Classification System (NAICS) Canada 2012: Utilities [NAICS 22](#)

Note: In preparing this document, the authors have taken care to provide clients with labour market information that is timely and accurate at the time of publication. Since labour market conditions are dynamic, some of the information presented here may have changed since this document was published. Users are encouraged to also refer to other sources for additional information on the local economy and labour market. Information contained in this document does not necessarily reflect official policies of Employment and Social Development Canada.

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For further information, please contact the LMI team at:

http://www.esdc.qc.ca/cqi-bin/contact/edsc-esdc/enq/contact_us.aspx?section=lmi

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