



Sectoral Profile

Non-metallic mineral product manufacturing

NAICS 327

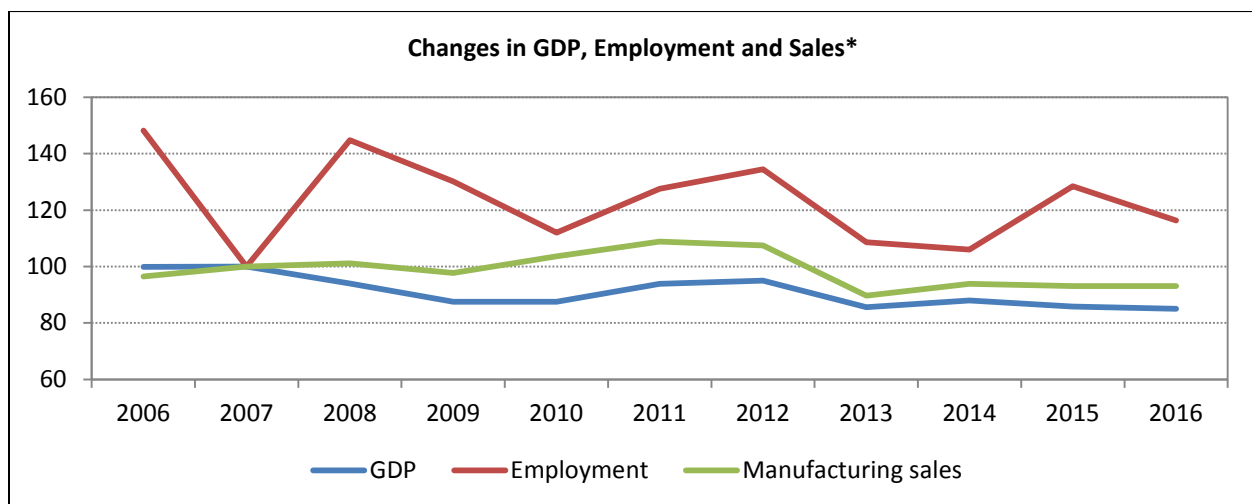
Quebec

2018-2020*



- Cement and concrete product manufacturing is the main segment of the industry, with more than half of jobs – combined with other non-metallic mineral products manufacturing and glass and glass product manufacturing, the three segments account for 93% of jobs in the industry
- Over the last ten years, there has been significant increase in non-metallic mineral products imports in Quebec; the value of imported cement and concrete products alone has more than doubled

In this industry, they cut, grind, shape and finish granite, marble, limestone, slate, glass, etc. The finish product can be off the raw material, or grounded and mixed with additives to obtain other products such as mineral wool acoustic tiles, bricks, refractories, ceramic products, drywall sheets, cement and glass. Three segments make up over 90% of the workforce: cement and concrete product manufacturing (54%), other non-metallic mineral products manufacturing, such as abrasives, mineral wool, flagstones, dimension stones, etc. (20%), and glass and glass product manufacturing (19%).



*Data are expressed as indices with 2007 = 100

Sources: Statistics Canada, GDP – CANSIM 379-0030, Employment – LFS, Sales – CANSIM 304-0015

Over the past decade, employment fluctuated in Quebec while there was a significant increase in non-metallic mineral products imports. The value of imported cement and concrete products alone has more than doubled during that time.

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

That being said, the short term outlook points toward a sustained demand for non-metallic mineral products linked to the intense activity in multi-unit building construction, civil engineering and public infrastructure, as well as in major institutional and commercial construction projects. Cement consumption, both in Canada and the United States, should continue to increase in the coming years. However, global competition could compel Quebec businesses to improve their productivity and to limit their production and hiring costs.

We expect stability in the workforce in Quebec: the positive dynamism in some regions will be cancelled out by the negative impacts experienced by some other regions, mainly due to the decline in residential construction.

Sectoral Dynamics for Regions

Québec 2018-2020	In the Economic Regions	AAGR
<p>Annual average growth: 0.1%</p> <p>Stable employment situation throughout the period</p> <p>Yearly dynamics: 2018: = 2019: = 2020: =</p>	Lanaudière	0.7%
	Bas-Saint-Laurent	0.7%
	Capitale-Nationale	0.2%
	Laurentides	0.2%
	Saguenay–Lac-Saint-Jean	0.1%
	Estrie	0.1%
	QUÉBEC	0.1%
	Montréal	0.1%
	Chaudière-Appalaches	0.0%
	Outaouais	0.0%
	Abitibi-Témiscamingue	0.0%
	Côte-Nord / Nord-du-Québec	0.0%
	Gaspésie–Les-Îles	0.0%
	Mauricie	0.0%
	Montréal CMA	0.0%
Centre-du-Québec	-0.5%	

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 of the non-metallic product industry’s workforce are the most likely to be affected by the expected dynamics (according to the occupation by industry matrix):

- 7511 Transport truck drivers
- 9414 Concrete, clay and stone forming operators
- 9413 Glass forming and finishing machine operators and glass cutters
- 7452 Material handlers
- 0911 Manufacturing managers
- 9211 Supervisors, mineral and metal processing
- 7311 Construction millwrights and industrial mechanics
- 7282 Concrete finishers
- 7611 Construction trades helpers and labourers
- 9611 Labourers in mineral and metal processing
- 7237 Welders and related machine operators

- 6411 Sales and account representatives - wholesale trade (non-technical)
- 7281 Bricklayers
- 7521 Heavy equipment operators (except crane)
- 1521 Shippers and receivers
- 9535 Plastic products assemblers, finishers and inspectors
- 7292 Glaziers
- 9619 Other labourers in processing, manufacturing and utilities
- 9613 Labourers in chemical products processing and utilities
- 7283 Tilesetters
- 5244 Artisans and craftspersons
- 2233 Industrial engineering and manufacturing technologists and technicians.

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

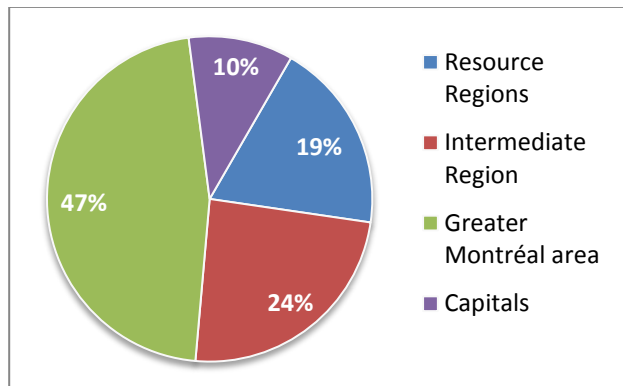
	Employment 2015–2017 Average			10-year Change in Employment	
	Employment In thousands	Provincial distribution	Regional employment share	In thousands	as a %
All of Quebec	13.8	100.0%	0.3%	-2.0	-12.7%
Resource Regions					
Abitibi-Témiscamingue	x	x	x	x	x
Bas-Saint-Laurent	x	x	x	x	x
Côte-Nord / Nord-du-Québec	x	x	x	x	x
Gaspésie-Îles-de-la-Madeleine	x	x	x	x	x
Saguenay-Lac-Saint-Jean	x	x	x	x	x
Intermediate Regions					
Centre-du-Québec	x	x	x	x	x
Chaudière-Appalaches	x	x	x	x	x
Estrie	x	x	x	x	x
Mauricie	x	x	x	x	x
Greater Montréal area					
Lanaudière	x	x	x	x	x
Laurentides	x	x	x	x	x
Laval	x	x	x	x	x
Montréal	3.0	22.0%	0.4%	0.0	1.1%
Montréal	x	x	x	x	x
Capitals					
Capitale-Nationale	1.6	11.6%	0.4%	-1.2	-42.9%
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

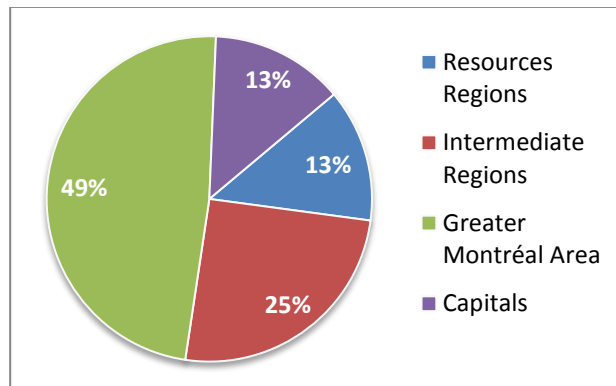
SOME CHARACTERISTICS OF THE INDUSTRY IN QUÉBEC

Establishment distribution by Region



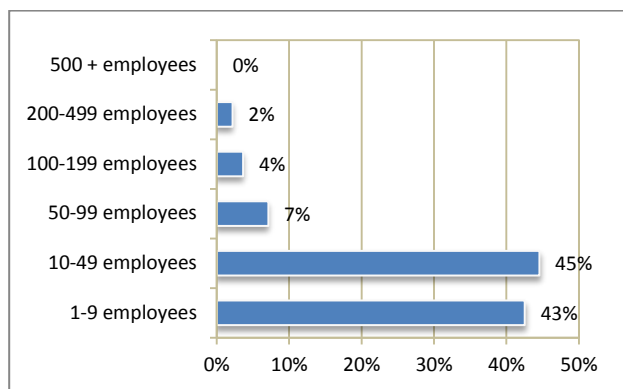
Source: Statistics Canada, Establishment Counts by Economic Region, industry, and Employee Size Ranges, December 2015

Employment distribution by Region



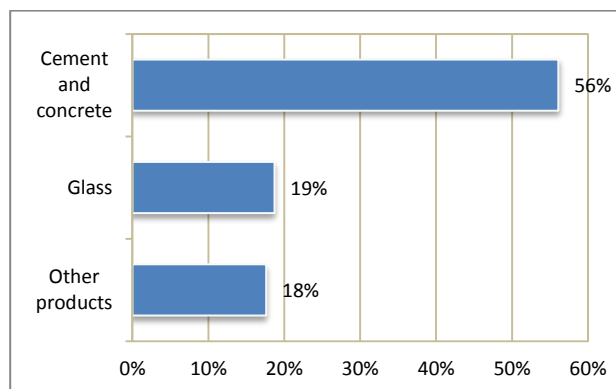
Source: Statistics Canada, Labour Force Survey; based on average employment in 2014-2016

Size of establishment



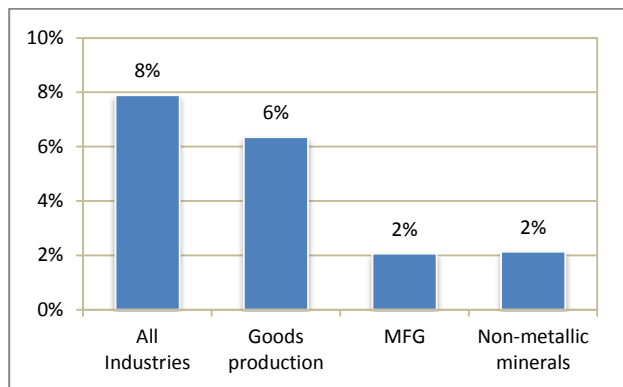
Source: Statistics Canada, Establishment Counts by Economic Region, industry, and Employee Size Ranges, December 2015

Employment by industry segment



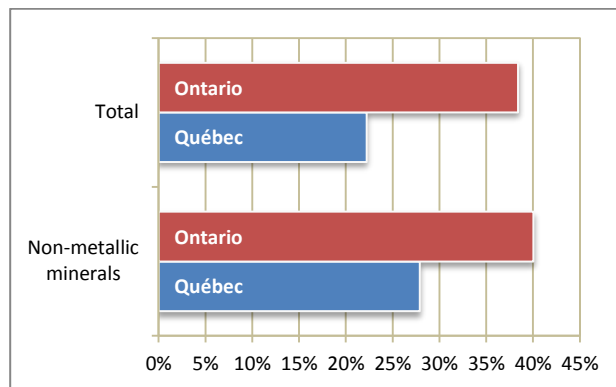
Source: Statistics Canada, Survey of Employment, Payrolls and Hours; based on average employment in 2014-2016

Self-employed jobs compared to Total employment



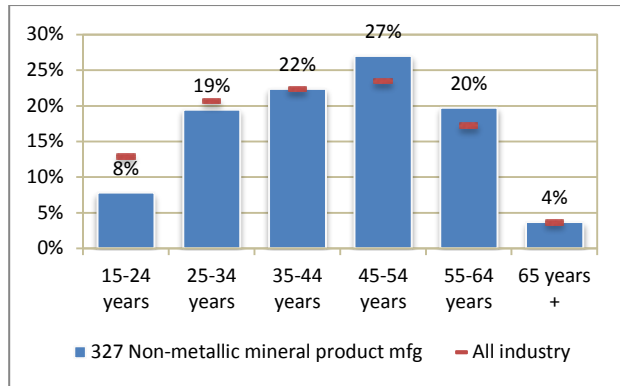
Source: Statistics Canada, CANSIM 383-0031 Labour statistics, based on average employment in 2014-2016

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	9%
1. Business, finance and administration	11%
2. Natural and applied sciences and related	6%
3. Health	0%
4. Education, law and social, community and government services	0%
5. Art, culture, recreation and sport	2%
6. Sales and service	7%
7. Trades, transport and equipment operators	33%
8. Natural resources, agriculture and related production	1%
9. Manufacturing and utilities	31%

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: Non-metallic mineral product manufacturing [NAICS 327](#)

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.gc.ca/cqi-bin/contact/edsc-esdc/eng/contact_us.aspx?section=lmi

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