



Labour Market Bulletin

Alberta

October 2019



This Labour Market Bulletin provides an analysis of Labour Force Survey results for the province of Alberta, including the regions of Calgary, Edmonton, Central Alberta and Mountain Parks, Southern Alberta, and Northern Alberta.

OVERVIEW

Employment in Alberta grew at a moderate pace in October, a mild improvement after several disappointing months. At 2.36 million, overall employment increased by 7,700 (+0.3% on the month, the equivalent of +3.6% on an annualized basis). Gains in full-time employment (+14,400) were partially offset by losses in part-time positions (-6,700). Both public sector and self-employed workers saw job losses on the month, while private sector employment increased by about 20,000.¹

Alberta Monthly Labour Force Statistics

Seasonally Adjusted Monthly Data	October 2019	September 2019	October 2018	Monthly Variation		Yearly Variation	
				Number	%	Number	%
Population 15 + ('000)	3,545.9	3,540.5	3,486.3	5.4	0.2	59.6	1.7
Labour Force ('000)	2,526.5	2,515.3	2,517.4	11.2	0.4	9.1	0.4
Employment ('000)	2,356.9	2,349.2	2,336.9	7.7	0.3	20.0	0.9
Full-Time ('000)	1,936.5	1,922.1	1,921.1	14.4	0.7	15.4	0.8
Part-Time ('000)	420.4	427.1	415.8	-6.7	-1.6	4.6	1.1
Unemployment ('000)	169.6	166.2	180.5	3.4	2.0	-10.9	-6.0
Unemployment Rate (%)	6.7	6.6	7.2	0.1	-	-0.5	-
Participation Rate (%)	71.3	71.0	72.2	0.3	-	-0.9	-
Employment Rate (%)	66.5	66.4	67.0	0.1	-	-0.5	-

Note: Totals may not add due to rounding

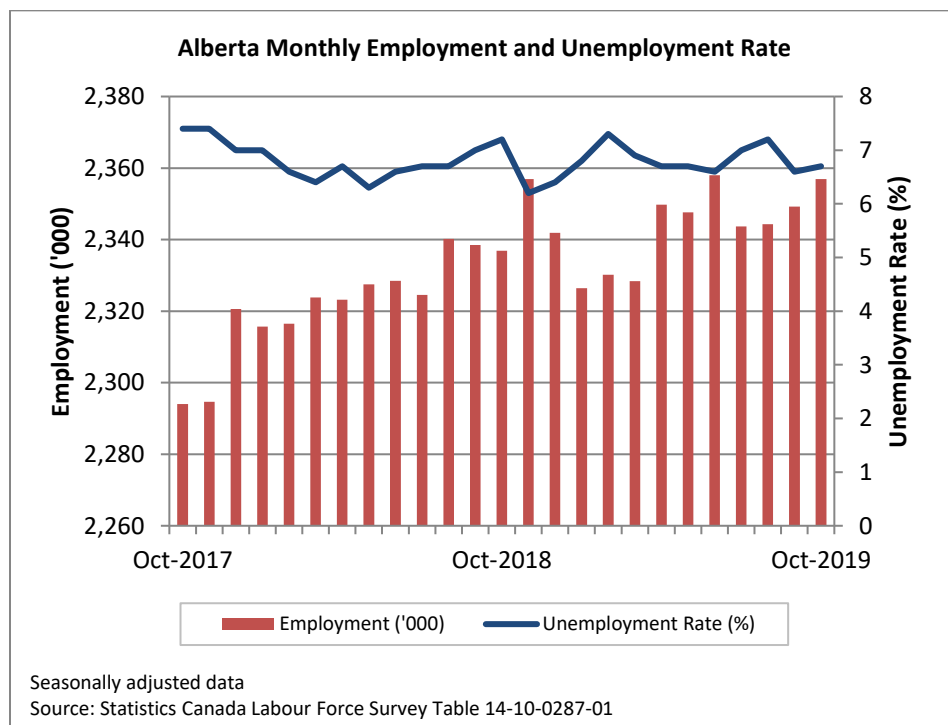
Source: Statistics Canada Labour Force Survey – Table 14-10-0287, formerly CANSIM 282-0087

Taking a longer view, overall employment edged up by only 0.9% compared to October of last year (+20,000). On the year, gains in both private sector (+51,600) and public sector (+9,100) employment were largely offset by a pullback in self-employment (-40,600).²

Hourly paid Albertans worked 31.3 hours on average in August (the most recent data available). This was the third highest among provinces and well above the corresponding figure nationwide (30.0 hours). Meanwhile at \$1,170 per week, average earnings in Alberta remain the highest among provinces, despite declining three times so far this year.³

In August 2019 (again the most recent data available), the number of regular Employment Insurance beneficiaries rose for a second consecutive month to 50,560. Year over year, the number of regular EI recipients in Alberta was 3.5% lower than in August 2018, the same rate of decline seen nationwide.⁴

Despite posting employment gains on the month, unemployment in the province increased in October, up 3,400, as labour market entrants exceeded job creation. Nevertheless, at 169,600, unemployment in the province was down 10,900 compared to the same month last year. At 6.7%, the unemployment rate in October was the highest west of New Brunswick – exceeding the national average by 1.2 percentage points. The average duration of unemployment in Alberta was 18.5 weeks in October, third highest among provinces and 1.8 weeks longer than the national average.⁵



Unemployment by major demographic grouping

At 6.7%, Alberta's overall unemployment rate edged up slightly in October, while down 0.5 percentage points (pp) on the year. Year over year, young workers fared the worst, with young men facing an unemployment rate of 16.5% compared to a rate of 9.8% for their female contemporaries. The outlook facing older men somewhat mirrored that of their younger counterparts, with the unemployment rate for men 25 years and older (6.1%) higher than that of women (5.2%) from the same age group.

Alberta Monthly Unemployment Rates, by Gender and Age

Seasonally Adjusted Data	October 2019	September 2019	October 2018	Monthly Variation	Yearly Variation
	(%)	(%)	(%)	(% points)	(% points)
Total	6.7	6.6	7.2	0.1	-0.5
25 years and over	5.7	5.2	6.4	0.5	-0.7
Men - 25 years and over	6.1	5.5	6.7	0.6	-0.6
Women - 25 years and over	5.2	4.9	5.9	0.3	-0.7
15 to 24 years	13.2	15.5	12.6	-2.3	0.6
Men - 15 to 24 years	16.5	19.9	14.6	-3.4	1.9
Women - 15 to 24 years	9.8	10.8	10.2	-1.0	-0.4

Note: Totals may not add due to rounding

Source: Statistics Canada Labour Force Survey – Table 14-10-0287, formerly CANSIM 282-0087

EMPLOYMENT BY INDUSTRY

Turning to employment by industry, the province's services-producing sector (e.g. professional, scientific and technical services) saw job gains on both the month and year over year. By contrast, the goods-producing sector (e.g. the resource extraction industries of forestry, fishing, mining, quarrying, oil and gas) saw employment expand on the month (+1,500), but contract compared to October of last year (-8,800).

Notably, Alberta's goods-producing sector represents a far larger share of the economy than it does in other major provinces. Despite job losses on the year, the outsized sector's share still accounted for one-quarter of total employment in the province, 4.4 percentage points above the national average.

At 140,200, the combined employment in forestry, fishing, mining, quarrying, oil and gas was almost 25% below the 183,600 posted in September 2014.

Alberta Monthly Labour Force Statistics, by Industry

Seasonally Adjusted Data ('000)	October 2019	September 2019	October 2018	Monthly Variation		Yearly Variation	
				Number	%	Number	%
Total employed, all industries	2,356.9	2,349.2	2,336.9	7.7	0.3	20.0	0.9
Goods-producing sector	588.6	587.1	597.4	1.5	0.3	-8.8	-1.5
Agriculture	52.1	51.9	46.3	0.2	0.4	5.8	12.5
Forestry, fishing, mining, quarrying, oil and gas	140.2	138.6	152.4	1.6	1.2	-12.2	-8.0
Utilities	24.8	24.2	23.8	0.6	2.5	1.0	4.2
Construction	236.6	236.3	247.7	0.3	0.1	-11.1	-4.5
Manufacturing	134.8	136.1	127.2	-1.3	-1.0	7.6	6.0
Services-producing sector	1,768.3	1,762.1	1,739.5	6.2	0.4	28.8	1.7
Trade	337.8	333.7	332.0	4.1	1.2	5.8	1.7
Transportation and warehousing	137.0	138.1	139.2	-1.1	-0.8	-2.2	-1.6
Finance, insurance, real estate and leasing	107.6	105.2	106.0	2.4	2.3	1.6	1.5
Professional, scientific and technical services	189.9	187.1	181.0	2.8	1.5	8.9	4.9
Business, building and other support services	81.7	78.6	88.8	3.1	3.9	-7.1	-8.0
Educational services	159.1	161.9	154.0	-2.8	-1.7	5.1	3.3
Health care and social assistance	304.7	298.9	280.9	5.8	1.9	23.8	8.5
Information, culture and recreation	75.4	76.3	77.8	-0.9	-1.2	-2.4	-3.1
Accommodation and food services	149.0	146.5	147.8	2.5	1.7	1.2	0.8
Other services	112.9	119.0	115.8	-6.1	-5.1	-2.9	-2.5
Public administration	113.2	116.7	116.1	-3.5	-3.0	-2.9	-2.5

Note: Totals may not add due to rounding

Source: Statistics Canada Labour Force Survey – Table 14-10-0355, formerly CANSIM 282-0088

Oil and gas

Oil production in the province expanded sharply last year, due in large part to the completion of Suncor Energy's huge new Fort Hills oilsands mine. As a result, 2018 was officially the year in which oil production in Alberta

exceeded pipeline take away capacity. While oil extraction occurs in every corner of the province, the oilsands region produces by far the largest provincial share. In September 2019, oilsands operations accounted for 84% of total oil production in the province.⁶

In recent years, Alberta's oil and gas firms have struggled to remain competitive with their U.S. counterparts, particularly with respect to attracting investment capital. The draw down in oil and gas investment is not just limited to Alberta or Canada, however. Globally, investment in oil production fell by about 40% between 2014 and 2018.⁷

Late last year, a combination of pipeline constraints, refinery closures, and falling international oil prices threatened the viability of the provincial energy sector. In November 2018, the price of Western Canada Select (WCS), Alberta's benchmark bitumen crude, averaged just \$18 USD per barrel for the entire month.

Attempting to limit job losses and bankruptcies, the Government of Alberta placed an overall cap (curtailment) on oil production in the province, effective January 2019. The curtailment successfully raised the price of WCS, which touched \$55 USD per barrel in April. Since then the price of WCS has fallen along with oil prices worldwide, as trade disruptions limit global oil demand growth. In November, OPEC (The Organization of Petroleum Exporting Countries) lowered its medium- and long-term oil demand forecasts.⁸

Despite the WCS price hike, Alberta's curtailment policy remained deeply unpopular with the province's largest oil producers. Because integrated firms with their own refineries can still make money when crude prices are low, these firms tend to oppose government intervention to various degrees. In any case, although curtailment remains on the books, firms can now increase production as they see fit, providing they ship any extra barrels by rail and not by pipeline.⁹

While oil by rail continues to expand, industry is still pinning its hopes on the completion of any two of the three export pipeline projects currently in advanced stages: Trans Mountain Expansion (TMX); Keystone XL; and the Line 3 replacement project. Of these, Line 3 is still the most likely to first come on stream – although it may again be delayed due to court challenges in Minnesota. Regarding TMX, in September the Federal Court of Appeal adjudicated on 12 further appeals of the project, dismissing six outright, while agreeing to hear the other six simultaneously and on an expedited basis.¹⁰ The project would twin an aging pipeline from Alberta to tidewater in Burnaby B.C., almost tripling capacity from 300,000 barrels per day (bpd) to 890,000 bpd.¹¹

Other goods-producing industries

Looking at Alberta's other goods-producing industries, **construction** posted a heavy year over year job loss in October (-4.5%). In September (the most recent data available), the seasonally-adjusted value of building permits issued in the province – including both new product and renovations – rose for a third consecutive month. At \$1.04 billion, building permits were up by 5.4% compared to September 2018.¹² However, there have been troubling signs of residential overbuilding in the province. In September, completed and sold – i.e. absorbed – new housing units in Alberta's two major centres of Calgary and Edmonton accounted for 27% of all large-city units absorbed nation-wide. At the same time, however, the two cities accounted for 35% of all large-city *unabsorbed* (completed and unsold) units.¹³

After a poor 2018, Alberta's **agriculture** industry had hoped for a recovery year in 2019. However, starting in March, trade issues came to the fore, as China systematically revoked all licences to import Canadian canola.¹⁴ The country then temporarily halted the importation of all Canadian meat products, following its discovery of counterfeit Canadian veterinary certificates.¹⁵ More recently, it became apparent that China has in fact accelerated importation of Canadian wheat year to date.¹⁶

This year's harvest did not go well in Alberta, as winter appears to have arrived early. At the time of writing, 89% of crops had been harvested compared to 95% at the same time last year. Moreover, harvest has likely come to a complete halt for the season.¹⁷

While low energy prices are a huge negative for resource extraction firms, they are a significant plus for the province's petrochemical **manufacturing** industry. Inter Pipeline is currently building a \$3.5 billion petrochemical complex in Alberta's Industrial Heartland, just outside Edmonton's city limits. The project is a major undertaking for Inter. Calgary-based Pembina Pipeline Corporation's \$4.5 billion joint venture with Kuwait's national petrochemical company is also being built in the Industrial Heartland. In September, the Globe and Mail reported that Inter Pipeline had rejected an unsolicited takeover bid from Hong Kong billionaire Li Ka-Shing's CK Infrastructure Holdings Ltd.¹⁸

Services-producing industries

Turning to the services-producing sector, at 1.768 million, net overall employment increased by 6,200 in October. **Wholesale and retail trade**, Alberta's largest industry by employment, saw job gains on both the month (+4,100) and year over year (+5,800). In August (the most recent data available), total retail sales increased by 0.1% on the month, while down 0.6% compared to August 2018.¹⁹

Wholesale and retail trade has been one of the service industries deeply hurt by the prolonged slump in the provincial energy sector. For example, over the five-year period from August 2014 to August 2019, the total value of retail sales in Alberta increased by just 3.0% – compared to 20% Canada-wide. Wholesale trade fared even worse; total sales in August 2019 were 4.9% below the level of August 2014.²⁰

In October, **Health care and social assistance**, Alberta's second largest industry by employee count, posted job gains on both the month (+1.9%) and on the year (+8.5%). Health care, along with educational services, and public administration are **public sector** industries. In general, public sector job growth tends to reflect population increase, somewhat independent of economic conditions. As such, these industries have been less affected by the oil and gas downturn than have private sector industries such as trade. That being said, in its first Budget, Alberta's new government proposes a course change and a 2.8% reduction in provincial operating expenses. The Province intends to reduce its public service by 7.7% over four years through hiring restraints and attrition, and to reduce post-secondary institutions' operating grants by up to 7.9%.

REGIONAL ANALYSIS

Compared to October 2018, year over year employment has increased in two of Alberta's seven economic regions. Calgary led the growth by adding approximately 33,300 jobs, while Edmonton posted the greatest losses (-15,000).

Alberta Monthly Labour Force Statistics, by Economic Region

3-Month Moving Averages Seasonally Unadjusted Data	Employment			Unemployment Rate		
	October 2019 ('000)	October 2018 ('000)	Yearly Variation (%)	October 2019 (%)	October 2018 (%)	Yearly Variation (% points)
Alberta	2,358.2	2,347.9	0.4	6.8	6.7	0.1
Economic Regions						
Lethbridge - Medicine Hat	147.9	146.3	1.1	6.4	4.1	2.3
Camrose - Drumheller	97.3	100.3	-3.0	4.3	5.9	-1.6
Calgary	923.1	889.8	3.7	7.4	8.2	-0.8
Banff - Jasper - Rocky Mountain House and Athabasca - Grand Prairie - Peace River	188.8	188.8	0.0	5.8	5.3	0.5
Red Deer	114.9	121.4	-5.4	7.3	6.3	1.0
Edmonton	804.1	819.1	-1.8	6.9	6.2	0.7
Wood Buffalo - Cold Lake	82.0	82.3	-0.4	5.1	5.5	-0.4

Note: Totals may not add due to rounding

Source: Statistics Canada Labour Force Survey – Table 14-10-0293, formerly CANSIM 282-0122

In **Lethbridge-Medicine Hat**, employment increased by 1.1% compared to October 2018. However, the area's unemployment rate has increased by 2.3 percentage points, to 6.4% from last year.

The services-producing sector fueled the region's increase in employment with impressive year over year growth. By contrast, the goods-producing sector continued to contract, with a 6.8% decrease in employment since October 2018. Still, there is reason to be optimistic going forward, as two major wind-power facilities, located east and west of Medicine Hat, have recently received approvals from provincial regulators. The combined value of the projects is an estimated \$450 million, with construction scheduled to start in the summer of 2020.

Year over year, employment fell by 3,000 in **Camrose-Drumheller**. Despite this, the unemployment rate fell by 1.6 percentage points, as the number of people exiting the labour force (4,900) masked unemployment in the region. At 4.3%, Camrose-Drumheller's unemployment rate was the lowest in the province.

Camrose-Drumheller's construction industry enjoyed a strong year since October 2018. Looking forward, it is likely that this industry will continue to thrive. Work continues on a large number of projects, with still more expected to begin soon, such as the Claresholm Solar project. Construction on the \$200 million project, located about 125 kilometres south of Calgary, is expected to commence before the end of the year.

There was no change in overall employment in **Banff-Jasper-Rocky Mountain House** and **Athabasca-Grand Prairie-Peace River** compared to October 2018. The unemployment rate did not vary much either, up 0.5 percentage points to 5.8%.

A decrease of 3,100 jobs in the services-producing sector was offset by an increase in employment in the goods-producing sector. Employment-wise, the construction industry has had a strong year, due in part to work on Persta Resources Inc.'s \$36 million natural gas pipeline and associated gas gathering infrastructure in the Voyager area. The pipeline will have a capacity of 1.3 billion cubic meters per year when construction wraps up by the end of 2019.²¹

Red Deer continued to post job losses, with a year over year employment decline of 5.4%. The unemployment rate increased by one percentage point since October 2018.

While both the region's goods-producing sector and services-producing saw net job losses, declines were somewhat steeper in the goods-producing sector. Agriculture saw a mild decrease in employment on the year. The industry has been hurt by ongoing global political and trade uncertainties. On a positive note, China has lifted its ban on Canadian beef and pork, which was in place since June of this year. China is the fifth largest export market for Canadian beef and the second largest for pork.

In the **Wood Buffalo-Cold Lake** region there was little change in employment, down 0.4% on the year. At the same time, the unemployment rate fell by 0.4 percentage points to 5.1%.

On October 31, 2019, the Government of Alberta eased oil curtailment limits for producers who want to ship additional oil, provided they ship the extra barrels by rail. The announcement aims to give producers a short term solution to the pipeline constraint problem, while maximizing usage of Alberta's rail system. Producers are currently shipping 310,000 barrels of oil per day via a rail system that can handle up to 600,000 barrels daily. This is good news for the region, which accounts for over 80% of all oil production in the province.

Employment in the **Edmonton** region fell by 1.8% from October 2018, with job losses occurring in the goods-producing sector, and to a lesser extent, in the services-producing sector. The unemployment rate edged up slightly to 6.9%, an increase of 0.7 percentage points from October 2018.

The transportation and warehousing industry has had a strong year with significant year over year employment gains. This growth is expected to continue when the Amazon fulfilment centre opens just south of the city in spring 2020. The centre is expected to provide more than 600 permanent, full time positions.²² Nearby, the Edmonton International Airport has entered into a commercial agreement with Drone Delivery Canada. In what is expected to be the world's first regularly scheduled drone service from an airport, unmanned aircrafts traveling upwards of 200 kilometers are expected to take off in early 2020 to deliver parcels to consumers.

At 7.4%, **Calgary** now has the highest unemployment rate in the province. Still, this is something of an improvement, as the rate was 8.2% during the same month last year. On the job creation front, the region posted a year over year increase in employment of 3.7%, representing the largest percentage increase for any region in the province. Growth in Calgary's services-producing sector offset net employment losses in its goods-producing sector. Employment in the professional, scientific and technical services industry exhibited strong year over year growth. Calgary Economic Development (CED) is hoping to build on this growth by spending \$4 million on an ad campaign to attract tech workers to the city. CED estimates that there are 2,000 to 3,000 tech jobs open at any given time.²³

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 information on the Labour Force Survey, please visit the Statistics Canada Web site at: www.statcan.gc.ca

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