

Image courtesy: BC Ministry of Transportation and Infrastructure

**Broadway Subway Project reaches major construction phase:** a 5.7-kilometre extension of the Millennium Line from VCC-Clark Station to Broadway and Arbutus, adding six stations along the way. The Broadway Subway will provide people in Metro Vancouver with faster, more convenient, and more affordable travel

**Total Cost:** The estimated cost of the project is \$2.83 billion, funded and delivered by the Province of B.C. (\$1.83 billion), with contributions from the Government of Canada (\$896.9 million) and the City of Vancouver (\$99.8 million in-kind).

# BRITISH COLUMBIA MAJOR PROJECTS INVENTORY

**SECOND QUARTER 2021** 



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#### **British Columbia Major Projects Inventory**

#### **Second Quarter 2021**

Major Projects Inventory as of June 30, 2021.

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#### About this Report

The objectives of this report are to analyze the updates to the Major Projects Inventory and to provide additional context on changes to economic conditions and construction activities. These snapshots of current economic activities are provided to help readers form expectations of the construction activities into the next quarter. This report was prepared with the most current data from economic indicators.

Detailed project listings are available in a searchable Excel database: www.majorprojectsinventory.com

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The B.C. Major Projects Inventory (MPI), published quarterly, provides summary information on major projects in the Province of British Columbia. The MPI includes a listing of private and public sector construction projects in B.C. with an estimated capital cost of \$15 million (CAD) or greater (\$20 million or greater within the Lower Mainland–Vancouver area).

Since 2019 (Quarter 1), about 75% of all the existing projects received an update each quarter. New projects are added to the list every quarter. Projects on hold for longer than two years are removed from the inventory. Completed projects are removed from the list in the following quarter.

Information collected in the MPI includes:

Project identification	Project name, description, specific and regional location, geographic coordinates, developer, contact information, project type, and project category.
Project status	<ul> <li>Proposed, under construction, completed, or on hold</li> <li>Proposed stages</li> <li>Start and completion dates (if available)</li> <li>Update activity on project status</li> <li>Environmental assessment stage</li> </ul>
Project size	Estimated capital cost (if available)
Other project characteristics	Construction type, construction subtype, public sector projects, clean energy projects and/or green (i.e. LEED) building projects, Indigenous peoples' agreements, the number of construction jobs and operating jobs.

While every effort is made to maintain a comprehensive project list that includes the most current publicly available information, it is important to note that projects are constantly added and re-evaluated by industry. Not all major projects are included in the MPI since projects need to be publicly announced in order to be included and some project information is not published due to confidentiality requirements.

#### **Sources of MPI Information**

Information sources include print and electronic media, developers, architects, general contractors, and government agencies (provincial, regional, municipal) as well as occasional site visits. Projects that are under consideration or proposed to be funded by the provincial government may be listed where there is public information about such projects. The description may indicate the status of provincial funding applications if such information is publicly available.

#### **Project Location**

Projects are listed within the eight economic development regions: Vancouver Island/Coast, Mainland/Southwest (Vancouver area), Thompson-Okanagan, Kootenay, Cariboo, North Coast, Nechako, and Northeast. A map showing the location of the regions and main population centres is included in the regional sections of the MPI. Projects are also listed according to the nearest population centre, which could be an unincorporated centre or a local government (e.g. a municipality).

#### **Estimated Cost**

Cost estimates are general estimates from the information sources used and are not necessarily produced in a consistent manner. The estimated costs are revised when new information is available. All estimates are recorded in millions of dollars. All capital costs in this report are estimates and therefore subject to change. This is particularly applicable in the early stages of a project proposal. Some capital costs are not included because they were not available at press time or the developer or owner requested that no capital cost be shown.

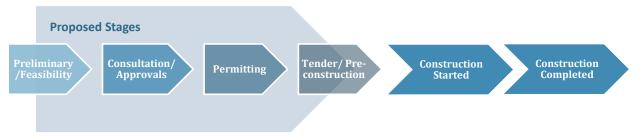
#### **Start and Finish Dates**

Start and finish dates for proposed projects are based on estimates from the sources used, or in some cases, reasonable assumptions. These dates are revised as new information becomes available.

#### **Project Status**

Projects are listed by status: proposed, under construction, completed, or on hold. Projects that are on hold for longer than two years are normally removed from the publication (although retained in our database). Cancelled projects are identified in the project description as "cancelled" and noted in a new field. Update Activity is identified as "cancelled-removing next issue". Cancelled projects and completed projects in this quarter will be removed from the next issue of the MPI. Changes to project status are based on public information releases and/or information supplied by project proponents. Cancelled projects are not included in reported totals in this report.

The following diagram illustrates the project stages listed in the database.



Technically, projects can have their status moved to "cancelled" at any stage except at the construction completed stage.

#### **Proposed**

Any major projects in the public realm with an intention to proceed on the part of a credible proponent are added to the database. Often major projects with an official news release or funding confirmed are added to the inventory. Projects released on the official websites may be included but are subject to approval for inclusion by the proponent. A review process for public projects is obtained by the project manager where the respective ministry can decide to include or remove the proposed projects based on feasibility or funding available for the project.

Proposed projects usually go through four stages prior to reaching the construction stage.

At the **Preliminary/Feasibility** stage, the feasibility of the project has been reviewed and the project's design and planning are in process.

**The Consultation/Approvals** stage includes approvals for the zoning, environmental assessment, Indigenous peoples and other public open house processes.

A proposed project will enter the **Permitting** stage after obtaining the required approvals (i.e. environmental assessment certificate, if indicated). This stage includes development and building permits, mines, water licenses and other additional information required before moving into pre-construction stage.

The Tender/Pre-construction stage includes construction tenders and building site preparation such as preloading, demolition, and excavation. The pre-construction work such as excavation or site work may begin in preparation for the construction permit.

#### **Sustainable Building Design**

Information on sustainable building designs and construction projects that are registered and certified under a recognized green building rating system are identified. Examples of green building rating system include Leadership in Energy and Environmental Design (LEED®) and Green Globes. LEED buildings provide an environmentally responsible standard for energy efficiency at home and in the workplace. This designation has been added to the project description to promote awareness of the benefits of green buildings.

#### **Indigenous Affiliation**

Information related to Indigenous peoples' involvement in projects is based on news releases and published project information that is publicly available. The information is consistent with the information maintained in the Indigenous Business and Investment Council Database (BCIBIC: <a href="https://biz.bcibic.ca/">https://biz.bcibic.ca/</a>).

#### **Project Category**

Project Category lists the seven industrial categories:

- a.) manufacturing;
- b.) mining, oil and gas extraction;
- c.) other services;
- d.) public services;
- e.) residential or commercial;
- f.) transportation and warehousing; and,
- g.) utilities (including sewage treatment).

Note: Liquefied Natural Gas (LNG) projects are classified under mining, oil and gas extraction. This is different from the North American Industry Classification System in which LNG liquefaction is classified as being in the transportation industry.

#### **Environmental Assessment Stage**

The stages of environmental assessment for each project undergoing review under the *B.C. Environmental Assessment Act* are added to this issue.

#### **Latitude and Longitude**

Field latitude and longitude are noted in the Degrees Minutes Seconds (DMS) format.

#### **Telephone**

Contact number of the project developer or representative.

#### **Update Activity**

Readers can search for and select projects based on the following seven criteria:

- a.) new proposed projects
- b.) project started construction
- c.) cancelled-removing next issue
- d.) project added-under construction
- e.) project completed-removing next issue
- f.) project placed on hold; and,
- g.) project removed from hold.

### B.C. MAJOR PROJECTS INVENTORY - Q2 2021

#### 1. B.C. Major Projects Highlights –Q2 2021

The estimated capital cost of all 972 major projects in the first quarter of 2021 has decreased from \$383.64 billion (B) in the first quarter of 2021 to \$381.38 B. Note that the total capital cost is the combined estimated value of projects identified as proposed, construction started, completed, and on hold excluding cancelled projects.

There are 28 new proposed projects over \$15 million (M) with available capital cost estimates totaling \$656 M if all the projects were to proceed. The potential capital investment for new projects has decreased from \$3.86 B in the first quarter of 2021.

There are 19 projects that have started construction in B.C., representing an estimated capital cost of \$3.76 B, down from the \$6.71B reported in the first quarter of 2021. Thirty-three projects completed construction in the second quarter of 2021, with an estimated capital cost of \$4.35 B compared to \$3.37 B in the previous quarter.

There are 261 projects with public funding contributions with a total capital cost of \$56.79 B. Funding for these projects is allocated through municipal, provincial and/or federal levels of government, crown corporations, public institutions and may include private partnerships. Of these, 119 projects worth a total of \$24.01 B have provincial government funding contributions.

There are 62 projects with a total estimated cost of \$126.72 B involving Indigenous communities in capacities such as project owners, project partners or benefit agreements.

Major projects currently under construction in B.C. totaled \$125.17 B, down from the \$125.96 B in the first quarter of 2021. Proposed projects totaled \$220.43 B, decreased from \$222.93 B in the previous quarter. Many major project proposals listed are in very preliminary stages and are not approved for construction, therefore capital cost estimates should be viewed with caution. Approximately \$31.43 B of projects are judged to be 'on hold' for the time being, higher than the previous quarter which value was \$31.38 B.

All capital costs in this report are estimates and therefore subject to change. Some capital costs are not included because they were not available at press time or the developer or owner requested that no capital cost be shown.

Figure 1 B.C. MPI Highlights

972	Number of total major projects
\$381.38 B	Value of all projects
	Number of total proposed projects
\$220.43 B	Value of proposed projects
365	Number of projects under construction
\$125.17 B	Value of projects under construction
33	Number of projects completed
\$4.35 B	Value of projects completed
	Number of new proposed projects
\$656 M	Value of newly proposed projects

### B.C. MAJOR PROJECTS INVENTORY - Q2 2021

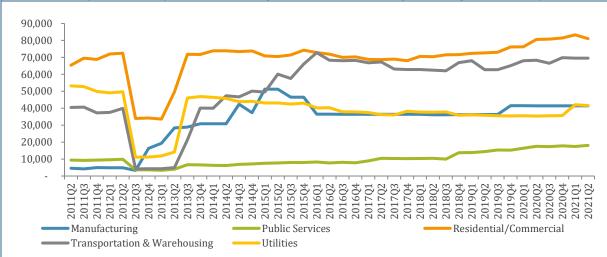
### 2. B.C. Major Projects Inventory – Q2 2021

#### By Project Category, Construction Type or Subtype

Exhibit 2.1 Estimated Cost Trends in B.C. Major Projects, by Project Category (\$ M)

Project Category	2020Q2	2020Q3	2020Q4	2021Q1	2021Q2	Change from the previous quarter	Change from the previous year
Mining & Oil & Gas Extraction	118,264	118,264	118,264	120,761	120,761	0.0%	2.1%
Residential/Commercial	80,600	80,780	81,406	83,376	81,017	-2.8%	0.5%
Transportation & Warehousing	68,310	66,525	69,831	69,536	69,516	0.0%	1.8%
Manufacturing	41,447	41,447	41,447	41,387	41,387	0.0%	-0.1%
Utilities (incl sewage treatment)	35,484	35,680	35,726	42,082	41,580	-1.2%	17.2%
Public Services	17,539	17,345	17,771	17,461	18,083	3.6%	3.1%
Other Services	9,794	9,794	9,126	9,036	9,036	0.0%	-7.7%
Grand Total	371,438	369,835	373,571	383,639	381,380	-0.6%	2.7%

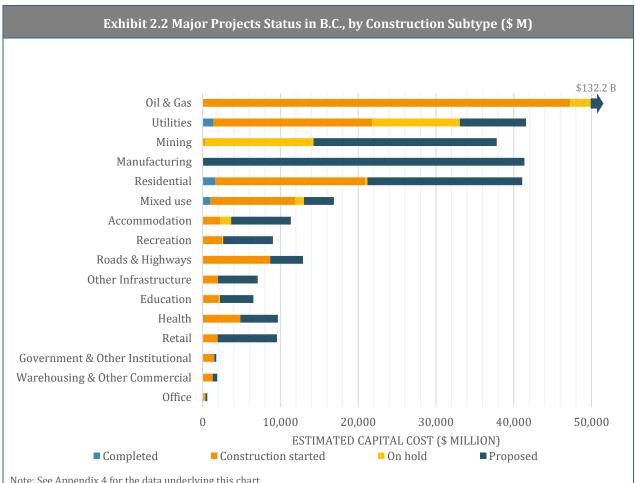
Note: Liquefied Natural Gas (LNG) projects are classified under mining, oil and gas extraction. This is different from the North American Industry Classification System in which LNG liquefaction is classified as being in the transportation industry.



Note: chart excludes mining oil & gas extraction and other services projects

The total estimated capital cost of major projects in B.C was up in the second quarter of 2021 (Q2), totaling \$381.38 B, representing a 0.6% decrease over the previous quarter and up 2.7% compared to last year.

### B.C. MAJOR PROJECTS INVENTORY – Q2 2021



Note: See Appendix 4 for the data underlying this chart.

- In the second quarter of 2021, Oil and Gas projects (including LNG) represent 34.7% of the total estimated capital cost in the MPI.
- Residential and Commercial development projects comprise of 570 of the 972 projects listed in the second quarter of 2021, representing a total estimated capital cost of \$90.39 B.
- Residential projects are concentrated in the Mainland/Southwest region (72.4%), Vancouver Island (17.7%), and Thompson-Okanagan (9.2%).
- Utility projects continue to be a significant driver for the province. The total cost of utilities projects is nearly \$41.58 B while the total cost of projects which are currently underway is nearly \$20.40 B.
- There are 57 mining projects listed in the MPI with a total estimated value of \$37.83 B.
- The top categories for new projects added to the MPI in this quarter is primary residential single use (\$441 M).
- Public Infrastructure The value of public funding contributions was \$56.79 B for 261 projects across all levels of government. Of these, 119 projects worth a total of \$24.01 B have provincial government funding contributions. It is important to note that this figure reflects the total cost, not just the provincial contribution.

# B.C. MAJOR PROJECTS INVENTORY – Q2 2021

Exhibit 2.3 Estimated Cost of Regional Major Projects, by Construction Type and Subtype (\$ M)

Construction Type & Subtype	Vancouver Island/Coast	Mainland/ Southwest	Thompson- Okanagan	Kootenay	Cariboo	North Coast	Nechako	Northeast	Total
Residential Subtotal	12,669	32,934	9,350	80	0	0	100	20	55,153
Primarily residential - Single use	8,869	24,118	7,900	80	0	0	100	20	41,087
Residential Mixed Use	3,800	8,816	1,450	0	0	0	0	0	14,044
Commercial Subtotal	3,033	24,309	3,004	3,002	1,322	30	0	540	35,240
Commercial Mixed Use	100	2,730	0	0	0	0	0	0	2,830
Accommodation	2,090	4,796	1,224	2,302	940	0	0	0	11,352
Recreation	253	6,418	1,665	700	0	0	0	0	9,036
Retail	480	8,460	115	0	0	0	0	500	9,555
Office	70	525	0	0	0	0	0	0	595
Warehousing	0	340	0	0	0	0	0	0	340
Other Commercial	40	1040	0	0	382	30	0	40	1,532
Industrial Subtotal	2,130	2,487	1,039	2,940	13,331	160,479	6,247	22,810	211,463
Mining	130	160	1,039	2,940	3,546	19,669	6,247	4,101	37,832
Oil & Gas	2,000	2,185	0	0	4,570	108,780	0	14,709	132,244
Manufacturing - Wood Products	0	0	0	0	0	30	0	0	30
Manufacturing - Petrochemical	0	0	0	0	5,200	32,000	0	4,000	41,200
Other Manufacturing	0	142	0	0	15	0	0	0	157
Institutional & Government Subtotal	4,582	9,898	1,357	132	917	503	148	424	17,961
Education	2,277	3,431	628	34	72	55	32	0	6,529
Health	716	6,353	729	98	845	448	116	375	9,680
Government buildings	1,589	114	0	0	0	0	0	49	1,752
Infrastructure Subtotal	8,802	18,977	4,087	968	1,232	5,364	477	21,656	61,563
Utilities	6,833	4,756	2,088	883	1,110	3,955	432	21,523	41,580
Roads & Highways	201	10,187	1,849	85	122	280	45	133	12,902
Other Transportation	1,768	4,034	150	0	0	1,129	0	0	7,081
Grand Total	31,216	88,605	18,837	7,122	16,802	166,376	6,972	45,450	381,380

### B.C. MAJOR PROJECTS INVENTORY - Q2 2021

Exhibit 2.4 Estimated Cost Trends in B.C. Major Projects, by Project Status (\$ M)

Status	2020Q2	2020Q3	2020Q4	2021Q1	2021Q2	Change from the previous quarter	Change from the previous year
Proposed	223,619	219,668	221,191	222,925	220,434	-1.1%	-1.4%
Construction started	115,179	117,760	119,925	125,962	125,173	-0.6%	8.7%
Completed	777	2,164	1,868	3,370	4,345	28.9%	459.2%
On hold	31,863	30,243	30,587	31,382	31,428	0.1%	-1.4%
Grand Total	371,438	369,835	373,571	383,639	381,380	-0.6%	2.7%

The value of completed projects increased from the first quarter of 2021 to \$4.35 B in Q2 2021. Notable projects completed were False Creek Central Condominium Development (\$1 B) in Vancouver, Tsawwassen First Nation Mixed Use Development (\$1 B) in Tsawwassen and Core Area Wastewater Management Project - Seaterra Program (\$765 M) in Victoria.

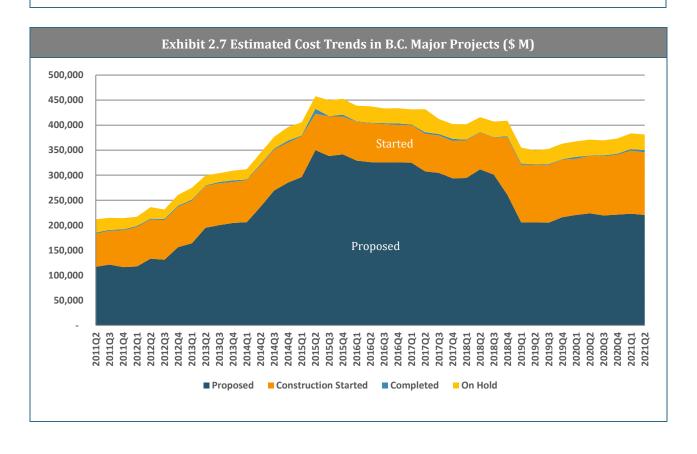
Exhibit 2.5 Summary of B.C. Major Projects (by Project Status)

	Estimated Capital Cost (\$M)	Percentage of Total	Number of Projects	Average Project Value (\$ M)	Average Years in Inventory
Proposed	220,434	58%	516	479	6.2
Preliminary/Feasibility	53,267	14%	120	538	4.6
Consultation/Approvals	76,024	20%	220	382	7.3
Permitting	46,620	12%	42	1166	3.7
Tender/Preconstruction	16,774	4%	76	240	3.2
Stage Unknown	27,801	7%	59	525	10.7
On hold	31,428	8%	58	571	12.7
Construction started	125,173	33%	365	355	6.4
Completed	4345	1%	33	136	5.7
Total	381,380	100%	972	424	6.6

Note: Average project value is the average of those projects for which there is a cost estimate. An average year in inventory is the average time span between the projects as first recorded in the MPI and the current period. Regional details provided in Exhibit 2.6.

# B.C. MAJOR PROJECTS INVENTORY – Q2 2021

Development Region	Proposed	Started	Completed	On Hold		Change from the previous quarter	Change from the previous year
1. Vancouver Island/Coast	14,194	10,654	860	5,508	31,216	0.4%	-0.1%
2. Mainland/Southwest	51,035	34,222	2754	594	88,605	-1.0%	3.3%
3. Thompson-Okanagan	4,258	12,104	91	2,384	18,837	-5.0%	-2.9%
4. Kootenay	2,628	2,674	400	1,420	7,122	-6.8%	-6.4%
5. Cariboo	11,780	4702	20	300	16,802	0.1%	9.6%
6. North Coast	117,442	36953	0	11,981	166,376	0.0%	1.0%
7. Nechako	4,433	299	0	2,240	6,972	0.0%	-0.2%
8. Northeast	14,664	23,565	220	7,001	45,450	-0.1%	12.6%
Total	220,434	125,173	4345	31,428	381,380	-0.6%	2.7%



# 3. B.C. Economy

#### **Exhibit 3.1 Economic Activity**

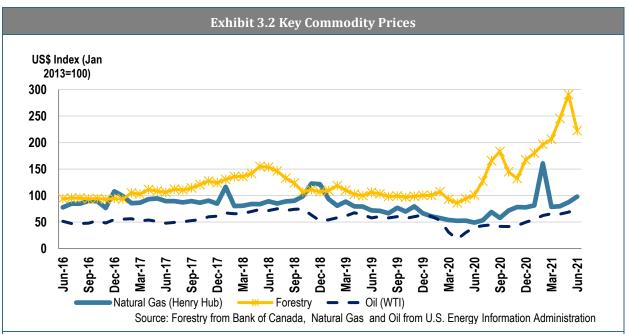
	2020	2021	2022	2023	2024
Real GDP	+2.0 %	+1.9 %	+1.9 %	+1.9 %	+2.2 %

Source: B.C. Budget and Fiscal Plan 2020/21 – 2022/23

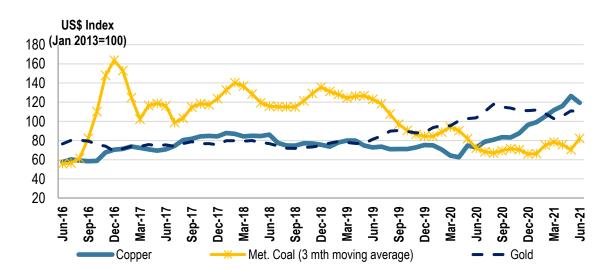
	Most Recent Period	Amount	Change from previous month	Change from previous year	Data Type
Retail trade (\$ M)	May-21	8,187	-1.4%	26.7%	seasonally adjusted
Manufacturing sales (\$ M)	May-21	5,525	1.2%	43.8%	seasonally adjusted
Residential - building permits (\$ M)	Jun-21	929	1.0%	-27.8%	seasonally adjusted
Residential - housing starts (units)	Jun-21	61,969	45.7%	71.6%	seasonally adjusted at annual rates
Non-Residential building permits (\$ M)	Jun-21	390	-16.0%	-29.7%	seasonally adjusted
Exports - all merchandise (\$ M)	May-21	4,568	14%	40.2%	seasonally adjusted
	Pi	rices			
B.C. Consumer price index (2002=100)	Jun-21	135.8	-0.1%	0.5%	not seasonally adjusted
Exchange rate	Jul-21	US 0.80	-2.4%	7.7%	not seasonally adjusted
Average 5-year residential mortgage rate	Jun-21	3.26%	0.01p.p.	-0.51p.p.	not seasonally adjusted
	Labou	r Market			
Employment	Jul-21	2,655,200	-0.1%	7.9%	seasonally adjusted
Unemployment rate	Jul-21	6.6%	0.0p.p.	-4.6p.p.	seasonally adjusted
Participation rate	Jul-21	65.4%	-0.2p.p.	1.0p.p.	seasonally adjusted
Average weekly earnings	Jul-21	1096.25	-1.0%	4.3%	seasonally adjusted

Source: Statistics Canada & Bank of Canada

Note: p.p. is percentage point, used here to show the difference between two percentage rates.

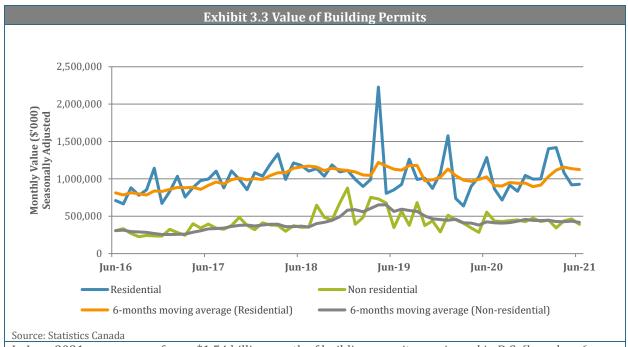


- In June 2021, the forestry price index decreased by 23.5% from previous month and it is nearly 1.2 times higher than a year ago.
- Natural gas stayed at US\$3.26/mm BTU, double the price of the previous year.
- Oil (WTI) increased to US\$71.38/bbl in June 2021, it is almost 1.9 times from a year ago.

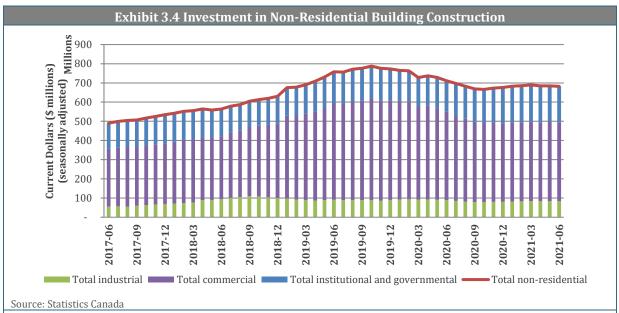


Source: B.C. Ministry of Energy and Mines, monthly average of daily values. Met. Coal: guarterly average to March

- Copper prices keep growing to reach US\$4.36 per lb as of June 2021 and up by 64% from previous year.
- Gold price dropped 1 per cent from previous month, and 5.9 per cent increase from June 2020.
- Metallurgical coal (3-month moving average) increased by 16.5% in June 2021, and up14.1% from the previous year.

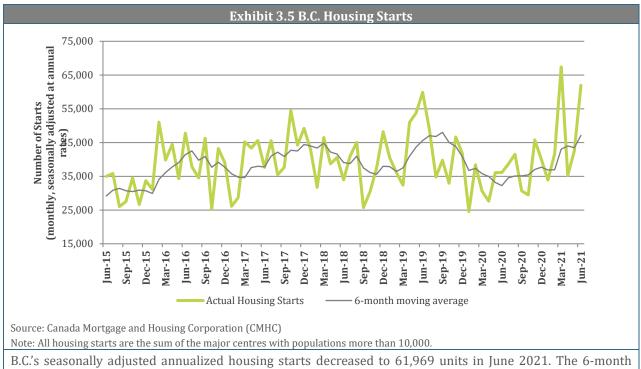


In June 2021, an average of over 1.54 billion worth of building permits was issued in B.C. (based on 6-month moving average), 1.6% decrease compared to the previous month and 6.2% increase compared to the same month in the previous year.

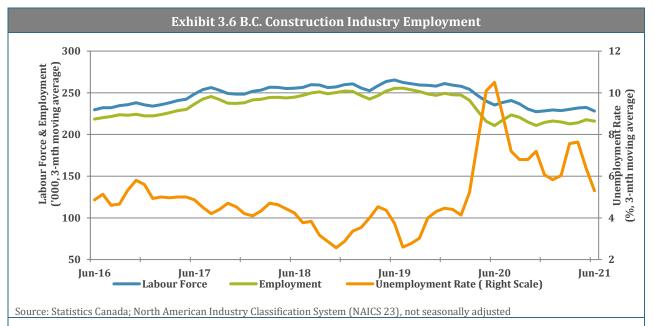


B.C. spending in non-residential building construction decreased by 0.4% from the previous month and still down 4.1% from the previous year. The current level of non-residential building investment in June 2021 was \$682 M.

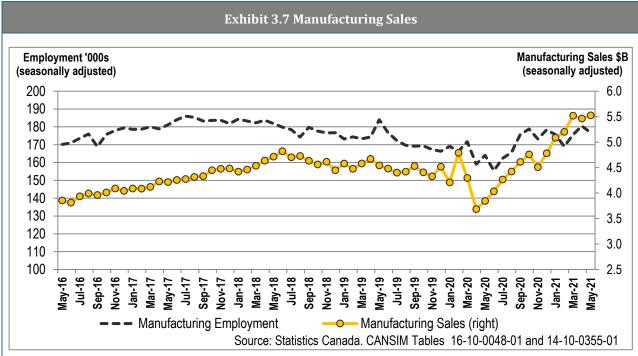
Note that this is the building investment only and does not include infrastructure investment.



B.C.'s seasonally adjusted annualized housing starts decreased to 61,969 units in June 2021. The 6-month moving average of the series was 8.4% higher than the previous month and increased by 46.2% from the previous year.



Employment in the construction sector in June 2021 increased by 2.5% while the labour force experienced a 3.1% decline compared to the previous year. The unemployment rate in B.C.'s construction industry decreased by 6.4 percentage points compared to June 2020.

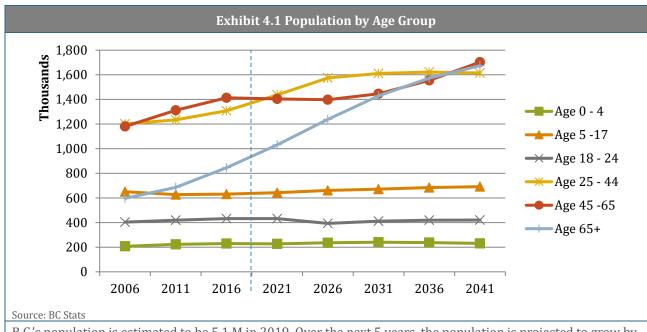


Source: Statistics Canada. CANSIM Tables 16-10-0048-01 and 14-10-0355-01

In May 2021, B.C.'s manufacturing sales were up by 1.2% to \$5.52 B from the previous month. In comparison to May 2020, sales were up by 43.8%. Manufacturing employment started to recover from the pandemic shock since July and reached 176,700.

### **B.C. DEMOGRAPHICS**

# 4. B.C. Demographics

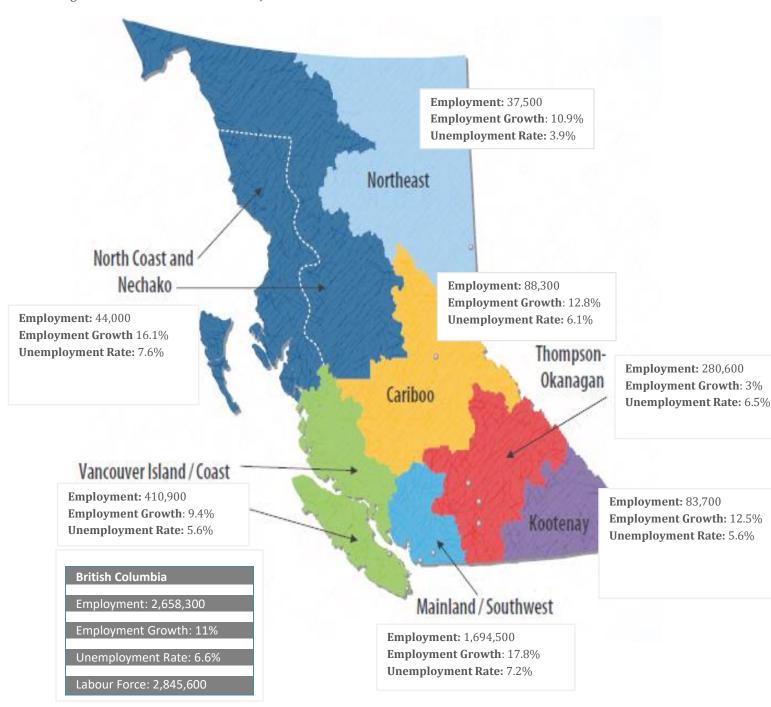


B.C.'s population is estimated to be 5.1 M in 2019. Over the next 5 years, the population is projected to grow by 1.2% per year.

### **REGIONAL SUMMARIES**

### 5. Regional Summaries

Regional Labour Market Statistics - June 2021

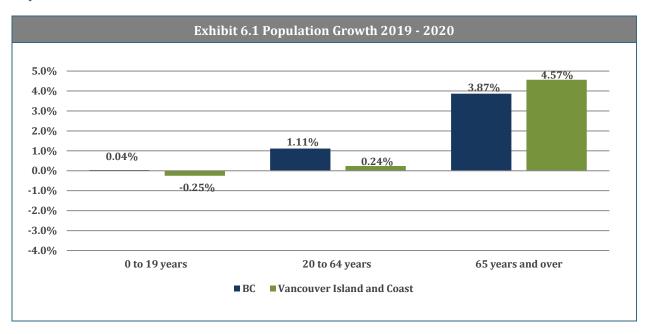


Note: Employment growth is over the previous 12 months. Data for B.C. at the provincial level is seasonally adjusted. Data for the regions is not seasonally adjusted and is based on 3-month moving averages. This means that the data at the provincial level is not directly comparable to the regional data, but the data for each region is directly comparable with the other regions. Source: Statistics Canada

# **VANCOUVER ISLAND/COAST REGION**

### 6. Vancouver Island/Coast Region

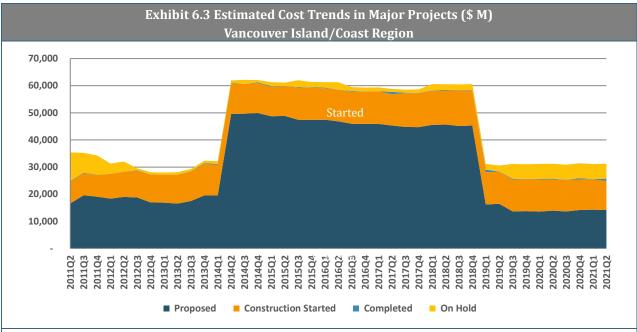
#### **Key Economic Indicators**





### **VANCOUVER ISLAND/COAST REGION**

#### **Trends in Major Projects**



- In Q2 2021, the Vancouver Island/Coast region has a total of 152 major projects with a combined value of \$31.2B a 0.4% increase from the first quarter of 2021 and slightly down (0.1%) from the previous year.
- Six projects newly proposed are added to the inventory this quarter, the top value project is \$47 M Cedar Hill Middle School Seismic Replacement in Victoria. See more new projects in Appendix 1.
- Five projects are completed: \$765 M Core Area Wastewater Management Project Seaterra Program in Victoria is the highest value completed in this quarter. See more completed projects in Appendix 3.
- There are 3 projects that began construction in this quarter, Wastewater Treatment Plant (\$76 M) in Powell River, Vancouver Island Radio System Project (\$53 M) in Comox area and Multi-family Apartments project (\$45 M) in Sooke.

Status	2020Q2	2020Q3	2020Q4	2021Q1	2021Q2	Change from the previous	Change from the previous
						quarter	year
Proposed	13,948	13,611	14,169	14,257	14,194	-0.4%	1.8%
Construction started	11,485	11,619	11,264	11,260	10,654	-5.4%	-7.2%
Completed	311	116	467	53	860	1522.6%	176.5%
On hold	5,493	5,508	5,508	5,508	5,508	0.0%	0.3%
Grand Total	31,237	30,854	31,408	31,078	31,216	0.4%	-0.1%

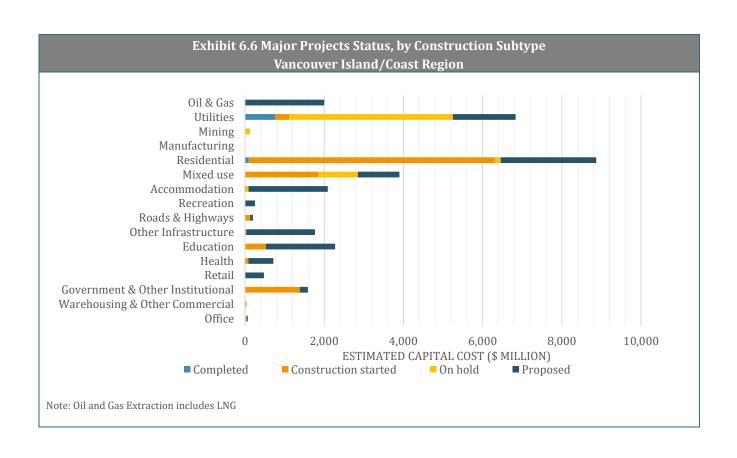
### **VANCOUVER ISLAND/COAST REGION**

Exhibit 6.5 Summary of Major Projects (by Project Status)

Vancouver Island/Coast Region

		couver island, c			
	Estimated Capital Cost (\$ million)	Percentage of Total	Number of Projects	Average Project Value (\$ million)	Average Year in Inventory
Proposed	14,194	45%	82	189	6.4
Preliminary/Feasibility	3,163	10%	16	226	6.1
Consultation/Approvals	5,220	17%	31	201	7.8
Permitting	1,374	4%	10	137	2.9
Tender/Preconstruction	1,082	3%	13	83	2.3
Stage Unknown	3,355	11%	12	280	10.7
On hold	5,508	18%	14	424	12.2
Construction started	10,654	34%	51	217	7.4
Completed	860	3%	5	172	7.0
Total	31,216	100%	152	220	7.3

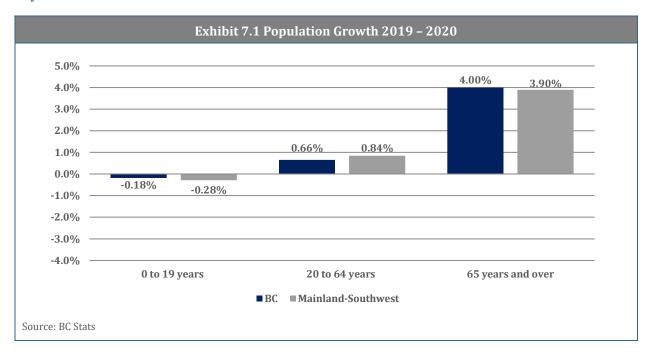
Notes: Average project value is the average of those projects for which there is a cost estimate. Average number of years in inventory is the average time span between the entry of the projects in the MPI and the current period.



# MAINLAND/SOUTHWEST REGION

# 7. Mainland/Southwest Region

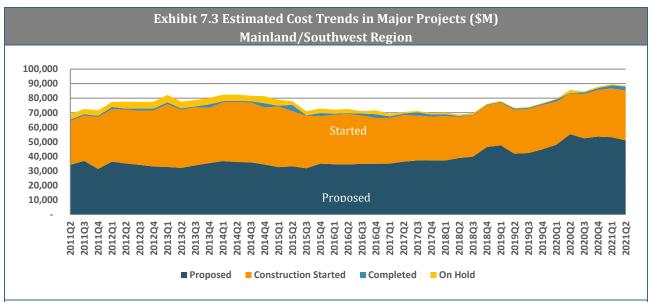
#### **Key Economic Indicators**





### MAINLAND/SOUTHWEST REGION

#### **Trends in Major Projects**



- In Q2 2021, the Mainland/Southwest region has a total of 532 major projects with a combined value of \$88.6 B, representing a 1% decrease from the previous quarter and a 3.3% increase compared to the previous year.
- There are 20 newly proposed projects added to the MPI this quarter. The top three value projects are: Mixed-Use Towers (\$45 M) in Vancouver, North Fraser Way Light Industrial and Office Building (\$40 M) in Burnaby and South Newton Elementary School (\$39 M) in Surrey. See more new projects in Appendix 1.
- Twenty-four major projects were completed in this quarter, Notable projects are False Creek Central Condominium Development (\$1 B) in Vancouver and Tsawwassen First Nation Mixed Use Developments (\$1 B) in Tsawwassen. See more completed projects in Appendix 3.
- Ten major projects began construction in this quarter with total capital costs nearly \$3.3 B. Broadway Subway Project (\$2.8 B) in Vancouver, New Westminster Aquatics and Community Centre (\$107 M) in New Westminster and Paramount Condominium (\$80 M) in Richmond are top-value projects in this quarter. See more projects underway in Appendix 2.
- Harry Jerome Recreation Centre (\$180 M) in North Vancouver became active as proposed from on hold.
- Hope Crossing Mixed-Use Complex (\$106 M) in Hope was placed on hold in this quarter.

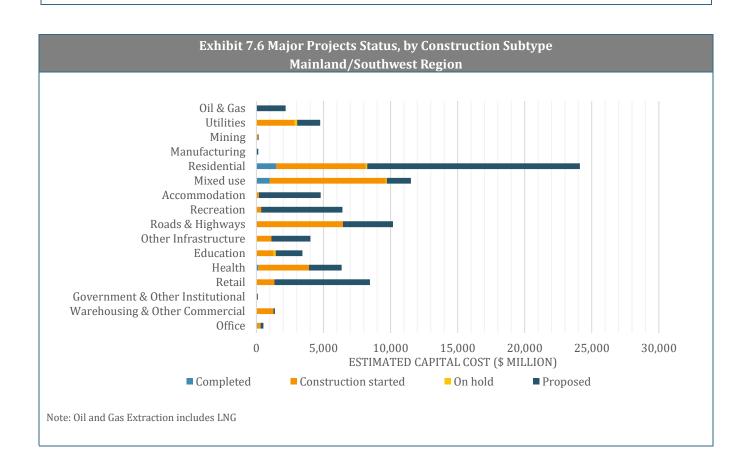
Exhibit 7.4 Estimated Cost Trends in Major Projects, by Project Status (\$ M) Mainland/Southwest Region								
Status	2020Q2	2020Q3	2020Q4	2021Q1	2021Q2	Change from the previous quarter	Change from the previous year	
Proposed	55,261	52,388	53,583	53,230	51,035	-4.1%	-7.6%	
Construction started	28,021	30,359	32,072	33,472	34,222	2.2%	22.1%	
Completed	371	1,257	1,311	2,218	2,754	24.2%	642.3%	
On hold	2,135	500	844	548	594	8.4%	-72.2%	
Grand Total	85,788	84,504	87,810	89,468	88,605	-1.0%	3.3%	

# MAINLAND/SOUTHWEST REGION

Exhibit 7.5 Summary of Major Projects (by Project Status)
Mainland/Southwest Region

	Estimated Capital Cost (\$ million)	Percentage of Total	Number of Projects	Average Project Value (\$ million)	Average Year in Inventory
Proposed	51,035	58%	282	203	5.0
Preliminary/Feasibility	9,229	10%	64	171	4.0
Consultation/Approvals	22,993	26%	122	213	6.0
Permitting	4,260	5%	24	185	2.5
Tender/Preconstruction	3,178	4%	50	69	2.7
Stage Unknown	11,427	13%	23	519	10.2
On Hold	594	1%	10	66	9.9
Construction Started	34,222	39%	217	164	5.0
Completed	2,754	3%	23	125	5.6
Total	88,605	100%	532	180	5.1

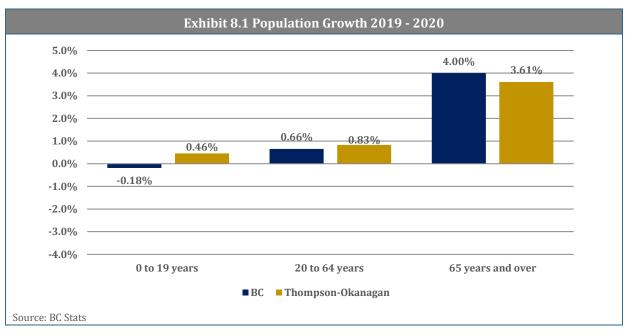
Notes: Average project value is the average of those projects for which there is a cost estimate. Average number of years in inventory is the average time span between the entry of the projects in the MPI and the current period.

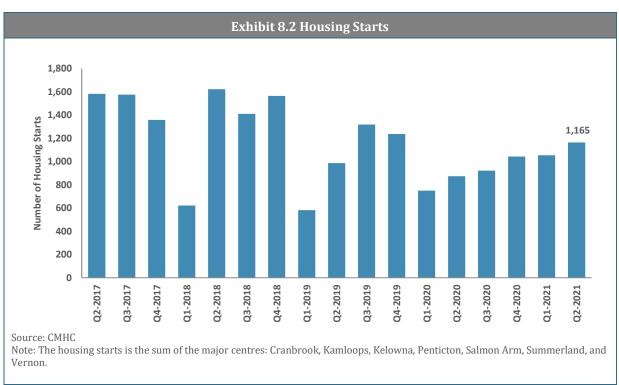


### **THOMPSON - OKANAGAN REGION**

# 8. Thompson - Okanagan Region

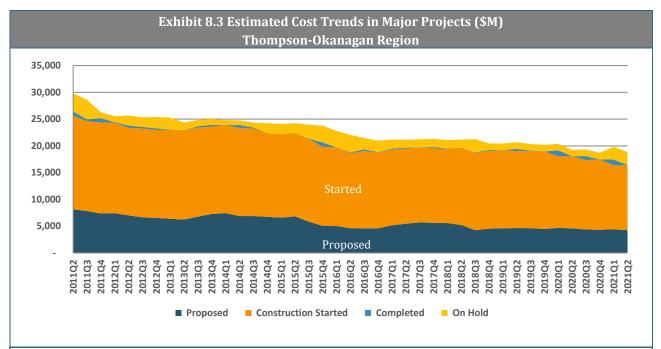
#### **Key Economic Indicators**





### THOMPSON - OKANAGAN REGION

#### **Trends in Major Projects**



- In Q2 2021, the Thompson-Okanagan region has a total of 100 major projects with a combined value of \$18.8 B, down 5 percent from the previous quarter and having a 2.9% decline compared to the previous year.
- Canyon Falls Residential Development (\$35 M) in Kelowna is the new proposed project in this quarter.
- There are two projects completed: UBC Okanagan Nechako Residence (\$51 M) in Kelowna and Tallus Ridge at Shannon Lake Mixed Residential Development (\$40 M) in West Kelowna.
- Five major projects began construction in this quarter, the top value project is Highway 1 Quartz Creek Bridge (\$121 M) in Golden. See more projects underway in Appendix 2.
- Downtown Hotel Residential/Commercial Development (\$60 M) in Kelowna was placed on hold in this quarter.

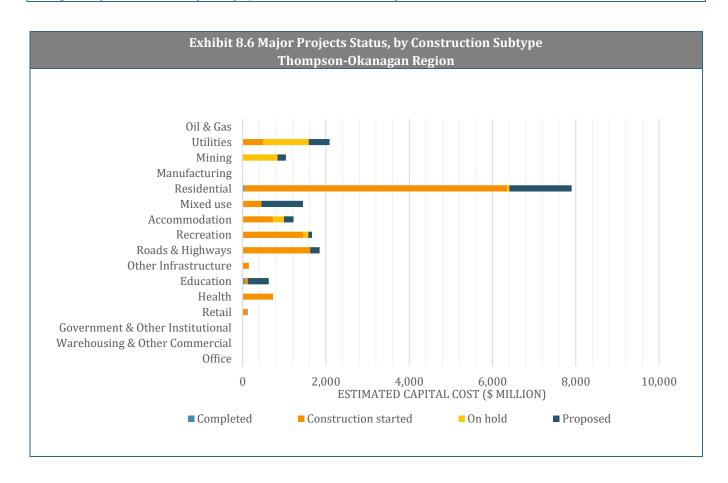
Exhibit 8.4 Estimated Cost Trends in Major Projects, by Project Status (\$ M)
Thompson-Okanagan Region

Status	2020Q2	2020Q3	2020Q4	2021Q1	2021Q2	Change from the previous quarter	Change from the previous year
Proposed	4,609	4,394	4,316	4,407	4,258	-3.4%	-7.6%
Construction started	13,431	12,962	13,131	11,951	12,104	1.3%	-9.9%
Completed	20	743	38	1,080	91	-91.6%	355.0%
On hold	1,338	1,338	1,338	2,384	2,384	0.0%	78.2%
Grand Total	19,398	19,437	18,823	19,822	18,837	-5.0%	-2.9%

### THOMPSON - OKANAGAN REGION

Exhibit 8.5 Summary of Major Projects (by Project Status) Thompson-Okanagan Region									
	Estimated Capital Cost (\$ million)	Percentage of Lotal Number of Projects							
Proposed	4,258	23%	38	129	7.2				
Preliminary/Feasibility	1,025	5%	15	85	3.7				
Consultation/Approvals	2,594	14%	13	200	10.5				
Permitting	150	1%	1	150	16.3				
Tender/Preconstruction	250	1%	4	83	2.3				
Stage Unknown	239	1%	5	60	10.9				
On hold	2,384	13%	7	341	14.9				
Construction started	12,104	64%	53	233	9.6				
Completed	91	0%	2	46	5.3				
Total	18,837	100%	100	200	9.0				

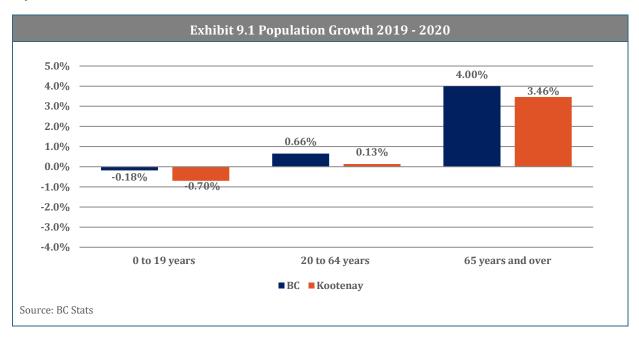
Notes: Average project value is the average of those projects for which there is a cost estimate. Average number of years in inventory is the average time span between the entry of the projects in the MPI and the current period.

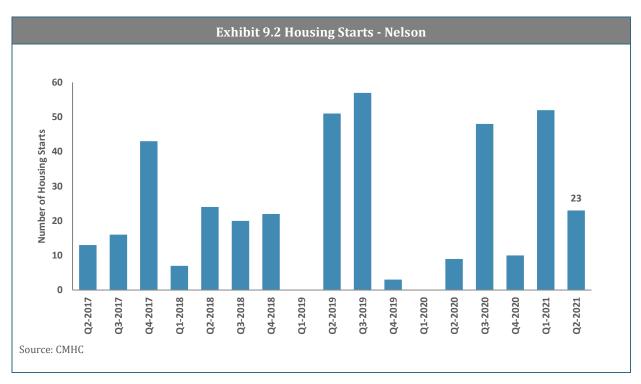


### **KOOTENAY REGION**

## 9. Kootenay Region

#### **Key Economic Indicators**

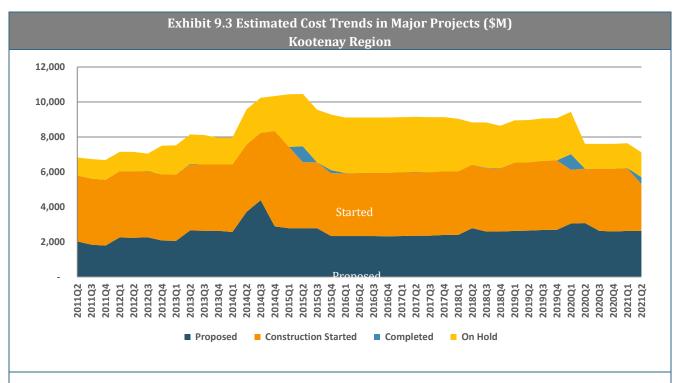




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### **KOOTENAY REGION**

#### **Trends in Major Projects**



- In Q2 2021, the Kootenay region has a total of 30 major projects with \$7.1 B combined value, down 6.8 percent from the previous quarter. This also represents a 6.4% decrease compared to the previous year.
- Elk Valley Water Treatment Facilities (\$400 M) in Sparwood was completed in this quarter.

Exhibit 9.4 Estimated Cost Trends in Major Projects, by Project Status (\$M) Kootenay Region									
Change Status 2020Q2 2020Q3 2020Q4 2021Q1 2021Q2 Change from the from the previous quarter previous year									
Proposed	3,078	2,633	2,594	2,628	2,628	0.0%	-14.6%		
Construction started	3,109	3,554	3,593	3,574	2,674	-25.2%	-14.0%		
Completed	-	-	-	19	400	2005.3%	0.0%		
On hold	1,420	1,420	1,420	1,420	1,420	0.0%	0.0%		
Grand Total	7,607	7,607	7,607	7,641	7,122	-6.8%	-6.4%		

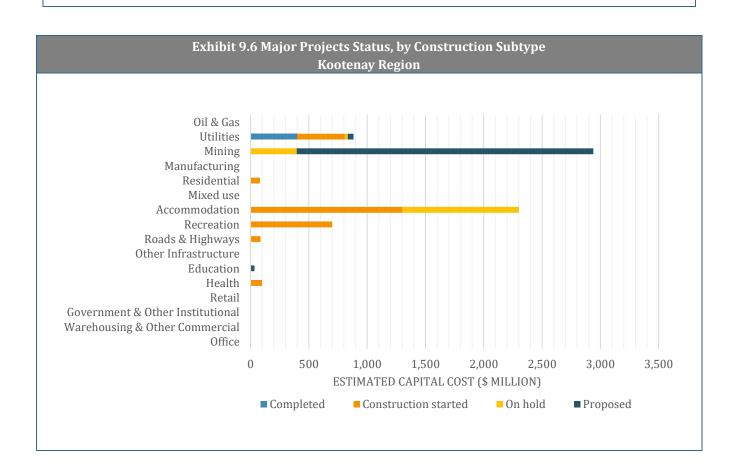
### **KOOTENAY REGION**

Exhibit 9.5 Summary of Major Projects (by Project Status)

Kootenay Region

	Estimated Capital Cost (\$ million)	Percentage of Total	Number of Projects	Average Project Value (\$ million)	Average Year in Inventory
Proposed	2,628	37%	9	375	7.9
Preliminary/Feasibility	34	0%	3	34	4.0
Consultation/Approvals	2,520	35%	4	630	10.8
Permitting	0	0%	0	0	0.0
Tender/Preconstruction	24	0%	1	24	4.3
Stage Unknown	50	1%	1	50	11.6
On hold	1,420	20%	3	473	15.0
Construction started	2,674	38%	17	157	13.3
Completed	400	6%	1	400	8.1
Total	7,122	100%	30	254	11.7

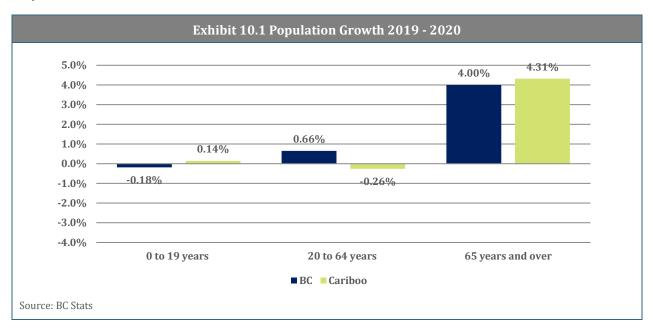
Average number of years in inventory is the average time span between the entry of the projects in the MPI and the current period.



### **CARIBOO REGION**

### 10. Cariboo Region

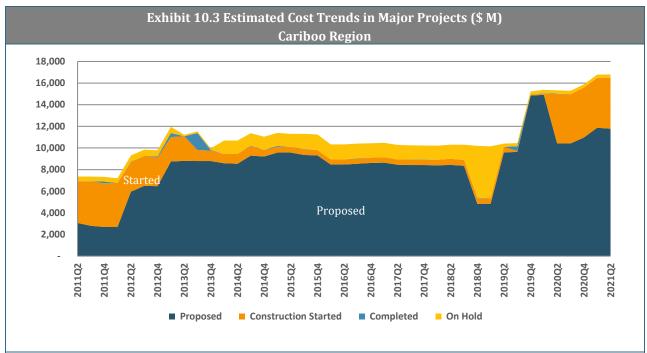
#### **Key Economic Indicators**





### **CARIBOO REGION**

#### **Trends in Major Projects**



- In Q2 2021, the Cariboo region has a total of 32 major projects with a combined value of nearly \$16.8 B, a slight increase (0.1%) from the previous quarter and up 9.6% compared to the same quarter last year
- Highway 97 Intersection Upgrades (\$19 M) in Quesnel is newly proposed in this quarter.
- Student Housing (\$20 M) in Prince George was completed.
- West Fraser Road Realignment (\$103 M) in Quesnel started construction in this quarter.

Exhibit 10.4 Estimated Cost Trends in Major Projects, by Project Status (\$M) Cariboo Region								
Status	2020Q2	2020Q3	2020Q4	2021Q1	2021Q2	Change from the previous quarter	Change from the previous year	
Proposed	10,416	10,416	10,964	11,864	11,780	-0.7%	13.1%	
Construction started	4,567	4,567	4,619	4,619	4,702	1.8%	3.0%	
Completed	44	0	0	0	20	0.0%	-54.5%	
On hold	300	300	300	300	300	0.0%	0.0%	
Grand Total	15,327	15,283	15,883	16,783	16,802	0.1%	9.6%	

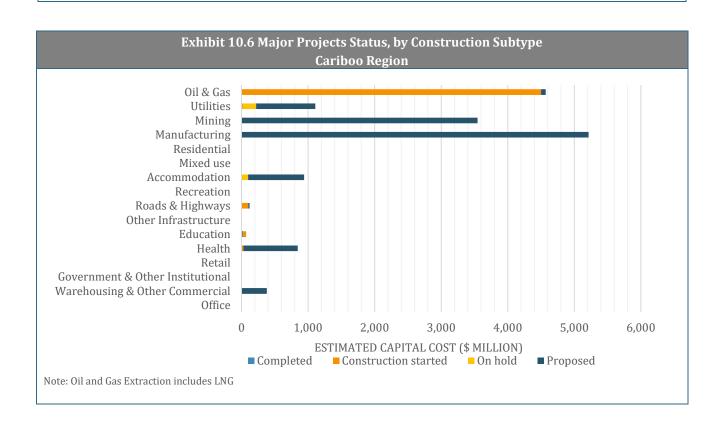
### **CARIBOO REGION**

Exhibit 10.5 Summary of Major Projects (by Project Status)

Cariboo Region

	Estimated Capital Cost (\$ million)	Percentage of Total	Number of Projects	Average Project Value (\$ million)	Average Year in Inventory
Proposed	11,780	70%	24	561	8.3
Preliminary/Feasibility	7,092	42%	9	1,182	4.9
Consultation/Approvals	4,558	27%	11	414	8.7
Permitting	0	0%	0	0	0.0
Tender/Preconstruction	60	0%	1	60	22.3
Stage Unknown	70	0%	3	23	12.3
On hold	300	2%	2	150	17.2
Construction started	4,702	28%	5	940	4.7
Completed	20	0%	1	20	1.3
Total	16,802	100%	32	579	8.1

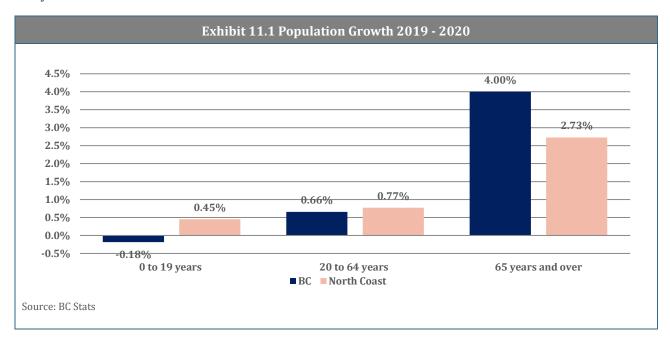
Notes: Average project value is the average of those projects for which there is a cost estimate. Average number of years in inventory is the average time span between the entry of the projects in the MPI and the current period.

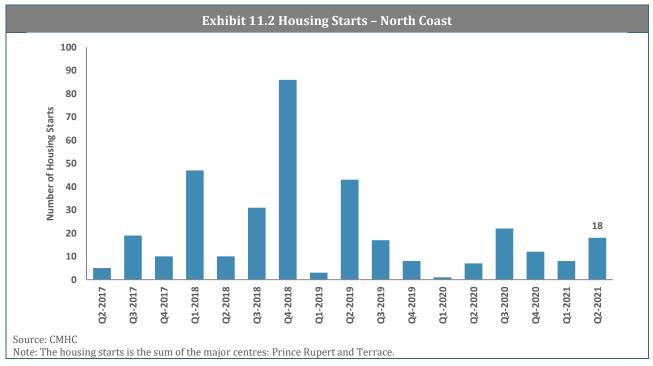


### NORTH COAST REGION

# 11. North Coast Region

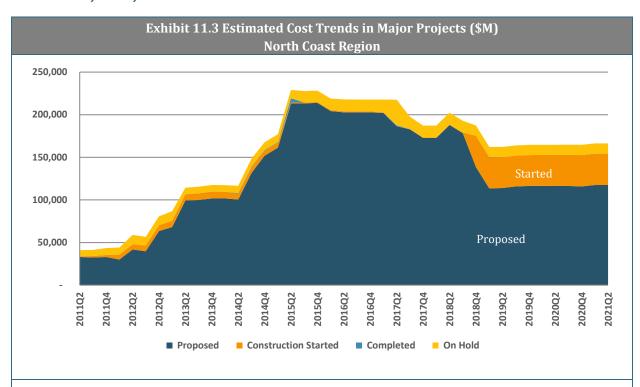
#### **Key Economic Indicators**





## **NORTH COAST REGION**

#### **Trends in Major Projects**



In Q2 2021, the North Coast region has a total of 59 major projects with a combined value of \$166.4 B, remains the same level as the previous quarter and 1 percent increase compared to the previous year.

Exhibit 11.4 Estimated Cost Trends in Major Projects, by Project Status (\$M) North Coast Region										
Status	2020Q2	2020Q3	2020Q4	2021Q1	2021Q2	Change from the previous quarter	Change from the previous year			
Proposed	116,442	116,438	115,777	117,442	117,442	0.0%	0.9%			
Construction started	36,315	36,337	36,937	36,937	36,953	0.0%	1.8%			
Completed	0	0	0	0	0	0.0%	0.0%			
On hold	11,981	11,981	11,981	11,981	11,981	0.0%	0.0%			
Grand Total	164,738	164,756	164,695	166,360	166,376	0.0%	1.0%			

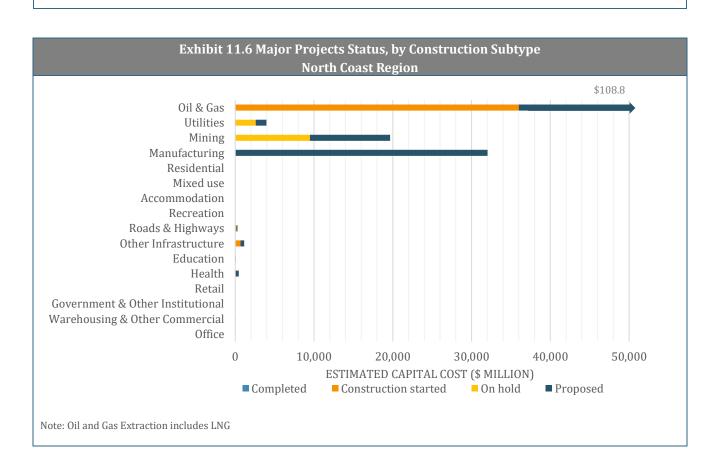
### **NORTH COAST REGION**

Exhibit 11.5 Summary of Major Projects (by Project Status)

North Coast Region

	Estimated Capital Cost (\$ million)	Percentage of Total	Number of Projects	Average Project Value (\$ million)	Average Year in Inventory
Proposed	117,442	71%	43	3,174	8.1
Preliminary/Feasibility	29,349	18%	10	3,261	6.2
Consultation/Approvals	29,923	18%	17	1,760	8.0
Permitting	35,400	21%	3	17,700	6.9
Tender/Preconstruction	11,765	7%	5	2,941	7.2
Stage Unknown	11,005	7%	8	2,201	11.8
On hold	11,981	7%	8	1,712	14.0
Construction started	36,953	22%	8	4,619	3.9
Completed	0	0%	0	0	0.0
Total	166,376	100%	59	3,200	8.3

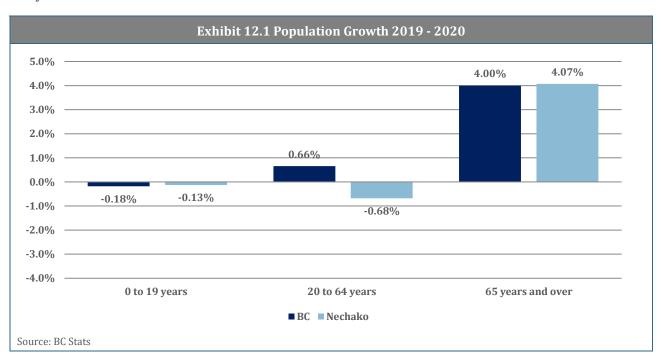
Notes: Average project value is the average of those projects for which there is a cost estimate. Average number of years in inventory is the average time span between the entry of the projects in the MPI and the current period.



## **NECHAKO REGION**

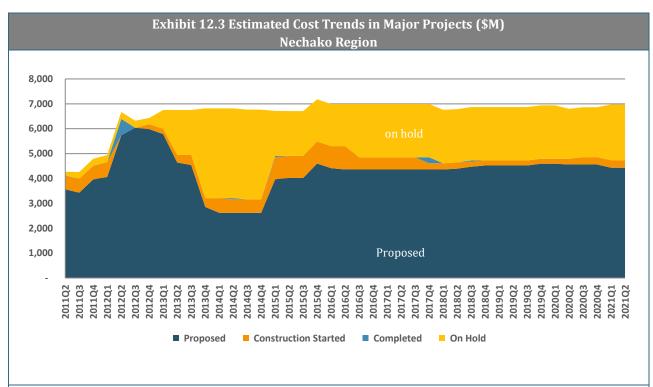
## 12. Nechako Region

#### **Key Economic Indicators**



## **NECHAKO REGION**

#### **Trends in Major Projects**



In Q2 2021, the Nechako region has a total of 21 major projects with a combined value of \$6.97 B, the same as the previous quarter and a slight decrease (-0.2%) compared to the same quarter of the previous year.

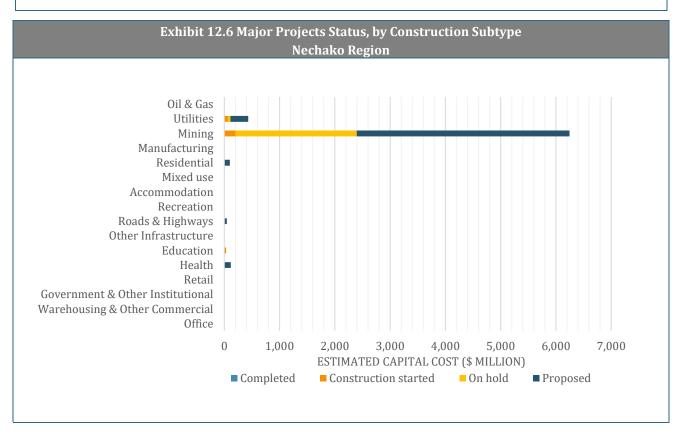
Exhibit 12.4 Estimated Cost Trends in Major Projects, by Project Status (\$M) Nechako Region										
Status	2020Q2	2020Q3	2020Q4	2021Q1	2021Q2	Change from the previous quarter	Change from the previous year			
Proposed	4,559	4,559	4,559	4,433	4,433	0.0%	-2.8%			
Construction started	233	299	299	299	299	0.0%	28.3%			
Completed	0	0	0	0	0	0.0%	0.0%			
On hold	2,195	2,195	2,195	2,240	2,240	0.0%	2.1%			
Grand Total	6,987	7,053	7,053	6,972	6,972	0.0%	-0.2%			

## **NECHAKO REGION**

Exhibit 12.5 Summary of Major Projects (by Project Status) Nechako Region

	Estimated Capital Cost (\$ million)	Percentage of Total	Number of Projects	Average Project Value (\$ million)	Average Year in Inventory
Proposed	4,433	64%	13	369	11.1
Preliminary/Feasibility	875	13%	2	438	14.6
Consultation/Approvals	842	12%	8	105	10.3
Permitting	1,416	20%	1	1,416	9.1
Tender/Preconstruction	0	0%	0	0	0.0
Stage Unknown	1,300	19%	2	1,300	11.8
On hold	2,240	32%	5	448	15.3
Construction started	299	4%	3	100	4.5
Completed	0	0%	0	0	0.0
Total	6,972	100%	21	349	11.1

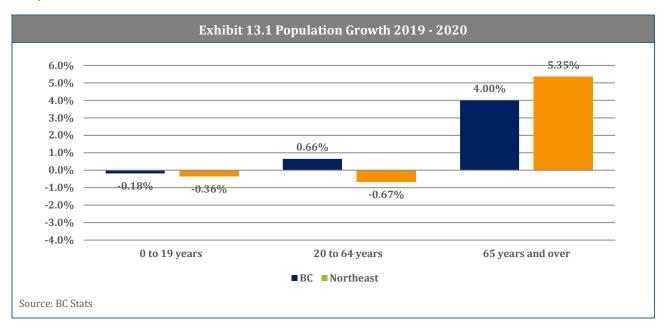
Notes: Average project value is the average of those projects for which there is a cost estimate. Average number of years in inventory is the average time span between the entry of the projects in the MPI and the current period.

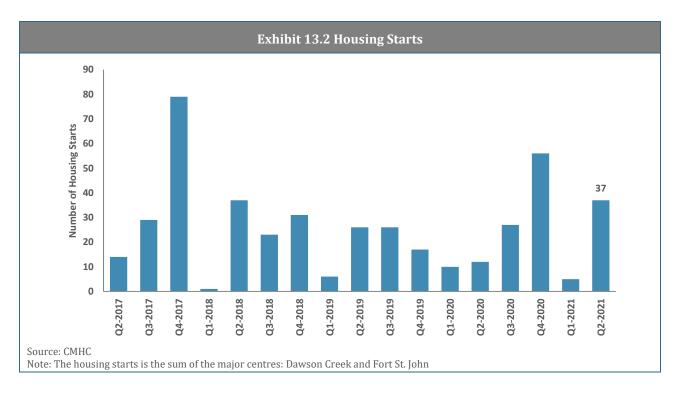


## **NORTHEAST REGION**

## 13. Northeast Region

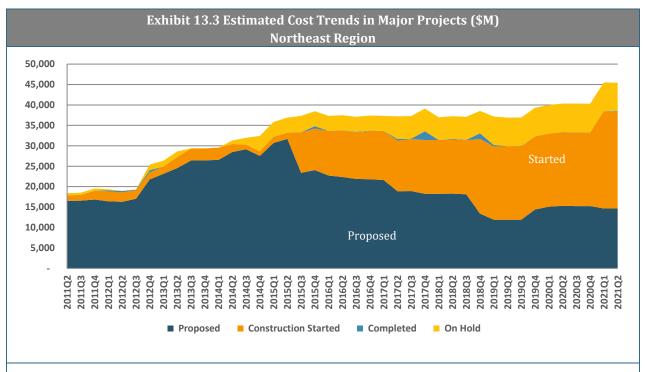
#### **Key Economic Indicators**





## NORTHEAST REGION

#### **Trends in Major Projects**



- In Q2 2021, the Northeast region has a total of 46 major projects with a combined value of \$45.5 B, slightly down (-0.1%) from the previous quarter and a 12.6% increase compared to the previous year.
- Peace Region Electricity Supply (PRES) Project (\$220 M) in North Peace was completed in this quarter.

Exhibit 13.4 Estimated Cost Trends in Major Projects, by Project Status (\$M)  Northeast Region										
Status	2020Q2	2020Q3	2020Q4	2021Q1	2021Q2	Change from the previous quarter	Change from the previous year			
Proposed	15,306	15,229	15,229	14,664	14,664	0.0%	-4.2%			
Construction started	18,018	18,063	18,010	23,850	23,565	-1.2%	30.8%			
Completed	31	48	52	0	220	0.0%	609.7%			
On hold	7,001	7,001	7,001	7,001	7,001	0.0%	0.0%			
Grand Total	40,356	40,341	40,292	45,515	45,450	-0.1%	12.6%			

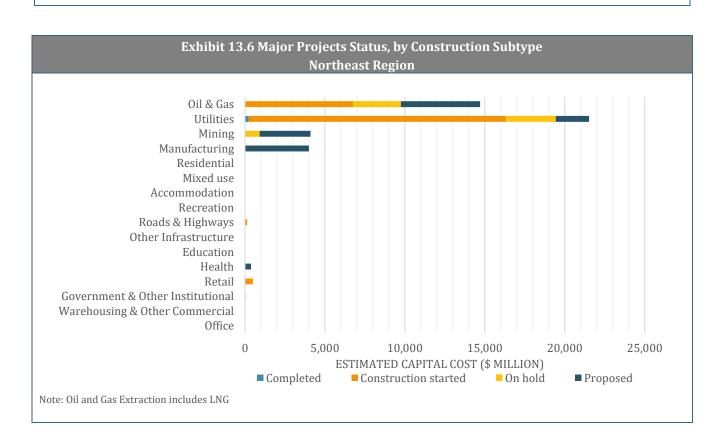
## **NORTHEAST REGION**

Exhibit 13.5 Summary of Major Projects (by Project Status)

Northeast Region

	Estimated Capital Cost (\$ million)	Percentage of Total	Number of Projects	Average Project Value (\$ million)	Average Year in Inventory
Proposed	14,664	32%	25	638	8.8
Preliminary/Feasibility	2,500	6%	1	2,500	1.6
Consultation/Approvals	7,374	16%	14	615	9.9
Permitting	4,020	9%	3	1,340	6.4
Tender/Preconstruction	415	1%	2	208	5.5
Stage Unknown	355	1%	5	71	10.0
On hold	7,001	15%	9	778	10.8
Construction started	23,565	52%	11	2,357	5.1
Completed	220	0%	1	220	3.1
Total	45,450	100%	46	1,057	8.2

Notes: Average project value is the average of those projects for which there is a cost estimate. Average number of years in inventory is the average time span between the entry of the projects in the MPI and the current period.



# Appendices

	New Proposed Proj	ects (April - June 2021)	
Region	Municipality	Project	Estimated Cost (\$ Million)
	Nanaimo	Ocean View Seniors Facility	20
		Apartment Tower	21
Vancouver Island/Coast		Scott Building Condominium	22
1 1111111111111111111111111111111111111	Victoria	Luther Court Housing	
		Cedar Hill Middle School	47
		Apartment Building	32
		Condominium Development	20
	Burnaby	Dania Seniors Apartment	20
		North Fraser Way Light Industrial and Office Building	40
	Delta	Evergreen Lane Affordable Housing	20
		KinVillage Redevelopment	20
	Maple Ridge	Lougheed Hwy Apartments	20
	apre r mage	Midrise Condominium Development	25
	New Westminster	Queen Elizabeth Elementary Expansion	20
	North Vancouver	Midrise Apartment	20
Mainland/Southwest	Richmond	Highway 99 Interchange	
		Apartment Building	25
		South Newton Elementary	39
	Surrey	Woodward Townhouses	28
		81 Ave Apartment Building	20
		85 Ave Apartment Building	28
		Mixed-Use Towers	45
		Mixed-Use Development	22
	Vancouver	VAHA Kingsway Housing	
		Granville Apartments	20
		Onyx Office Building	28
Thompson-Okanagan	Kelowna	Canyon Falls Residential Development	35
Cariboo	Quesnel	Highway 97 Intersection Upgrades	19
Total			656

	Construct	ion Started (April - June 2021)		
Region	Municipality	Project	Completion Date	Estimated Cost (\$ Million)
	Comox Area	Vancouver Island Radio System Project	2024-Q1	5:
Vancouver Island/Coast	Powell River	Wastewater Treatment Plant	2023-Q1	7
	Sooke	Multi-family Apartments	2022-Q3	4.
	Burnaby	Central Park House Condominium	2023-Q4	4
	Langley	Foundry Townhouses	2022-Q1	2
	New Westminster	New Westminster Aquatics and Community Centre	2024-Q3	10
	Port Coquitlam	Montrose Square	2022-Q2	4
Mainland/Southwest	Richmond	One Park Condominium		5
Mainand/30dthwest	Kichiniona	Paramount Condominium	2022-Q3	80
	Surrey	Ta'talu Elementary (Site 207) (former Sunnyside Elementary)	2023-Q3	44
		Paradigm Condominium	2023-Q4	4.
	Vancouver	Habitat Lowrise Condominium	2023-Q2	2
		Broadway Subway Project	2025-Q4	2,82
	Golden	Highway 1 Quartz Creek Bridge	2023-Q4	12
	Kelowna	Green Square Condominium	2022-Q4	18
Thompson-Okanagan	Relowiia	Aurora Apartments	2022-Q2	20
	Keremeos	Keremeos Affordable Housing	2022-Q1	1
	Vernon	Vernon Supportive Housing	2022-Q2	3
Cariboo	Quesnel	West Fraser Road Realignment	2023-Q4	10
Total				3,750

	Constr	uction Completed (April - June 2021)	
Region:	Municipality:	Project	Estimated Cost (\$ Million)
	Nanaimo	Riverstone Place	20
		Bellewood Park Condominium Development	20
Vancouver Island/Coast	Victoria	Core Area Wastewater Management Project - Seaterra Program	765
	Victoria	Vivid at the Yates	40
		Quadra Street Apartments	15
		IntraUrban Brentwood Industrial Park	20
	Burnaby	Glenlyon Business Park	
		Terraces at the Peak Condominium	20
	Coquitlam	Hensley Condominiums	35
	Delta to Richmond	George Massey Tunnel Safety Improvements	40
		Langley Memorial Hospital Emergency Expansion	39
	Langley	Denby Townhomes	20
		Hudson & Singer Condominium	30
		The Wex Condominium	20
		Solaro Rental Housing	20
	Squamish	Eaglewind Master Planned Community	80
Mainland/Southwest		Sirocco Development	26
		Wynd Highrise Condominium	40
	Surrey	City Centre Professional Buildings	65
		Maverick Condominium Development	30
	Tsawwassen	Tsawwassen First Nation Mixed Use Development	1,000
		False Creek Central Condominium Development	1,000
		Joyce Condominium	40
	Vancouver	The Spot - 2806 Cambie Street	25
	Valicouvei	1661 Davie Street Condominium	38
		Vancouver General Hospital - OR Renewal Phase 1	102
		Avenue One Condominiums	44
	White Rock	Semiah Condominium	20
Thompson-Okanagan	Kelowna	UBC Okanagan - Nechako Residence	51
i iioiiipsoii-Okaiiagaii	West Kelowna	Tallus Ridge at Shannon Lake Mixed Residential Development	40
Kootenay	Sparwood	Elk Valley Water Treatment Facilities	400
Cariboo	Prince George	Student Housing	20
Northeast	North Peace	Peace Region Electricity Supply (PRES) Project	220
Total			4,345

Project Value and Project Status for each Industry Sector (April - June 2021)										
Category	Proposed	Construction started	Completed	On hold	Total					
Oil & Gas	81,995	47,265	0	2,984	132,244					
Manufacturing	41,387	0	0	0	41,387					
Residential	19,879	19,276	1,623	309	41,087					
Utilities	8,514	20,401	1,385	11,280	41,580					
Mining	23,564	301	0	13,967	37,832					
Mixed use	3,872	10,918	1,000	1,106	16,874					
Accommodation	7,682	2,249	0	1,421	11,352					
Roads & Highways	4,217	8,645	40	0	12,902					
Retail	7,615	1,940	0	0	9,555					
Recreation	6,401	2,510	0	125	9,036					
Health	4,811	4,728	141	0	9,680					
Other infrastructure	5,109	1,972	0	0	7,081					
Education	4,312	1,990	71	156	6,529					
Government & other institutional	562	1,290	20	0	1,872					
Warehousing & other commercial	264	1,488	0	0	1,752					
Office	250	200	65	80	595					
Total	220,434	125,173	4,345	31,428	381,380					

### **Appendix 5**

### Number of Regional Major Projects Excluding Completed Projects (by Project Category)

Development Region	Residential/ Commercial	Transportation & Warehousing	Mining & Oil & Gas Extraction	Utilities	Manufacturing	Public Services	Other Services	Total
Vancouver Island/Coast	86	9	4	19	0	23	6	147
Mainland/Southwest	355	34	6	33	2	67	12	509
Thompson-Okanagan	52	8	3	19	0	11	5	98
Kootenay	10	1	7	5	0	3	3	29
Cariboo	5	3	8	8	3	4	0	31
North Coast	2	13	24	11	4	5	0	59
Nechako	1	1	13	4	0	2	0	21
Northeast	3	8	15	15	2	2	0	45
Total	514	77	80	114	11	117	26	939

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