

Future of Canadian Automotive Labourforce Sur l'avenir de la main-d'œuvre de l'industrie automobile canadienne

TREND REPORT

AUTOMOTIVE INDUSTRY LABOUR MARKET ANALYSIS

Recruiting Immigrant Labour in the Automotive Production Sector

The project is a collaboration of the Canadian Skills Training and Employment Coalition, Prism Economics and Analysis, and the Automotive Policy Research Ce<u>ntre</u>n 2021

futureautolabourforce.ca



THIS PAPER was prepared for the Auto Labour Market Information (LMI) Project – the Future of *Canadian Automotive Labourforce (FOCAL)* Initiative.

The goal of the project is to help stakeholders better understand the automotive labour market. The Project will create industry-validated, regional, occupational supply and demand analyses and forecasts and skill profiles for skilled trades and other key skilled occupations in the broader automotive sector including vehicle assemblers, parts manufacturers and technology companies that supply the industry. The project will also examine various labour market trends in the sector and facilitate discussions among stakeholders about how to address any forecasted skills shortages and other labour market information that will support colleges, employers, policy makers and other stakeholders in taking practical steps to address skills shortages and other labour market challenges.

This project is funded by the Government of Canada's Sectoral Initiatives Program. The opinions and interpretations in this publication are those of the author(s) and do not necessarily reflect those of the Government of Canada.

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May 2021











EXECUTIVE SUMMARY

This paper takes a close look at: (i) the labour force of landed immigrants in the automotive production sector – parts and assembly, and (ii) immigrant participation in 49 key occupations in the general labour force. The paper does not look at temporary foreign workers as they are not extensively employed in the automotive production sector. The analysis provides insights that can inform government policy and support implementation of concrete actions by the Industry and its stakeholders to utilise immigrants as a source of labour. We make several observations based on this analysis.

- Immigrant labour has traditionally been important to the automotive production sector in both assembly and parts production. In 2019, immigrants in Canada made up 23% of the labour force in assembly and 39% in parts production; the latter is higher than the overall share of immigrants in the Canadian labour force which was 26%.
- The immigrant labour force share is particularly high in the GTHA¹ in parts production where 60% are immigrants, while 34% of GTHA assembly employees are immigrants.
- In metropolitan areas, immigrants predominantly occupy engineering/technical/ managerial occupations but have a more even distribution in other regions within the three groups of occupations (total 49 NOCs) used in our FOCAL labour forecast.
- In 2019, most immigrants working in both assembly and parts production came from Asia, followed by Europe.
- The educational profile of immigrants admitted to Canada has been shifting over the last several years, reflecting changing immigration policy and the types of applicants being prioritised to enter Canada. Immigrants with university education, as a share of all immigrants, grew from 12% during the landing period 1985-1994 to 40% in 2016, while the share with formal trades certification or apprenticeship training was 5% in 2016. A review of the admission categories and points system may be needed to give greater weight to bring in more people with skills in the trades.
- Newcomers (immigrants landed 5 years or less) have the highest unemployment rates (9.1% in Toronto and 9.3% in Ontario in 2019). This suggests there is a pool of labour that is unutilised or underutilised that could be absorbed by companies facing recruitment challenges. These unemployment numbers increased under COVID-19 restrictions.
- Intermediaries such as industry associations, unions and NGOs have been supporting companies in other sectors with recruiting and retaining immigrants to work in jobs facing shortages and may be able to assist the automotive sector with filling vacancies.

¹ The GTHA is also called the Golden Horseshoe and includes 3530 – Toronto; 3550 - Hamilton-Niagara Peninsula.



INTRODUCTION

The automotive production sector is among Canada's most important employers and has many good-paying jobs. The FOCAL Initiative estimates that there are approximately 188,000 jobs in this sector that includes *NAICS 3361 (motor vehicle manufacturing or assembly), NAICS 3363 (motor vehicle parts manufacturing or parts production)*, and other sectors that we refer to as *primary suppliers* in other papers and our occupational forecasts. (See Appendix 1 for the components of the entire automotive sector.) As we have done in others including *Women, Youth and Indigenous Peoples* and *Women's Participation in Canada's Automotive Industry*, in this paper, we examine immigrant participation in vehicle assembly and parts manufacturing (NAICS 3363 and NAICS 3361) due to challenges in examining the data in other sectors. This paper will also review the presence of immigrants in 49 key occupations in the Canadian labour force used in our forecasts (See Appendix 2). The analysis is organized into three sections: 1) Profile of immigrants in assembly and parts production; 2) Immigrant labour sources; and 3) Implications for the sector.

Context for immigrant labour

As the Canadian population ages, the need for new workers to enter the workforce has become more urgent. Canada's population growth of 1.4% between 2018 and 2019 was driven by the arrival of immigrants and non-permanent residents (IRCC², 2020). Due to its immigration policies, Canada has the highest-educated immigrant population in the OECD (OECD, 2019). The federal government's target for permanent residents in the *2021-2023 Immigration Levels Plan³* is 401,000 in 2021; 411,000 in 2022, and 421,000 in 2023. Landed immigrants are admitted under various categories⁴ including: *Economic immigrant; Immigrant sponsored by family; Refugee*; and *Other immigrant*. Most landed immigrants arrive as economic immigrants⁵ in Canada – 58% in 2019. Economic immigration in Canada consists of various admission programs including the Federal Skilled Worker program (FSWP), Provincial Nominee Program (PNP) and Canadian Experience Class (CEC).

While there is an increase in the use of temporary foreign workers (TFWs), with 2.9% of workers in Canada under that category, this paper does not include the use of TFWs as the automotive production sector does not rely on TFWs for labour⁶. However, increasing numbers of TFWs, including postsecondary education students, have been converting their status to that of landed immigrant under the various IRCC programs.

Understanding labour market participation of immigrants will help the automotive production sector to assess opportunities to recruit from the immigrant pool of labour; inform human resources development plans at the government and enterprise-levels; and inform corporate and public policy goals of integrating immigrants into the automotive production sector.

Immigrants vs NPRs

NPRs have been legally granted the right to live in Canada on a temporary basis (along with family) under the authority of a *temporary* resident permit. The category includes refugee claimants, foreign students, visitors and special temporary residents' permits. TFWs are a subset of NPRs and are defined by Statistics Canada as "temporary residents who received a T4 slip during the year". The use of TFWs increased in the Canadian labour market in recent years (Lu and Hou, 2019) with approximately 470,000 foreign nationals with work permits that became effective in 2019 up from 390,000 in 2018. TFWs are primarily issued work permits under the *Temporary* Foreign Worker Program (TFWP) or the International Mobility Program (IMP). The goal of the TFWP is to fill short-term labour shortages with participants holding an employerspecific work permit (ESWP), which restricts them to a specific employer who could not find suitable Canadian workers. The IMP's goals are "to advance Canada's broad economic and cultural interests" (CIC 2014). The majority of IMP participants hold an open work permit (OWP), which allows them to work for any employer willing to hire them.

² Immigration, Refugees and Citizenship Canada

³ See https://www.canada.ca/en/immigration-refugees-citizenship/news/notices/supplementary-immigration-levels-2021-2023.html.

⁴ See

https://www23.statcan.gc.ca/imdb/p3VD.pl?Function=getVD&TVD=323293&CVD=323294&CLV=0&MLV=4&D=1.

⁵ Principal applicant, spouse and dependents

⁶ Agriculture, home services and others make use of TFWs (Lu, 2020).



Methodology

This paper is based on secondary research data using custom data requests from the Longitudinal Immigration Database (IMDB) and the Labour Force Survey (LFS). It also references other reports on labour force participation of immigrants. The paper uses two approaches to measure immigrant labour market participation in the sector. A *narrow definition* of the automotive production sector was also used based on data availability – NAICS 3361 (motor vehicle assembly) and NAICS 3363 (motor vehicle parts manufacturing or parts production). However, we acknowledge these two codes comprise one subset of the labour force in the automotive production sector – approximately 63% – and is a reasonable proxy for understanding what is happening in the production sector. (See Appendix 1) The FOCAL Initiative's measure of the automotive production sector uses other official employer surveys as data sources, while this paper uses the Labour Force survey and the Longitudinal Immigration Database (IMDB). To assess the potential labour supply of immigrants for the automotive production sector, we used the 49 key occupations⁷ from our forecast of labour supply and demand. The employment data for the 49 NOCs do not only look at the people employed in the automotive production sector but the <u>entire Canadian labour force</u>.

SECTION I: PROFILE OF IMMIGRANTS IN ASSEMBLY AND PARTS PRODUCTION

This section provides information on landed immigrants in the general labour force⁸ and in the assembly and parts production components of the automotive production sector. Immigrants have been an important source of labour for industry in the last several years. Current unemployment rates suggest that immigrants integrate well into the workforce. In 2019, immigrants (15 years and over) in Ontario for 10 years or more had a lower unemployment rate (4.9%) than people born in Canada (6.2%). This was also the case in the Toronto Census Metropolitan Area⁹, where unemployment among immigrants was 4.9%, compared with 5.4% for people born in Canada. However, *newcomers* (immigrants landed 5 years or less) had the highest unemployment rates, reaching 9.1% in Toronto and 9.3% in Ontario in 2019. This suggests there is a pool of labour that is unutilised or underutilised in the Ontario labour market. This labour could be absorbed by companies with vacancies based on education, skills and competencies and with some commitment to skills evaluation, re-skilling and upskilling. See Figure 1.

COVID-19 pandemic closures had a significant impact on employment for newcomers. Between February to May 2020, close to 40 000 newcomers lost their jobs in Ontario¹⁰. Figure 1 shows the impact in 2020 with an increase in unemployment rates in the Toronto CMA (12.6%) and Ontario (13.7%) compared to 2019 for recent immigrants. Many newcomers struggle to find work given limited social networks and end up working in itinerant jobs in service industries that were heavily impacted by lockdown measures. As the economy recovers over the course of the next two years, immigrants who permanently lost their jobs

⁷ See Appendix 2

⁸ Employed included Employees and Self-employed and labour force means people available to work in the sector.

⁹ See *map* of Toronto CMA

¹⁰ See Report of the Canadian Poverty Institute (CPI)



due to COVID-19, with the continuing arrival of new immigrants, provide a source of labour for the Industry and regions facing labour shortages.



Figure 1: Immigrant Unemployment in Ontario and Toronto CMA

Statistics Canada. Table 14-10-0083-01 Labour force characteristics by immigrant status, annual

Immigrant Labour force in Auto

In 2019, the number of immigrants in the parts production and assembly labour force in Canada was approximately 148 000 people, with 23% in assembly and 39% in parts production. Automotive manufacturing employers face tight regional labour markets and shortages of skilled workers. *Parts production* is a large employer of immigrants in Ontario (40%) while *assembly* has about 25% immigrants. Immigrants account for 60% of the labour force in the GTHA parts production sector, in line with the share in the broader manufacturing sector (56%). Assembly, however, has a lower share of immigrants nationally, provincially and in each region. See Figure below.





Labour Force trends

The trends in the shares of immigrants in the automotive production sector have been consistent over the last 14 years. Assembly rose from 21% in the labour force to a peak of 25% in 2012, then dropped again to 23% in 2019. Parts production consistently employs a greater share of immigrants than assembly and overall manufacturing. Immigrants in parts production

Source: LFS Custom Request



peaked at 44% in 2007 and dropped to 39% in 2019. It is likely that this share will increase in the future as members of the current workforce retires. See Figure 3.



Figure 3: Immigrants as a share of assembly and parts production labour force in Canada

Immigrant Labour Force in Auto vs other industries

Assembly and parts production relies more on immigrant labour than the overall Canadian economy. Immigrants comprise 26% of the Canadian labour market. While all sectors have an immigrant labour force, the parts production sub sector ranks number one for the largest share of immigrants employed (39%). This is higher than the overall manufacturing sector (31%). Meanwhile, the assembly (motor vehicle manufacturing) sub sector ranks 13th, where immigrants make up 23% of the workforce. Some sectors like Agriculture do not show a large share of immigrants because they utilise TFWs. See figure below.

Figure 4: Immigrants in Canadian Labour Force by Industrial Sector, 2019



Source: LFS, Custom request



Immigrant labour force in selected occupations

Immigrants by region and occupational groups

Figure 5 below shows *the* immigrant labour force in economic regions by occupational groups. *Engineering/technical/managerial; skilled trades;* and *supervisors and production* workers comprise the 49 occupations identified as in demand by the automotive production sector and used in the FOCAL forecast model (See Appendix 2 for list of occupations). <u>The occupation statistics represent all immigrants in the labour force not just people in the automotive production sector. There was insufficient data to display the distribution of immigrants employed in assembly and production (NAICs 3361 and 3363) for economic regions by occupational group and individual occupations.¹¹</u>

Among the 3 occupational groups, the GTHA (239,600), Montréal (56,700), and Eastern Ontario (31 600) have the majority of immigrant labour in *engineering/technical/managerial* occupations. *Production* occupations employ the least immigrant labour in all economic regions except for Kitchener-Waterloo-Barrie, where the immigrant labour force is fairly evenly distributed across the three occupational groups. The numbers of immigrants in the GTHA and Montréal region are reflective of the size of the population in these metropolitan centres, as more popular destinations for immigrants. The availability of immigrant labour in the GTHA makes it an attractive region for future investment. On the other hand, labour demand in other regions will require encouraging immigrants with the required education, skills, and competencies to settle in, or relocate to, these non-metropolitan regions. Relocation might be attractive given housing affordability, as recent population migration outside of the GTA during the COVID-19 pandemic has demonstrated.



Figure 5: Immigrant Labour force by Occupational Group and region, 2019 (000s)

¹¹ Data is suppressed by Statistics Canada to meet confidentiality requirements of the Statistics Act.



Share of immigrants in occupational groups by region

Figure 6 below shows the share of immigrants in the three occupational groups in each region. In the GTHA region, the share of immigrants is more than 50% in all three occupational groupings – *Engineering/Technical/managerial, Skilled Trades*, and *Supervisors and Production*, where the majority of automotive manufacturing occurs. In the Winnipeg region, immigrants are more dominant in supervisory and production jobs (50%). In other auto regions, immigrants make up a much lower share and work mainly in *Engineering/Technical/ managerial* areas. This may reflect regional differences in the number immigrants as well as the skills that they bring to local labour markets.



Immigrants in skilled trades in the GTHA

In the GTHA¹², 44%-55% of selected skilled trades jobs are currently held by immigrants. This suggests that immigrant intake will continue to be important to fill vacancies in some of the occupations for which FOCAL forecasts significant recruitment gaps. See Figure 7.





(Source: Labour Force survey)

Immigrants in production jobs

The automotive production industry in the GHTA is very reliant on immigrant workers to fill production jobs. Figure 8 displays occupations with anticipated recruitment gaps and for which data was available. Except for *motor vehicle assemblers, inspectors and testers* (17%),

¹² Data on immigrants in the labour force at NOC level was only available for the GTHA region.



immigrants form a large share of the occupations and are over-represented in *plastics processing machine operator* jobs (84%), and *labourer* jobs (72%). See below.





SECTION II : IMMIGRANT LABOUR SOURCES

In 2019, most immigrants working in both *assembly* and *parts production* came from Asia followed by Europe, which reflects changes in countries of origin. As immigrant numbers from Europe decline, China, India, and the Philippines have become top sending countries to Canada.

Table 1: Landed Immigrants by Sending Area, 2019

World Area	3361 Motor vehicle manufacturing	3363 Motor vehicle parts manufacturing
Europe	3,000	6,900
Africa	DNA ¹³	3,400
Asia	7,700	20,500

(Source: Labour Force survey)

Intended occupation

Of the immigrants admitted to Canada from 2015 to 2017 who declared an 'intended occupation¹⁴', the overwhelming majority (over 80%) indicated they intended to work in *engineering/technical/managerial* occupations. Only 12%-15% indicated *skilled trades* in recent years, and very few intended to work in *supervisors and production* jobs. Given that the industry already uses a substantial number of immigrant workers, the new entrant data

¹³ Note: DNA - data not available based on small values. N. America and Oceania were omitted based on small values. ¹⁴ Intended Occupation (IMDB) – immigrants who declared an intended occupation. Mostly economic immigrants are required to provide an intended occupation on their application, but the majority of applicants do not have to.



suggest that skilled trades jobs will continue to be difficult to fill. Jobs requiring university education in engineering and technology fields should be easier to fill.



Figure 9: Intended occupation of immigrants, 2015 to 2017 by occupational group

Trends in Education of Immigrants

The educational profile of immigrants 15 years and over has been changing over the past decades. There was a larger share with *secondary school or less* (57%) during the landing period 1985-1994; however, this share has been dropping and reached 34% in 2016. Those with degree-level university education grew from 12% during the landing period 1985-1994 to 41% in 2016. The share with a *formal trade certificate or apprenticeship* training has been small over the years and was 5.5% in 2016. People with skilled trades training are in demand by the automotive production sector as well as the broader manufacturing sector. The immigration system is prioritising university educated workers as indicated by the shifts in education of immigrants. See Figure 10 below.



Figure 10: Education Levels by Landing Years for Immigrants 15+ years

(Source: IMDB, Statistics Canada)

TREND REPORT Recruiting Immigrant Labour in the Automotive Production Sector



Country of origin of immigrants

The table below shows the top countries of origin for immigrants (who filed taxes in 2017) for the period 2010 -2017, where *intended occupation* in Canada was in skilled trades jobs used in FOCAL forecasts (See Appendix 2 for list of occupations). Over the period, the top 3 countries of origin of immigrants whose intended occupation was in one of these skilled trades were India, the Philippines, and United Kingdom. Only two countries were from the European Union – the UK and Ireland.

Country of Origin	Number of Applicants
India	3925
Philippines	2465
United Kingdom	855
Ukraine	715
China	620
Korea, South	545
Iran	385
Jamaica	360
Morocco	330
Ireland	310

Table 2: Intended Occupation in Skilled Trades, 2010-2017

Over the period, the top 3 countries of origin of immigrants whose intended occupation was in an *engineering/technical/managerial* field were India, China, and Iran. Only two countries were from the European Union – France and the UK.

Table 3: Intended Occupation in Engineering/Technical/Managerial field, 2010-2017

Country of Origin	Number of Applicants
India	21730
China	7265
Iran	4320
Philippines	3250
France	2970
Pakistan	2390
Algeria	1675
Nigeria	1565
Brazil	1485
United Kingdom	1470

Very few immigrants indicated *supervisor or production* jobs as their intended occupation in Canada. However, for those that did, the top 3 countries of origin were Philippines, India, and Morocco. While the 'intended occupation' is only required from primarily economic immigrants for their applications, the numbers and countries of origin do provide some



indication of the skills of immigrants in recent years who are available to the automotive production sector.

SECTION III: IMPLICATIONS FOR THE AUTOMOTIVE PRODUCTION SECTOR

OECD countries with older populations and low birth rates are competing with Canada for skilled immigrants. The federal government has indicated that it is focused on building a workforce that can sustain and grow the Canadian economy.¹⁵ As the workforce ages out and fertility rates stagnate, the important role that immigrants play in meeting Canada's labour market needs is well documented. In addition, the challenges that some new Canadians face in identifying job opportunities is also well researched. Based on the labour needs of the sector, which have been identified through various consultations and labour forecasts in the FOCAL project, the findings have implications for recruitment strategies and policy reform to improve the flow of immigrant labour to the sector.

Education and Skills: The high level of education in the immigrant labour pool suggests that the sector will continue to be able to rely on immigrants as a source of labour for jobs that require university education, especially in technical, engineering, and managerial positions. International students at the post-graduate level studying in Canada have a pathway to immigration through the *Express Entry* process after completion of studies, which adds to the pool of highly educated people. However, there seems to be an imbalance in the skills and educational profile of newcomers, as a smaller percentage of immigrants have skilled trades qualifications. This is relevant because some of the greatest labour shortages forecasted for the sector are in the skilled trades. One immigration policy for which the industry may want to consider advocating is altering the process for assessing potential immigrants to provide greater weight to people with certification and/or skills that are in short supply. The federal government may need to review the levers in the system such as points allocated to education and skills to prioritise skilled trades.

Tracking skills and labour market outcomes: Gaps exist in the immigrant data available. Only 30% to 40% of immigrants are required to declare an *intended occupation* when applying for permanent resident status. A more comprehensive and streamlined system to track education and skills will help Industry to understand the pool of labour available including all *working age* adult immigrants admitted; past occupation; intended occupation in all admission categories; and tracking of actual occupation after landing. This information will determine whether there are structural labour demand and supply issues that need to be addressed through policy modification for both immigration and labour market training.

Labour market integration, skills recognition and intermediaries: Labour market integration of newcomers has continued to be a policy and program issue in the Canadian labour market. Employers are facing recruitment challenges while many newcomers remain unaware of labour market opportunities and experience difficulties in finding work appropriate to their skill level and qualifications. More work needs to be done to determine how best to connect

¹⁵ See 2020 Annual Report to Parliament on Immigration.



employers with the segments of the labour force in search of employment. One option may be the use of intermediaries. *World Education Services Canada* (WES) is a US non-profit which established a Toronto office in 2000 to provide credential recognition services for internationally educated professionals, which assists employers to make recruiting decisions. In 2013, WES became an IRCC designated provider for credentials evaluation. The use of intermediaries to assist employers to evaluate credentials and skills of technicians and skilled trades people may be worth further examination.

Our research identifies a need for some immigrant workers to continue ESL after recruitment; a need for industry and occupation-specific language training; and a need for cultural competency training for Canadian-born and newcomer staff, depending on countries of origin. There is some evidence that intermediaries such as industry associations, unions, and NGOs have been supporting companies in other sectors with recruiting and retaining immigrants to work in jobs facing shortages. This approach may ultimately be useful in assisting the automotive sector.

CONCLUSION

This paper reviewed the most recent government data to understand immigrant employment in the automotive production sector (assembly and parts production) and opportunities for employers to solve looming skills shortages by hiring and/or training more immigrants. Trends in the labour force data show that immigrants are employed in production, technical and professional occupations but are much less so in the skilled trades area. The higher education profile of recent immigrants also suggests that there may be a greater supply of talent available for the evolving automotive production sector, which will require education and skills in fields such as mechanical and electrical engineering and software technologies. For both *assembly* and *parts production* and the broader *automotive production sector*, the diverse education, skills, and competencies needed may require different recruitment strategies. Strategies to support integration into companies or to encourage new immigrants to pursue careers in the automotive sector may be considered through further research or development of tools to support Industry recruitment efforts to address current and longterm labour needs of the automotive sector.



APPENDIX 1 – FOCAL DEFINITION OF THE AUTO SECTOR





Appendix 2: 49 occupations and 3 Occupational Groups

Engineering/Technical/Managerial

- 0016 Senior managers construction, transportation, production and utilities
- 0211 Engineering managers
- 0213 Computer and information systems managers
- 0911 Manufacturing managers
- 1121 Human resources professionals
- 1521 Shippers and receivers
- 1523 Production logistics co-ordinators
- 2132 Mechanical engineers
- 2133 Electrical and electronics engineers
- 2141 Industrial and manufacturing engineers
- 2142 Metallurgical and materials engineers
- 2147 Computer engineers (except software engineers and designers)
- 2171 Information systems analysts and consultants
- 2172 Database analysts and data administrators
- 2173 Software engineers and designers
- 2174 Computer programmers and interactive media developers
- 2232 Mechanical engineering technologists and technicians
- 2233 Industrial engineering and manufacturing technologists and technicians
- 2241 Electrical and electronics engineering technologists and technicians
- 2243 Industrial instrument technicians and mechanics
- 2281 Computer network technicians
- 2282 User support technicians

Skilled Trades

- 7201 Contractors and supervisors, machining, metal forming, shaping and erecting trades and related occupations
- 7231 Machinists and machining and tooling inspectors
- 7232 Tool and die makers
- 7237 Welders and related machine operators
- 7241 Electricians (except industrial and power system)
- 7242 Industrial electricians
- 7301 Contractors and supervisors, mechanic trades
- 7311 Construction millwrights and industrial mechanics
- 7321 Automotive service technicians, truck and bus mechanics and mechanical repairers
- 7452 Material handlers
- 7511 Transport truck drivers

Supervisors and Production

- 9221 Supervisors, motor vehicle assembling
- 9222 Supervisors, electronics manufacturing
- 9223 Supervisors, electrical products manufacturing
- 9224 Supervisors, furniture and fixtures manufacturing
- 9226 Supervisors, other mechanical and metal products manufacturing
- 9227 Supervisors, other products manufacturing and assembly
- 9412 Foundry workers
- 9416 Metalworking and forging machine operators
- 9417 Machining tool operators
- 9422 Plastics processing machine operators
- 9522 Motor vehicle assemblers, inspectors and testers
- 9523 Electronics assemblers, fabricators, inspectors and testers



- 9526 Mechanical assemblers and inspectors
- 9535 Plastic products assemblers, finishers and inspectors
- 9536 Industrial painters, coaters and metal finishing process operators
- 9619 Other labourers in processing, manufacturing and utilities



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