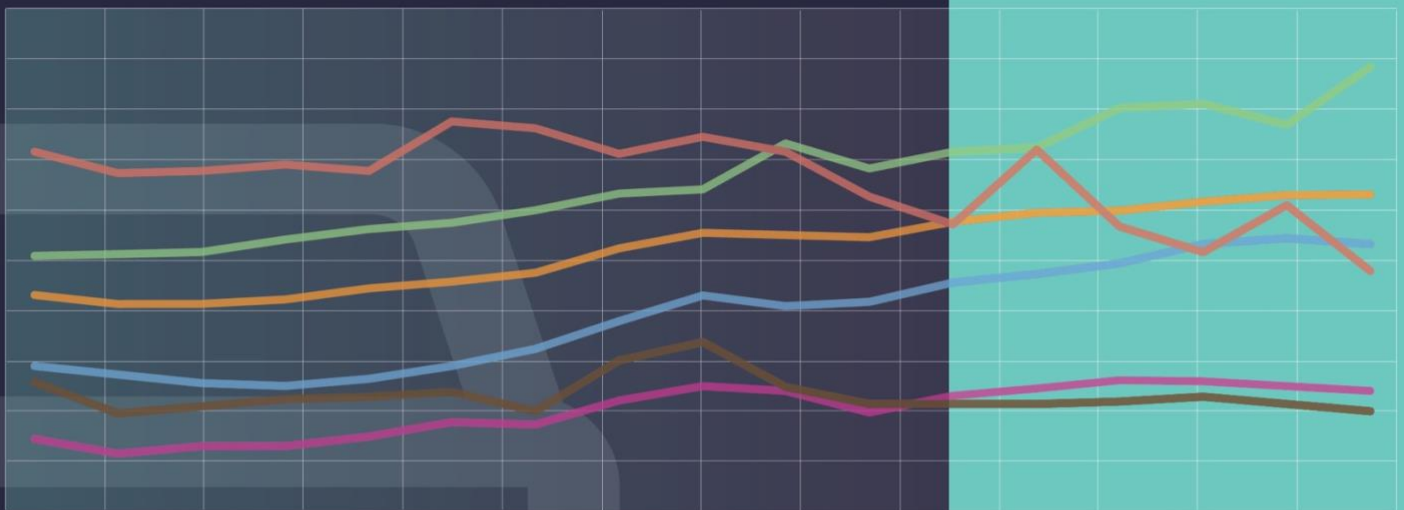


AUTOMOTIVE INDUSTRY LABOUR MARKET ANALYSIS

COVID-19 & CANADA'S AUTOMOTIVE MANUFACTURING SECTOR: A YEAR IN REVIEW



The project is a collaboration of the Canadian Skills Training and Employment Coalition, Prism Economics and Analysis, and the Automotive Policy Research Centre.

THIS PAPER was prepared for the Auto Labour Market Information (LMI) Project, now known as 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 challenges. The planned outcome of the project is enhanced regional 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 in the automotive sector.

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(FOCAL) Initiative, futureautolabourforce.ca

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Automotive Policy Research Centre, automotivepolicy.ca

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INTRODUCTION

On March 11, 2020, the World Health Organization (WHO) declared the Coronavirus disease (COVID-19) a global pandemic. Prior to this announcement, COVID-19 was sweeping the world impacting economies and leading countries to shutdown numerous industries and sectors. The automotive production industry was no exception, as it has had its fair share of disruptions and shutdowns throughout the pandemic. Between mid-March and May of 2020, Canada's automotive production sector was completely shut down. Manufacturing was halted and employees were sent home, with some resulting temporary layoffs. In the following months, the automotive manufacturing sector went into recovery mode. Production and sales rebounded as restrictions eased for the sector, and workers returned to their jobs with provincial health and safety guidelines in place.

The COVID-19 pandemic posed unprecedented challenges for the automotive manufacturing sector and its labour force throughout the past year. While working from home to mitigate the risk of COVID-19 was an option for many sectors of the economy, this was not feasible in a manufacturing setting. Moreover, manufacturing processes are complex and require in many instances for workers to be in close proximity to perform specific tasks simultaneously. Measures such as physical distancing, reducing contact (when possible), health screening, wearing masks and shields, and sanitizing workstations were among the approaches followed by manufacturers. Since the start of the pandemic there has been much discussion about its impact on the sector, its supply chain, its and labour force. For example, according to McKinsey & Co., Ernst & Young (EY) and PricewaterhouseCoopers (PwC), the pandemic has led to serious dislocations in the workplace which are likely to have echoes for some time to come. Given the health guidelines and workplace changes, these companies have argued that the pandemic has been a great opportunity to accelerate automation and "Industry 4.0"¹ adoption to reduce worker-to-worker contact, especially in manufacturing settings (McKinsey, 2020; EY, 2021; PwC, 2020). Therefore, with the sector recovering and adapting to this new reality, it is important to examine if the recovery in production over the past year was associated with a recovery or transformations in the sector's labour market.

¹ "Industry 4.0" is one of the leading trends in manufacturing technologies. It consists of a set of interconnected technologies which includes artificial intelligence; smart sensors; internet of things (IoT); big data and analytics; cyber security; autonomous robotics; cloud computing; simulation; augmented reality and additive manufacturing.

Despite the shutdowns and challenges that the sector had experienced throughout the past year, some good stories also came out of the sector. Several automotive manufacturing companies such as General Motors, Magna, Linamar and Martinrea were able to step up to produce personal protective equipment (PPEs) and ventilators which were running low in the early days of the pandemic. Other automotive manufacturers such as The Woodbridge Group contributed innovative solutions to address the challenges that the pandemic has imposed. This prompt pivot to manufacturing a completely different product by some automotive manufacturing companies showed how resilient the sector is.

In this report, we look back at the impact that the pandemic has had on the Canadian automotive production sector and its labour force over the period of 2020 and early 2021. By examining data on production, sales, employment and changes in labour characteristics, in this report we attempt to assess this impact and provide an update on the status of the sector after a year of challenges and disruptions. The report also highlights the major events and trends that occurred in the automotive manufacturing sector throughout the past year.

HOW THE PANDEMIC UNFOLDED FOR THE AUTOMOTIVE MANUFACTURING SECTOR

When the Coronavirus was reportedly spreading in Hubei province, one of four major automotive manufacturing regions in China, delays and disruptions in receiving automotive parts from China were already being reported by Canadian automotive manufacturers (KPMG, 2020). These delays were reported as early as the beginning of February of 2020, before COVID-19 restrictions and lockdown measures were set in place in most Canadian provinces. Trade data shows that motor vehicle parts imports from China dropped by almost 17.5% in February compared to the average auto parts imports of six months prior to the beginning of the pandemic². Some automakers and auto parts manufacturers even started setting contingency plans in anticipation of potential acute disruptions in the automotive supply chain, as with any single part missing in production, vehicles cannot roll off the production lines.

One month later, Canada's COVID-19 case count started mounting. On March 17, 2020, the province of Ontario declared a state of emergency which was followed by Canada's provincial

² According to Industry Canada Trade Data – Import, Export & Investment

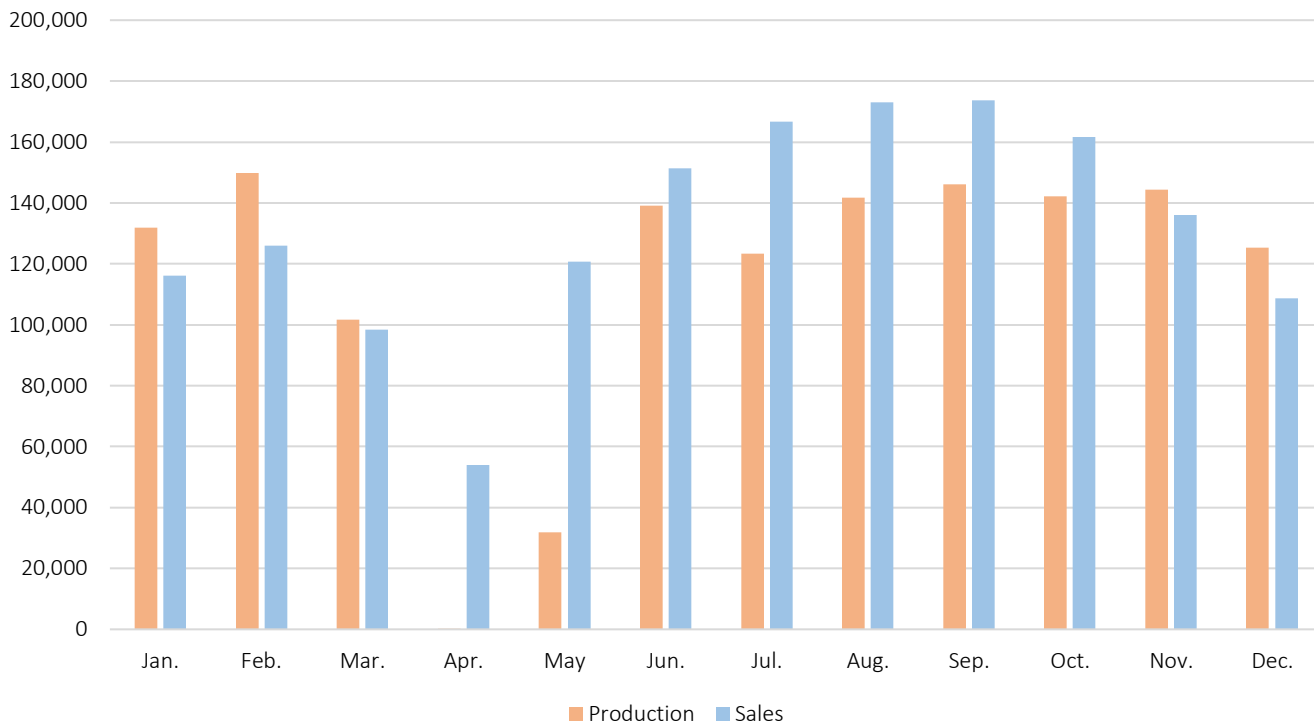
and municipal medical officers recommending the closure of all non-essential businesses. For Canada's automotive manufacturing sector, most facilities followed suit their North American counterparts, and the recommendations of local public health officers. In Ontario, the five OEMs also halted production with the earliest shutting down on March 18, 2020 and the latest on March 23, 2020. With the stringent restrictions and shutdowns, automotive manufacturing employees were off the production line for six full weeks and automotive manufacturing was completely halted during that period in Canada.

EXAMINING ECONOMIC INDICATORS OF THE SECTOR

Figure 1. presents the number of vehicles assembled and sold throughout 2020. The figure shows a sharp drop in both production and dealership sales in March and April. While no vehicles were assembled in April due to the halt in production, around 54,000 vehicles were purchased during that month in Canada (70% lower than vehicle sales of April 2019), with the majority of these vehicles being sold online (Irwin, 2020). In the following months, the automotive manufacturing sector was able to reopen and production gradually recommenced. However, although production almost recovered to its normal levels for the rest of the year, vehicle retail sales dipped again around the end of 2020 as the Canadian provinces moved into a second lockdown. In total, Canada's vehicle production was 22.25% lower in 2020 compared to 2019³, while vehicle sales fell by 19.5% during that year.

³ Excluding GM's Oshawa Production in 2019

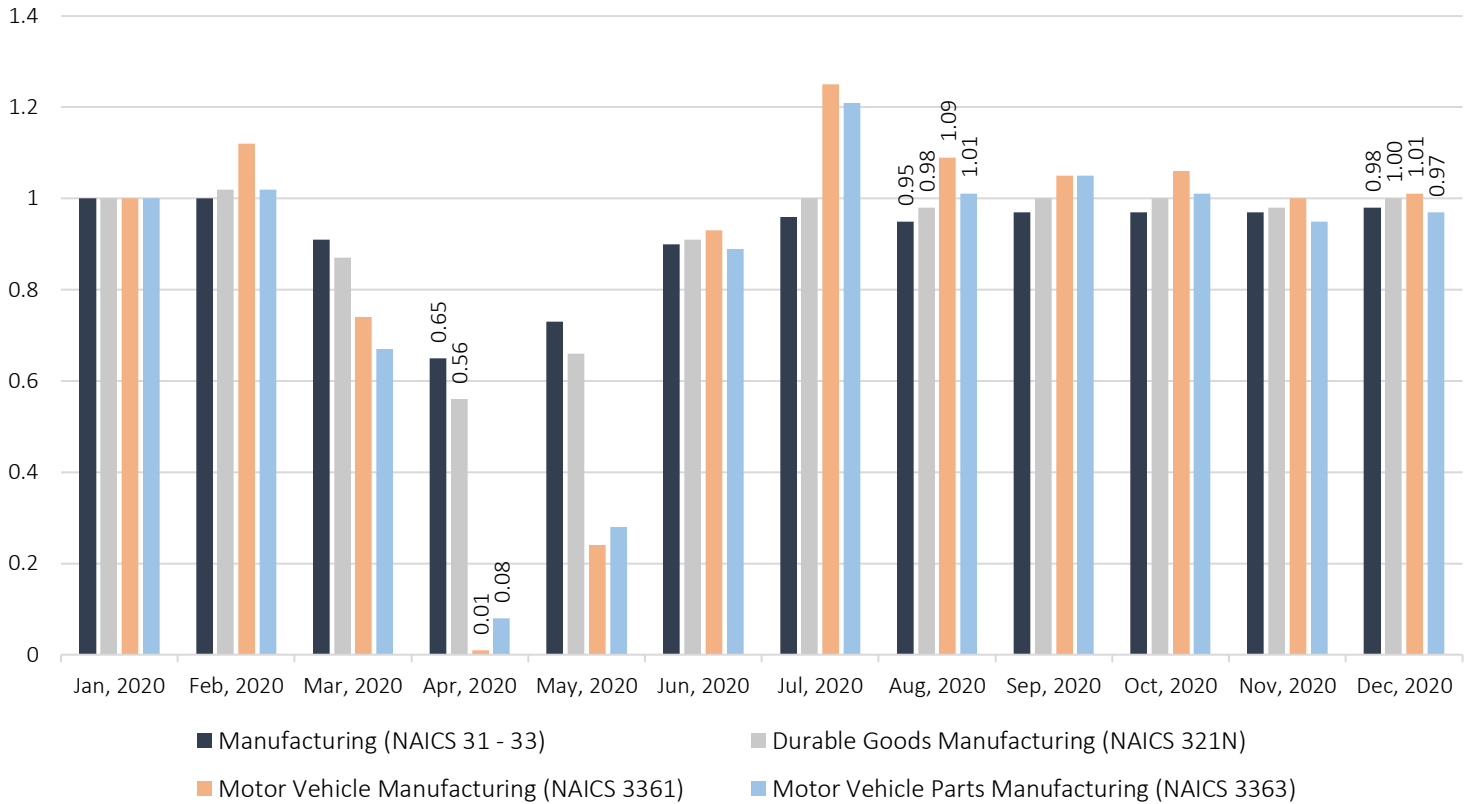
Figure 1. Canadian Vehicle Production & Dealership Sales in 2020 (units)



Source: Marklines; monthly vehicle production and retail sales data (2020)

However, as Figure 2 details, the 2020 business-to-business (B2B) sales of manufactured goods in both motor vehicle manufacturing (NAICS 3361) and motor vehicle parts manufacturing (NAICS 3363) indicate on average a strong recovery for the sector compared to the overall sales of the manufacturing sector (NAICS 31 - 33) and of durable goods (NAICS 321N). Despite the early supply chain disruption and uncertainties in February, sales of both motor vehicle manufacturing (NAICS 3361) and motor vehicle parts manufacturing (NAICS 3363) were not impacted. With the industry going into full shutdown and halt in production, B2B sales of the automotive manufacturing industry fell to close to zero during the month of April relative to January 2020 levels. In the following months, the automotive manufacturing industry exhibited a strong recovery, especially during the month of July. In the second half of 2020, sales of manufactured goods for both motor vehicle manufacturing and motor vehicle parts manufacturing were relatively higher in the second half of 2020 compared to the average sales of the overall manufacturing sector and to the sales of the durable goods manufacturing industries.

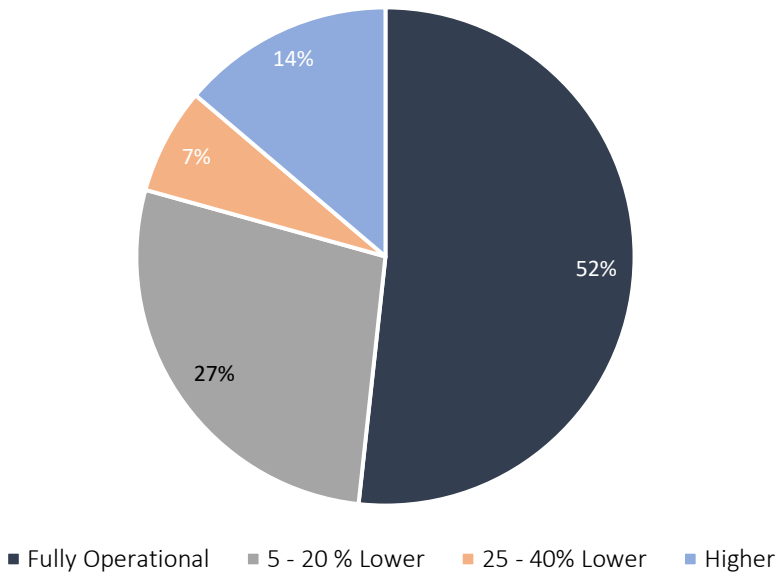
Figure 2. Index – Sales (Business-to-Business) of Manufactured Goods (Jan 2020 = 1.00)



Source: Statistics Canada, Monthly sales of manufactured goods; Survey of Manufacturers

In a poll conducted by the FOCAL Initiative in February and March of 2021 in four separate automotive regional consultation meetings, 19 automotive parts manufacturing companies out of 29 (65.5%) indicated that their manufacturing operations had fully recovered or were higher compared to pre-pandemic levels (Figure 3). On the other hand, 10 companies (34.5%) indicated that they were operating at lower manufacturing levels.

Figure 3. FOCAL's poll results on operational levels of automotive manufacturing companies after almost a year of the pandemic



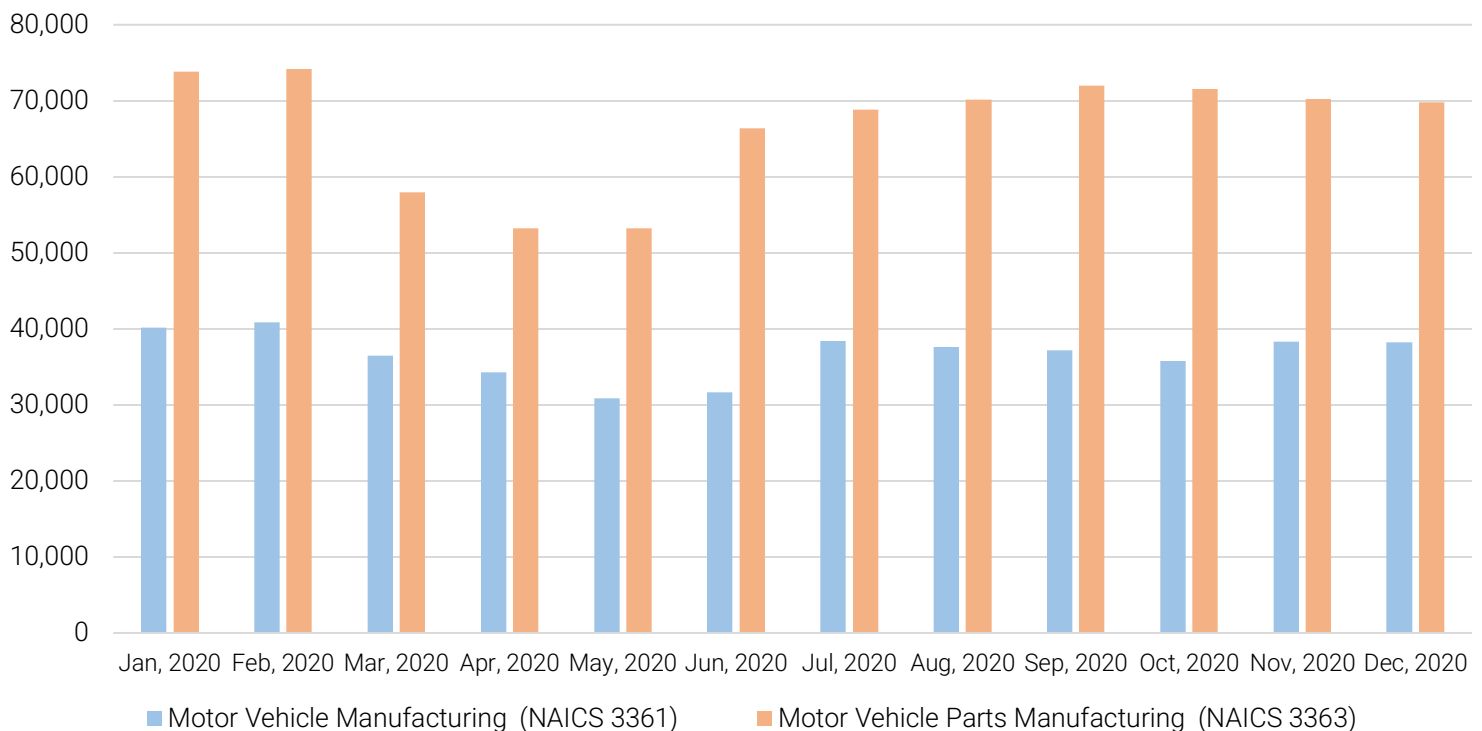
Canada's Automotive Manufacturing Labour Force

Unlike previous economic and financial disruptions in recent history, the COVID-19 pandemic posed unprecedented challenges for the automotive manufacturing industry. The contagious nature of this disease put all individuals, including all members of the automotive manufacturing labour force, in harm's way. The swift response of both manufacturers and policy makers was crucial for ensuring the safety of all employees in the sector. The initial shutdown for the automotive manufacturing sector in March of 2020 was important to mitigate the risk of infection among automotive manufacturing employees and to set plans for a safe reopening.

According to the federal Survey of Employment, Payrolls and Hours (SEPH), more than 115,000 employees were employed in both **Vehicle Assembly (NAICS 3361)** and **Vehicle Parts Manufacturing (NAICS 3363)** in February 2020. While the automotive manufacturing shutdown impacted those 115,000 jobs during March and April of 2020, FOCAL's previous research has established that an additional 70,000 jobs in **Other Primary Automotive Supplying Industries** depend on the automotive manufacturing sector. These jobs were also most likely affected by the shutdown and by the halt in assembly and manufacturing, as these

jobs directly supply both vehicle assemblers and automotive parts manufacturers. However, due to the unavailability of data for these **Other Primary Automotive Supplying Industries**, this section examines only the available employment data for vehicle assembly (NAICS 3361) and vehicle parts manufacturing (NAICS 3363). We assume that these other primary automotive supplying industries were similarly impacted, relative to the percentage of their output that is normally sold to companies included in NAICS 3361 and 3363.

Figure 4. Monthly NAICS 3361 & 3363 Employment (2020)



Source: Employment and average weekly earnings (including overtime) for all employees by industry, monthly, seasonally adjusted. Table: 14-10-0220-01 (formerly CANSIM 281-0047)

As seen in Figure 4, relative to February 2020 employment levels, employment in vehicle assembly (NAICS 3361) reached its lowest in May (30,898 employees compared to 40,891 employees in February 2020) with almost 24.4% of the employees temporarily losing their jobs. Employment in vehicle parts manufacturing (NAICS 3363) fell to its lowest level at 53,200 (a decline of almost 28.3%) in April compared to 74,195 jobs in February 2020. Employment in both vehicle assembly and vehicle parts manufacturing started recovering in June 2020. By the end of the year, employment levels in both assembly and parts manufacturing were still close to 5.7% below the January and February 2020 employment levels.

Figure 5. Index - Monthly Employment (2020, Jan 2020 = 1.00)

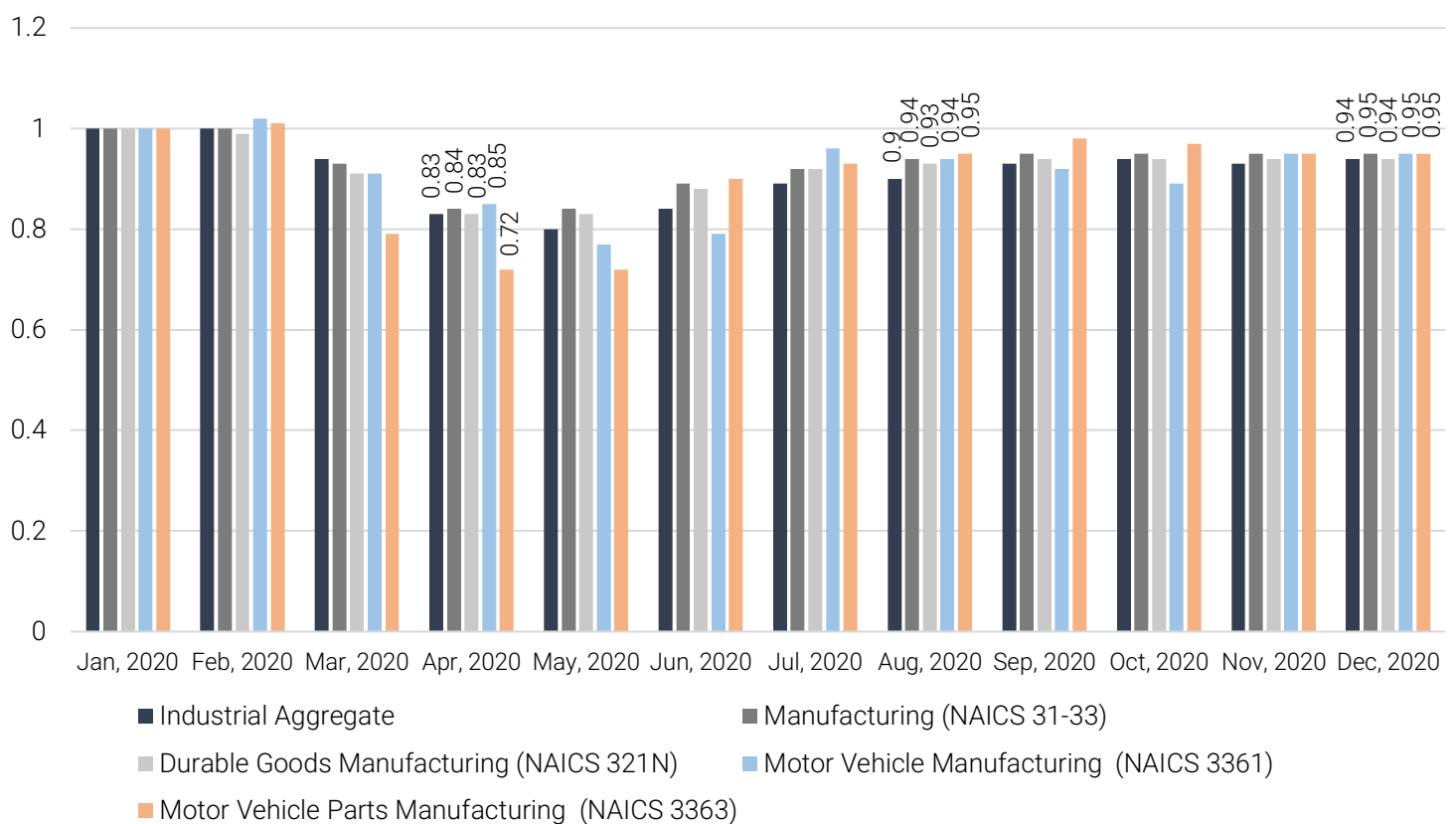


Figure 5 shows that automotive manufacturing jobs were among the hardest hit jobs during the months of April and May of 2020 when compared to the relative average employment levels of all industries, manufacturing and durable goods manufacturing. However, in the following months, employment levels in automotive manufacturing bounced back close to the relative industrial and manufacturing average employment levels.

Source: Employment and average weekly earnings (including overtime) for all employees by industry, monthly, seasonally adjusted. Table: 14-10-0220-01 (formerly CANSIM 281-0047)

Changes in Labour Characteristics During the Pandemic

In this section, the impact that the pandemic may have had on gender and age is examined. Since 4-digit NAICS Labour Force Survey (LFS) data was not readily available for this study, durable goods manufacturing was selected for this analysis as a proxy to estimate the changes. The choice of durable goods manufacturing for this analysis was based in two main reasons:

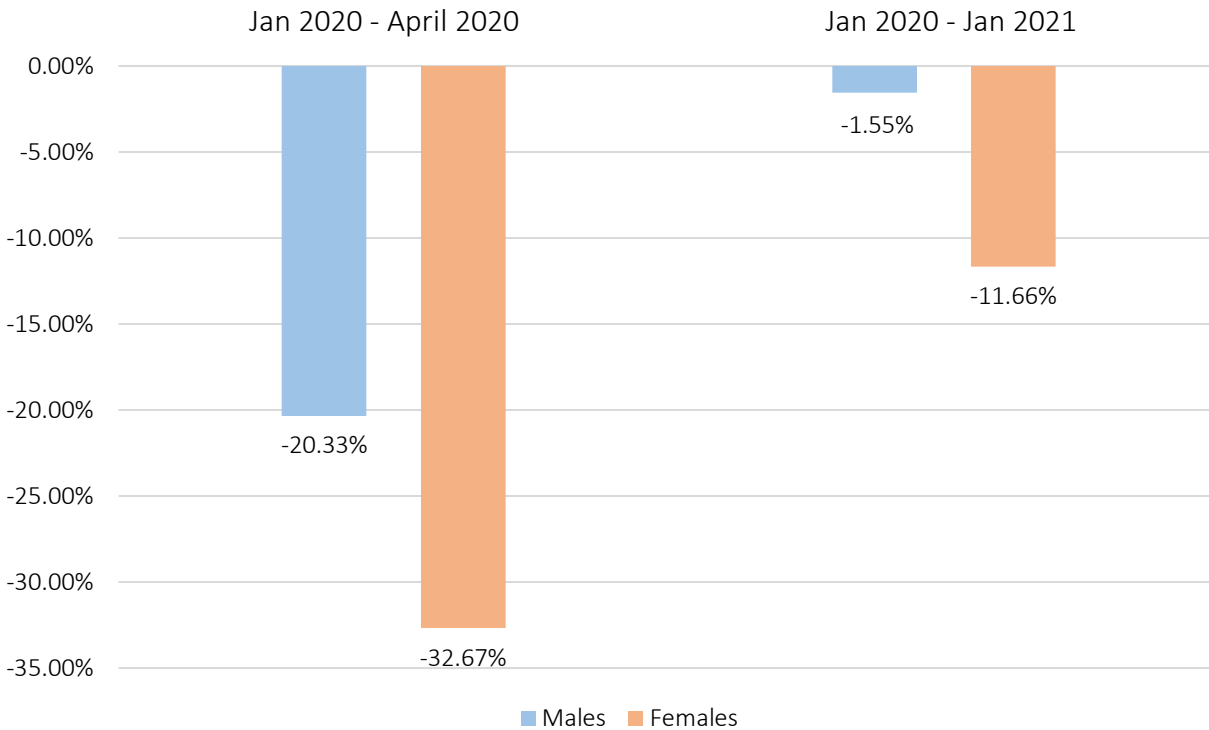
- 31 of the 42 automotive manufacturing NAICS codes previously selected by the FOCAL Initiative in defining and forecasting employment in Canada's automotive production sector are also included within the durable goods manufacturing NAICS codes definition.
- Around 160,000 employees out of FOCAL's 188,000 ($\approx 85\%$) automotive manufacturing jobs in the broader automotive manufacturing sector fall within the durable goods manufacturing defined jobs. In 2020, the 160,000 employees within the FOCAL-defined automotive manufacturing sector made up 16.05% of the total employment in durable goods manufacturing.

Examining the labour characteristic changes of durable goods manufacturing may be useful in understanding any changes in the labour force characteristics within FOCAL's broadly defined automotive production sector. These changes are examined across two time periods: January 2020 - April 2020 to examine the changes when the automotive manufacturing sector experienced the sharpest drop in employment during the pandemic, and January 2020 - January 2021, the latest LFS data that was available when the analysis was conducted.

Gender

Examining LFS data for both the periods of Jan 2020 - April 2020 and Jan 2020 - Jan 2021 shows that women in durable goods manufacturing were the most affected by the job losses during the pandemic (Figure 6). In April's sharp drop, women lost almost 1.6 times more jobs than men in durable goods manufacturing. Even after almost a year from the beginning of the pandemic, women's participation in durable goods manufacturing was still down by more than 11.5% relative to January 2020, while men's participation decreased by only 1.55%.

Figure 6. Percentage Change in Labour Characteristics (by Gender) in Durable Goods Manufacturing

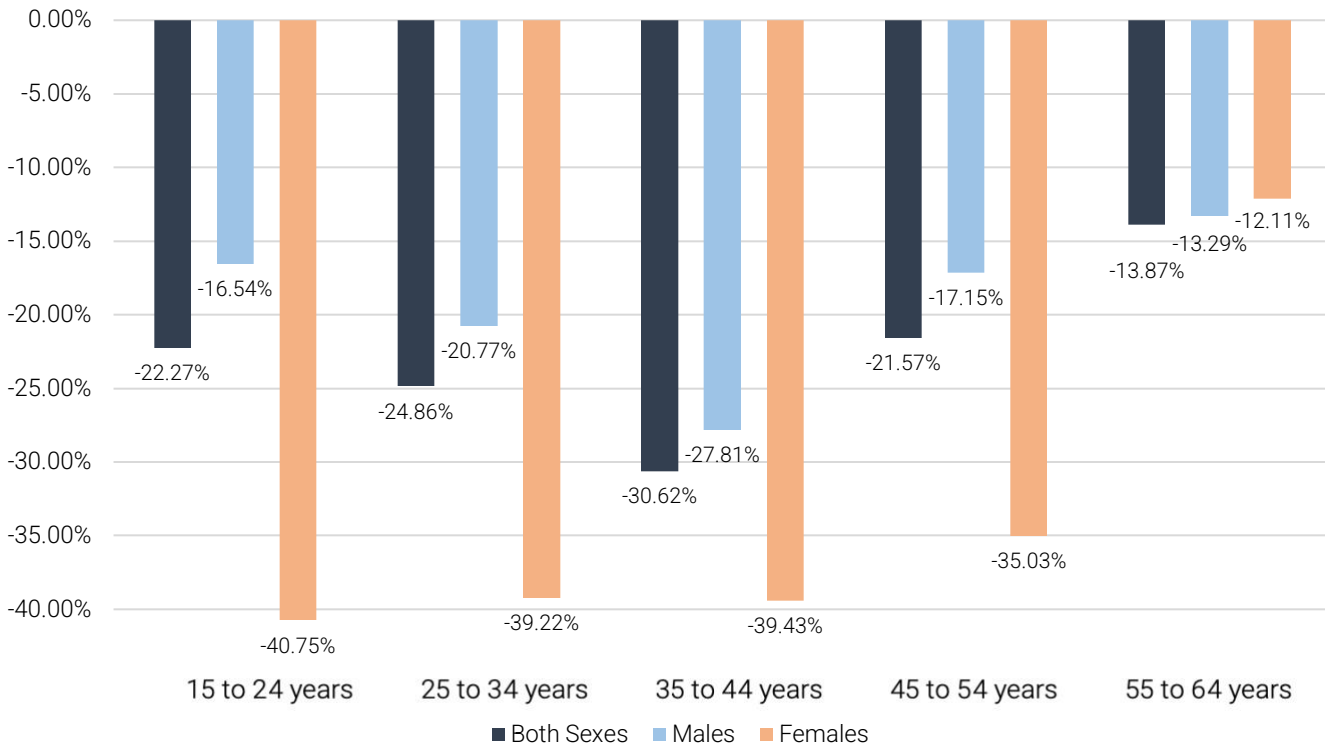


Source: LFS Data (January 2020 - April 2020)

Age

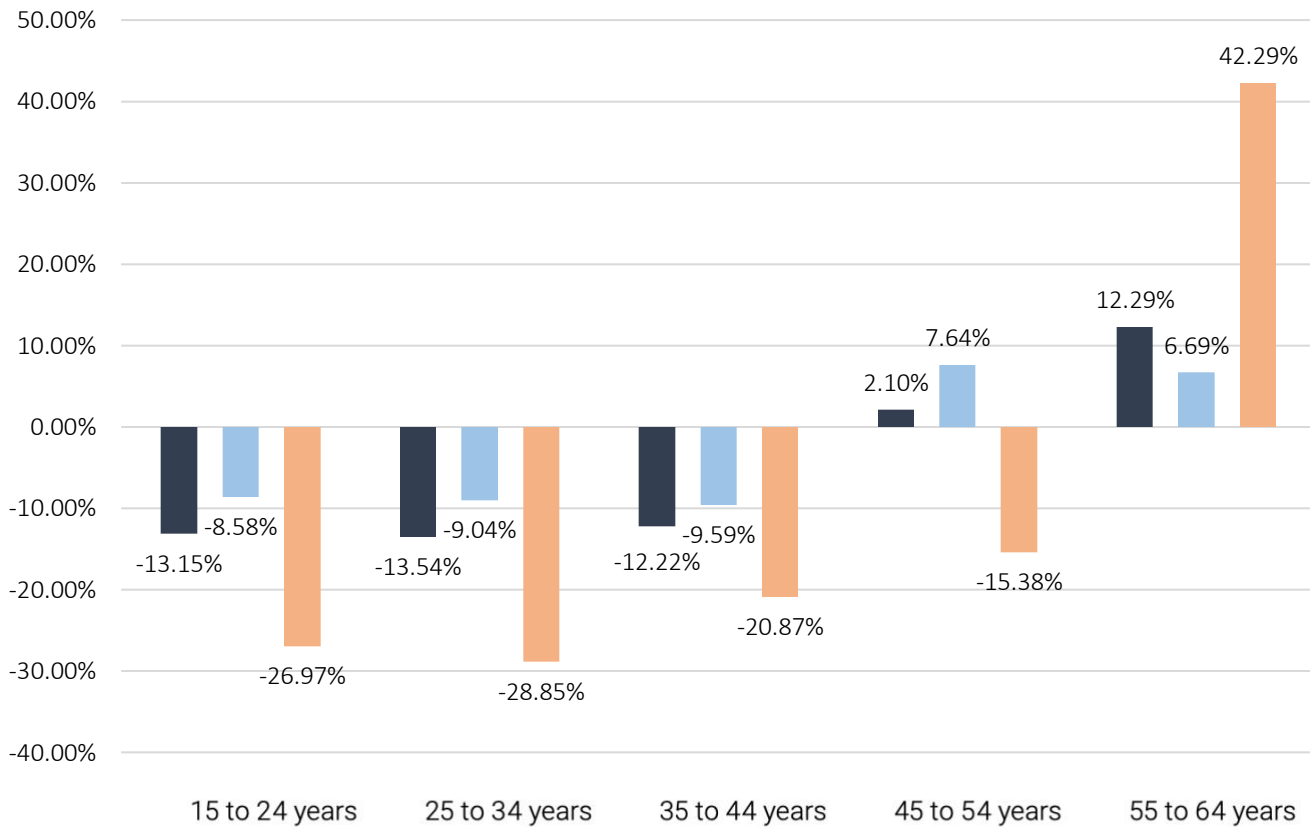
Both figures 7 and 8 show that employees under the age of 45 (especially women) in durable goods manufacturing were more impacted than older employees during the pandemic. On average, the participation of these three age groups (15 - 24 years, 25 - 34 years, 35 - 44 years) dropped by more than 12% after almost a year of the beginning of the pandemic. On the other hand, the participation of people aged 45 to 64 in durable goods manufacturing rose on average during that period. A significant rise of more than 40% in older women’s participation (aged 55 to 64) can be noted between January 2020 and January 2021.

Figure 7. Percentage Change in Labour Characteristics (by Age & Gender) in Durable Goods Manufacturing (Jan 2020 - April 2020)



Source: LFS Data (January 2020 - April 2020)

Figure 8. Percentage Change in Labour Characteristics (by Age & Gender) in Durable Goods Manufacturing (Jan 2020 - April 2021)



Source: LFS Data (January 2020 - January 2021)

OPENING UP & PATH TO RECOVERY

During 2020's March and April shutdown, the federal and provincial governments worked on developing and implementing programs and measures for the re-opening of the economy's different sectors. For example, the federal government implemented the Temporary Wage Subsidy, a 3-month 75% wage subsidy program to help small businesses keep and return workers to the payroll (PM Canada, 2020). The Canada Emergency Wage Subsidy (CEWS) was also introduced to help companies cover part of employee wages and help companies rehire. Such subsidies might have assisted automotive manufacturing companies in retaining and rehiring their employees, especially during the months following the initial shutdown.

On a provincial level, the Ministry of Labour, Training and Skills Development at Government of Ontario and the Workplace Safety & Prevention Services (WSPS) partnered to develop guidelines for operation during COVID-19 which are meant to keep workers safe and reopen workplaces. These guidelines were sector-specific and addressed different tasks performed by different occupational groups. For example, it was recommended that employers revise manufacturing operations in which production workers and supervisors get in close contact. For this, WSPS recommended the physical distancing of 2 meters when possible, with the installation of distancing markers throughout the facility (WSPS, 2020). In the cases where physical distancing was not possible, employers were encouraged to install transparent plastic barriers (where practical) to reduce the possibility of direct exposure among employees. WSPS also recommended considering staggering shifts and breaktimes, and sanitizing workstations, counters and equipment between shifts. It was also recommended that all engineers, technicians, maintenance staff and equipment operators postpone all non-essential projects and tasks, especially the ones that require close interaction with workers or customers. Other measures and guidelines included screening all employees and requiring face masks or face coverings to limit the spread of COVID-19 in the workplace.

Starting in early May 2020, automotive manufacturing companies resumed production. For many companies, adjusting and adapting with the new health and safety guidelines was one of many challenges the pandemic has posed. In fact, the measures and approaches taken have so far been effective for many automotive manufacturing companies (Trillium Network for

Advanced Manufacturing, 2020). By the time of writing this report, we were aware of only four major COVID-19 outbreaks in automotive manufacturing facilities⁴.

Another challenge triggered by the pandemic has been the shortage of automotive semiconductor chips. Semiconductor chips are an integral component in modern vehicles. These chips can be found in numerous parts of a vehicle such as the infotainment system, engine control module, power steering module and brakes. In late 2020 and early 2021, COVID-19 induced production disruptions and delays in the semiconductor supply chain directly impacted the global and Canadian automotive manufacturing sector. Several Canadian OEMs had to idle their assembly plants and halt production for days or weeks since the beginning of January 2021. As of April 2021, LMC Automotive projects that the production of a total of 719,000 vehicles will be impacted in North America due to semiconductor shortages. It is expected that the shortage in semiconductors will last for months or even a few years (Sigal, 2021).

COVID-19 PIVOT TO MEDICAL EQUIPMENT

During the early days of the pandemic, many countries were rushing to secure medical and personal protective equipment (PPE) supplies for medical and healthcare workers in anticipation of the rise in COVID-19 cases. Moreover, ventilators were also required to care for COVID-19 patients. As the March 2020 shutdown brought production to a halt and left almost all automotive manufacturing plants idling, several Canadian automotive industry leaders got together to coordinate a mobilization of Canada's automotive manufacturing capabilities and capacity to pivot and manufacture medical supplies. Led by the Automotive Parts Manufacturers' Association (APMA) and with the support of numerous other organizations, companies, universities, and government, the "Step Up" initiative was launched in mid-March (APMA, 2020). On a provincial level, the Ontario Government launched the "Ontario Together" program to seek new ways in which companies and their employees can assist the province in addressing the challenges of the pandemic⁵.

According to the APMA, 165 member companies initially stepped forward in March and April to offer their capacity and expertise in manufacturing to address the shortages in medical

⁴ Out of more than 950 automotive manufacturing facilities in Canada within the FOCAL-defined automotive production sector.

⁵ Government of Ontario - Ontario Together: <https://covid-19.ontario.ca/how-your-organization-can-help-fight-coronavirus>

supplies, from which 25 companies ended up with contracts. Among these companies were Canada's biggest three suppliers - Magna, Linamar and Martinrea - which agreed to supply 10,000 ventilators to the province of Ontario (Layson, 2020). Other automotive manufacturing companies were able to pivot their operations to produce face masks, face shields, gloves, and medical gowns.

As of March 2021, the Trillium Network for Advanced Manufacturing counts 31 automotive manufacturing companies which pivoted their operations to supply personal protective equipment (PPE) and ventilators in Ontario. Within Ontario's manufacturing sector, 13.5% of the companies that pivoted were automotive.

Transitioning to the production of PPE demonstrated the adaptability of both the industry and its workforce. Many of the companies which stepped up had to retool and repurpose their operations within days, and the fact that many engineers, technicians, skilled trades and production workers were able to adapt and innovate within a short period of time should be acknowledged. For example, AarKel Tool and Die's team in southwestern Ontario had to produce metal molds and cores for the production of the plastic parts of ventilators (Chatham Daily News, 2020). The Woodbridge Group's team of engineers and designers worked on developing an ASTM⁶ Level 3 face mask in partnership with researchers at McMaster University's Engineering and Medical Schools. By April 7, 2020, just under a month of the beginning of the first lockdown; the first batch of 1,000 face masks were delivered. Finally, in April 2021, General Motors Canada completed the production of 10 million face masks for the Government of Canada, a process which extended for almost a year and helped protect many Canadians, especially front-line workers.

INDUSTRY 4.0 AND COVID-19

COVID-19 has induced numerous changes in the manufacturing sector, as it has in many other sectors across the economy. In the early days of the pandemic, many businesses had to come up with new approaches to adjust to the disruptive changes. Digital technologies such as cloud services, videoconferencing and online retail have had a critical role in the shift from working in-person to working from home for many businesses. And while these technologies may have helped some employees of the automotive industry resume their daily work tasks (especially employees of the automotive technology industry), this number of employees remains

⁶ ASTM: American Society for Testing and Materials Standard

relatively small compared to the number of workers directly involved in manufacturing and production in the sector⁷, where remote work is not possible.

With the risks that COVID-19 has imposed on individuals, and with the health measures and guidelines in workplaces, several consulting companies (such as McKinsey & Co., EY and PwC) and organizations (such as the OECD and the Society of Manufacturing Engineers) have suggested that the pandemic has led to the acceleration of adoption of advanced manufacturing technologies, especially Industry 4.0 (McKinsey, 2020; EY, 2021; PwC, 2020; OECD, 2020; SME, 2021). According to Ernst & Young's 2021 Global Capital Confidence Barometer, 63% of 2,400 globally surveyed company executives have indicated that the COVID-19 pandemic has shifted their investment and strategic focus towards the digital transformation, making digitization and automation the top priority for many companies (EY, 2021). This percentage has significantly risen over the past year compared to early 2020 results when digital transformation had only a 31% positive sentiment among global executives (EY, 2020).

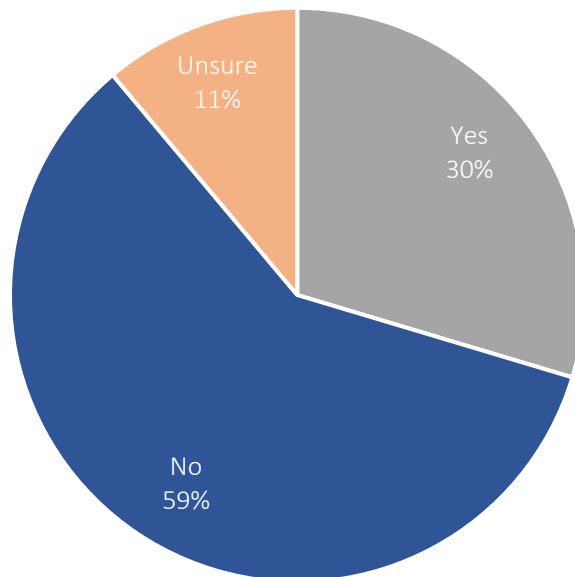
While technology has helped different parts of the economy shift to remote work during the pandemic, automation and digitization in manufacturing may be capable of helping to mitigate the risk of worker-to-worker interaction. This reduces the possibility of health disruptions in manufacturing while ensuring that COVID-19 health guidelines and measures are followed. If such an increase in capital spending to introduce digitization has occurred, this might increase productivity.

However, according to the OECD, this wave of digitization, like previous waves of technological changes; will likely contribute to labour market polarization and lead to a decline in opportunities for workers without post-secondary training (OECD, 2020). Moreover, throughout the past year sales of automotive manufacturing companies declined, and while the recovery in production can be observed around the end of 2020, the shutdowns and parts shortages which have extended through 2021 are associated with lower economic activity which also impacts the automotive industry. With lower revenues, especially for small and medium-sized enterprises (SMEs), the decision to invest in new technologies may be less attractive. For many companies, the priority may be a proper and healthy recovery from the aftermath of the pandemic.

⁷ Based on the number of jobs in automotive technologies and based on the distribution of occupations in the sector.

A recent poll conducted by the FOCAL Initiative in four regional consultation sessions has shown that almost 30% of 27 responding automotive parts manufacturing companies have moved forward with Industry 4.0 upgrades during the pandemic. While this suggests that some automotive manufacturing companies are moving forward with technology upgrades, digital transformation is not widespread throughout the sector.

Figure 9. FOCAL’s poll results on Industry 4.0 adoption during the pandemic



In an in-depth interview conducted by FOCAL, an automotive parts manufacturing company indicated that the pandemic has slowed down its agenda on some technology upgrades to its production line due to continuous disruptions that the company and its technology supplier have experienced during the pandemic. However, the company has no additional plans for introducing other new technologies at the moment and continues to focus on ensuring that its employees follow applicable health guidelines to operate safely.

However, in one of the recent webinars hosted by the Automotive Parts Manufacturers’ Association (APMA), a tier 1 supplier in Canada’s automotive manufacturing sector indicated that the company has been able to use augmented, extended and virtual reality technologies (AR/XR/VR) to provide a variety of services to its manufacturing facilities, and support to its customers during COVID-19. With the tight restrictions around travel, the company has been able to employ extended reality (XR) to provide maintenance instructions and support to

employees in other facilities without traveling. Through developing and testing this technology, and through ensuring that it provides an immersive experience, the company has been able to reduce any downtime and save on its travel budget. This technological change has been previously detailed by the FOCAL Initiative in its “Impact of Industry 4.0 Technologies on Key Occupations in Automotive Manufacturing” report, in which the impact of various Industry 4.0 technologies is examined on individual tasks performed by 48 automotive manufacturing occupations. The Industry 4.0 report describes how the adoption of augmented and extended reality technologies may alter the tasks of several occupations in the sector, especially in maintenance and training tasks.

While the pandemic may have pushed the digital transformation agenda of some automotive manufacturing companies, especially for large enterprises who have the expertise and capital to adjust and make the upgrades; small and medium enterprises may be more focused on recovering and operating safely during the pandemic. However, for many of SMEs, the digital transformation may come sooner than anticipated to keep up with the changing nature of the digital supply chain and with the increasing number of companies that have focused on digitization and automation during the pandemic.

CONCLUDING REMARKS

The COVID-19 pandemic has been a unique and disruptive event for the automotive manufacturing sector, as it has been for many other sectors. Shutdowns, stay-at-home orders, supply chain disruptions, and lower economic activity continue to impact the sector to this day. The data presented in this report shows that the sector and its labour force have almost recovered from the initial shock of the pandemic, despite the changes in the participation of women and younger age groups that can be noted in durable goods manufacturing.

In spite of the challenges that the pandemic has posed, some companies in the sector have been able to step up and pivot to manufacture medical equipment to protect front-line workers and many other Canadians. This offered an opportunity for some companies to collaborate and explore new ways of mobilizing skills, production capabilities and technologies.

Irrespective of the impact that the pandemic may have had on the digital transformation agendas of companies in Canada’s automotive manufacturing sector, the sector continues to adapt to the changes and recover from the aftermath of the pandemic. While the upcoming

months may bring better clarity to the recovery path ahead, the automotive manufacturing sector, and its labour force continue to navigate the challenges induced by this unprecedented pandemic.

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