CANADIAN AUTOMOTIVE MANUFACTURING SECTOR PROFILE

February 2026

An analysis of Canada's automotive manufacturing sector, examining production trends, economic contributions, employment, trade, and the transition to electric vehicle manufacturing.

ABOUT
TRADE AUTO CANADA

TRADE Auto Canada: *Trade, Resilience, and Adaptation to Disruption in Employment in Canada's Automotive Manufacturing Sector* is a research initiative led by the **Canadian Skills Training and Employment Coalition (CSTEC)** in partnership with the **Automotive Policy Research Centre (APRC)**, funded by the **Future Skills Centre (FSC)**. The project examines the compounded impact of U.S. trade tariffs, shifting EV demand, and evolving trade policy on Canada's automotive manufacturing sector and its workforce. Through sector and trade exposure analysis, economic and labour market impact modelling, national occupational forecasting, and stakeholder engagement, the project aims to provide policymakers, employers, labour organizations, and workforce development providers with the data and tools needed to support employment stability, workforce transition planning, and long-term sector resilience.

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Introduction

Canada's automotive manufacturing sector has long been a cornerstone of the national economy, contributing significantly to GDP, employment, and trade. For decades, this sector operated within a relatively stable environment shaped by the highly integrated North American supply chains and established trade agreements.

Over the past five years, the stability of the Canadian automotive manufacturing sector has been challenged by a series of disruptions, including plant closures, retooling, and persistent supply-chain shocks. At the same time, the accelerating transition to electric vehicles (EVs) and related product and process technological advancements have begun to reshape the sector’s trajectory, prompting new investments and a significant realignment of automotive supply chains.

Despite ongoing efforts to support recovery and growth following these disruptions, the sector now faces a new challenge: a rapidly shifting trade-policy landscape since the beginning of 2025. As long-standing frameworks governing cross-border trade with the United States (U.S.) are increasingly threatened, the sector, its production and labour force are challenged with increased uncertainty.

In early 2025, the U.S. administration imposed 25% tariffs on imported vehicles and certain automotive parts. While goods from Canada and Mexico that comply with the Canada-United States-Mexico Agreement (CUSMA) receive partial relief, these measures nonetheless represent a significant shift in North American automotive trade policy (Kitamura, 2025). The highly integrated nature of the North American automotive supply chain implies that vehicle parts and components, as well as partially assembled vehicles routinely cross the Canada-U.S. and Mexico-U.S. borders multiple times before final assembly (Bowman, 2026). These tariffs introduce significant cost pressures into a supply chain that was designed around ease of cross-border trade. The mandatory joint review of CUSMA, which must be completed by July 1, 2026, will determine whether the agreement is extended for another 16 years, or will shift to annual reviews until its scheduled expiration in 2036 (Boscariol, Glasgow, Stanic, Sathananthan, & Stymiest-Losier, 2025).

The simultaneous pressures of trade, technology, investment and labour amplify risks for manufacturers, suppliers, and workers across the Canadian automotive supply chain. In this context, a detailed and up-to-date profile of the sector is important to understand its structure, levels of activity and supply chain integration, situating recent performance within the context of these trade and policy developments. This report examines the trends in production, employment, and trade for the period of 2018 – 2024. It also profiles the structure of the parts supply chain; and outlines the challenges and uncertainties that lie ahead as the sector navigates tariff pressures and the outcome of the CUSMA review.

Macro-Production Statistics

North America's vehicle production levels have experienced significant disruptions over the past several years, influenced by the impact of the COVID-19 pandemic, supply chain challenges, and strategic industry realignment. In 2020, vehicle production fell sharply as the pandemic triggered widespread temporary shutdowns across assembly and parts plants beginning in mid-March of that year (The Associated Press, 2020). The industry has made a significant recovery over the past five years but faces a new threat with the imposition of U.S. Section 232 tariffs on finished vehicles and vehicle parts entering the U.S. (Kitamura, 2025).

Based on the production series shown in Table 1. and Figure 1., North American output (Canada, U.S., and Mexico) was relatively steady between 2018 and 2019 at 17.4 million and 16.8 million respectively. North American production in 2020 and 2021 sharply declined and averaged approximately 13.4 million vehicles per year. Vehicle output then increased modestly to 14.8 million in 2022 and 16.2 million in 2023, before stabilizing at 16.1 million in 2024. Between 2020 and 2024, global motor vehicle production levels also recovered to 92.5 million in 2024 following the sharp pandemic drop, suggesting that the global post-pandemic recovery was largely complete by the years 2023 and 2024, despite variation across regions.

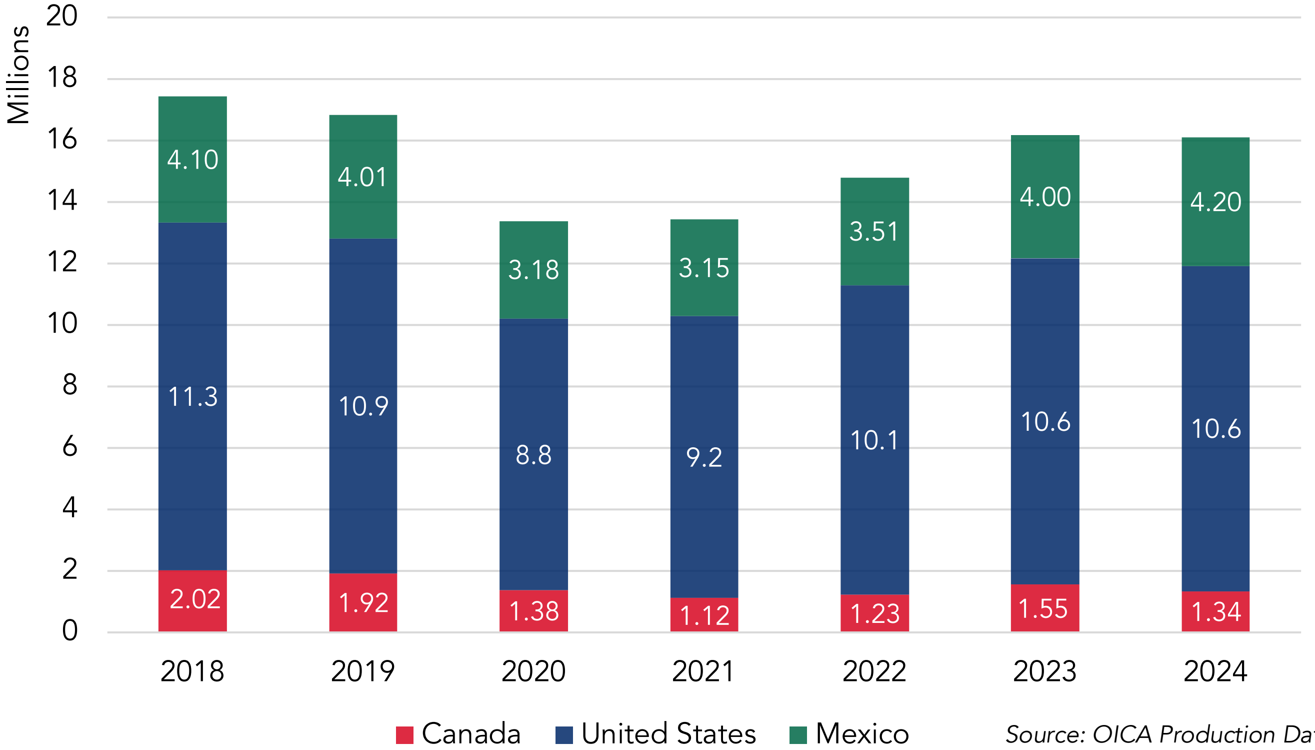
In Canada, production remained volatile between 2018 and 2024. Output fluctuated between a low of 1.12 million vehicles in 2021 and a peak of 1.55 million in 2023, settling at 1.34 million in 2024. Despite vehicle production in U.S. and Mexico returning to their pre-pandemic levels in

Table1. Vehicle production in North America (‘000 units)

	2018	2019	2020	2021	2022	2023	2024
Canada	2,021	1,917	1,377	1,115	1,229	1,553	1,342
USA	11,315	10,880	8,822	9,167	10,060	10,612	10,562
Mexico	4,101	3,987	3,177	3,146	3,509	4,002	4,203
USMCA	17,436	16,783	13,376	13,428	14,798	16,167	16,107
Global	95,635	91,787	77,622	80,146	84,811	93,453	92,504

Source: OICA Production Data

Figure 1. North American vehicle production, 2018 - 2024

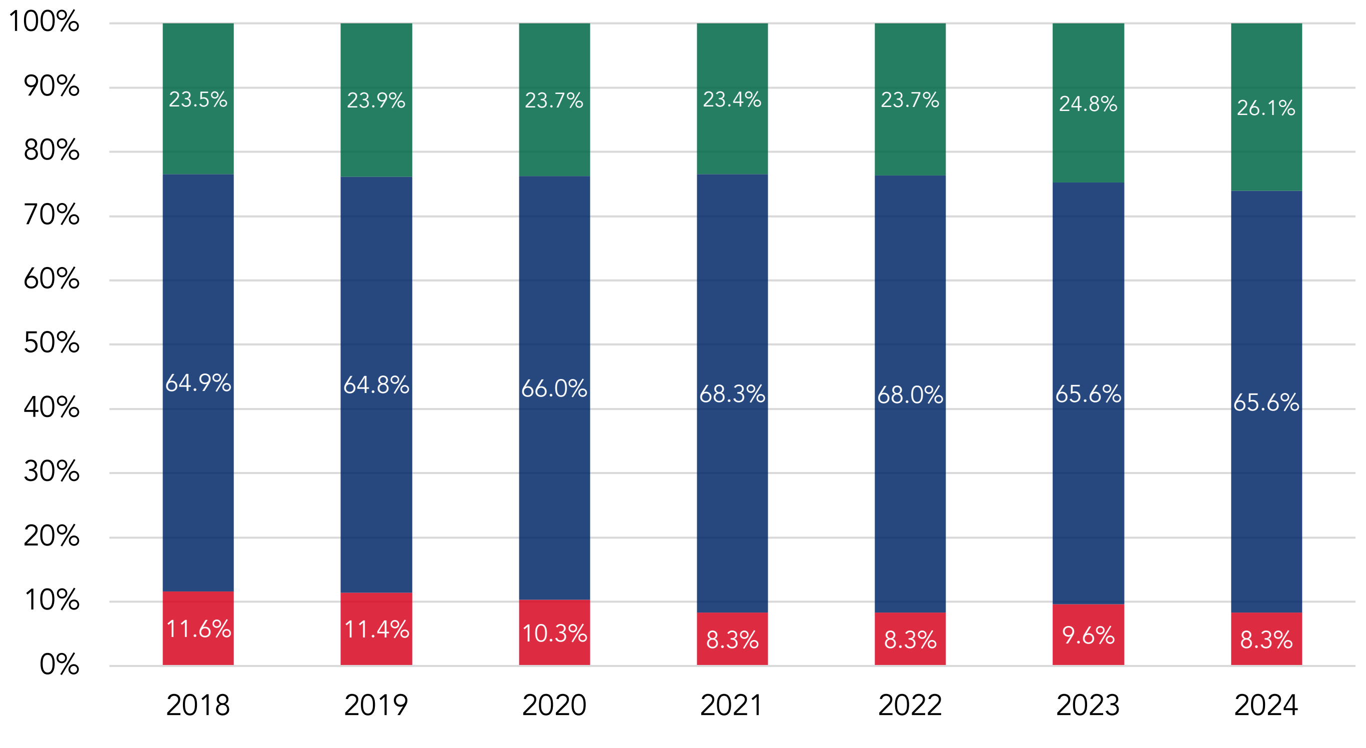


Source: OICA Production Data

2023 and 2024, vehicle production in Canada remains significantly below the 2019 production level. In Canada, the COVID-19 plant shutdowns in 2020, and the global semiconductor shortage in 2021 and 2022 limited assembly volumes and contributed to production interruptions (Statistics Canada, 2021). Vehicle Original Equipment Manufacturers (OEMs) also managed scarce chips by prioritizing higher-margin production in Canada, which amplified uneven impacts across plants (Klayman, 2021).

Another contributing factor to the drop in production levels in Canada has been the reallocation of vehicle production models across North American and global facilities, as well as evolving investment decisions. Throughout the period of 2020 to 2024, automakers made strategic decisions on where to allocate production across North America, particularly as it relates to EV production. Developments at major assembly facilities help explain the observed production patterns in Canada. For example, Ford moved Lincoln Nautilus production from its Oakville Assembly plant to China beginning with the redesigned 2024 model, while discontinuing the Ford Edge from the same facility in 2024 to make way for retooling. At Ford's Oakville facility, retooling, the associated adjustments in plans, as well as the evolving EV product plans over the past years affected production volumes (Atkins, 2025). GM's

Figure 2. Share of vehicle production in North America, 2018 - 2024



Source: OICA Production Data

Oshawa Assembly plant, which had closed in 2019 after losing models such as the Chevrolet Impala and Cadillac XTS, was reopened in 2021 - 2022 to produce pickup trucks, which led to a narrower product mix and lower volumes than the plant had historically supported. Finally, GM's CAMI Assembly plant in Ingersoll, Ontario was retooled between 2022 and 2024 to produce the EV BrightDrop van, which operates at significantly lower production volumes compared to the Chevrolet Equinox and GMC Terrain models it previously assembled, further contributing to the decline in Canada's overall vehicle output (GM Canada, 2022). These decisions affected production levels in Canada, as plants experienced production gaps during model changeovers and retooling for electrification (Nora, 2024).

Automotive Production Share

Figure 2 presents vehicle production shares for the U.S., Mexico, and Canada between 2018 and 2024. The proportion of production for all three countries held relatively steady in 2018 and 2019. Canada's share of North American production dropped to 8.3% in 2021 following the onset of the pandemic and has struggled to recover since. Although it briefly climbed to 9.3% in 2023, it fell back to 8.3% in 2024. In contrast, Mexico has steadily expanded its share over the past years, gaining ground while Canada's share stagnated.

Canada's difficulty regaining its pre-pandemic production share reflects both the severity of COVID-19 disruptions and a structural vulnerability. As Canadian vehicle production is concentrated in a small number of assembly plants, a single plant closure, model transition, or retooling shutdown can significantly affect national output in a way that would minimally impact production levels in the U.S. or Mexico, where production is more dispersed (Yates & Holmes, 2019).

New Investment and Production Changes

Between 2018 and 2024, Canada's five OEMs announced a series of significant investments in their Canadian vehicle assembly operations, totalling over C$16 billion. These commitments were largely directed toward retooling and modernizing existing plants to support electrification, with additional allocations for R&D capabilities. Despite the significant production commitments made, the period of 2018 - 2024 has been marked by significant production gaps, model changeovers, and delays as a result of the slowing EV uptake and trade uncertainty.

The General Motors (GM) CAMI Assembly plant in Ingersoll, Ontario was retooled between 2022 and 2024 as part of a C$2 billion investment to produce the BrightDrop fully electric commercial van. In July 2024, GM opened a new 400,000 square-foot battery module facility at CAMI to support the BrightDrop van and other GM EV production. However, in early 2025, temporary layoffs at the plant were announced due to the slowing demand for the BrightDrop van. At its Oshawa location, GM reopened the facility in 2021 to produce the Chevrolet Silverado pickup trucks following its 2019 closure (GM Canada, 2022).

In 2022, Stellantis announced a C$3.6 billion investment to retool both its Windsor and Brampton Assembly plants as part of its electrification strategy. At Windsor Assembly, the plant was retooled to support the production of multiple powertrain models. The Brampton Assembly plant ended production of the Chrysler 300, Dodge Charger, and Dodge Challenger in late 2023 to begin retooling for the next-generation Jeep Compass. Retooling was paused in February 2025 and, as of early 2026, operations remain halted at that plant (Kennedy, 2026).

In 2023, Ford announced a C$1.8 billion investment to retool its Oakville Assembly Complex for EV production. Retooling began in mid-2024, which ended the production of the Ford Edge and Lincoln Nautilus. In April 2024, Ford delayed the start of EV production from 2025 to 2027 (Nora, 2024).

Honda Canada invested C$1.38 billion in 2022 to upgrade its Alliston, Ontario plants. In April 2024, Honda announced a C$15 billion investment to build four new EV-related facilities in Ontario. In May 2025, the project was postponed by approximately two years due to slowing EV demand (Hughes, 2025).

Finally, Toyota Motor Manufacturing Canada (TMMC) invested C$1.4 billion in 2018 to retool its Cambridge and Woodstock plants for RAV4 production. In 2025, Toyota invested a further C$1.1 billion to produce the sixth-generation RAV4 with in-house battery pack assembly (Donnini, 2025).

Vehicle Assembly Employment

As of the end of 2024, the five OEMs in Canada employed approximately 27,000 people in their automotive manufacturing operations (APRC Database, 2025). The largest employer, Toyota, employed around 9,900 people at its Cambridge, Woodstock plants, and an additional 95 at Hino plant. The second largest, Stellantis, employed 6,618 people in vehicle assembly operations, despite having 3,000 workers on temporary layoff as of early 2024. These two OEMs are followed by GM at 4,811, Honda 4,700, and Ford at 700 at its Oakville plant. Employment at OEM components and parts manufacturing facilities is not included in this section and is detailed later in this report.

Vehicle Parts Manufacturing

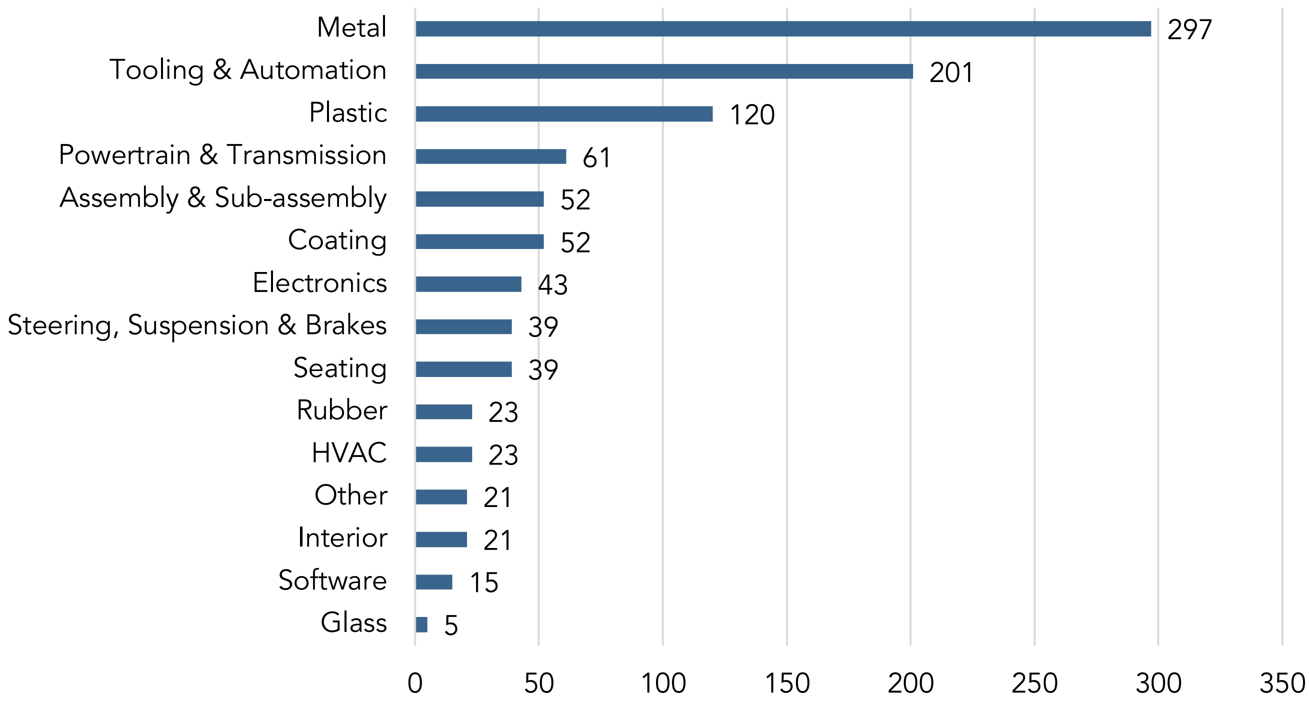
The analysis in this section draws on a previous analysis performed by the FOCAL Initiative on the size of the Canadian automotive manufacturing supply chain, as well as on data from a database of automotive manufacturers and suppliers across the broader supply chain. This analysis captures upstream and adjacent firms that do not necessarily self-identify as "automotive manufacturers" but functionally supply parts, components, and materials into automotive parts production and vehicle assembly value chains. The database encompasses over 1,000 manufacturers and suppliers, in addition to more than 300 R&D labs, testing facilities, and technical centres that support product development, process innovation, and quality assurance across the industry. Employment in these production, research and technology development facilities exceeds 200,000 jobs.

This broad analysis, as well as the inventory of facilities allows for a detailed examination of the composition of Canada's automotive parts manufacturing sector. By categorizing firms according to their primary manufacturing process or product specialization, it is possible to identify the sector's underlying structural strengths and areas of concentration.

Figure 3 presents the number of automotive manufacturing facilities within each product or process category. Out of the 1,100 automotive manufacturing facilities, the largest concentration is in metal manufacturing with 297 facilities (27.0%), followed by tooling and automation with 201 (18.3%), and plastics with 120 (10.9%). Powertrain and transmission accounts for 61 facilities (5.5%), while assembly and sub-assembly and coating each comprise 52 (4.7%). The remaining categories, including electronics, steering, seating, rubber, HVAC, interior, software, and glass, each represent smaller shares of the sector. This composition is consistent with Canada's established strengths in metalworking, dies/molds, and process capabilities that serve both assembly operations and multi-tier suppliers (Statistics Canada, 2026).

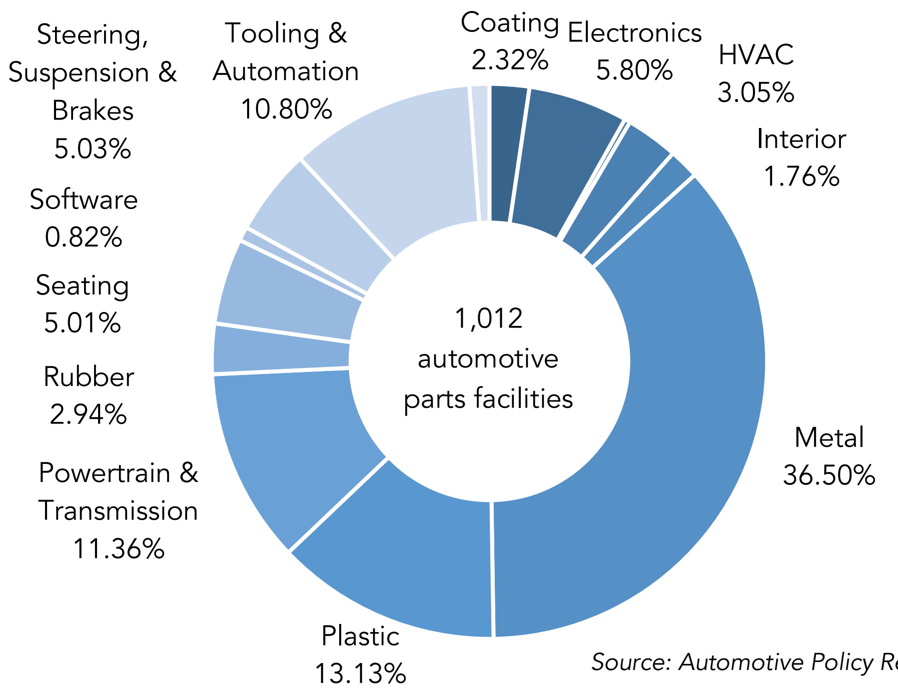
The automotive database of manufacturers and suppliers also tracks employment in these individual facilities, totalling over 165,000 jobs across the facilities. As shown in Figure 4, and similar to the distribution of facilities across the different process and product categories, employment is heavily concentrated in metal manufacturing, which accounts for 36.5% of total employment, followed by plastics (13.1%), powertrain and transmission (11.4%), and tooling and automation (10.8%). Together, these four categories represent over 70% of all

Figure 3. Automotive Parts Manufacturing Facilities by Product Category, 2024



Source: Automotive Policy Research Centre Database

Figure 4. Share of Parts Manufacturing Employment by Sub-industries, 2024



Source: Automotive Policy Research Centre Database

automotive parts employment. Smaller but notable shares are found in electronics (5.8%), seating (5.0%), and steering, suspension and brakes (5.0%), with the remaining categories each comprising less than 4% of total employment.

Battery Manufacturing Industry

As the automotive industry shifts toward electrification, the battery manufacturing industry continues to be a critical component of Canada's automotive manufacturing strategy. Between 2020 and 2024, Canada attracted over C$46 billion in EV-related investment announcements, with most projects concentrated in Ontario and Québec. Major commitments included Stellantis and LG Energy Solution's $5 billion NextStar Energy battery cell plant in Windsor, Ontario, Volkswagen's $7 billion PowerCo gigafactory in St. Thomas, Ontario, Honda's $15 billion comprehensive EV and battery supply chain in Alliston, Ontario, and Northvolt's planned $7 billion battery cell facility in Québec (PBO, 2024).

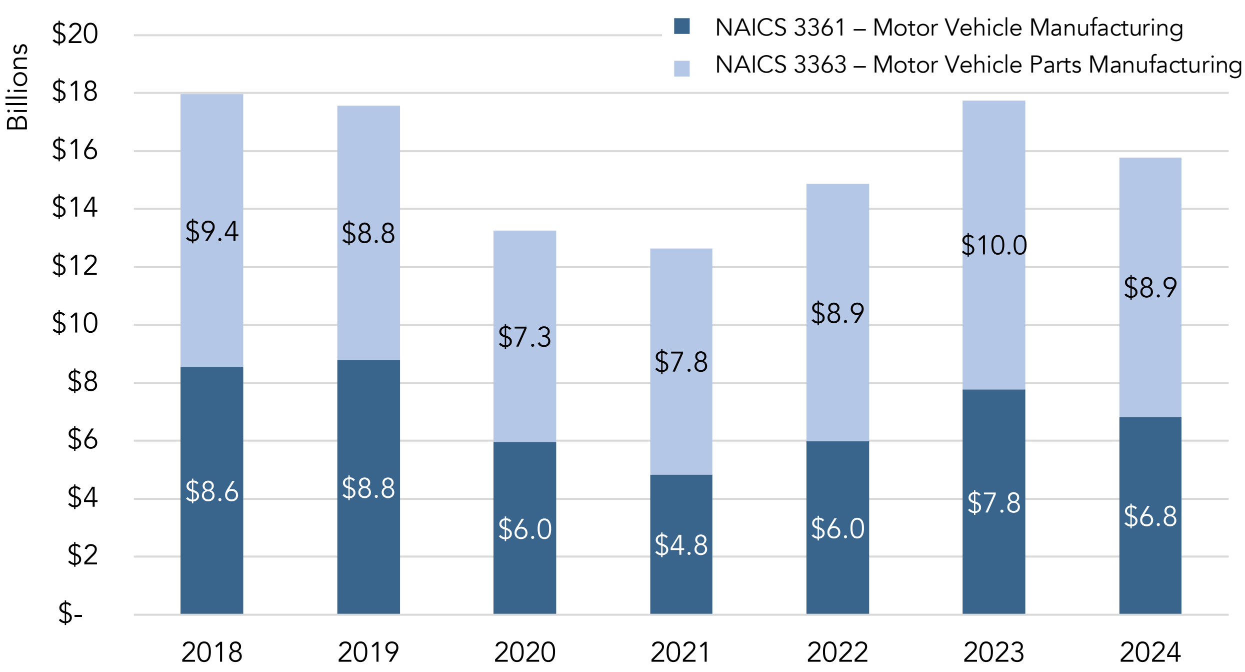
However, by 2024 and into 2025, several of these projects faced significant delays, scaling back, or cancellation due to slowing EV demand growth, U.S. tariff uncertainty, and financial difficulties among some battery manufacturers. Umicore halted construction on its $2.7 billion cathode materials plant near Kingston, Ontario in mid-2024, citing worsening EV market conditions (CBC, 2024). Northvolt's Québec project shut down after its parent company filed for bankruptcy, with Québec losing $270 million in investment and officially ending the partnership in September 2025 (CBC, 2025a). Honda postponed its $15 billion Ontario EV investment by two years in May 2025, citing tariff impacts and softening demand (CBC, 2025b). Ford cancelled its original plans to produce EVs at Oakville, pivoting instead to Super Duty truck production (Electric Autonomy Canada, 2024).

On the other hand, some projects have continued to advance. NextStar Energy in Windsor completed construction in 2025 and began preparing for battery cell production (Loop, 2025). Volkswagen's PowerCo broke ground on its St. Thomas gigafactory in late 2025, with production targeted for 2027 (CBC, 2025c). GM and POSCO Future M's cathode active materials plant in Bécancour, Québec continued to progress, with Phase 1 production now targeted for late 2026, though Phase 2 expansion has been paused indefinitely (CBC, 2025d). Finally, Asahi Kasei, in partnership with Honda, began construction of a lithium-ion battery separator plant in Port Colborne, Ontario (Asahi Kasei, 2024).

Industry Economic Indicators

In the section, the 4-digit level NAICS data is utilized to summarize the performance of the core of the Canadian automotive sector: NAICS 3361 (motor vehicle manufacturing) and NAICS 3363 (motor vehicle parts manufacturing). These indicators provide a consistent view of

Figure 5. GDP contribution of Automotive Manufacturing in Canada, 2018 - 2024



Source: Statistics Canada Table 36-10-0434-01

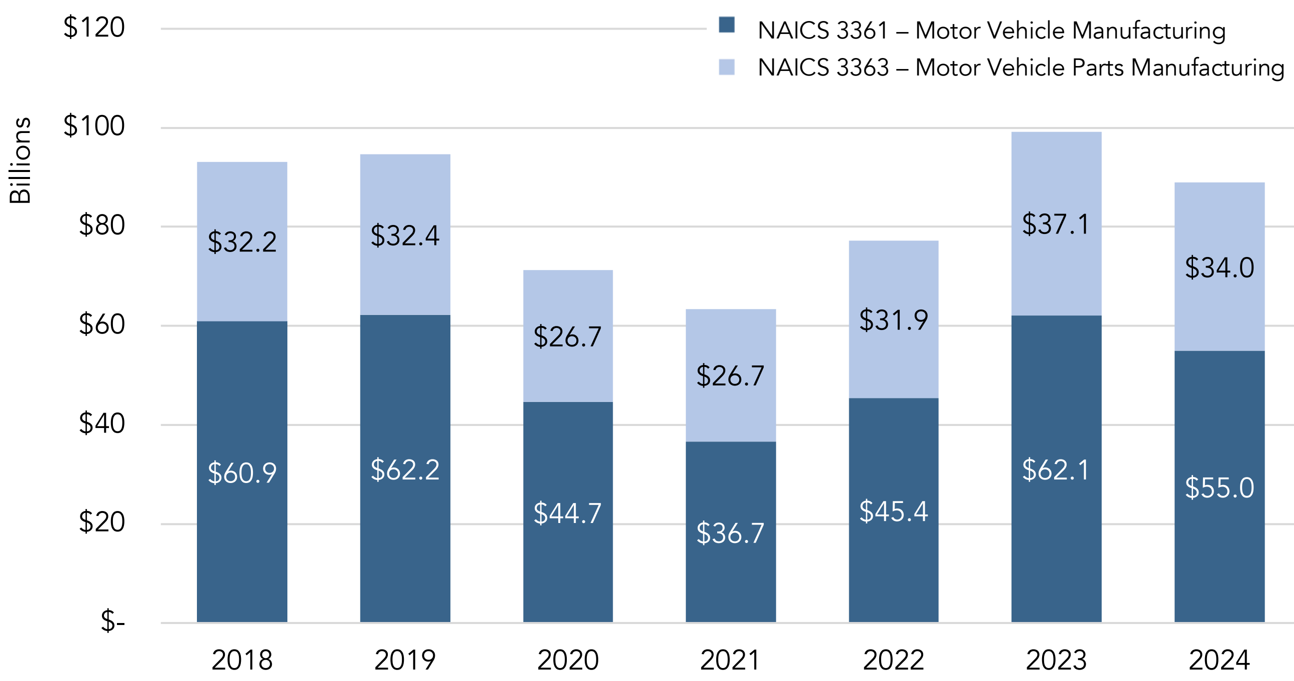
industry conditions, but they do not capture all firms in the automotive supply chain that are classified outside NAICS 3361 and 3363. In the context of new tariff risks and the 2026 CUSMA joint review, these series provide a baseline for assessing the industry's performance and economic contributions.

GDP Contribution & Output

Figure 5 presents the GDP contribution of the two core automotive manufacturing industries measured in value added from 2018 to 2024. Combined value added of the sector pre-pandemic stood at roughly $18.0 billion, dropped to a low of $12.6 billion in 2021, and recovered back to $17.8 billion in 2023 before a drop to $15.7 billion in 2024 as plant retooling and lower production volumes weighed on the sector. Despite the 2023 recovery, the sector's economic contribution remains below its pre-pandemic baseline.

Figure 6 shows the output for the two core automotive manufacturing industries. The pattern mirrors GDP contribution: combined output peaked at $99.2 billion in 2023 after recovering from a pandemic low of $63.4 billion in 2021, before falling back to $89.0 billion in 2024. Between 2023 and 2024, the decline was concentrated in vehicle assembly, which dropped from $62.1 billion to $55.0 billion due to the drop in vehicle production from 1.55 million

Figure 6. Output of Automotive Manufacturing in Canada, 2018 - 2024



Source: Statistics Canada Table 16-10-0047-01

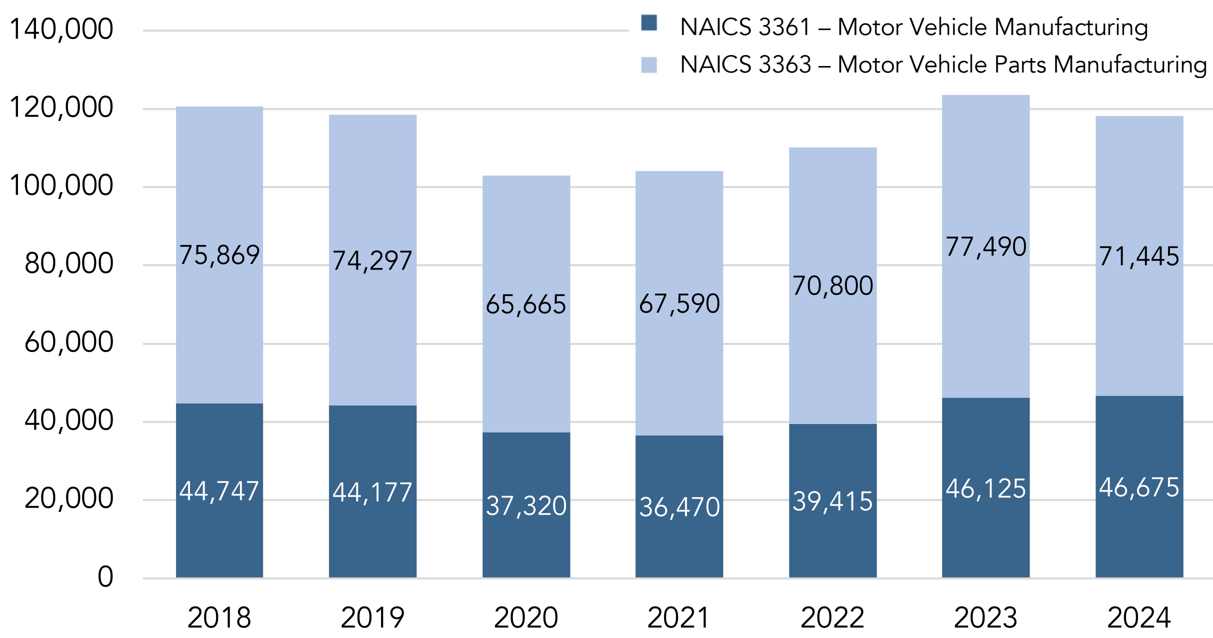
vehicles to 1.34 million, while parts manufacturing eased more modestly from $37.1 billion to $34.0 billion. As with value added, output in 2024 remained below its pre-pandemic level of roughly $93 billion, reinforcing the picture of a sector that has yet to regain its earlier productive capacity.

It is important to note that despite the output of NAICS 3361 exceeding NAICS 3363, the GDP contribution of parts manufacturing has consistently exceeded that of vehicle assembly. This reflects the nature of parts production, which is more labour- and process-intensive relative to vehicle assembly. Vehicle assembly, by contrast, involves combining high-value components into finished vehicles, generating high gross output but a smaller margin between inputs and final product. Compared to vehicle assemblers, parts manufacturers tend to create more domestic economic value per dollar of output. For this reason, this industry's GDP contribution outweighs that of assembly even though its output is lower.

Employment

Employment in Canada's vehicle assembly and automotive parts industries ranged between 103,000 and 124,000 between 2018 to 2024. As shown in Figure 7 Employment dipped significantly during the pandemic after two stable years between 2018-2019, and recovered in 2023 and

Figure 7. Employment in Vehicle Assembly and Parts Manufacturing in Canada 2018 - 2024



Source: Statistics Canada Table 14-10-0202-01

2024 ranging between 118,000 and 124,000.

Parts manufacturing employs roughly twice as many workers as vehicle assembly, a ratio that has held throughout the period. Between 2018 and 2024, vehicle assembly employment ranged between approximately 36,500 and 46,500, while parts manufacturing employment ranged between approximately 66,500 and 77,500. This is consistent with the labour-intensive nature of parts production relative to final assembly.

Taken together, NAICS 3361 and 3363 do not capture the full scope of automotive manufacturing employment; a significant number of jobs exist in other NAICS industries and sectors which may be direct suppliers of automotive manufacturing such as plastic, metal, rubber, glass, electronics and other parts manufacturers. Therefore, employment in automotive manufacturing is significantly larger than what NAICS 3361 and 3363 alone suggest, and is estimated at approximately 210,000 jobs when the broader supply chain is taken into account (FOCAL Initiative, 2021).

Trade

Canada's motor vehicle and motor vehicle parts manufacturing imports have consistently exceeded exports of both assembled vehicles as well as motor vehicle parts since 2018 (Table 2). This is a new trend for the industry, with the exception of 2009, has exported more than it has imported for decades prior (Sweeney, 2020).

The vehicle manufacturing deficit widened sharply between 2018 and 2023, rising from $2.9 billion in 2018 to a peak of $29.3 billion in 2022. As shown in Figure 8, both exports and imports contracted significantly in 2020 and 2021 as result of the impacts COVID-19 pandemic due to the decline in consumer demand, supply chain disruptions, and the significant drops in production. Motor vehicle exports rebounded beyond pre-pandemic levels to $58.36 billion in 2023, however import growth outpaced this recovery leaving a trade deficit of $23.8 billion for that year. This pattern can be seen as well in motor vehicle parts manufacturing in Figure 9, with imports and exports dropping significantly between 2020 - 2021 pandemic. The trade deficit in parts manufacturing narrowed during this period as slowed and stalled production meant fewer imported parts were needed.

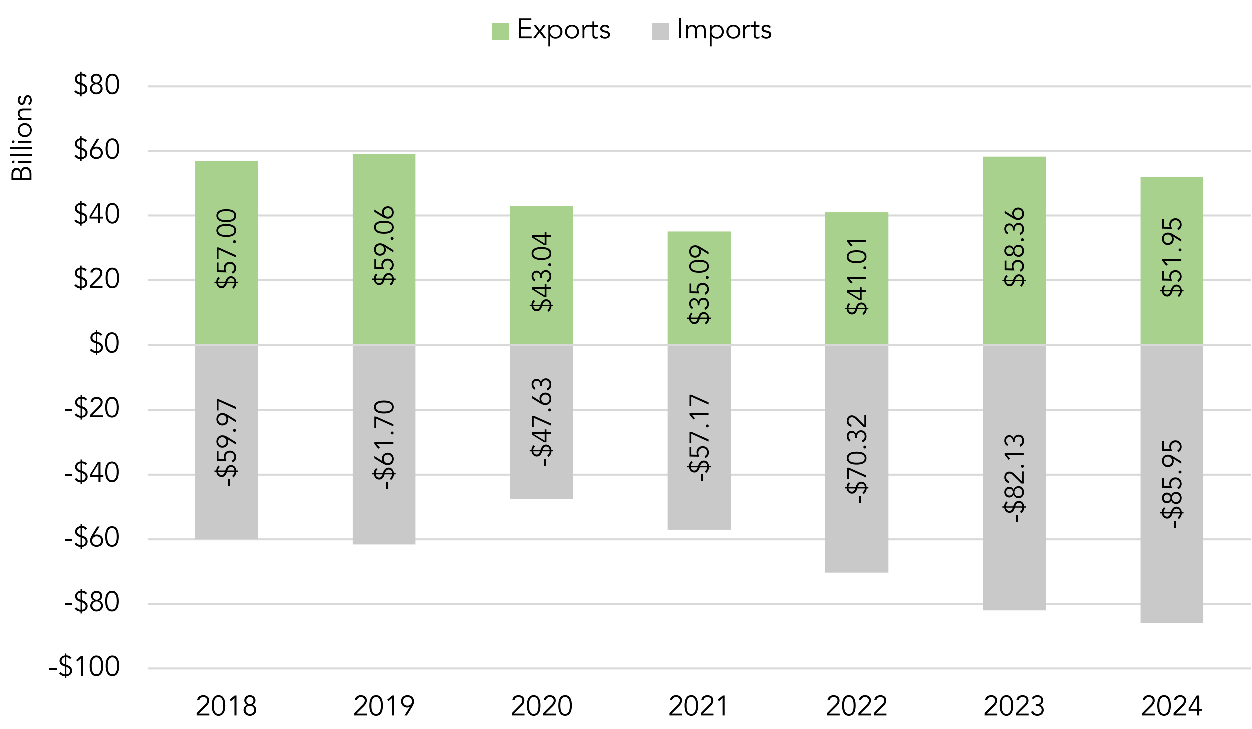
The trade disputes Canada faces risk fundamentally disrupting the integrated North American supply chain, particularly as the CUSMA review in July 2026 could see the U.S. push for greater domestic content requirements or allow the agreement to expire.

Table 2. Canadian Automotive Trade Balance, 2018 - 2024

	2018	2019	2020	2021	2022	2023	2024
NAICS 3361 Motor vehicle manufacturing	- $2.9 B	- $2.6 B	-$4.6 B	-$22.1 B	-$29.3 B	- $23.8 B	- $34.0 B
NAICS 3363 Motor vehicle parts manufacturing	-$25.1 B	-$25.8 B	-$18.4 B	-$14.4 B	-$17.1 B	-$24.3 B	- $21.6 B

Source: Industry Canada Trade Data Online

Figure 8. Canadian Vehicle Imports and Exports, 2018 - 2024



Source: Industry Canada Trade Data Online

Figure 9. Canadian Vehicle Parts Imports and Exports, 2018 - 2024

Source: Industry Canada Trade Data Online

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About the Canadian Skills Training and Employment Coalition (CSTEC)

The Canadian Skills Training and Employment Coalition (CSTEC) is an enabler of innovative, multi-stakeholder solutions to training, recruitment, and labour market challenges faced by employers and unions within the broader manufacturing sector. Working with employers, job seekers, educators, and unions, CSTEC has supported over 1,900 youth into manufacturing, helped more than 200 firms meet their workforce needs, and assisted over 1,000 individuals from equity-deserving groups to enter industrial skilled trades and manufacturing occupations. CSTEC also produces manufacturing-specific labour market forecasts and occupational outlooks, and operates workforce development initiatives.

About the Automotive Policy Research Centre (APRC)

The Automotive Policy Research Centre (APRC) is a Canadian research organization that conducts and disseminates knowledge about the role of public policy in supporting Canada's globally competitive automotive industry. The APRC engages university-based researchers, policymakers, and industry stakeholders from Canada and abroad before becoming an independent NGO in 2018. APRC's research spans industry profiling, economic modelling, labour market analysis, and industry mapping, with a focus on understanding trade agreement impacts, sector structure, workforce needs, and the transferability of public policy tools used by governments globally.

About Future Skills Centre

The Future Skills Centre (FSC) is a forward-thinking centre for research and collaboration dedicated to driving innovation in skills development so that everyone in Canada can be prepared for the future of work. We partner with policymakers, researchers, practitioners, employers and labour, and post-secondary institutions to solve pressing labour market challenges and ensure that everyone can benefit from relevant lifelong learning opportunities. We are founded by a consortium whose members are Toronto Metropolitan University, Blueprint, and Signal49 Research, and are funded by the Government of Canada's Future Skills Program.