# TRADE DISRUPTIONS & THE EV TRANSITION: NATIONAL OCCUPATIONAL FORECASTS 2026 - 2040

June 2026

An occupation-level view of how trade disruptions and the EV transition could reshape labour demand in Canada's automotive manufacturing sector through 2040.

# 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.

CSTEC
Canadian Skills Training & Employment Coalition

APRC
Automotive Policy Research Centre

TRADE Auto Canada is funded by the Government of Canada's Future Skills Program.

Trade Auto Canada est financé par le gouvernement du Canada dans le cadre du programme Compétences futures.

Future Skills Centre | Centre des Compétences futures

Funded by the Government of Canada's Future Skills Program | Canada

## Introduction

For over a century, Canada's automotive manufacturing sector has played a significant role in the nation's economic development and growth. It has been a major contributor to GDP, employment, and international trade.

The sector has successfully prevailed through changes in technology, consumer preferences, and North American supply chain reconfigurations. However, recent disruptions in international trade and the pace of vehicle electrification threaten the vitality and resilience of the sector.

Industry-wide economic and labour market impacts of these disruptions are explored more thoroughly in a companion report, *Trade Disruptions & the EV Transition: Economic & Labour Market Impacts on Canadian Automotive Manufacturing, 2026–2040.* The present report extends that analysis by examining potential impacts at the occupation level.

## Industry-Level Impacts

Results from the economic and labour market impact analysis in *Trade Disruptions & the EV Transition: Economic & Labour Market Impacts on Canadian Automotive Manufacturing, 2026–2040* are the starting point for developing the occupational forecasts, so a brief description of that analysis is useful.

A review of industry and environmental trends provided context for quantifying economic and industry-level labour market impacts. Economic modelling and industry consultations yielded three scenarios (summarized in Table 1) that encompassed a range of potential industry conditions spanning from 2026 to 2040.

The scenarios were differentiated based on assumptions that included:

- tariff rates,
- the status of the Canada-United States-Mexico Agreement (CUSMA),
- export volumes,
- the number and output of battery plants,
- vehicle production levels and powertrain mixes,
- the rate of transition to electrified vehicles, and
- the composition of the domestic supply chain for battery manufacturing.

Scenario 1 envisioned industry conditions associated with minimal disruptions. The CUSMA free trade agreement would be renewed, vehicle production would rise from 1.2 million to 1.3 million vehicles annually by 2040, the distribution of powertrain types (ICEV, HEV, PHEV, and BEV) would be relatively equal, and three battery plants would be operational.

Scenario 2 described partial disruption in industry conditions, with more significant impacts. Across-the-board tariffs would be in place, vehicle production would fall to 836,000 vehicles annually by 2040 with a relatively equal mix of powertrains, and two battery plants would be operational.

Full industry disruptions were modelled for Scenario 3. The sector would experience severe impacts, with higher across-the-board tariffs and annual vehicle production falling sharply to slightly more than 500,000 vehicles. ICEV powertrains would comprise nearly three-quarters of manufacturer product mixes and only one battery plant would be operational.

Table 1. Scenario Assumptions.

| | **Scenario 1 – Minimal Disruption** | **Scenario 2 – Partial Disruption** | **Scenario 3 - Full Disruption** |
|---|---|---|---|
| Trade Conditions | CUSMA renewed | Across-the-board tariffs | Higher across-the-board tariffs |
| Vehicle Production<br>annual, by 2040 | + 1.3M | - 836K | - 500K |
| Powertrain mix | Relatively equal<br>ICEV / HEV / PHEV / BEV | Relatively equal<br>ICEV / HEV / PHEV / BEV | ~75% ICEV<br>ICE dominant |
| Battery plants<br>operational | 3 | 2 | 1 |

*Source: TRADE Auto Canada; IMPLAN*

Industry-level economic and labour market impacts were modelled for each of the scenarios, in five-year intervals from 2026 to 2040. Table 2 summarizes employment impacts for each scenario.

Table 2. Employment impacts in Canada's broader automotive sector, relative to base year (2025) employment.

| Industry | Forecasted Change in Employment | | | | | |
|---|---|---|---|---|---|---|
| | Scenario 1 – Minimal Disruption | | Scenario 2 – Partial Disruption | | Scenario 3 - Full Disruption | |
| | 2026 | 2040 | 2026 | 2040 | 2026 | 2040 |
| Automobile & light-duty motor vehicle manufacturing | -4,563 | -83 | -9,863 | -12,330 | -13,289 | -22,532 |
| Heavy-duty truck manufacturing | -4,553 | -4,290 | -5,402 | -6,091 | -6,500 | -7,717 |
| Vehicle parts manufacturing | -4,407 | -4,415 | -10,078 | -16,251 | -14,775 | -26,550 |
| Battery manufacturing | 1,073 | 9,247 | 467 | 4,693 | 433 | 1,301 |
| Material Processing | -84 | 413 | -405 | -581 | -575 | -1,098 |
| Mining | -10 | 607 | -112 | 14 | -134 | -245 |

*Source: TRADE Auto Canada; IMPLAN*

This report deconstructs the aforementioned industry-level employment impacts so that labour market challenges for specific occupations can be identified.

## Measuring Occupation Impacts

Industry employment forecasts served as demand-side inputs in the occupational forecast model. Broader population trends and occupation demographics were key supply-side inputs. Two occupational forecasts were generated, in five-year intervals spanning a period from 2026 to 2040. The first forecast assumed minimally disruptive industry conditions and the second assumed fully disruptive conditions (as described in Scenario 1 and Scenario 3 of the industry impact analysis, respectively).

Occupation impacts are described in the form of forecasted 'recruitment gaps'. A recruitment gap is an aggregate measure of labour market conditions for an occupation, incorporating three key components of labour supply and demand: expansion demand, replacement demand, and new entrants.

*Expansion Demand*

The first component of the recruitment gap for each occupation is expansion demand. This is the change in employment that is directly related to broader industry impacts. Expansion demand increases during periods when there are higher levels of vehicle assembly, battery production and business activity elsewhere the supply chain. When

expansion demand increases, businesses would likely experience greater recruiting challenges and more opportunities would be available for job seekers.

Conversely, higher tariffs and a decrease in vehicle production and exports would cause expansion demand to contract along the supply chain. Businesses would be less likely to expand their workforce and might experience labour surpluses. Job seekers would have greater difficulties obtaining employment in the industry.

Changes in technology may result in increased expansion demand for some occupations and decreased expansion demand for other occupations. For example, as vehicle production shifts from combustion engine to battery drivetrains, expansion demand might increase for occupations in the battery supply-chain and it might decrease for occupations that are tied more exclusively to combustion engine manufacturing.

*Replacement Demand*

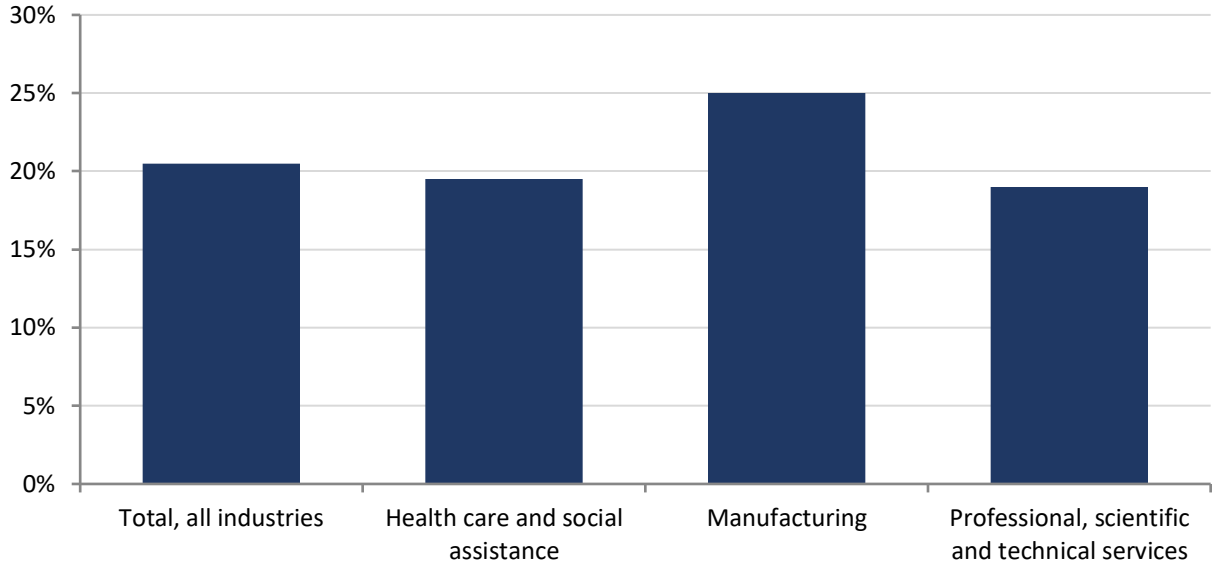
The second component of the recruitment gap is replacement demand. Replacement demand is an estimate of the number of workers that are needed to maintain current levels of employment as current workers leave the workforce.

There has been a tendency for replacement demand to be higher in recent decades, as baby boomers have peaked and then started to exit the labour market. Most of the baby boomers have already aged out of the labour force and the tail end of this generation will be 65 years old by 2030.

For occupations and industries with older age profiles, replacement demand will contribute to tighter labour market conditions as employers fill positions that are vacated by workers who exit the workforce due to retirement.

Manufacturing has a higher proportion of older workers compared to other industries in Canada, as shown in Figure 1.

Figure 1. Proportion of older workers by major industry, Canada (2025).




*Source: Statistics Canada Labour Force Survey. Table 14-10-0023-01.*

Participation rates among older workers have generally been increasing and this may slightly reduce replacement demand if older workers remain in the workforce instead of retiring (Statistics Canada, 2026a). However, in industries that are experiencing decreased expansion demand, replacement demand dynamics might be less clear. Opportunities for senior workers to voluntarily remain in the workforce may be limited, employees may proactively exit the workforce to seek more secure employment elsewhere, or older workers might take advantage of early-retirement incentives offered by employers.

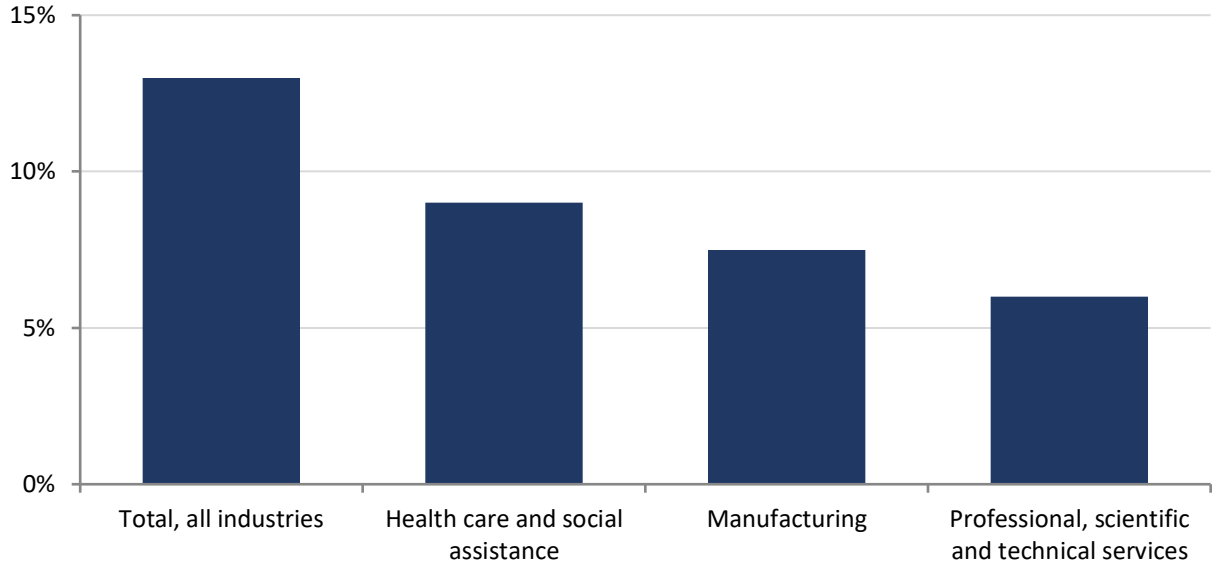
*New Entrants*

The third component of the recruitment gap considers new entrants. One important source of new entrants is individuals from the existing population. These typically include young people who have completed their education and are seeking full-time employment in the workforce.

Recent data suggests that fewer young adults are entering the labour force (Employment and Social Development Canada, 2025; Statistics Canada, 2026d). Some are making alternate decisions such as continuing education, perhaps by choice or perhaps because youth unemployment rates have increased in recent years.

Compounding the effect of recent trends, manufacturing industries typically have a lower proportion of younger workers compared to other industries in Canada, as shown in Figure 2.

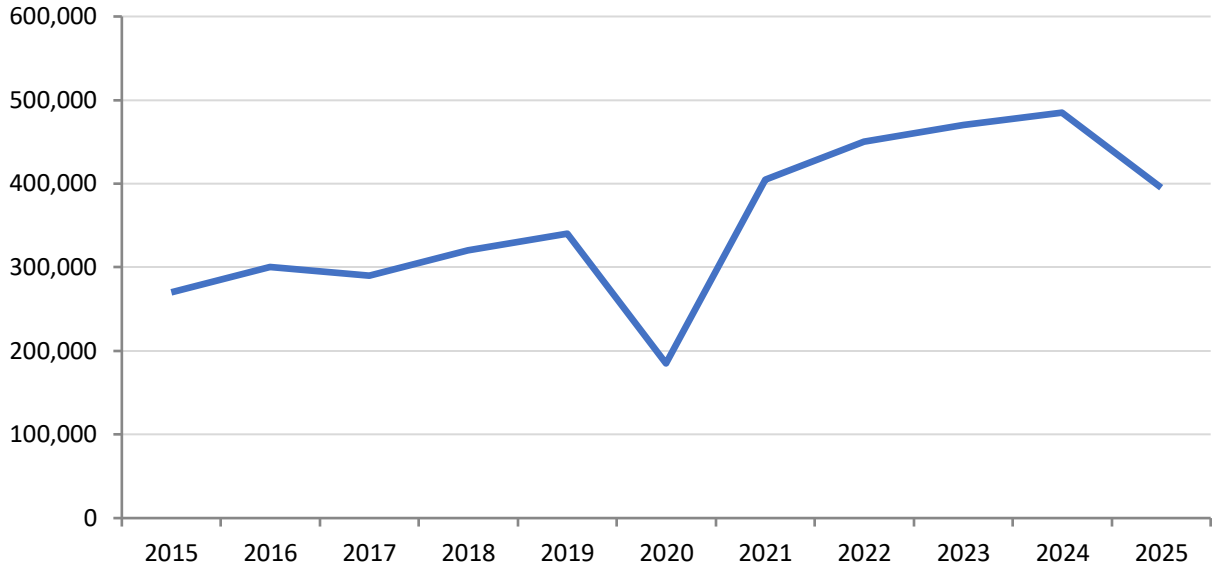
Figure 2. Proportion of younger workers by major industry, Canada (2025).




*Source Statistics Canada Labour Force Survey. Table 14-10-0023-01.*

Immigrants are also an important source of new entrants. As shown in Figure 3, there have been changes in immigration during the past decade – increases, followed by decreases (due to covid immigration restrictions), followed by increases, and then decreases. Immigration levels are expected to remain constant in the short term, but immigration policy may change after that (Statistics Canada, 2025e). In the meantime, a ripple effect will be observed in the occupational forecasts as differently sized immigrant cohorts move through the forecast period.

Figure 3. Immigration, Canada (2015 to 2025).




*Source: Statistics Canada. Quarterly Demographic Estimates. Table 17-10-0040-01.*

*Recruitment Gap*

The recruitment gap is defined as expansion demand plus replacement demand less new entrants. If expansion demand and/or replacement demand increases, the size of the recruitment gap increases. When the number of new entrants increase, the size of the recruitment gap decreases. The interplay of expansion demand, replacement demand, and new entrants results in a unique replacement gap for each occupation.

Large, positive recruitment gaps signal tight labour markets where demand for workers outpace the supply of new entrants. Employers are likely to experience more acute recruiting pressures as competition for skilled workers intensifies. Small recruitment gaps (positive or negative) imply relatively balanced labour markets. Large, negative recruitment gaps signal labour market conditions where the supply of labour exceeds demand. Available positions become easier to fill and labour surpluses are likely to develop.

Recruitment gaps have been forecasted for 68 occupations in 51 industries in Canada's broader auto manufacturing sector (see Appendix A and B, respectively, for a list of industries and occupations modelled in the forecast). The overall forecast period is from 2026 to 2040 and is divided into five-year intervals: 2026 to 2030, 2031 to 2035, and 2036 to 2040. Results for each interval sum the recruitment gap for each year within the

interval. Throughout the forecast period, each component of the recruitment gap may increase or decrease (e.g., as baby boomers exit the labour force, as vehicle production levels change, or as immigration levels rise and fall). The net recruitment gap from 2026 to 2040 indicates long-term changes in labour market conditions for each occupation, while the five-year intervals reveal changes in the size and direction of the recruitment gap in the intervening years.

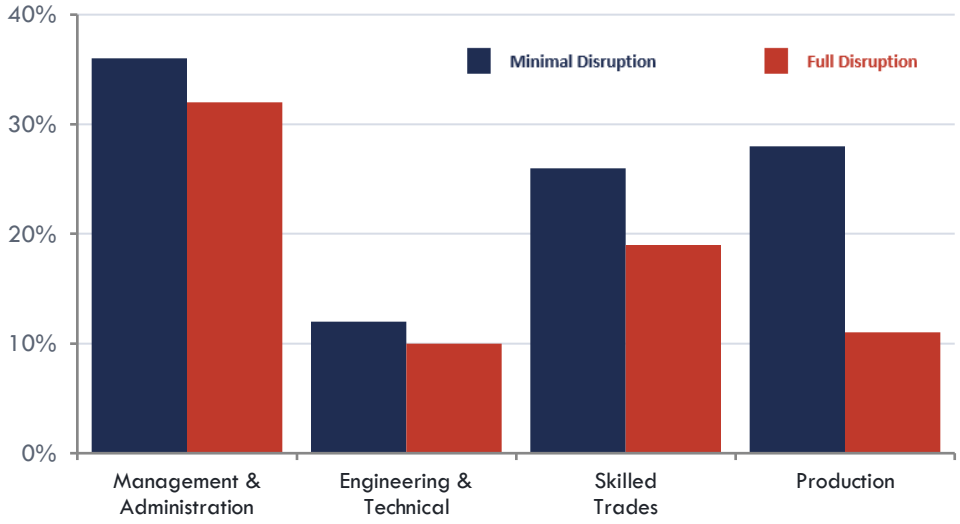
Recruitment gaps are expressed relative to 2025 base year employment levels for each occupation, as the number of additional workers needed (headcount) and as a percentage of base year employment. In other words, recruitment gaps are not a forecast of total employment for each occupation.

Occupation impacts are presented for two forecast Scenarios. The Scenario 1 forecast assumes minimal disruptions in tariffs, exports, and production levels. The Scenario 3 forecast assumes full disruptions in trade and production levels. These scenarios were taken from the industry impact analysis that was discussed in the *Trade Disruptions & the EV Transition: Economic & Labour Market Impacts on Canadian Automotive Manufacturing, 2026-2040* report and summarized at the beginning of this report. Detailed results for Scenario 1 and Scenario 3 are found in Appendix D and E, respectively.

## Impacts by Occupational Group

Figure 4 illustrates the recruitment gaps for the following occupational groups: management and administration, engineering and technical, skilled trades, and production occupations.

Figure 4. Recruitment gaps for occupation groups, 2026-2040 (% of 2025 employment).




*Source: TRADE Auto Canada occupational forecast*

As Figure 4 shows, the size of the recruitment gaps differs among the occupation groups within each scenario. Results show clearly that recruitment pressures will not be consistent across all occupations. The recruitment gap is larger for management and administration occupations relative to engineering and technical occupations. Senior managers, for example, may be older so replacement demand would contribute to a larger recruitment gap. Also, young adults typically don't become senior managers immediately when they enter the workforce, so fewer new entrants would also contribute to a larger recruitment gap for this occupation.

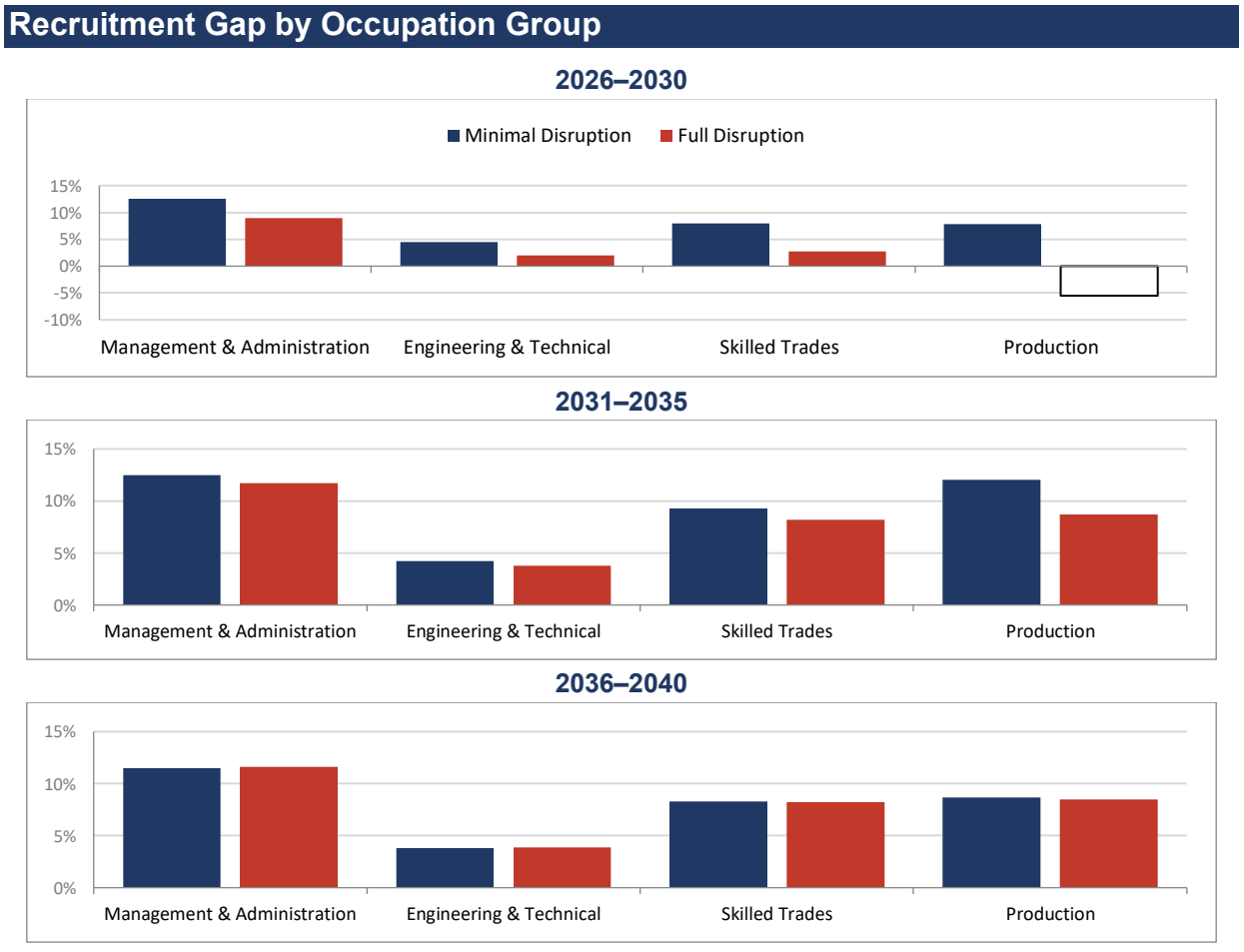
Figure 4 also shows that recruitment gaps are larger for occupations in the minimal-disruption scenario compared to the full disruption scenario. Scenario 3 (the full disruption scenario) assumes lower vehicle production levels and higher tariffs; these conditions will suppress expansion demand, which will reduce the size of recruitment gaps.

Finally, Figure 4 illustrates that recruitment gaps will be positive for both scenarios by the end of the forecast period in 2040. This is not to say that each of the individual

occupations analyzed in the model will have a positive recruitment gap, or a recruitment gap resembling the size in the figure. The model generates unique recruitment gaps for each occupation (as shown in the data tables in Appendices D and E).

Figure 5 disaggregates the full forecast period into five-year intervals. The top chart in Figure 5 shows the Recruitment Gaps for occupation groups during the first interval in the forecast period, from 2026 to 2030. The chart in the middle illustrates the mid-period of the forecast, from 2031 to 2035. The chart on the bottom shows the later interval of the forecast, from 2036 to 2040.

Figure 5. Recruitment gaps for occupation groups - 2026-2030, 2031-2035, 2036-2040 (% of 2025 employment).




*Source: TRADE Auto Canada occupational forecast*

Appendices D and E contain data tables showing the recruitment gap, expansion demand, replacement demand, and new entrant forecast for each occupation. A closer examination of these data tables reveals the relative contribution of each component to the overall recruitment gap for each occupation.

The difference between the two scenarios is most pronounced in the first interval of the forecast (i.e., the top chart in Figure 5), as expansion demand is expected to contract the most during these five years. For production workers in the full-disruption scenario (Scenario 3) in the first interval of the forecast period, a negative recruitment gap is forecasted. This suggests a likely surplus of workers in that occupation group.

In the second and third interval of the forecast, the occupation group impacts become more similar between Scenario 1 and Scenario 3. An exception is apparent for production workers in the middle interval between 2031 and 2035, where a difference in recruitment gaps between Scenario 1 and Scenario 3 can still be observed. This is consistent with the scenario assumptions - significantly lower vehicle production is assumed for Scenario 3 compared to Scenario 1, and production workers will be directly affected.

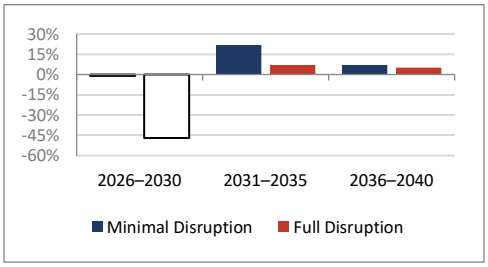
## Impacts for Selected Occupations

Recruitment gaps for selected occupations presented in Figures 6 to 13. These Figures illustrate similarities and differences in recruitment gaps across occupations. The left side of each Figure shows the recruitment gap by forecast interval, as a percentage of base year employment. The right side of each Figure shows the recruitment gap as the number of additional (or fewer) workers needed, compared to 2025 base year employment for that occupation.

Figure 6 and Figure 7 illustrate examples of occupations that have similar recruitment gap profiles. Significant negative recruitment gaps are observed in the first interval of the forecast under the full disruption scenario (Scenario 3). Recruitment gaps peak in the middle interval of the forecast and then decline somewhat in the third interval. A negative recruitment gap for Scenario 3 is forecasted for the overall forecast period from 2026 to 2040, consistent with the assumption of significantly reduced vehicle production.

Figure 6. Recruitment gap – Supervisors, motor vehicle assembling.

**Supervisors, motor vehicle assembling**

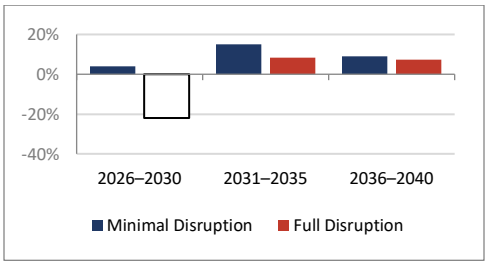



| # of workers | 2026–2030 | 2031–2035 | 2036–2040 | 2026–2040 |
|---|---|---|---|---|
| Minimal Disruption | -60 | 1,320 | 440 | **1,700** |
| Full Disruption | -2,490 | 400 | 310 | **-1,770** |

*Source: TRADE Auto Canada occupational forecast.*

Figure 7. Recruitment gap – Motor vehicle assemblers, inspectors and testers.

**Motor vehicle assemblers, inspectors and testers**



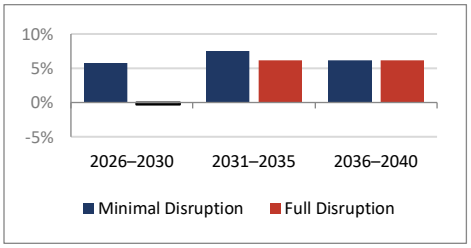

| # of workers | 2026–2030 | 2031–2035 | 2036–2040 | 2026–2040 |
|---|---|---|---|---|
| Minimal Disruption | 1,990 | 6,920 | 4,140 | **13,050** |
| Full Disruption | -9,740 | 3,590 | 3,360 | **-2,780** |

*Source: TRADE Auto Canada occupational forecast*

The next two occupations (in Figures 8 and 9) are examples from the skilled trades. Both of these occupations include relatively larger proportions of older workers. During the first interval of the forecast, there will be a higher number of exits due to retirement, so increased replacement demand will contribute to larger recruitment gaps for these occupations. This will offset some of the negative impacts of lower expansion demand. If workers in these occupations were younger, the recruitment gaps from 2026 to 2030 would have been lower. The recruitment gaps are quite similar between Scenario 1 and Scenario 3 between 2036 to 2040, suggesting that the impacts converge by the end of the forecast period.

Figure 8. Recruitment gap – Welders and related machine operators.

**Welders and related machine operators**

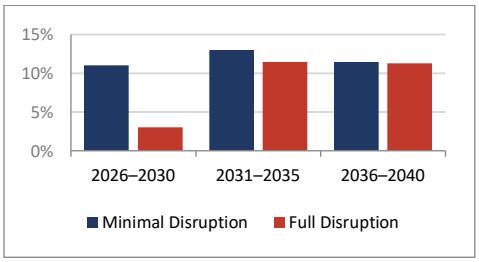



| # of workers | 2026–2030 | 2031–2035 | 2036–2040 | *2026–2040* |
|---|---|---|---|---|
| Minimal Disruption | 1,410 | 1,780 | 1,510 | **4,690** |
| Full Disruption | -40 | 1,470 | 1,480 | **2,910** |

*Source: TRADE Auto Canada occupational forecast*

Figure 9. Recruitment gap – Construction millwrights and industrial mechanics.

**Construction millwrights and industrial mechanics**



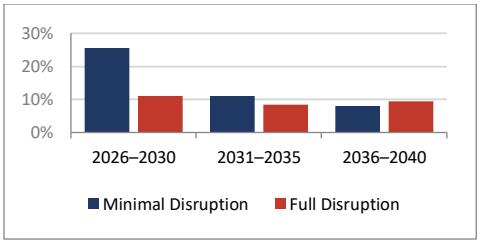

| # of workers | 2026–2030 | 2031–2035 | 2036–2040 | *2026–2040* |
|---|---|---|---|---|
| Minimal Disruption | 1,620 | 1,950 | 1,720 | **5,290** |
| Full Disruption | 410 | 1,680 | 1,670 | **3,780** |

*Source: TRADE Auto Canada occupational forecast*

The examples in Figures 10 and 11 illustrate occupations with positive recruitment gaps in all intervals for both Scenario 1 and Scenario 3. This is because both of these occupations are associated with battery manufacturing. Unlike vehicle manufacturing, industry impacts for battery manufacturing are forecasted to be positive under both scenarios (see Table 2) so increased expansion demand is contributing to positive recruitment gaps.

Figure 10. Recruitment gap – Supervisors, electronics and electrical products manufacturing.

**Supervisors, electronics and electrical products manufacturing**

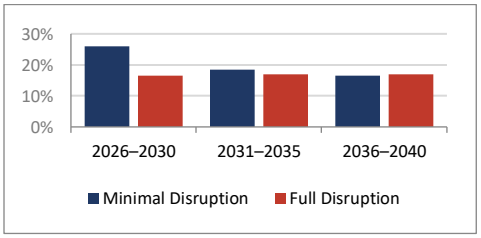



| # of workers | 2026–2030 | 2031–2035 | 2036–2040 | *2026–2040* |
|---|---|---|---|---|
| Minimal Disruption | 330 | 140 | 100 | **570** |
| Full Disruption | 140 | 110 | 120 | **370** |

*Source: TRADE Auto Canada occupational forecast*

Figure 11. Recruitment gap – Electronics assemblers, fabricators, inspectors and testers.

**Electronics assemblers, fabricators, inspectors and testers**



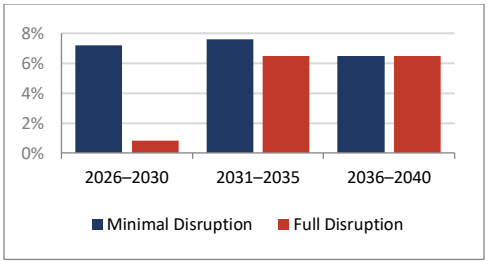

| # of workers | 2026–2030 | 2031–2035 | 2036–2040 | *2026–2040* |
|---|---|---|---|---|
| Minimal Disruption | 2,130 | 1,510 | 1,350 | **4,990** |
| Full Disruption | 1,350 | 1,370 | 1,380 | **4,110** |

*Source: TRADE Auto Canada occupational forecast*

For the engineering and technical occupations in Figures 12 and 13, the largest difference in recruitment gaps occur early in the forecast. After that, the recruitment gaps are generally stable across the entire forecast period for both scenarios. This overall pattern is consistent with the previous examples. The differences between occupations – and the magnitude of the impacts - become apparent when recruitment gap headcounts are examined.

Figure 12. Recruitment gap – Mechanical engineering technologists and technicians.

**Mechanical engineering technologists and technicians**

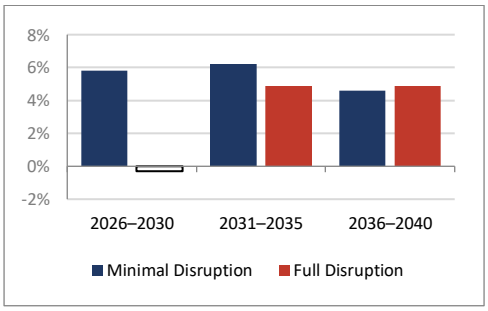



| # of workers | 2026–2030 | 2031–2035 | 2036–2040 | *2026–2040* |
|---|---|---|---|---|
| Minimal Disruption | 860 | 920 | 780 | **2,550** |
| Full Disruption | 90 | 770 | 770 | **1,620** |

*Source: TRADE Auto Canada occupational forecast*

Figure 13. Recruitment gap – Mechanical engineers.

**Mechanical engineers**




| # of workers | 2026–2030 | 2031–2035 | 2036–2040 | *2026–2040* |
|---|---|---|---|---|
| Minimal Disruption | 1,480 | 1,560 | 1,170 | **4,210** |
| Full Disruption | -110 | 1,220 | 1,230 | **2,340** |

*Source: TRADE Auto Canada occupational forecast.*

## Occupations with Largest Positive Recruitment Gaps

When the entire forecast period from 2026 to 2040 is considered, the recruitment gap is expected to be largest for the occupations listed in Tables 3 and 4. Expansion demand will contribute to the growth in some of these occupations (e.g., electronics assemblers, fabricators, inspectors & testers) while other occupations (e.g., tool and die makers) are forecasted to grow primarily to replacement demand. Regardless of the underlying reason(s) for the recruitment gaps, all are exposed to a higher risk of labour shortages.

Table 3. Occupations with the largest positive recruitment gaps, 2026-2040 – Scenario 1.

| | Largest Positive Recruitment Gaps, 2026 to 2040 – Scenario 1 | Recruitment gap (% of 25 employment) |
|---|---|---|
| 1 | Electronics assemblers, fabricators, inspectors & testers | 61% |
| 2 | Assemblers, fabricators & inspectors, industrial electrical motors & transformers | 50% |
| 3 | Transport truck drivers | 49% |
| 4 | Senior managers — public & private sector | 48% |
| 5 | Tool & die makers | 46% |
| 6 | Manufacturing managers | 46% |
| 7 | Supervisors, electronics & electrical products manufacturing | 44% |
| 8 | Contractors & supervisors, machining, metal forming, shaping & erecting trades & related occupations | 40% |
| 9 | Supervisors, mining & quarrying | 38% |
| 10 | Construction millwrights & industrial mechanics | 35% |

*Source: TRADE Auto Canada occupational forecast. Ranked recruitment gap as a share of 2025 employment over 2026 – 2040*

Other than some re-ordering of the occupations, the main difference between the lists in Tables 3 and 4 is that the overall Recruitment Gaps are relatively lower in the full-disruption scenario.

Table 4. Occupations with the largest positive recruitment gaps, 2026-2040 – Scenario 3.

| | Largest Positive Recruitment Gaps, 2026 to 2040 – Scenario 3 | Recruitment gap (% of '25 employment) |
|---|---|---|
| 1 | Electronics assemblers, fabricators, inspectors & testers | 51% |
| 2 | Senior managers — public & private sector | 46% |
| 3 | Transport truck drivers | 43% |
| 4 | Manufacturing managers | 35% |
| 5 | Contractors & supervisors, machining, metal forming, shaping & erecting trades & related occupations | 35% |
| 6 | Supervisors, mining & quarrying | 34% |
| 7 | Tool & die makers | 33% |
| 8 | Assemblers, fabricators & inspectors, industrial electrical motors & transformers | 30% |
| 9 | Plastics processing machine operators | 29% |
| 10 | Supervisors, electronics & electrical products manufacturing | 29% |

*Source: TRADE Auto Canada occupational forecast. Ranked recruitment gap as a share of 2025 employment over 2026 – 2040*

Again, the overall recruitment gap for these occupations from 2026 to 2040 is positive, but this may obscure peaks and troughs during the intervals within the 15-year forecast period.

## Occupations with the Largest Negative Recruitment Gaps

Although several occupations will experience positive recruitment gaps through the overall forecast period of 2026 to 2040, others will face a net negative recruitment gap. Tables 5 and 6 list the occupations with negative overall recruitment gaps in Scenario 1 and Scenario 3, respectively. The risk of mild or moderate surpluses is highest among information technology occupations, largely because the number of new entrants is relatively higher than both expansion and replacement demand.

Table 5. Occupations with the largest negative recruitment gaps, 2026-2040 – Scenario 1.

| | Largest Negative Recruitment Gaps, 2026 to 2040 – Scenario 1 | Recruitment gap (% of 2025 employment) |
|---|---|---|
| 1 | Software developers & programmers | -3% |
| 2 | Web designers | -4% |
| 3 | Information systems testing technicians | -6% |
| 4 | Web developers & programmers | -8% |
| 5 | Data scientists | -14% |

*Source: TRADE Auto Canada occupational forecast. Ranked recruitment gap as a share of 2025 employment over 2026 – 2040*

Information technology occupations have negative overall recruitment gaps under Scenario 3 as well. However, a handful of additional occupations appear in the list for Scenario 3 (Table 6). These additional occupations are at risk of labour shortages primarily because of reduced expansion demand in motor vehicle assembly and parts manufacturing.

Table 6. Occupations with the largest negative recruitment gaps, 20206-2040 – Scenario 3.

| | Scenario 3 | Recruitment gap |
|---|---|---|
| 1 | Web designers | -4% |
| 2 | Software developers & programmers | -4% |
| 3 | Motor vehicle assemblers, inspectors & testers | -6% |
| 4 | Information systems testing technicians | -7% |
| 5 | Mechanical assemblers & inspectors | -8% |
| 6 | Web developers & programmers | -8% |
| 7 | Supervisors, other mechanical & metal products manufacturing | -10% |
| 8 | Data scientists | -15% |
| 9 | Supervisors, motor vehicle assembling | -33% |

*Source: TRADE Auto Canada occupational forecast. Ranked recruitment gap as a share of 2025 employment over 2026 – 2040*

## Summary and Discussion

Occupation impacts were determined by modelling occupation and population demographics alongside two different demand-side scenarios. The assumptions for Scenario 1 depicted sector-wide trade conditions that were minimally disrupted by tariffs, and vehicle production and export levels resembled the current status quo. Scenario 3 assumptions were more pessimistic, with increased tariffs and decreased exports, vehicle production and battery manufacturing. These assumptions were developed as part of an industry-level economic impact analysis summarized in the TRADE Auto Canada report titled *Trade Disruptions & the EV Transition: Economic & Labour Market Impacts on Canadian Automotive Manufacturing, 2026–2040.*

This report describes occupation impacts for each of the scenarios, forecasting recruitment gaps for nearly 70 occupations in more than 50 industries in the broader auto manufacturing sector. Results show that some occupations are more exposed to risk of labour shortages from 2026 to 2040, while others are expected to face a higher risk of labour surpluses. Occupation impacts are measured as recruitment gaps, or the incremental number of additional workers needed above 2025 base year employment. Recruitment gaps combine elements of expansion demand, replacement demand, and new entrants for each occupation.

Forecast modelling shows that the largest risk of labour surpluses occur in the first interval of the forecast period, from 2026 to 2030. This is particularly true for Scenario 3 forecasts, where expansion demand contracts the most. For several occupations, higher replacement demand offsets contracted expansion demand in the first forecast

interval. Recruitment gaps narrow between the two scenarios during the second and third intervals of the forecast period.

Different recruitment gaps across occupations and across forecast intervals imply that a broad-brushed response to address shortages or surpluses will likely be less effective. Surpluses appear to be a bigger concern for the sector, particularly under Scenario 3 conditions. While surpluses are largely driven by contracted expansion demand, demographically-driven replacement demand (higher among occupations with older age profiles) and new entrants (higher among information technology occupations) may obscure the nature of the labour impacts.

For some occupations, managing replacement demand might be sufficient to address contractions in expansion demand. There may also be opportunities to develop targeted responses involving skill transferability between compatible occupations that are experiencing positive recruitment gaps and occupations that are experiencing negative recruitment gaps. Responses such as these may help smooth out adjustments and balance out labour markets.

National forecasts may obscure underlying regional dimensions that limit responses to recruitment gaps. For example, geographically distant labour supply pools complicate responses that involve geographic mobility of workers.

This report summarizes the scope and scale of occupation impacts in Canada's auto manufacturing sector. Given current instability in the sector, a range of outcomes falling between Scenarios 1 and 3 is plausible. However, unless negotiations and other events shift the trajectory towards a more positive outlook, stakeholders need to be aware and prepared for negative labour market impacts.

# References


Employment and Social Development Canada (2025). Building Canada strong: Youth in the labour market, discussion paper. Government of Canada. https://www.canada.ca/en/employment-social-development/programs/youth-employment-strategy/labour-challenges/discussion.html

Metro Economics. Custom data.

Statistics Canada. 2021 Census. Custom Data.

Statistics Canada. Labour Force Survey. Custom Data.

Statistics Canada (2026a). A record number of Canadian seniors worked in 2025: Here are some reasons why. Statistics Canada. https://www.statcan.gc.ca/o1/en/plus/9132-record-number-canadian-seniors-worked-2025-here-are-some-reasons-why

Statistics Canada (2026b). Estimates of the components of international migration, quarterly. Statistics Canada. Table 17-10-0040-01. https://www150.statcan.gc.ca/t1/tbl1/en/cv.action?pid=1710004001

Statistics Canada (2026c). Labour force characteristics by occupation, annual. Statistics Canada. Table 14-10-0416-01. https://www150.statcan.gc.ca/t1/tbl1/en/tv.action?pid=1410041601

Statistics Canada (2026d). Labour Force Survey, January 2026. Statistics Canada [The Daily]. https://www150.statcan.gc.ca/n1/en/daily-quotidien/260206/dq260206a-eng.pdf?st=gA_DuoZA

Statistics Canada (2025a). Labour force characteristics by gender and detailed age group, annual. Statistics Canada. Table 14-10-0327-01. https://www150.statcan.gc.ca/t1/tbl1/en/cv.action?pid=1410032701

Statistics Canada (2025b). Population estimates on July 1, by age and gender. Statistics Canada. Table: 17-10-0005-01. https://www150.statcan.gc.ca/t1/tbl1/en/cv.action?pid=1710000501

Statistics Canada (2025c). Projected population, by projection scenario, age and gender, as of July 1. Statistics Canada. Table 17-10-0057-01. https://www150.statcan.gc.ca/t1/tbl1/en/cv.action?pid=1710005701

Statistics Canada (2025d). Population projections for Canada (2024 to 2074), provinces and territories (2024 to 2049). Statistics Canada. https://www150.statcan.gc.ca/n1/pub/91-520-x/91-520-x2025001-eng.htm

Statistics Canada (2025e). Supplementary information for the 2026-2028 Immigration Levels Plan. Statistics Canada. https://www.canada.ca/en/immigration-refugees-citizenship/corporate/mandate/corporate-initiatives/levels/supplementary-immigration-levels-2026-2028.html

Statistics Canada (2024). Mortality rates by age group. Statistics Canada. Table 13-10-0710-01. https://www150.statcan.gc.ca/t1/tbl1/en/cv.action?pid=1310071001

Statistics Canada (2023). Employment by industry, monthly, unadjusted for seasonality. Statistics Canada. Table 14-10-0201-01. https://www150.statcan.gc.ca/t1/tbl1/en/cv.action?pid=1410020101

Statistics Canada (2022). North American Industry Classification System (NAICS) Canada 2022 Version 1.0. Statistics Canada. https://www23.statcan.gc.ca/imdb/p3VD.pl?Function=getVD&TVD=1369825

Statistics Canada (2021). National Occupational Classification (NOC) 2021 Version 1.0. Statistics Canada. https://www.statcan.gc.ca/en/subjects/standard/noc/2021/indexV1

# Appendices

Appendix A – Industries Analyzed in the Labour Market Impact Model
Appendix B – Occupations Analyzed in the Labour Market Impact Model
Appendix C – Methodology Notes
Appendix D – Detailed Results, Scenario 1 (Minimal Trade Disruptions)
Appendix E – Detailed Results, Scenario 3 (Full Trade Disruptions)

# Appendix A – Industries Analyzed in the Labour Market Impact Model

Table A1. List of industries analyzed in the labour market impact model, with NAICS industry codes.

| Industry (NAICS Code) |
|---|
| 2122 Metal ore mining |
| 2123 Non-metallic mineral mining and quarrying |
| 3132 Fabric Mills |
| 3133 Textile and Fabric Finishing and Fabric Coating Mills |
| 3251 Basic chemical manufacturing |
| 3252 Resin, Synthetic Rubber, and Artificial and Synthetic Fibers and Filaments Manufacturing |
| 3255 Paint, coating and adhesive manufacturing |
| 3259 Other chemical product manufacturing |
| 3261 Plastic product manufacturing |
| 3262 Rubber product manufacturing |
| 3272 Glass and glass product manufacturing |
| 3279 Other non-metallic mineral product manufacturing |
| 3311 Iron and steel mills and ferro-alloy manufacturing |
| 3312 Steel product manufacturing from purchased steel |
| 3313 Alumina and aluminum production and processing |
| 3314 Non-ferrous metal (except aluminum) production and processing |
| 3315 Foundries |
| 3321 Forging and stamping |
| 3322 Cutlery and hand tool manufacturing |
| 3323 Architectural and structural metals manufacturing |
| 3325 Hardware manufacturing |
| 3326 Spring and Wire Product Manufacturing |
| 3327 Machine shops, turned product, and screw, nut and bolt manufacturing |
| 3328 Coating, engraving, cold and heat treating and allied activities |
| 3329 Other fabricated metal product manufacturing |
| 3335 Metalworking machinery manufacturing |
| 3341 Computer and peripheral equipment manufacturing |
| 3342 Communications equipment manufacturing |
| 3344 Semiconductor and other electronic component manufacturing |
| 3345 Navigational, measuring, medical and control instruments manufacturing |
| 3351 Electric lighting equipment manufacturing |

| |
|---|
| 3353 Electrical equipment manufacturing |
| 3359 Other electrical equipment and component manufacturing |
| *3361 Motor vehicle manufacturing:* |
| 336110 - Automobile and light Duty Motor Vehicle Manufacturing |
| 336120 - Heavy-duty truck manufacturing |
| *3363 Motor vehicle parts manufacturing:* |
| 336310 - Motor vehicle gasoline engine and engine parts manufacturing |
| 336320 - Motor vehicle electrical and electronic equipment manufacturing |
| 336330 - Motor vehicle steering and suspension components (except spring) manufacturing |
| 336340 - Motor vehicle brake system manufacturing |
| 336350 - Motor vehicle transmission and power train parts manufacturing |
| 336360 - Motor vehicle seating and interior trim manufacturing |
| 336370 - Motor vehicle metal stamping |
| 336390 - Other motor vehicle parts manufacturing |
| 415 Motor vehicle and motor vehicle parts and accessories merchant wholesalers |
| 4173 Computer and communications equipment and supplies merchant wholesalers |
| 4931 Warehousing and storage |
| 5413 Architectural, engineering and related services |
| 5415 Computer systems design and related services |
| 5416 Management, scientific and technical consulting services |

# Appendix B – Occupations Analyzed in the Labour Market Impact Model

Table B1. List of occupations analyzed in the labour market impact model, with NOC occupational codes.

| NOC Code | Occupation |
|---|---|
| 00018 | Senior managers - public & private sector |
| 11200 | Human resources professionals |
| 13201 | Production and transportation logistics coordinators |
| 14400 | Shippers and receivers |
| 14402 | Production logistics workers |
| 20010 | Engineering managers |
| 20012 | Computer and information systems managers |
| 21101 | Chemists |
| 21211 | Data scientists |
| 21220 | Cybersecurity specialists |
| 21221 | Business systems specialists |
| 21222 | Information systems specialists |
| 21223 | Database analysts and data administrators |
| 21230 | Computer systems developers and programmers |
| 21231 | Software engineers and designers |
| 21232 | Software developers and programmers |
| 21233 | Web designers |
| 21234 | Web developers and programmers |
| 21301 | Mechanical engineers |
| 21310 | Electrical and electronics engineers |
| 21311 | Computer engineers (except software engineers and designers) |
| 21320 | Chemical engineers |
| 21321 | Industrial and manufacturing engineers |
| 21322 | Metallurgical and materials engineers |
| 21330 | Mining Engineers |
| 22100 | Chemical technologists and technicians |
| 22220 | Computer network and web technicians |
| 22222 | Information systems testing technicians |
| 22301 | Mechanical engineering technologists and technicians |
| 22302 | Industrial engineering and manufacturing technologists and technicians |
| 22310 | Electrical and electronics engineering technologists and technicians |
| 22312 | Industrial instrument technicians and mechanics |

| NOC Code | Occupation |
|---|---|
| 72010 | Contractors and supervisors, machining, metal forming, shaping and erecting trades and related occupations |
| 72020 | Contractors and supervisors, mechanic trades |
| 72100 | Machinists and machining and tooling inspectors |
| 72101 | Tool and die makers |
| 72106 | Welders and related machine operators |
| 72200 | Electricians (except industrial and power system) |
| 72201 | Industrial electricians |
| 72400 | Construction millwrights and industrial mechanics |
| 72410 | Automotive service technicians, truck and bus mechanics and mechanical repairers |
| 73300 | Transport truck drivers |
| 73400 | Heavy equipment operators |
| 75101 | Material handlers |
| 82020 | Supervisors, mining and quarrying |
| 83100 | Underground production and development miners |
| 84100 | Underground mine service and support workers |
| 90010 | Manufacturing managers |
| 92020 | Supervisors, motor vehicle assembling |
| 92021 | Supervisors, electronics and electrical products manufacturing |
| 93100 | Central control and process operators, mineral and metal processing |
| 93101 | Central control and process operators, petroleum, gas and chemical processing |
| 94100 | Machine operators, mineral and metal processing |
| 94101 | Foundry workers |
| 94104 | Inspectors and testers, mineral and metal processing |
| 94105 | Metalworking and forging machine operators |
| 94106 | Machining tool operators |
| 94110 | Chemical plant machine operators |
| 94111 | Plastics processing machine operators |
| 94200 | Motor vehicle assemblers, inspectors and testers |
| 94201 | Electronics assemblers, fabricators, inspectors and testers |
| 94203 | Assemblers, fabricators and inspectors, industrial electrical motors and transformers |
| 94204 | Mechanical assemblers and inspectors |
| 94212 | Plastic products assemblers, finishers and inspectors |
| 94213 | Industrial painters, coaters and metal finishing process operators |
| 95100 | Labourers in mineral and metal processing |
| 95102 | Labourers in chemical products processing and utilities |

| NOC Code | Occupation |
|---|---|
| 95109 | Other labourers in processing, manufacturing and utilities |

# Appendix C – Methodology Notes

*2025 Base Year Employment*

The base year for the occupational forecasts in this report was 2025. This was the most recent year in which complete data on employment by industry was available. Base year employment was estimated using multiple data sources, including Statistics Canada, APRC, Metro Economics, and Prism Economics and Analysis.

*Occupation Age Profiles*

Single-year age profiles (by occupation and by industry) were produced from 2021 Census data. Census data was collected during May 2021, in the midst of COVID-related labour market disruptions.

*Population Forecasts*

Population forecasts were sourced from Statistics Canada. Statistics Canada prepares a range of population forecast scenarios. The 'low growth' scenario was used in the occupational forecast model. Relative to the other population forecast scenarios, this scenario assumes low fertility, high mortality, low immigration, high emigration, and low levels of non-permanent residents. Finally, this population scenario assumes that internal migration patterns match recent trends, transitioning to the average of the period 1991/1992 to 2023/2024 (Statistics Canada (2025b).

# Appendix D - Detailed Results, Scenario 1 (Minimal Trade Disruptions)

This Appendix contains detailed forecasts of occupation impacts for Scenario 1, which assumes minimal trade disruptions in the auto sector during the forecast period. The following tables are included: expansion demand (Table D1), replacement demand (Table D2), and new entrants (Table D3). Recruitment gaps combine these supply and demand factors into a summary measure of labour market conditions for each occupation. Recruitment gap tables are presented as headcounts (Table D4) and as a percentage of 2025 base year employment (Table D5). All occupation names include NOC (National Occupational Classification) codes.

*Expansion Demand*

Expansion demand is the change in employment that is directly related to broad industry changes. Results in Table D1 are expressed as the number of additional workers that will be required in the auto sector due to expansion, relative to 2025 base year employment.

Table D1. Expansion demand – detailed results, Scenario 1.

| Expansion Demand – Scenario 1 | 2026-30 | 2031-35 | 2036-40 | 2026-40 |
|---|---|---|---|---|
| 00018 Senior managers - public & private sector | 210 | 60 | -120 | 160 |
| 11200 Human resources professionals | -40 | 60 | -30 | -10 |
| 13201 Production & transportation logistics coordinators | 40 | 50 | -50 | 40 |
| 14400 Shippers & receivers | 80 | 120 | -140 | 60 |
| 14402 Production logistics workers | 10 | 10 | -10 | 10 |
| 20010 Engineering managers | 130 | 50 | -60 | 120 |
| 20012 Computer & information systems managers | 20 | 40 | -30 | 30 |
| 21101 Chemists | 40 | 0 | -20 | 30 |
| 21211 Data scientists | -10 | 10 | 0 | 0 |
| 21220 Cybersecurity specialists | 0 | 10 | 0 | 0 |
| 21221 Business systems specialists | -20 | 10 | -10 | -10 |
| 21222 Information systems specialists | -20 | 50 | -30 | 0 |
| 21223 Database analysts & data administrators | -10 | 10 | 0 | 0 |
| 21230 Computer systems developers & programmers | 0 | 20 | -10 | 10 |
| 21231 Software engineers & designers | -30 | 100 | -40 | 30 |
| 21232 Software developers & programmers | 30 | 60 | -40 | 50 |
| 21233 Web designers | 0 | 0 | 0 | 0 |
| 21234 Web developers & programmers | 0 | 20 | -10 | 0 |

| Expansion Demand – Scenario 1 | 2026-30 | 2031-35 | 2036-40 | 2026-40 |
|---|---|---|---|---|
| 21301 Mechanical engineers | 130 | 260 | -170 | 210 |
| 21310 Electrical & electronics engineers | 390 | 100 | -120 | 370 |
| 21311 Computer engineers (except software engineers & designers) | 20 | 10 | -20 | 20 |
| 21320 Chemical engineers | 120 | 0 | -40 | 70 |
| 21321 Industrial & manufacturing engineers | 30 | 90 | -60 | 60 |
| 21322 Metallurgical & materials engineers | -10 | 0 | -10 | -10 |
| 21330 Mining Engineers | 20 | 0 | -10 | 10 |
| 22100 Chemical technologists & technicians | 30 | 0 | -20 | 10 |
| 22220 Computer network & web technicians | 20 | 30 | -30 | 20 |
| 22222 Information systems testing technicians | 0 | 0 | 0 | 0 |
| 22301 Mechanical engineering technologists & technicians | 20 | 100 | -60 | 60 |
| 22302 Industrial engineering & manufacturing technologists & technicians | 50 | 60 | -60 | 60 |
| 22310 Electrical & electronics engineering technologists & technicians | 320 | 50 | -100 | 270 |
| 22312 Industrial instrument technicians & mechanics | 0 | 0 | 0 | 0 |
| 72010 Contractors & supervisors, machining, metal forming, shaping & erecting trades & related occupations | -40 | 20 | -20 | -30 |
| 72020 Contractors & supervisors, mechanic trades | -20 | 30 | -20 | -20 |
| 72100 Machinists & machining & tooling inspectors | -70 | 110 | -70 | -30 |
| 72101 Tool & die makers | -100 | 100 | -30 | -40 |
| 72106 Welders & related machine operators | -200 | 220 | -90 | -70 |
| 72200 Electricians (except industrial & power system) | 30 | 10 | -10 | 30 |
| 72201 Industrial electricians | -110 | 140 | -60 | -40 |
| 72400 Construction millwrights & industrial mechanics | -200 | 140 | -110 | -170 |
| 72410 Automotive service technicians, truck & bus mechanics & mechanical repairers | -150 | 170 | -70 | -50 |
| 73300 Transport truck drivers | -20 | 60 | -60 | -30 |
| 73400 Heavy equipment operators | 70 | -10 | -40 | 20 |
| 75101 Material handlers | -30 | 350 | -240 | 80 |
| 82020 Supervisors, mining & quarrying | 70 | -10 | -20 | 40 |

| Expansion Demand – Scenario 1 | 2026-30 | 2031-35 | 2036-40 | 2026-40 |
|---|---|---|---|---|
| 83100 Underground production & development miners | 120 | -10 | -40 | 70 |
| 84100 Underground mine service & support workers | 30 | 0 | -10 | 20 |
| 90010 Manufacturing managers | 150 | 270 | -240 | 190 |
| 92020 Supervisors, motor vehicle assembling | -600 | 760 | -150 | 10 |
| 92021 Supervisors, electronics & electrical products manufacturing | 200 | 0 | -40 | 150 |
| 93100 Central control & process operators, mineral & metal processing | -40 | 0 | 0 | -40 |
| 93101 Central control & process operators, petroleum, gas & chemical processing | 140 | -10 | -40 | 90 |
| 94100 Machine operators, mineral & metal processing | -360 | 0 | -30 | -400 |
| 94101 Foundry workers | -20 | 0 | -10 | -20 |
| 94104 Inspectors & testers, mineral & metal processing | -30 | 0 | -10 | -40 |
| 94105 Metalworking & forging machine operators | -130 | 30 | -20 | -120 |
| 94106 Machining tool operators | -50 | 40 | -30 | -40 |
| 94110 Chemical plant machine operators | 20 | 0 | -10 | 10 |
| 94111 Plastics processing machine operators | -10 | 70 | -60 | -10 |
| 94200 Motor vehicle assemblers, inspectors & testers | -2,520 | 2,410 | -490 | -600 |
| 94201 Electronics assemblers, fabricators, inspectors & testers | 650 | 0 | -160 | 480 |
| 94203 Assemblers, fabricators & inspectors, industrial electrical motors & transformers | 140 | 70 | 10 | 220 |
| 94204 Mechanical assemblers & inspectors | -90 | 150 | -40 | 20 |
| 94212 Plastic products assemblers, finishers & inspectors | -20 | 20 | -20 | -10 |
| 94213 Industrial painters, coaters & metal finishing process operators | -130 | 120 | -40 | -50 |
| 95100 Labourers in mineral & metal processing | -210 | 10 | -20 | -220 |
| 95102 Labourers in chemical products processing & utilities | 40 | 10 | -20 | 30 |
| 95109 Other labourers in processing, manufacturing & utilities | 280 | 140 | -170 | 250 |

*Replacement Demand*

Replacement demand is an estimate of the number of workers needed to maintain current levels of employment, as workers exit the labour force due to retirements and deaths. Results in Table D2 are expressed as the number of additional workers (aged 15 to 69) that will be required, relative to 2025 base year employment.

Table D2. Replacement demand – detailed results, Scenario 1.

| Replacement Demand – Scenario 1 | 2026-30 | 2031-35 | 2036-40 | 2026-40 |
|---|---|---|---|---|
| 00018 Senior managers - public & private sector | 6,040 | 6,070 | 6,060 | 18,170 |
| 11200 Human resources professionals | 1,240 | 1,240 | 1,240 | 3,720 |
| 13201 Production & transportation logistics coordinators | 740 | 750 | 750 | 2,250 |
| 14400 Shippers & receivers | 3,300 | 3,330 | 3,320 | 9,950 |
| 14402 Production logistics workers | 140 | 140 | 140 | 430 |
| 20010 Engineering managers | 1,610 | 1,630 | 1,630 | 4,860 |
| 20012 Computer & information systems managers | 2,770 | 2,770 | 2,770 | 8,320 |
| 21101 Chemists | 350 | 350 | 350 | 1,040 |
| 21211 Data scientists | 110 | 110 | 110 | 320 |
| 21220 Cybersecurity specialists | 300 | 300 | 300 | 900 |
| 21221 Business systems specialists | 770 | 770 | 770 | 2,310 |
| 21222 Information systems specialists | 5,500 | 5,510 | 5,510 | 16,520 |
| 21223 Database analysts & data administrators | 570 | 570 | 570 | 1,720 |
| 21230 Computer systems developers & programmers | 1,230 | 1,230 | 1,230 | 3,690 |
| 21231 Software engineers & designers | 2,360 | 2,370 | 2,370 | 7,100 |
| 21232 Software developers & programmers | 2,300 | 2,300 | 2,300 | 6,900 |
| 21233 Web designers | 300 | 300 | 300 | 900 |
| 21234 Web developers & programmers | 1,000 | 1,000 | 1,000 | 3,000 |
| 21301 Mechanical engineers | 2,520 | 2,540 | 2,550 | 7,610 |
| 21310 Electrical & electronics engineers | 2,660 | 2,690 | 2,690 | 8,040 |
| 21311 Computer engineers (except software engineers & designers) | 950 | 960 | 960 | 2,870 |
| 21320 Chemical engineers | 420 | 430 | 420 | 1,270 |
| 21321 Industrial & manufacturing engineers | 670 | 680 | 690 | 2,040 |
| 21322 Metallurgical & materials engineers | 130 | 130 | 130 | 390 |
| 21330 Mining Engineers | 140 | 140 | 140 | 420 |
| 22100 Chemical technologists & technicians | 380 | 380 | 380 | 1,140 |

| Replacement Demand – Scenario 1 | 2026-30 | 2031-35 | 2036-40 | 2026-40 |
|---|---|---|---|---|
| 22220 Computer network & web technicians | 1,240 | 1,250 | 1,250 | 3,730 |
| 22222 Information systems testing technicians | 250 | 250 | 250 | 750 |
| 22301 Mechanical engineering technologists & technicians | 1,370 | 1,380 | 1,380 | 4,130 |
| 22302 Industrial engineering & manufacturing technologists & technicians | 860 | 870 | 870 | 2,590 |
| 22310 Electrical & electronics engineering technologists & technicians | 1,790 | 1,820 | 1,820 | 5,420 |
| 22312 Industrial instrument technicians & mechanics | 220 | 220 | 220 | 650 |
| 72010 Contractors & supervisors, machining, metal forming, shaping & erecting trades & related occupations | 860 | 860 | 860 | 2,590 |
| 72020 Contractors & supervisors, mechanic trades | 270 | 280 | 280 | 830 |
| 72100 Machinists & machining & tooling inspectors | 2,590 | 2,600 | 2,610 | 7,800 |
| 72101 Tool & die makers | 1,400 | 1,410 | 1,420 | 4,230 |
| 72106 Welders & related machine operators | 2,700 | 2,720 | 2,730 | 8,150 |
| 72200 Electricians (except industrial & power system) | 150 | 160 | 160 | 470 |
| 72201 Industrial electricians | 690 | 710 | 710 | 2,110 |
| 72400 Construction millwrights & industrial mechanics | 2,220 | 2,240 | 2,240 | 6,690 |
| 72410 Automotive service technicians, truck & bus mechanics & mechanical repairers | 830 | 830 | 840 | 2,500 |
| 73300 Transport truck drivers | 1,990 | 2,000 | 2,000 | 5,990 |
| 73400 Heavy equipment operators | 600 | 600 | 600 | 1,800 |
| 75101 Material handlers | 7,240 | 7,270 | 7,280 | 21,790 |
| 82020 Supervisors, mining & quarrying | 250 | 250 | 250 | 760 |
| 83100 Underground production & development miners | 370 | 370 | 370 | 1,110 |
| 84100 Underground mine service & support workers | 120 | 120 | 120 | 370 |
| 90010 Manufacturing managers | 4,320 | 4,380 | 4,380 | 13,080 |
| 92020 Supervisors, motor vehicle assembling | 640 | 680 | 710 | 2,030 |
| 92021 Supervisors, electronics & electrical products manufacturing | 180 | 200 | 190 | 570 |

| Replacement Demand – Scenario 1 | 2026-30 | 2031-35 | 2036-40 | 2026-40 |
|---|---|---|---|---|
| 93100 Central control & process operators, mineral & metal processing | 120 | 120 | 120 | 370 |
| 93101 Central control & process operators, petroleum, gas & chemical processing | 310 | 320 | 320 | 950 |
| 94100 Machine operators, mineral & metal processing | 560 | 560 | 560 | 1,670 |
| 94101 Foundry workers | 210 | 210 | 210 | 640 |
| 94104 Inspectors & testers, mineral & metal processing | 150 | 150 | 150 | 450 |
| 94105 Metalworking & forging machine operators | 990 | 990 | 990 | 2,960 |
| 94106 Machining tool operators | 740 | 750 | 750 | 2,230 |
| 94110 Chemical plant machine operators | 280 | 280 | 280 | 840 |
| 94111 Plastics processing machine operators | 1,790 | 1,800 | 1,800 | 5,380 |
| 94200 Motor vehicle assemblers, inspectors & testers | 6,230 | 6,360 | 6,460 | 19,040 |
| 94201 Electronics assemblers, fabricators, inspectors & testers | 1,700 | 1,760 | 1,750 | 5,210 |
| 94203 Assemblers, fabricators & inspectors, industrial electrical motors & transformers | 230 | 240 | 250 | 720 |
| 94204 Mechanical assemblers & inspectors | 310 | 320 | 320 | 950 |
| 94212 Plastic products assemblers, finishers & inspectors | 570 | 570 | 580 | 1,720 |
| 94213 Industrial painters, coaters & metal finishing process operators | 770 | 780 | 780 | 2,330 |
| 95100 Labourers in mineral & metal processing | 520 | 520 | 520 | 1,560 |
| 95102 Labourers in chemical products processing & utilities | 470 | 470 | 470 | 1,410 |
| 95109 Other labourers in processing, manufacturing & utilities | 2,770 | 2,810 | 2,810 | 8,390 |

*New Entrants*

New entrants include the number of additional young people and immigrants who are expected to enter the labour force, relative to the 2025 base year.

Table D3. New entrants – detailed results, Scenario 1.

| New Entrants – Scenario 1 | 2026-30 | 2031-35 | 2036-40 | 2026-40 |
|---|---|---|---|---|
| 00018 Senior managers - public & private sector | 290 | 310 | 300 | 890 |
| 11200 Human resources professionals | 420 | 450 | 430 | 1,300 |
| 13201 Production & transportation logistics coordinators | 290 | 310 | 300 | 900 |
| 14400 Shippers & receivers | 950 | 1,010 | 980 | 2,950 |
| 14402 Production logistics workers | 80 | 80 | 80 | 240 |
| 20010 Engineering managers | 230 | 240 | 230 | 700 |
| 20012 Computer & information systems managers | 460 | 480 | 470 | 1,410 |
| 21101 Chemists | 150 | 160 | 160 | 470 |
| 21211 Data scientists | 290 | 310 | 300 | 910 |
| 21220 Cybersecurity specialists | 180 | 190 | 180 | 540 |
| 21221 Business systems specialists | 290 | 310 | 300 | 890 |
| 21222 Information systems specialists | 1,280 | 1,360 | 1,320 | 3,950 |
| 21223 Database analysts & data administrators | 170 | 180 | 180 | 530 |
| 21230 Computer systems developers & programmers | 850 | 900 | 870 | 2,610 |
| 21231 Software engineers & designers | 2,230 | 2,360 | 2,290 | 6,880 |
| 21232 Software developers & programmers | 2,760 | 2,920 | 2,840 | 8,520 |
| 21233 Web designers | 370 | 390 | 380 | 1,130 |
| 21234 Web developers & programmers | 1,630 | 1,720 | 1,670 | 5,020 |
| 21301 Mechanical engineers | 1,160 | 1,240 | 1,210 | 3,610 |
| 21310 Electrical & electronics engineers | 800 | 850 | 830 | 2,470 |
| 21311 Computer engineers (except software engineers & designers) | 300 | 320 | 310 | 920 |
| 21320 Chemical engineers | 230 | 250 | 240 | 710 |
| 21321 Industrial & manufacturing engineers | 350 | 370 | 360 | 1,080 |
| 21322 Metallurgical & materials engineers | 70 | 80 | 70 | 220 |
| 21330 Mining Engineers | 60 | 70 | 60 | 190 |
| 22100 Chemical technologists & technicians | 130 | 140 | 140 | 410 |
| 22220 Computer network & web technicians | 690 | 730 | 710 | 2,140 |
| 22222 Information systems testing technicians | 340 | 360 | 350 | 1,040 |
| 22301 Mechanical engineering technologists & technicians | 530 | 560 | 550 | 1,640 |
| 22302 Industrial engineering & manufacturing technologists & technicians | 300 | 320 | 320 | 940 |

| New Entrants – Scenario 1 | 2026-30 | 2031-35 | 2036-40 | 2026-40 |
|---|---|---|---|---|
| 22310 Electrical & electronics engineering technologists & technicians | 490 | 530 | 510 | 1,530 |
| 22312 Industrial instrument technicians & mechanics | 80 | 80 | 80 | 240 |
| 72010 Contractors & supervisors, machining, metal forming, shaping & erecting trades & related occupations | 110 | 120 | 120 | 350 |
| 72020 Contractors & supervisors, mechanic trades | 90 | 100 | 100 | 290 |
| 72100 Machinists & machining & tooling inspectors | 660 | 700 | 680 | 2,050 |
| 72101 Tool & die makers | 200 | 210 | 210 | 620 |
| 72106 Welders & related machine operators | 1,090 | 1,160 | 1,130 | 3,390 |
| 72200 Electricians (except industrial & power system) | 110 | 110 | 110 | 330 |
| 72201 Industrial electricians | 160 | 170 | 170 | 500 |
| 72400 Construction millwrights & industrial mechanics | 400 | 420 | 410 | 1,230 |
| 72410 Automotive service technicians, truck & bus mechanics & mechanical repairers | 320 | 340 | 330 | 990 |
| 73300 Transport truck drivers | 270 | 290 | 280 | 830 |
| 73400 Heavy equipment operators | 190 | 200 | 190 | 580 |
| 75101 Material handlers | 3,300 | 3,500 | 3,400 | 10,210 |
| 82020 Supervisors, mining & quarrying | 20 | 30 | 30 | 80 |
| 83100 Underground production & development miners | 130 | 140 | 130 | 390 |
| 84100 Underground mine service & support workers | 60 | 70 | 60 | 190 |
| 90010 Manufacturing managers | 260 | 280 | 270 | 810 |
| 92020 Supervisors, motor vehicle assembling | 100 | 120 | 120 | 340 |
| 92021 Supervisors, electronics & electrical products manufacturing | 50 | 50 | 50 | 150 |
| 93100 Central control & process operators, mineral & metal processing | 50 | 60 | 60 | 170 |
| 93101 Central control & process operators, petroleum, gas & chemical processing | 160 | 180 | 170 | 510 |
| 94100 Machine operators, mineral & metal processing | 200 | 210 | 210 | 630 |
| 94101 Foundry workers | 80 | 80 | 80 | 250 |

| New Entrants – Scenario 1 | 2026-30 | 2031-35 | 2036-40 | 2026-40 |
|---|---|---|---|---|
| 94104 Inspectors & testers, mineral & metal processing | 60 | 60 | 60 | 190 |
| 94105 Metalworking & forging machine operators | 300 | 320 | 310 | 940 |
| 94106 Machining tool operators | 210 | 220 | 220 | 650 |
| 94110 Chemical plant machine operators | 80 | 80 | 80 | 230 |
| 94111 Plastics processing machine operators | 430 | 460 | 440 | 1,330 |
| 94200 Motor vehicle assemblers, inspectors & testers | 1,720 | 1,850 | 1,830 | 5,390 |
| 94201 Electronics assemblers, fabricators, inspectors & testers | 220 | 240 | 230 | 700 |
| 94203 Assemblers, fabricators & inspectors, industrial electrical motors & transformers | 60 | 70 | 70 | 210 |
| 94204 Mechanical assemblers & inspectors | 130 | 140 | 140 | 410 |
| 94212 Plastic products assemblers, finishers & inspectors | 170 | 180 | 170 | 520 |
| 94213 Industrial painters, coaters & metal finishing process operators | 280 | 290 | 290 | 860 |
| 95100 Labourers in mineral & metal processing | 240 | 250 | 240 | 730 |
| 95102 Labourers in chemical products processing & utilities | 200 | 210 | 210 | 620 |
| 95109 Other labourers in processing, manufacturing & utilities | 970 | 1,030 | 1,000 | 3,000 |

*Recruitment Gap (#)*

The recruitment gap is a composite measure that incorporates expansion demand, replacement demand, and new entrants. of labour market conditions. The values in Table D4 are expressed as the number of additional workers for each occupation, relative to 2025 base year employment.

Table D4. Recruitment gap (#) – detailed results, Scenario 1.

| Recruitment Gap (#) – Scenario 1 | 2026-30 | 2031-35 | 2036-40 | 2026-40 |
|---|---|---|---|---|
| 00018 Senior managers - public & private sector | 5,960 | 5,830 | 5,650 | 17,430 |
| 11200 Human resources professionals | 780 | 850 | 780 | 2,410 |
| 13201 Production & transportation logistics coordinators | 500 | 490 | 390 | 1,390 |
| 14400 Shippers & receivers | 2,430 | 2,430 | 2,210 | 7,060 |
| 14402 Production logistics workers | 70 | 70 | 50 | 200 |
| 20010 Engineering managers | 1,520 | 1,430 | 1,330 | 4,280 |
| 20012 Computer & information systems managers | 2,340 | 2,330 | 2,270 | 6,940 |
| 21101 Chemists | 240 | 190 | 170 | 600 |
| 21211 Data scientists | -200 | -200 | -200 | -590 |
| 21220 Cybersecurity specialists | 120 | 120 | 120 | 360 |
| 21221 Business systems specialists | 470 | 480 | 470 | 1,410 |
| 21222 Information systems specialists | 4,200 | 4,210 | 4,160 | 12,570 |
| 21223 Database analysts & data administrators | 390 | 400 | 390 | 1,190 |
| 21230 Computer systems developers & programmers | 380 | 360 | 350 | 1,090 |
| 21231 Software engineers & designers | 110 | 100 | 40 | 250 |
| 21232 Software developers & programmers | -430 | -560 | -580 | -1,570 |
| 21233 Web designers | -70 | -80 | -80 | -230 |
| 21234 Web developers & programmers | -630 | -700 | -680 | -2,010 |
| 21301 Mechanical engineers | 1,480 | 1,560 | 1,170 | 4,210 |
| 21310 Electrical & electronics engineers | 2,250 | 1,940 | 1,750 | 5,940 |
| 21311 Computer engineers (except software engineers & designers) | 680 | 650 | 630 | 1,970 |
| 21320 Chemical engineers | 310 | 180 | 140 | 630 |
| 21321 Industrial & manufacturing engineers | 360 | 410 | 270 | 1,030 |
| 21322 Metallurgical & materials engineers | 50 | 60 | 50 | 160 |

| Recruitment Gap (#) – Scenario 1 | 2026-30 | 2031-35 | 2036-40 | 2026-40 |
|---|---|---|---|---|
| 21330 Mining Engineers | 90 | 70 | 70 | 240 |
| 22100 Chemical technologists & technicians | 280 | 240 | 220 | 740 |
| 22220 Computer network & web technicians | 570 | 540 | 510 | 1,610 |
| 22222 Information systems testing technicians | -90 | -100 | -100 | -300 |
| 22301 Mechanical engineering technologists & technicians | 860 | 920 | 780 | 2,550 |
| 22302 Industrial engineering & manufacturing technologists & technicians | 600 | 610 | 490 | 1,700 |
| 22310 Electrical & electronics engineering technologists & technicians | 1,610 | 1,340 | 1,210 | 4,160 |
| 22312 Industrial instrument technicians & mechanics | 140 | 140 | 130 | 410 |
| 72010 Contractors & supervisors, machining, metal forming, shaping & erecting trades & related occupations | 710 | 770 | 730 | 2,210 |
| 72020 Contractors & supervisors, mechanic trades | 160 | 200 | 160 | 520 |
| 72100 Machinists & machining & tooling inspectors | 1,860 | 2,010 | 1,860 | 5,730 |
| 72101 Tool & die makers | 1,100 | 1,300 | 1,170 | 3,570 |
| 72106 Welders & related machine operators | 1,410 | 1,780 | 1,510 | 4,690 |
| 72200 Electricians (except industrial & power system) | 80 | 50 | 30 | 170 |
| 72201 Industrial electricians | 420 | 670 | 480 | 1,570 |
| 72400 Construction millwrights & industrial mechanics | 1,620 | 1,950 | 1,720 | 5,290 |
| 72410 Automotive service technicians, truck & bus mechanics & mechanical repairers | 360 | 660 | 440 | 1,460 |
| 73300 Transport truck drivers | 1,700 | 1,770 | 1,660 | 5,120 |
| 73400 Heavy equipment operators | 480 | 400 | 370 | 1,240 |
| 75101 Material handlers | 3,910 | 4,120 | 3,640 | 11,660 |
| 82020 Supervisors, mining & quarrying | 290 | 220 | 210 | 720 |
| 83100 Underground production & development miners | 360 | 220 | 200 | 790 |

| Recruitment Gap (#) – Scenario 1 | 2026-30 | 2031-35 | 2036-40 | 2026-40 |
|---|---|---|---|---|
| 84100 Underground mine service & support workers | 90 | 50 | 50 | 200 |
| 90010 Manufacturing managers | 4,220 | 4,370 | 3,880 | 12,460 |
| 92020 Supervisors, motor vehicle assembling | -60 | 1,320 | 440 | 1,700 |
| 92021 Supervisors, electronics & electrical products manufacturing | 330 | 140 | 100 | 570 |
| 93100 Central control & process operators, mineral & metal processing | 30 | 70 | 70 | 170 |
| 93101 Central control & process operators, petroleum, gas & chemical processing | 290 | 130 | 100 | 520 |
| 94100 Machine operators, mineral & metal processing | 0 | 340 | 310 | 650 |
| 94101 Foundry workers | 110 | 130 | 120 | 370 |
| 94104 Inspectors & testers, mineral & metal processing | 60 | 90 | 80 | 230 |
| 94105 Metalworking & forging machine operators | 550 | 700 | 650 | 1,890 |
| 94106 Machining tool operators | 480 | 560 | 500 | 1,540 |
| 94110 Chemical plant machine operators | 230 | 200 | 190 | 620 |
| 94111 Plastics processing machine operators | 1,350 | 1,410 | 1,290 | 4,050 |
| 94200 Motor vehicle assemblers, inspectors & testers | 1,990 | 6,920 | 4,140 | 13,050 |
| 94201 Electronics assemblers, fabricators, inspectors & testers | 2,130 | 1,510 | 1,350 | 4,990 |
| 94203 Assemblers, fabricators & inspectors, industrial electrical motors & transformers | 300 | 240 | 190 | 730 |
| 94204 Mechanical assemblers & inspectors | 90 | 320 | 150 | 560 |
| 94212 Plastic products assemblers, finishers & inspectors | 380 | 420 | 390 | 1,190 |
| 94213 Industrial painters, coaters & metal finishing process operators | 360 | 600 | 460 | 1,420 |
| 95100 Labourers in mineral & metal processing | 70 | 280 | 250 | 610 |
| 95102 Labourers in chemical products processing & utilities | 300 | 270 | 240 | 810 |

| Recruitment Gap (#) – Scenario 1 | 2026-30 | 2031-35 | 2036-40 | 2026-40 |
|---|---|---|---|---|
| 95109 Other labourers in processing, manufacturing & utilities | 2,090 | 1,910 | 1,630 | 5,630 |

*Recruitment Gap (% of 2025 base year employment)*

Table D5 shows the recruitment gap for each occupation, expressed as a percentage of 2025 base year employment. For example: If the recruitment gap percentage for an occupation is 50%, then an amount equal to half of the employed workers in 2025 will be required during the forecast period. These results take into consideration demographics and other supply-side conditions, given the broader industry impacts affecting demand.

Table D5. Recruitment gap (% of 2025 base year employment) – detailed results, Scenario 1.

| Recruitment Gap (% of 2025 base employment) – Scenario 1 | 2026-30 | 2031-35 | 2036-40 | 2026-40 |
|---|---|---|---|---|
| 00018 Senior managers - public & private sector | 17% | 16% | 16% | 48% |
| 11200 Human resources professionals | 7% | 8% | 7% | 22% |
| 13201 Production & transportation logistics coordinators | 6% | 6% | 5% | 17% |
| 14400 Shippers & receivers | 10% | 10% | 9% | 29% |
| 14402 Production logistics workers | 4% | 4% | 3% | 13% |
| 20010 Engineering managers | 11% | 10% | 10% | 31% |
| 20012 Computer & information systems managers | 7% | 7% | 7% | 22% |
| 21101 Chemists | 7% | 6% | 5% | 18% |
| 21211 Data scientists | -5% | -5% | -5% | -14% |
| 21220 Cybersecurity specialists | 3% | 3% | 3% | 8% |
| 21221 Business systems specialists | 5% | 5% | 5% | 16% |
| 21222 Information systems specialists | 8% | 8% | 8% | 24% |
| 21223 Database analysts & data administrators | 8% | 8% | 8% | 23% |
| 21230 Computer systems developers & programmers | 2% | 2% | 2% | 7% |
| 21231 Software engineers & designers | 0% | 0% | 0% | 1% |
| 21232 Software developers & programmers | -1% | -1% | -1% | -3% |
| 21233 Web designers | -1% | -1% | -1% | -4% |
| 21234 Web developers & programmers | -2% | -3% | -3% | -8% |

| Recruitment Gap (% of 2025 base employment) – Scenario 1 | 2026-30 | 2031-35 | 2036-40 | 2026-40 |
|---|---|---|---|---|
| 21301 Mechanical engineers | 6% | 6% | 5% | 16% |
| 21310 Electrical & electronics engineers | 10% | 9% | 8% | 27% |
| 21311 Computer engineers (except software engineers & designers) | 6% | 6% | 6% | 18% |
| 21320 Chemical engineers | 7% | 4% | 3% | 14% |
| 21321 Industrial & manufacturing engineers | 5% | 6% | 4% | 14% |
| 21322 Metallurgical & materials engineers | 4% | 4% | 4% | 12% |
| 21330 Mining Engineers | 7% | 5% | 5% | 18% |
| 22100 Chemical technologists & technicians | 10% | 8% | 8% | 26% |
| 22220 Computer network & web technicians | 3% | 3% | 3% | 9% |
| 22222 Information systems testing technicians | -2% | -2% | -2% | -6% |
| 22301 Mechanical engineering technologists & technicians | 7% | 8% | 6% | 21% |
| 22302 Industrial engineering & manufacturing technologists & technicians | 8% | 8% | 6% | 22% |
| 22310 Electrical & electronics engineering technologists & technicians | 13% | 11% | 10% | 33% |
| 22312 Industrial instrument technicians & mechanics | 8% | 8% | 7% | 23% |
| 72010 Contractors & supervisors, machining, metal forming, shaping & erecting trades & related occupations | 13% | 14% | 13% | 40% |
| 72020 Contractors & supervisors, mechanic trades | 7% | 9% | 7% | 22% |
| 72100 Machinists & machining & tooling inspectors | 10% | 10% | 10% | 30% |
| 72101 Tool & die makers | 14% | 17% | 15% | 46% |
| 72106 Welders & related machine operators | 6% | 7% | 6% | 20% |
| 72200 Electricians (except industrial & power system) | 5% | 3% | 2% | 11% |
| 72201 Industrial electricians | 7% | 12% | 8% | 28% |
| 72400 Construction millwrights & industrial mechanics | 11% | 13% | 11% | 35% |
| 72410 Automotive service technicians, truck & bus mechanics & mechanical repairers | 5% | 9% | 6% | 21% |
| 73300 Transport truck drivers | 16% | 17% | 16% | 49% |
| 73400 Heavy equipment operators | 12% | 10% | 9% | 30% |
| 75101 Material handlers | 6% | 6% | 6% | 18% |
| 82020 Supervisors, mining & quarrying | 15% | 12% | 11% | 38% |

| Recruitment Gap (% of 2025 base employment) – Scenario 1 | 2026-30 | 2031-35 | 2036-40 | 2026-40 |
|---|---|---|---|---|
| 83100 Underground production & development miners | 9% | 6% | 5% | 21% |
| 84100 Underground mine service & support workers | 8% | 4% | 4% | 17% |
| 90010 Manufacturing managers | 15% | 16% | 14% | 46% |
| 92020 Supervisors, motor vehicle assembling | -1% | 22% | 7% | 28% |
| 92021 Supervisors, electronics & electrical products manufacturing | 25% | 11% | 8% | 44% |
| 93100 Central control & process operators, mineral & metal processing | 2% | 5% | 5% | 12% |
| 93101 Central control & process operators, petroleum, gas & chemical processing | 9% | 4% | 3% | 15% |
| 94100 Machine operators, mineral & metal processing | 0% | 6% | 5% | 11% |
| 94101 Foundry workers | 6% | 7% | 6% | 19% |
| 94104 Inspectors & testers, mineral & metal processing | 5% | 7% | 6% | 18% |
| 94105 Metalworking & forging machine operators | 8% | 10% | 9% | 28% |
| 94106 Machining tool operators | 9% | 10% | 9% | 29% |
| 94110 Chemical plant machine operators | 11% | 9% | 9% | 29% |
| 94111 Plastics processing machine operators | 11% | 12% | 11% | 34% |
| 94200 Motor vehicle assemblers, inspectors & testers | 4% | 15% | 9% | 28% |
| 94201 Electronics assemblers, fabricators, inspectors & testers | 26% | 18% | 16% | 61% |
| 94203 Assemblers, fabricators & inspectors, industrial electrical motors & transformers | 20% | 16% | 13% | 50% |
| 94204 Mechanical assemblers & inspectors | 4% | 13% | 6% | 22% |
| 94212 Plastic products assemblers, finishers & inspectors | 10% | 11% | 11% | 32% |
| 94213 Industrial painters, coaters & metal finishing process operators | 6% | 10% | 8% | 23% |
| 95100 Labourers in mineral & metal processing | 1% | 6% | 5% | 13% |
| 95102 Labourers in chemical products processing & utilities | 8% | 8% | 7% | 23% |
| 95109 Other labourers in processing, manufacturing & utilities | 11% | 10% | 8% | 29% |

# Appendix E - Detailed Results, Scenario 3 (Full Trade Disruptions)

This Appendix contains detailed forecasts of occupation impacts for Scenario 3, which assumes full trade disruptions across the auto sector during the forecast period. The following tables are included: expansion demand (Table E1), replacement demand (Table E2), and new entrants (Table E3). Recruitment gaps combine these supply and demand factors into a summary measure of labour market conditions for each occupation. Recruitment gap tables are presented as headcounts (Table E4) and as a percentage of 2025 base year employment (Table E5).

*Expansion Demand*

Expansion demand is the change in employment that is directly related to broad industry changes. Results in Table E1 are expressed as the number of additional workers that will be required in the auto sector due to expansion, relative to 2025 base year employment.

Table E1. Expansion demand – detailed results, Scenario 3.

| Expansion Demand – Scenario 3 | 2026-30 | 2031-35 | 2036-40 | 2026-40 |
|---|---|---|---|---|
| 00018 Senior managers - public & private sector | -560 | -10 | -20 | -590 |
| 11200 Human resources professionals | -370 | 0 | 0 | -370 |
| 13201 Production & transportation logistics coordinators | -390 | 0 | -10 | -400 |
| 14400 Shippers & receivers | -980 | -10 | -20 | -1,000 |
| 14402 Production logistics workers | -110 | 0 | 0 | -110 |
| 20010 Engineering managers | -310 | -10 | -10 | -330 |
| 20012 Computer & information systems managers | -240 | 0 | -10 | -250 |
| 21101 Chemists | -40 | 0 | 0 | -40 |
| 21211 Data scientists | -40 | 0 | 0 | -40 |
| 21220 Cybersecurity specialists | -30 | 0 | 0 | -30 |
| 21221 Business systems specialists | -80 | 0 | 0 | -80 |
| 21222 Information systems specialists | -340 | 0 | 0 | -340 |
| 21223 Database analysts & data administrators | -50 | 0 | 0 | -50 |
| 21230 Computer systems developers & programmers | -140 | 0 | 0 | -150 |
| 21231 Software engineers & designers | -440 | 10 | -10 | -440 |
| 21232 Software developers & programmers | -300 | 0 | -10 | -310 |
| 21233 Web designers | -20 | 0 | 0 | -20 |
| 21234 Web developers & programmers | -110 | 0 | 0 | -110 |

| Expansion Demand – Scenario 3 | 2026-30 | 2031-35 | 2036-40 | 2026-40 |
|---|---|---|---|---|
| 21301 Mechanical engineers | -1,420 | 0 | -30 | -1,440 |
| 21310 Electrical & electronics engineers | -380 | -20 | -20 | -410 |
| 21311 Computer engineers (except software engineers & designers) | -80 | 0 | 0 | -90 |
| 21320 Chemical engineers | -70 | -10 | -10 | -80 |
| 21321 Industrial & manufacturing engineers | -600 | 0 | -10 | -610 |
| 21322 Metallurgical & materials engineers | -70 | 0 | 0 | -70 |
| 21330 Mining Engineers | -10 | 0 | 0 | -10 |
| 22100 Chemical technologists & technicians | -60 | 0 | 0 | -60 |
| 22220 Computer network & web technicians | -200 | 0 | 0 | -210 |
| 22222 Information systems testing technicians | -20 | 0 | 0 | -20 |
| 22301 Mechanical engineering technologists & technicians | -720 | 0 | -10 | -730 |
| 22302 Industrial engineering & manufacturing technologists & technicians | -540 | 0 | -10 | -560 |
| 22310 Electrical & electronics engineering technologists & technicians | -290 | -20 | -20 | -330 |
| 22312 Industrial instrument technicians & mechanics | -40 | 0 | 0 | -40 |
| 72010 Contractors & supervisors, machining, metal forming, shaping & erecting trades & related occupations | -230 | 0 | 0 | -230 |
| 72020 Contractors & supervisors, mechanic trades | -180 | 0 | 0 | -180 |
| 72100 Machinists & machining & tooling inspectors | -870 | 0 | -10 | -880 |
| 72101 Tool & die makers | -780 | 10 | 0 | -780 |
| 72106 Welders & related machine operators | -1,590 | 10 | -10 | -1,590 |
| 72200 Electricians (except industrial & power system) | -60 | 0 | 0 | -60 |
| 72201 Industrial electricians | -830 | 10 | -10 | -830 |
| 72400 Construction millwrights & industrial mechanics | -1,300 | 0 | -20 | -1,320 |
| 72410 Automotive service technicians, truck & bus mechanics & mechanical repairers | -880 | 10 | -10 | -870 |
| 73300 Transport truck drivers | -460 | 0 | -10 | -470 |
| 73400 Heavy equipment operators | -110 | -10 | 0 | -120 |
| 75101 Material handlers | -2,380 | 10 | -30 | -2,410 |
| 82020 Supervisors, mining & quarrying | -10 | 0 | 0 | -10 |

| Expansion Demand – Scenario 3 | 2026-30 | 2031-35 | 2036-40 | 2026-40 |
|---|---|---|---|---|
| 83100 Underground production & development miners | -20 | -10 | 0 | -30 |
| 84100 Underground mine service & support workers | -10 | 0 | 0 | -10 |
| 90010 Manufacturing managers | -1,910 | -10 | -40 | -1,960 |
| 92020 Supervisors, motor vehicle assembling | -2,870 | 70 | -20 | -2,810 |
| 92021 Supervisors, electronics & electrical products manufacturing | 10 | -10 | -10 | -10 |
| 93100 Central control & process operators, mineral & metal processing | -70 | 0 | 0 | -70 |
| 93101 Central control & process operators, petroleum, gas & chemical processing | -50 | -10 | -10 | -60 |
| 94100 Machine operators, mineral & metal processing | -580 | -10 | -10 | -590 |
| 94101 Foundry workers | -160 | 0 | 0 | -160 |
| 94104 Inspectors & testers, mineral & metal processing | -100 | 0 | 0 | -100 |
| 94105 Metalworking & forging machine operators | -470 | 0 | 0 | -470 |
| 94106 Machining tool operators | -420 | 0 | 0 | -430 |
| 94110 Chemical plant machine operators | -50 | 0 | 0 | -50 |
| 94111 Plastics processing machine operators | -440 | 0 | -10 | -440 |
| 94200 Motor vehicle assemblers, inspectors & testers | -13,460 | 220 | -60 | -13,290 |
| 94201 Electronics assemblers, fabricators, inspectors & testers | -70 | -40 | -30 | -140 |
| 94203 Assemblers, fabricators & inspectors, industrial electrical motors & transformers | -20 | 0 | 0 | -20 |
| 94204 Mechanical assemblers & inspectors | -610 | 10 | -10 | -610 |
| 94212 Plastic products assemblers, finishers & inspectors | -140 | 0 | 0 | -140 |
| 94213 Industrial painters, coaters & metal finishing process operators | -630 | 10 | 0 | -630 |
| 95100 Labourers in mineral & metal processing | -420 | 0 | 0 | -430 |
| 95102 Labourers in chemical products processing & utilities | -110 | 0 | 0 | -110 |
| 95109 Other labourers in processing, manufacturing & utilities | -1,080 | -20 | -30 | -1,130 |

*Replacement Demand*

Replacement demand is an estimate of the number of workers needed to maintain current levels of employment, as workers exit the labour force due to retirements and deaths. Results in Table E2 are expressed as the number of additional workers (aged 15 to 69) that will be required, relative to 2025 base year employment.

Table E2. Replacement demand – detailed results, Scenario 3

| Replacement Demand – Scenario 3 | 2026-30 | 2031-35 | 2036-40 | 2026-40 |
|---|---|---|---|---|
| 00018 Senior managers - public & private sector | 5,960 | 5,940 | 5,940 | 17,830 |
| 11200 Human resources professionals | 1,210 | 1,200 | 1,200 | 3,610 |
| 13201 Production & transportation logistics coordinators | 720 | 710 | 710 | 2,130 |
| 14400 Shippers & receivers | 3,210 | 3,180 | 3,180 | 9,570 |
| 14402 Production logistics workers | 140 | 130 | 130 | 400 |
| 20010 Engineering managers | 1,580 | 1,580 | 1,570 | 4,730 |
| 20012 Computer & information systems managers | 2,750 | 2,750 | 2,750 | 8,250 |
| 21101 Chemists | 340 | 340 | 340 | 1,020 |
| 21211 Data scientists | 110 | 110 | 110 | 320 |
| 21220 Cybersecurity specialists | 300 | 300 | 300 | 890 |
| 21221 Business systems specialists | 770 | 760 | 760 | 2,290 |
| 21222 Information systems specialists | 5,480 | 5,470 | 5,470 | 16,430 |
| 21223 Database analysts & data administrators | 570 | 570 | 570 | 1,700 |
| 21230 Computer systems developers & programmers | 1,220 | 1,220 | 1,220 | 3,660 |
| 21231 Software engineers & designers | 2,350 | 2,340 | 2,340 | 7,040 |
| 21232 Software developers & programmers | 2,290 | 2,280 | 2,280 | 6,850 |
| 21233 Web designers | 300 | 300 | 300 | 900 |
| 21234 Web developers & programmers | 1,000 | 1,000 | 1,000 | 2,990 |
| 21301 Mechanical engineers | 2,410 | 2,390 | 2,380 | 7,180 |
| 21310 Electrical & electronics engineers | 2,610 | 2,600 | 2,600 | 7,810 |
| 21311 Computer engineers (except software engineers & designers) | 950 | 950 | 950 | 2,840 |
| 21320 Chemical engineers | 410 | 410 | 410 | 1,230 |
| 21321 Industrial & manufacturing engineers | 630 | 620 | 620 | 1,880 |
| 21322 Metallurgical & materials engineers | 130 | 120 | 120 | 370 |

| Replacement Demand – Scenario 3 | 2026-30 | 2031-35 | 2036-40 | 2026-40 |
|---|---|---|---|---|
| 21330 Mining Engineers | 140 | 140 | 140 | 410 |
| 22100 Chemical technologists & technicians | 370 | 370 | 370 | 1,110 |
| 22220 Computer network & web technicians | 1,230 | 1,230 | 1,230 | 3,690 |
| 22222 Information systems testing technicians | 250 | 250 | 250 | 740 |
| 22301 Mechanical engineering technologists & technicians | 1,310 | 1,290 | 1,290 | 3,900 |
| 22302 Industrial engineering & manufacturing technologists & technicians | 810 | 800 | 800 | 2,410 |
| 22310 Electrical & electronics engineering technologists & technicians | 1,750 | 1,740 | 1,740 | 5,220 |
| 22312 Industrial instrument technicians & mechanics | 210 | 210 | 210 | 640 |
| 72010 Contractors & supervisors, machining, metal forming, shaping & erecting trades & related occupations | 840 | 830 | 830 | 2,500 |
| 72020 Contractors & supervisors, mechanic trades | 260 | 260 | 260 | 770 |
| 72100 Machinists & machining & tooling inspectors | 2,520 | 2,490 | 2,490 | 7,500 |
| 72101 Tool & die makers | 1,310 | 1,280 | 1,280 | 3,870 |
| 72106 Welders & related machine operators | 2,590 | 2,550 | 2,550 | 7,700 |
| 72200 Electricians (except industrial & power system) | 150 | 150 | 150 | 440 |
| 72201 Industrial electricians | 630 | 610 | 610 | 1,850 |
| 72400 Construction millwrights & industrial mechanics | 2,110 | 2,070 | 2,070 | 6,240 |
| 72410 Automotive service technicians, truck & bus mechanics & mechanical repairers | 760 | 740 | 740 | 2,240 |
| 73300 Transport truck drivers | 1,930 | 1,910 | 1,910 | 5,760 |
| 73400 Heavy equipment operators | 580 | 580 | 580 | 1,750 |
| 75101 Material handlers | 7,070 | 7,010 | 7,010 | 21,090 |
| 82020 Supervisors, mining & quarrying | 250 | 250 | 250 | 740 |
| 83100 Underground production & development miners | 360 | 360 | 360 | 1,080 |
| 84100 Underground mine service & support workers | 120 | 120 | 120 | 360 |
| 90010 Manufacturing managers | 4,100 | 4,040 | 4,040 | 12,180 |
| 92020 Supervisors, motor vehicle assembling | 450 | 390 | 400 | 1,240 |

| Replacement Demand – Scenario 3 | 2026-30 | 2031-35 | 2036-40 | 2026-40 |
|---|---|---|---|---|
| 92021 Supervisors, electronics & electrical products manufacturing | 170 | 170 | 170 | 510 |
| 93100 Central control & process operators, mineral & metal processing | 120 | 120 | 120 | 370 |
| 93101 Central control & process operators, petroleum, gas & chemical processing | 300 | 300 | 300 | 900 |
| 94100 Machine operators, mineral & metal processing | 550 | 540 | 540 | 1,620 |
| 94101 Foundry workers | 200 | 200 | 200 | 600 |
| 94104 Inspectors & testers, mineral & metal processing | 150 | 140 | 140 | 430 |
| 94105 Metalworking & forging machine operators | 950 | 940 | 940 | 2,830 |
| 94106 Machining tool operators | 700 | 690 | 690 | 2,090 |
| 94110 Chemical plant machine operators | 270 | 270 | 270 | 810 |
| 94111 Plastics processing machine operators | 1,740 | 1,730 | 1,730 | 5,200 |
| 94200 Motor vehicle assemblers, inspectors & testers | 5,110 | 4,750 | 4,760 | 14,630 |
| 94201 Electronics assemblers, fabricators, inspectors & testers | 1,640 | 1,640 | 1,630 | 4,900 |
| 94203 Assemblers, fabricators & inspectors, industrial electrical motors & transformers | 210 | 210 | 210 | 640 |
| 94204 Mechanical assemblers & inspectors | 260 | 250 | 250 | 750 |
| 94212 Plastic products assemblers, finishers & inspectors | 560 | 560 | 560 | 1,670 |
| 94213 Industrial painters, coaters & metal finishing process operators | 730 | 710 | 710 | 2,150 |
| 95100 Labourers in mineral & metal processing | 510 | 500 | 500 | 1,500 |
| 95102 Labourers in chemical products processing & utilities | 460 | 450 | 450 | 1,360 |
| 95109 Other labourers in processing, manufacturing & utilities | 2,660 | 2,630 | 2,620 | 7,910 |

*New Entrants*

New entrants include the number of additional young people and immigrants who are expected to enter the labour force, relative to the 2025 base year.

Table E3. New entrants – detailed results, Scenario 3.

| New Entrants – Scenario 3 | 2026-30 | 2031-35 | 2036-40 | 2026-40 |
|---|---|---|---|---|
| 00018 Senior managers - public & private sector | 280 | 300 | 290 | 870 |
| 11200 Human resources professionals | 410 | 430 | 420 | 1,260 |
| 13201 Production & transportation logistics coordinators | 280 | 290 | 280 | 860 |
| 14400 Shippers & receivers | 920 | 970 | 940 | 2,840 |
| 14402 Production logistics workers | 70 | 80 | 80 | 230 |
| 20010 Engineering managers | 220 | 230 | 230 | 680 |
| 20012 Computer & information systems managers | 450 | 480 | 460 | 1,390 |
| 21101 Chemists | 150 | 160 | 150 | 460 |
| 21211 Data scientists | 290 | 310 | 300 | 900 |
| 21220 Cybersecurity specialists | 170 | 180 | 180 | 540 |
| 21221 Business systems specialists | 290 | 300 | 290 | 890 |
| 21222 Information systems specialists | 1,280 | 1,350 | 1,310 | 3,930 |
| 21223 Database analysts & data administrators | 170 | 180 | 170 | 520 |
| 21230 Computer systems developers & programmers | 840 | 890 | 860 | 2,590 |
| 21231 Software engineers & designers | 2,220 | 2,340 | 2,270 | 6,820 |
| 21232 Software developers & programmers | 2,750 | 2,900 | 2,810 | 8,460 |
| 21233 Web designers | 370 | 390 | 380 | 1,130 |
| 21234 Web developers & programmers | 1,620 | 1,710 | 1,660 | 5,000 |
| 21301 Mechanical engineers | 1,110 | 1,160 | 1,130 | 3,400 |
| 21310 Electrical & electronics engineers | 780 | 820 | 800 | 2,400 |
| 21311 Computer engineers (except software engineers & designers) | 300 | 310 | 300 | 910 |
| 21320 Chemical engineers | 220 | 240 | 230 | 690 |
| 21321 Industrial & manufacturing engineers | 320 | 340 | 330 | 990 |
| 21322 Metallurgical & materials engineers | 70 | 70 | 70 | 210 |
| 21330 Mining Engineers | 60 | 60 | 60 | 190 |
| 22100 Chemical technologists & technicians | 130 | 140 | 130 | 400 |
| 22220 Computer network & web technicians | 690 | 720 | 700 | 2,110 |
| 22222 Information systems testing technicians | 340 | 360 | 340 | 1,040 |
| 22301 Mechanical engineering technologists & technicians | 500 | 530 | 510 | 1,540 |
| 22302 Industrial engineering & manufacturing technologists & technicians | 290 | 300 | 290 | 880 |

| New Entrants – Scenario 3 | 2026-30 | 2031-35 | 2036-40 | 2026-40 |
|---|---|---|---|---|
| 22310 Electrical & electronics engineering technologists & technicians | 480 | 510 | 490 | 1,470 |
| 22312 Industrial instrument technicians & mechanics | 80 | 80 | 80 | 230 |
| 72010 Contractors & supervisors, machining, metal forming, shaping & erecting trades & related occupations | 110 | 120 | 110 | 340 |
| 72020 Contractors & supervisors, mechanic trades | 90 | 90 | 90 | 270 |
| 72100 Machinists & machining & tooling inspectors | 640 | 670 | 650 | 1,970 |
| 72101 Tool & die makers | 190 | 190 | 190 | 570 |
| 72106 Welders & related machine operators | 1,050 | 1,090 | 1,060 | 3,200 |
| 72200 Electricians (except industrial & power system) | 100 | 110 | 100 | 310 |
| 72201 Industrial electricians | 150 | 150 | 140 | 440 |
| 72400 Construction millwrights & industrial mechanics | 370 | 390 | 380 | 1,140 |
| 72410 Automotive service technicians, truck & bus mechanics & mechanical repairers | 290 | 300 | 290 | 880 |
| 73300 Transport truck drivers | 260 | 270 | 270 | 800 |
| 73400 Heavy equipment operators | 180 | 190 | 190 | 560 |
| 75101 Material handlers | 3,220 | 3,380 | 3,280 | 9,870 |
| 82020 Supervisors, mining & quarrying | 20 | 30 | 20 | 80 |
| 83100 Underground production & development miners | 130 | 130 | 130 | 390 |
| 84100 Underground mine service & support workers | 60 | 60 | 60 | 190 |
| 90010 Manufacturing managers | 250 | 260 | 250 | 750 |
| 92020 Supervisors, motor vehicle assembling | 70 | 70 | 70 | 210 |
| 92021 Supervisors, electronics & electrical products manufacturing | 40 | 50 | 40 | 140 |
| 93100 Central control & process operators, mineral & metal processing | 50 | 60 | 50 | 160 |
| 93101 Central control & process operators, petroleum, gas & chemical processing | 160 | 170 | 160 | 490 |
| 94100 Machine operators, mineral & metal processing | 200 | 210 | 200 | 610 |
| 94101 Foundry workers | 80 | 80 | 80 | 230 |

| New Entrants – Scenario 3 | 2026-30 | 2031-35 | 2036-40 | 2026-40 |
|---|---|---|---|---|
| 94104 Inspectors & testers, mineral & metal processing | 60 | 60 | 60 | 180 |
| 94105 Metalworking & forging machine operators | 290 | 310 | 300 | 900 |
| 94106 Machining tool operators | 200 | 210 | 200 | 610 |
| 94110 Chemical plant machine operators | 70 | 80 | 80 | 230 |
| 94111 Plastics processing machine operators | 420 | 440 | 430 | 1,280 |
| 94200 Motor vehicle assemblers, inspectors & testers | 1,390 | 1,390 | 1,350 | 4,130 |
| 94201 Electronics assemblers, fabricators, inspectors & testers | 210 | 230 | 220 | 660 |
| 94203 Assemblers, fabricators & inspectors, industrial electrical motors & transformers | 60 | 60 | 60 | 190 |
| 94204 Mechanical assemblers & inspectors | 110 | 110 | 110 | 320 |
| 94212 Plastic products assemblers, finishers & inspectors | 160 | 170 | 170 | 500 |
| 94213 Industrial painters, coaters & metal finishing process operators | 260 | 270 | 260 | 790 |
| 95100 Labourers in mineral & metal processing | 230 | 240 | 230 | 700 |
| 95102 Labourers in chemical products processing & utilities | 200 | 210 | 200 | 600 |
| 95109 Other labourers in processing, manufacturing & utilities | 920 | 970 | 940 | 2,830 |

## Recruitment Gap (#)

The recruitment gap is a composite measure that incorporates expansion demand, replacement demand, and new entrants. of labour market conditions. The values in Table E4 are expressed as the number of additional workers for each occupation, relative to 2025 base year employment.

Table E4. Recruitment gap (#) – detailed results, Scenario 3.

| Recruitment Gap (#) – Scenario 3 | 2026-30 | 2031-35 | 2036-40 | 2026-40 |
|---|---|---|---|---|
| 00018 Senior managers - public & private sector | 5,120 | 5,630 | 5,630 | 16,370 |
| 11200 Human resources professionals | 430 | 770 | 780 | 1,980 |
| 13201 Production & transportation logistics coordinators | 50 | 410 | 420 | 880 |
| 14400 Shippers & receivers | 1,310 | 2,200 | 2,220 | 5,730 |
| 14402 Production logistics workers | -40 | 50 | 60 | 70 |
| 20010 Engineering managers | 1,050 | 1,330 | 1,340 | 3,720 |
| 20012 Computer & information systems managers | 2,060 | 2,270 | 2,280 | 6,610 |
| 21101 Chemists | 150 | 180 | 180 | 520 |
| 21211 Data scientists | -230 | -200 | -190 | -620 |
| 21220 Cybersecurity specialists | 90 | 110 | 120 | 330 |
| 21221 Business systems specialists | 400 | 460 | 470 | 1,330 |
| 21222 Information systems specialists | 3,860 | 4,130 | 4,160 | 12,160 |
| 21223 Database analysts & data administrators | 350 | 390 | 390 | 1,130 |
| 21230 Computer systems developers & programmers | 240 | 330 | 360 | 930 |
| 21231 Software engineers & designers | -310 | 10 | 70 | -220 |
| 21232 Software developers & programmers | -760 | -620 | -540 | -1,910 |
| 21233 Web designers | -80 | -90 | -70 | -240 |
| 21234 Web developers & programmers | -730 | -720 | -670 | -2,120 |
| 21301 Mechanical engineers | -110 | 1,220 | 1,230 | 2,340 |
| 21310 Electrical & electronics engineers | 1,450 | 1,760 | 1,780 | 5,000 |
| 21311 Computer engineers (except software engineers & designers) | 570 | 630 | 640 | 1,840 |
| 21320 Chemical engineers | 120 | 170 | 170 | 460 |
| 21321 Industrial & manufacturing engineers | -290 | 290 | 290 | 280 |
| 21322 Metallurgical & materials engineers | -10 | 50 | 50 | 90 |

| Recruitment Gap (#) – Scenario 3 | 2026-30 | 2031-35 | 2036-40 | 2026-40 |
|---|---|---|---|---|
| 21330 Mining Engineers | 70 | 70 | 70 | 210 |
| 22100 Chemical technologists & technicians | 180 | 230 | 230 | 650 |
| 22220 Computer network & web technicians | 350 | 500 | 520 | 1,370 |
| 22222 Information systems testing technicians | -110 | -110 | -100 | -320 |
| 22301 Mechanical engineering technologists & technicians | 90 | 770 | 770 | 1,620 |
| 22302 Industrial engineering & manufacturing technologists & technicians | -20 | 500 | 500 | 980 |
| 22310 Electrical & electronics engineering technologists & technicians | 970 | 1,220 | 1,230 | 3,420 |
| 22312 Industrial instrument technicians & mechanics | 100 | 130 | 130 | 370 |
| 72010 Contractors & supervisors, machining, metal forming, shaping & erecting trades & related occupations | 500 | 720 | 720 | 1,930 |
| 72020 Contractors & supervisors, mechanic trades | -10 | 160 | 160 | 320 |
| 72100 Machinists & machining & tooling inspectors | 1,000 | 1,820 | 1,830 | 4,650 |
| 72101 Tool & die makers | 340 | 1,090 | 1,090 | 2,520 |
| 72106 Welders & related machine operators | -40 | 1,470 | 1,480 | 2,910 |
| 72200 Electricians (except industrial & power system) | -10 | 40 | 40 | 70 |
| 72201 Industrial electricians | -350 | 470 | 460 | 580 |
| 72400 Construction millwrights & industrial mechanics | 430 | 1,680 | 1,670 | 3,780 |
| 72410 Automotive service technicians, truck & bus mechanics & mechanical repairers | -410 | 450 | 440 | 480 |
| 73300 Transport truck drivers | 1,210 | 1,640 | 1,640 | 4,490 |
| 73400 Heavy equipment operators | 290 | 380 | 390 | 1,070 |
| 75101 Material handlers | 1,470 | 3,640 | 3,700 | 8,810 |
| 82020 Supervisors, mining & quarrying | 210 | 220 | 220 | 650 |
| 83100 Underground production & development miners | 220 | 220 | 230 | 670 |

| Recruitment Gap (#) – Scenario 3 | 2026-30 | 2031-35 | 2036-40 | 2026-40 |
|---|---|---|---|---|
| 84100 Underground mine service & support workers | 50 | 50 | 60 | 160 |
| 90010 Manufacturing managers | 1,950 | 3,780 | 3,750 | 9,470 |
| 92020 Supervisors, motor vehicle assembling | -2,490 | 400 | 310 | -1,770 |
| 92021 Supervisors, electronics & electrical products manufacturing | 140 | 110 | 120 | 370 |
| 93100 Central control & process operators, mineral & metal processing | 0 | 70 | 70 | 130 |
| 93101 Central control & process operators, petroleum, gas & chemical processing | 100 | 120 | 130 | 350 |
| 94100 Machine operators, mineral & metal processing | -230 | 320 | 330 | 420 |
| 94101 Foundry workers | -40 | 120 | 120 | 200 |
| 94104 Inspectors & testers, mineral & metal processing | -10 | 80 | 80 | 160 |
| 94105 Metalworking & forging machine operators | 190 | 630 | 640 | 1,460 |
| 94106 Machining tool operators | 80 | 480 | 490 | 1,050 |
| 94110 Chemical plant machine operators | 150 | 190 | 190 | 530 |
| 94111 Plastics processing machine operators | 890 | 1,290 | 1,290 | 3,480 |
| 94200 Motor vehicle assemblers, inspectors & testers | -9,740 | 3,590 | 3,360 | -2,780 |
| 94201 Electronics assemblers, fabricators, inspectors & testers | 1,350 | 1,370 | 1,380 | 4,110 |
| 94203 Assemblers, fabricators & inspectors, industrial electrical motors & transformers | 130 | 150 | 150 | 430 |
| 94204 Mechanical assemblers & inspectors | -460 | 150 | 130 | -180 |
| 94212 Plastic products assemblers, finishers & inspectors | 260 | 390 | 390 | 1,030 |
| 94213 Industrial painters, coaters & metal finishing process operators | -160 | 450 | 440 | 730 |
| 95100 Labourers in mineral & metal processing | -150 | 260 | 260 | 370 |

| Recruitment Gap (#) – Scenario 3 | 2026-30 | 2031-35 | 2036-40 | 2026-40 |
|---|---|---|---|---|
| 95102 Labourers in chemical products processing & utilities | 150 | 240 | 250 | 650 |
| 95109 Other labourers in processing, manufacturing & utilities | 650 | 1,640 | 1,660 | 3,950 |

## Recruitment Gap (% of 2025 base year employment)

Table E5 shows the recruitment gap for each occupation, expressed as a percentage of 2025 base year employment.

For example: If the recruitment gap percentage for an occupation is 50%, then an amount equal to half of the employed workers in 2025 will be required during the forecast period. These results take into consideration demographics and other supply-side conditions, given the broader industry impacts affecting demand.

Table E5. Recruitment gap (% of 2025 base year employment) – detailed results, Scenario 3.

| Recruitment Gap - % of 2025 base employment Scenario 3 | 2026-30 | 2031-35 | 2036-40 | 2026-40 |
|---|---|---|---|---|
| 00018 Senior managers - public & private sector | 14% | 16% | 16% | 46% |
| 11200 Human resources professionals | 4% | 7% | 7% | 19% |
| 13201 Production & transportation logistics coordinators | 1% | 5% | 5% | 11% |
| 14400 Shippers & receivers | 5% | 9% | 9% | 24% |
| 14402 Production logistics workers | -3% | 3% | 4% | 5% |
| 20010 Engineering managers | 8% | 10% | 10% | 27% |
| 20012 Computer & information systems managers | 7% | 7% | 7% | 21% |
| 21101 Chemists | 5% | 5% | 5% | 16% |
| 21211 Data scientists | -5% | -5% | -5% | -15% |
| 21220 Cybersecurity specialists | 2% | 3% | 3% | 8% |
| 21221 Business systems specialists | 5% | 5% | 5% | 15% |
| 21222 Information systems specialists | 7% | 8% | 8% | 23% |
| 21223 Database analysts & data administrators | 7% | 8% | 8% | 22% |
| 21230 Computer systems developers & programmers | 1% | 2% | 2% | 6% |
| 21231 Software engineers & designers | -1% | 0% | 0% | 0% |
| 21232 Software developers & programmers | -2% | -1% | -1% | -4% |

| Recruitment Gap - % of 2025 base employment Scenario 3 | 2026-30 | 2031-35 | 2036-40 | 2026-40 |
|---|---|---|---|---|
| 21233 Web designers | -1% | -1% | -1% | -4% |
| 21234 Web developers & programmers | -3% | -3% | -3% | -8% |
| 21301 Mechanical engineers | 0% | 5% | 5% | 9% |
| 21310 Electrical & electronics engineers | 7% | 8% | 8% | 23% |
| 21311 Computer engineers (except software engineers & designers) | 5% | 6% | 6% | 17% |
| 21320 Chemical engineers | 3% | 4% | 4% | 10% |
| 21321 Industrial & manufacturing engineers | -4% | 4% | 4% | 4% |
| 21322 Metallurgical & materials engineers | -1% | 4% | 4% | 7% |
| 21330 Mining Engineers | 5% | 5% | 5% | 16% |
| 22100 Chemical technologists & technicians | 6% | 8% | 8% | 23% |
| 22220 Computer network & web technicians | 2% | 3% | 3% | 8% |
| 22222 Information systems testing technicians | -2% | -2% | -2% | -7% |
| 22301 Mechanical engineering technologists & technicians | 1% | 6% | 6% | 14% |
| 22302 Industrial engineering & manufacturing technologists & technicians | 0% | 7% | 7% | 13% |
| 22310 Electrical & electronics engineering technologists & technicians | 8% | 10% | 10% | 27% |
| 22312 Industrial instrument technicians & mechanics | 6% | 7% | 7% | 21% |
| 72010 Contractors & supervisors, machining, metal forming, shaping & erecting trades & related occupations | 9% | 13% | 13% | 35% |
| 72020 Contractors & supervisors, mechanic trades | 0% | 7% | 7% | 14% |
| 72100 Machinists & machining & tooling inspectors | 5% | 10% | 10% | 24% |
| 72101 Tool & die makers | 5% | 14% | 14% | 33% |
| 72106 Welders & related machine operators | 0% | 6% | 6% | 12% |
| 72200 Electricians (except industrial & power system) | -1% | 3% | 3% | 4% |
| 72201 Industrial electricians | -6% | 9% | 8% | 11% |
| 72400 Construction millwrights & industrial mechanics | 3% | 11% | 11% | 26% |
| 72410 Automotive service technicians, truck & bus mechanics & mechanical repairers | -6% | 7% | 6% | 7% |
| 73300 Transport truck drivers | 12% | 16% | 16% | 43% |

| Recruitment Gap - % of 2025 base employment Scenario 3 | 2026-30 | 2031-35 | 2036-40 | 2026-40 |
|---|---|---|---|---|
| 73400 Heavy equipment operators | 7% | 9% | 9% | 26% |
| 75101 Material handlers | 2% | 6% | 6% | 13% |
| 82020 Supervisors, mining & quarrying | 11% | 12% | 12% | 34% |
| 83100 Underground production & development miners | 6% | 6% | 6% | 17% |
| 84100 Underground mine service & support workers | 4% | 4% | 5% | 13% |
| 90010 Manufacturing managers | 7% | 14% | 14% | 35% |
| 92020 Supervisors, motor vehicle assembling | -47% | 7% | 6% | -33% |
| 92021 Supervisors, electronics & electrical products manufacturing | 11% | 9% | 9% | 29% |
| 93100 Central control & process operators, mineral & metal processing | 0% | 5% | 5% | 9% |
| 93101 Central control & process operators, petroleum, gas & chemical processing | 3% | 4% | 4% | 10% |
| 94100 Machine operators, mineral & metal processing | -4% | 5% | 6% | 7% |
| 94101 Foundry workers | -2% | 6% | 6% | 11% |
| 94104 Inspectors & testers, mineral & metal processing | -1% | 6% | 6% | 13% |
| 94105 Metalworking & forging machine operators | 3% | 9% | 9% | 22% |
| 94106 Machining tool operators | 2% | 9% | 9% | 20% |
| 94110 Chemical plant machine operators | 7% | 9% | 9% | 25% |
| 94111 Plastics processing machine operators | 7% | 11% | 11% | 29% |
| 94200 Motor vehicle assemblers, inspectors & testers | -23% | 8% | 8% | -6% |
| 94201 Electronics assemblers, fabricators, inspectors & testers | 17% | 17% | 17% | 51% |
| 94203 Assemblers, fabricators & inspectors, industrial electrical motors & transformers | 9% | 10% | 10% | 30% |
| 94204 Mechanical assemblers & inspectors | -19% | 6% | 5% | -8% |
| 94212 Plastic products assemblers, finishers & inspectors | 7% | 11% | 11% | 28% |
| 94213 Industrial painters, coaters & metal finishing process operators | -3% | 8% | 7% | 12% |
| 95100 Labourers in mineral & metal processing | -3% | 5% | 5% | 8% |

| Recruitment Gap - % of 2025 base employment Scenario 3 | 2026-30 | 2031-35 | 2036-40 | 2026-40 |
|---|---|---|---|---|
| 95102 Labourers in chemical products processing & utilities | 4% | 7% | 7% | 18% |
| 95109 Other labourers in processing, manufacturing & utilities | 3% | 8% | 9% | 20% |

CSTEC
Canadian Skills Training & Employment Coalition

## 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.

APRC
Automotive Policy Research Centre

## 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.

Future Skills Centre | Centre des Compétences futures

## 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.