

# MANUFACTURING



A Study of Perceptions,  
Issues and Possibilities  
for the London  
Economic Region

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August 2013

# MANUFACTURING in the London Economic Region

**Publisher:** Elgin Middlesex Oxford Workforce Planning & Development Board, August 2013

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**Photos** provided courtesy Elgin County Economic Development & Tourism and Toyota Motor Manufacturing Inc.

## **Acknowledgements:**

Jack Adams — London Economic Development Corporation  
Jason Bates — Excellence in Manufacturing Consortium  
Paul Bourgeois  
Mary Cushing — Great Lakes Copper  
Kathy Davis — TrojanUV  
Chris Duncan — Daddy's Photography  
Donna Hodgins — Stax Packaging  
Brian Hughes — JMP Engineering

Michael Lodder— Transform Automotive  
Debra Mountenay — Elgin Middlesex Oxford Workforce Planning & Development Board  
Todd Oliver — Excellence in Manufacturing Consortium  
Cephas Panschow — Town of Tillsonburg  
Dave Shaw — Taurus Stampings  
Paul Walmsley  
Martin Withenshaw — Elgin Middlesex Oxford Workforce Planning & Development Board

...and to the many anonymous contributors who graciously provided their time and input.

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This Employment Ontario project is funded by the Ontario government.



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## Introduction

With the global economic downturn in 2008 that saw a rise in unemployment due to layoffs and closures, there is a perception that manufacturing in the London Economic Region (the City of London, Elgin, Middlesex, and Oxford Counties) took a catastrophic hit. The prevailing feeling among the general public is that manufacturing in the region is in decline. Certainly media coverage of the struggles and demise of large local automotive manufacturers have contributed to the perception that manufacturing “jobs are never coming back”. Automotive production, however, is but one sub-sector of a large and diverse sector of the economy in London and area. With recent data showing an increase in manufacturing jobs in 2011 and 2012, manufacturing remains as one of the largest employment sectors in the region, with even automotive manufacturing experiencing a resurgence.

## Methodology

The study is based on local employment and business information from Statistics Canada using the most recent information from December 2012 as much as possible.

Publications from the Elgin Middlesex Oxford Workforce Planning and Development Board were used, in addition to studies such as

Miner Management Consultants “*Jobs of the Future: Options and Opportunities*” and “*Jobs Without People, People Without Jobs: Ontario's Labour Market Future.*”

“...manufacturing remains as one of the largest employment sectors in the region.”

Interviews were conducted with individuals and focus groups representing job seekers, service providers, employers and associations, to gain a better understanding of prevailing issues and perceptions.

## Overview

The recent recession certainly took its toll on manufacturing in the London Economic Region, as it did elsewhere in Ontario and across North America. Understandably, transportation has the highest profile and is the most dominant sector within manufacturing in North America. Several of the largest employers in the region are (or were) automotive assembly plants. So when major North American automotive producers Chrysler, Ford, and General Motors were faced with near collapse in 2008, the effects locally were also devastating with layoffs and plant closures. However, despite an

unemployment rate that remains stubbornly above 9% in the region, there is plenty of good news within the local manufacturing scene.

Manufacturing is experiencing resurgence in the region, with jobs coming back in many manufacturing sub-sectors. The manufacturing sector had a labour force of 48,200 people in the London Economic

Region in 2012. While still below the 2008 numbers of 52,900 it represents a significant 9.5% increase over a low of 43,600 in 2010. For the first time since 2008, manufacturing at 14.7% overtook trade at 14% as the largest employment sector in the region during 2012. So despite the opinions of many that “manufacturing is dead” the numbers show that quite the opposite is true.

## London Economic Region Employment

London Economic Region (ER 3560 - Elgin, Middlesex and Oxford )	(Numbers in thousands)					Percent Change 2008- 2012
	2008	2009	2010	2011	2012	
<b>Total Employment</b>	333.2	320.8	324.8	324.8	328.0	-1.6%
<b>Goods Producing Sector</b>	85.3	77.9	77.3	79.1	82.0	-3.9%
Agriculture	8.2	8.7	10.5	10.4	9.3	13.4%
Forestry, Fishing, Mining, Quarrying, Oil & Gas	x	x	x	x	x	x
Utilities	1.9	2.6	1.6	x	2.7	42.1%
Construction	21.9	20.9	21.1	20.8	21.1	-3.7%
Manufacturing	52.9	45.1	43.6	45.6	48.2	-8.9%
<b>Services Producing Sector</b>	<b>247.9</b>	<b>242.9</b>	<b>247.5</b>	<b>245.7</b>	<b>246.0</b>	<b>-0.8%</b>
Trades	48.4	49.0	47.2	47.9	46.0	-3.9%
Transportation & Warehousing	16.6	14.8	14.8	15.2	17.1	3.0%
Finance, Insurance, Real Estate & Leasing	23.9	23.2	23.4	23.3	21.5	-10.0%
Professional, Scientific & Technical Services	15.6	16.5	16.0	17.6	19.8	26.9%
Business, Building & Support Services	14.8	13.5	16.8	13.7	13.8	-6.8%
Educational Services	26.8	24.0	28.5	27.5	25.6	-4.5%
Health Care & Social Assistance	43.7	45.1	45.1	45.2	42.9	-1.8%
Information, Culture & Recreation	14.0	11.7	12.1	12.4	12.5	-10.7%
Accommodation & Food Services	21.7	19.7	20.4	17.6	18.4	-15.2%
Other Services	12.9	13.8	13.4	16.1	15.3	18.6%
Public Administration	9.5	11.7	9.7	9.3	12.6	32.6%

Source: Statistics Canada, Labour Force Survey; Elgin Middlesex Oxford Workforce Planning and Development Board

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To be sure, most manufacturing sectors, not just transportation, suffered during the recession. One employer claimed that revenue dropped 20% in 2009-2010, while their sub-sector (not automotive) dropped an estimated 35% and a quarter of Ontario businesses in the sub-sector failed. Likewise, the resurgence has not been as strong as the sudden decline was swift. Opinions vary on the prospects of certain manufacturing sub-sectors, ranging from “guarded optimism” and “the trend is up” to “still shallow and shaky” and “uncertain.” So while recovery in some sub-sectors is not as robust as in others, the strength of the region's manufacturing sector is the fact that there are a range of sub-sectors within it. While the struggles of the automotive industry received a major share of the media coverage, transportation is but one sub-sector of a large and diverse manufacturing base in the London Economic Region.

**“...the strength of the region's manufacturing sector is the fact that there are a range of sub-sectors within it.”**

There are a number of reasons why London's manufacturing sector has rebounded which include:

## Survival of the Fittest

The recession was devastating for numerous manufacturers, large and small. Many didn't survive and were forced to close. Others had to drastically alter and streamline their operations in order to survive. However, now that the economy has rebounded somewhat, many manufacturers are thriving again. With markets expanding, market share has been regained, and some experienced double digit growth in 2012.

## A few large employers gone but many small ones growing

True, the loss of just a few large employers can devastate a community and even a region, but economic growth in all sectors is largely driven by small business, including manufacturing. Likewise, small and medium sized manufacturers generally have a greater flexibility than large scale operations in how they operate, what customers they service, and what they produce.

## Entrepreneurial spirit

The recession required manufacturers to devise creative solutions to address complex problems. The London region is lucky enough to have creative, talented people with a passion for manufacturing in a variety

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of sub-sectors. Instead of contracting, some chose to grow by buying out competitors and suppliers, using ever improving analytical tools in production and sales, and continually looking for new markets. Others brought in new management teams to devise and implement fresh ideas. Entrepreneurial leadership also tends to identify like-minded, talented people among their employees. There are a number of examples of local employees who showed initiative and an aptitude for learning that were identified and promoted, often to positions and tasks completely unrelated to what they were originally hired for.

### **Local ownership with a commitment to community**

Small and medium sized businesses generally are locally owned and managed by people from the local community. Locally owned manufacturers tend to be committed to the communities they are in, as they do not have the capacity to juggle operations by ramping up production in some facilities while closing others around the globe. In addition, a greater commitment to the community generally means a greater interest in the personal and professional wellbeing of their employees. Multinationals tend not to have the same commitment to communities, and more



than likely will make decisions based solely on what is best for investors.

### **Location and Clusters**

The London Economic Region is ideally situated in Canada as many manufacturers have a large share of their business in the U.S. market. The region is located midway between major border crossings with the states of Michigan and New York, accessible by major highway and rail lines, and the city is committed to further developing air cargo capabilities at the region's international airport. In addition, the region is home to some significant manufacturing clusters, such as agri-food processing, automotive parts suppliers, defence manufacturers, life sciences products, and wood products, to name a few. Those clusters attract the attention of other manufacturers, to identify what aspects of the region saw those clusters develop.

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## Significant Manufacturing Subsectors in the London Economic Region

### Transportation

Despite the devastating effect of the recession on the North American automotive sector, and the closure of some large local assembly plants, transportation remains the largest manufacturing sub-sector in the region. The loss of the Ford and Sterling production facilities were at least partially offset by the opening of the Toyota plant, and increased production at Cami. While Elgin continued to lose jobs in the sector in 2012, Oxford's employment remained steady while Middlesex saw a slight increase. With the recent upswing in the North American auto market, local automotive suppliers are also experiencing a rebound, with some forecasting strong production numbers beyond 2017.

“Transportation manufacturing is not limited to the production of cars and trucks...”

Transportation manufacturing is not limited to the production of cars and trucks; it includes all forms of transportation of which the region has some significant clusters and expertise such as:

**Boat Building:** The region is home to a little known but high quality number of boat manufacturers. These include manufacturers of canoes, yachts, and sailboats with a large export market, and Olympic rowing shells used in competition around the globe.

**Military Armored Vehicle, Tank, and Tank Component Manufacturing:** The region is also home to a significant cluster of defence equipment manufacturers, mainly focused on armoured vehicle production. With the release of the Canada First Defence Strategy in 2006, the Government of Canada identified and outlined a long term plan to equip and modernize the Canadian Forces over the next two decades. The plan has already included upgrading the existing fleet of Light Armoured Vehicles, with London as a major provider of those upgrades. In addition the plan looks to acquire fleets of three new vehicles, where London area manufacturers should figure prominently in their production.

### Food and Beverage

Food manufacturing is the second largest sub-sector in the region, with indications that it will continue to grow. With long time establishments like Cargill, Kellogg's, and McCormick's, along with more recent additions such the Original Cakerie and Dr. Oetker, the region's food manufacturers

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service national and international markets. Along with transportation, it is a sub-sector of considerable significance to economic development initiatives in the region. The federal and provincial governments are promoting the “Ontario Food Cluster” through trade and investment incentives focussed primarily on southern Ontario. With London sitting in the geographic centre of the cluster, the region looks to benefit from continued investment attracted by the success of already established companies.

Included in the food sub-sector is **Pet Food** manufacturing. Over \$20 billion was spent on pet food in the U.S. in 2012, up 3% from 2011. Local start-ups like Bosco and Roxy's Inc. and Pets 4 Life, have enjoyed tremendous success in a relatively short time, in an industry that remained consistent through the recession and looks to continue to grow.

**Beverage production** is also seeing growth. With Labatt's having been a long time presence in the region, there have been other successful additions to the sector in recent years. Establishments such as Black Fly Beverage, Forked River Brewing and Railway City Brewing Company are more recent additions to a small but dynamic sector. Both Black Fly and Railway City have just moved and expanded operations, while

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“**...governments are promoting the “Ontario Food Cluster” through trade and investment incentives focussed primarily on southern Ontario.**”

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Forked River Brewing is a recent start-up. Craft breweries have tripled their market share in Ontario over the past decade and Forked River is the first such brewery to open within the City of London in over a decade.

### **Primary Metal/Fabricated Metal**

The lines between these two sub-sectors are starting to blur, with the consolidation of primary metal and fabricated metal production by some manufacturers. Some have taken to fabricating finished metal products from the primary metal they produce in the same facility. By buying out fabricators who used to be customers, they are able to produce a finished product with less mark-up and sell at a price more competitive to products produced off-shore. Fabricated metal manufacturing in the region did not suffer as severe effects of the recession as other sub-sectors, while seeing an increase in employment in 2012.

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## Machinery

Machinery manufacturing is receiving a boost from the province's initiative on clean energy. Siemens established a wind turbine manufacturing facility in Tillsonburg in 2010, while Samsung has announced plans to bring 200 jobs producing solar energy components to London by the end of 2013. With the inability of some manufacturers to make investments in machinery and equipment earlier, demand has picked up since 2011. Some employers, however, are still reluctant to undertake the kind of large scale improvements they may have made in the past. There are numerous examples of manufacturers that made large investments just prior to the recession in 2008 that never saw use, with some not even making it out of its packaging. So while the sector is recovering, it is definitely an example of a sector where “the trend is up” but it is “still shallow and shaky.”

## Wood Products

The emergence of wood product manufacturing is one of the region's success stories. Though hit hard by the collapse of the U.S. housing market in 2007/08, the sub-sector has rebounded strongly with the growth of existing manufacturers, and establishment of new facilities in the region, particularly in the Tillsonburg area. Local manufacturers

**The emergence of wood product manufacturing is one of the region's success stories.**

produce flooring, engineered beams and joists, doors and windows, and furniture and office systems. With proximity to the U.S. border, and attracted by a qualified local workforce, the local wood product sector continues to grow. Aided by the U.S. housing market that is on the rebound, area producers are optimistic about growth as they export across North America.

## Chemical

Chemical manufacturing includes the production of goods such as paints, resins, adhesives, fertilizer, tape, film, and pharmaceuticals. Major manufacturers such as 3M and Accucaps are continuing to grow, while the region and its significant health care and research sector look to compliment pharmaceutical manufacturing. The sub-sector also looks to have a significant future here with the establishment of the Fraunhofer Project Centre at Western. The centre is researching composite, lightweight materials for use in sectors that are significant in the region including the transportation, defense and renewable energy sub-sectors.

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## Other Niche sectors

**Environmental** includes the renewable energy components outlined in machinery manufacturing, in addition to geo-thermal heating and cooling systems. The region's environmental sector also includes the production of bio-fuels, and water filtration and purification systems.

**Life Sciences:** London is a major centre for medical research, which supports manufacturers of life science products such as pharmaceuticals, medical devices and medical imaging. Through partnerships with Western University and the Stiller Centre for Technological Commercial-ization, research can lead to the manufacturing of products here in London, to be distributed to markets around the world.

**Sporting goods** manufacturing is a small but dynamic niche sector in London. Products produced in London are used at the highest levels of competition and includes boat production such as canoes and Olympic caliber rowing shells, scoreboards used in facilities around the world, and hockey equipment used by players at the highest professional levels. Vaughn goalie pads, for example, are worn by NHL goalies more than any other manufacturer.

## Training Opportunities

### **As the massive “baby boom” cohort enters its retirement, employers face a looming skills shortage.**

Many are increasingly worried over the lack of qualified candidates on the horizon. London still struggles with one of the highest unemployment rates in the country. How can this be?

A study by Miner Management Consultants' *“Jobs Without People, People Without Jobs: Ontario's Labour Market Future”* describes this dilemma as “shortage in the midst of surplus” or an imbalance between skilled and non-skilled workers in Ontario. There are not enough workers with suitable post-secondary training, and too many people without. While some employers offer incentives and programs so unskilled workers can receive training, many companies do not. They offer reasons such as lack of time and money, a lack of government assistance or training options, annoyance over training employees who end up “heading down the road for an extra buck” or simply do not see training as the responsibility of the company.

Many employees who are offered training also refuse due to lack of time, a lack of knowledge of training opportunities, thinking that the training is not relevant to them, or are simply, not interested.

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There are, however, many companies that do offer training, and many employees willing to pursue it. For those that embrace an investment in training and education, the outlook for addressing the skills gap is generally positive. For those who do not, they admittedly face a dilemma over the next few years for which they do not see a solution. Many also admit the number one obstacle for their company's future growth will be a lack of qualified employees.

Employers offer a variety of training opportunities including:

## **1. Educational/tuition assistance.**

Employees are taking advantage of opportunities to take university and college programs through company sponsored tuition programs. Most require that the program of choice be related in some way to business or occupational advancement, but often those requirements are loosely defined. Companies may also link the levels of assistance with the employee's performance, rewarding better results with higher level of reimbursement.

**“For companies that embrace an investment in training and education, the outlook for addressing the skills gap is generally positive...”**



## **2. Apprenticeship programs.**

Employers facing a shortage in skilled trades are embracing apprenticeship programs for unskilled employees. Manufacturers have been running apprenticeship programs for years, with many in the skilled trades being former production employees or other unskilled labour. Employers however, are also starting to offer apprenticeship programs to new candidates and recent secondary graduates in an effort to attract new talent.

## **3. Co-op programs.**

While some employers have discontinued co-op programs due to safety and reliability concerns, others are embracing it as a tool to attract and retain young workers. Co-op placements allow students the opportunity to gain skills and experience, while evaluating whether a career in manufacturing is right for them. Employers benefit by getting to evaluate students and determine if they could be suitable candidates after graduation.

## **4. Other training and certification.**

Manufacturers tend to promote employees from the shop floor to group leader,

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supervisory and management positions. Promotion from a production employee to a supervisory role often requires leadership training and certification to meet Occupational Health and Safety Act regulations, all of which companies will provide.

### **Occupations/Skills in Demand**

So, what are the skilled trades in demand, the ones offering the best opportunities for job security now and in the future? Where are the current and looming shortages, as cited in the Miner Management Consultant's report?

#### **Electrical Engineering:**

Many engineering disciplines are in demand, but electrical engineering is the one most often mentioned.

#### **Other Engineering:**

Of the many named, mechanical and chemical are also in high demand.

#### **Skilled Trades:**

Electricians, tool and die, and other specialized maintenance skills.

#### **Quality Control:**

Often these skills require post-secondary education and significant specialized training in the workplace, suitable for individual manufacturer's specifications, processes, and products.

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**Many manufacturers have positions that require very specialized, specific and diverse skill sets.**

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#### **Sales and Marketing:**

Sales in manufacturing can require a significant amount of technical knowledge and expertise, as employees are often dealing with sophisticated, knowledgeable clients. Due to the large export market of many manufacturers, it can also require extensive travel and foreign language skills.

#### **Other Specialized Skill Sets:**

Many manufacturers have positions that require very specialized, specific, and diverse skills sets. Examples include project management that may require significant technological expertise, quality control capability, marketing and client relations, specific to a certain product or sub-sector. They require individuals with outstanding leadership skills and a suitable temperament capable of handling any number of demands and stresses, while having a very specialized technical background.

Understandably, these positions are very difficult to fill, and emphasizes the need for adequate employer-provided training.

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## Soft Skills

An often contentious and frustrating issue for most employers is what is referred to as an employee's "soft skills." While work experience, technical skills, and educational background can be outlined in a resume and elaborated in an interview, evaluating how a job candidate may "fit" into a particular manufacturer's work environment can be a difficult task. Will an employee get along well with others? Will they show up on time, ready to go? Are they accountable for their actions or are they in the habit of blaming others? Will they thrive or quit when faced with a challenge?

**“...evaluating how a candidate may “fit” into a particular manufacturer’s work environment can be a very difficult task.”**

Employers face enormous hurdles, which the average candidate may not fully appreciate, when trying to fill openings. One manufacturer, despite paying higher than average starting wages, and requiring significant manufacturing experience, estimated around forty percent of new employees left within their first three months of employment. Other manufacturers estimates were even



higher, with one employer typically conducting fifteen to twenty interviews, resulting in three to five candidates chosen for placement, in the hopes that possibly one of them will prove a good fit.

The best thing candidates can do for themselves and their new employer is research the job they are applying for and really determine if it is a good fit.

Understandably candidates can get to a point where they apply for and accept any job they can get. However, if the tasks are of the type the employee normally would not be interested in performing, the chance for long term success is minimal. While it can often be difficult to do, candidates are helping themselves and their future employer if they can identify opportunities where they envision long term success. If applicants feel the need to accept less than desirable employment, then approaching short term solutions as opportunities to build a resume and gain a valuable reference, will help them keep the proper perspective in less than ideal circumstances.

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## Manufacturing Myths

Here is a sampling of the more prevalent myths surrounding the manufacturing sector. Some are long held beliefs, while others more recently, are typically fuelled by media reports.

*“Manufacturing is in decline and there are no jobs.”*

Some sectors may be in decline, and some types of jobs may be phasing out, but manufacturing is not going away any time soon; but it is changing. The days of high paying, low skilled jobs are likely over. The recession took care of many of those operations, as many could not survive what many describe as the worst economic downturn since the great depression. Employers today need a more skilled workforce and will pay competitive wages to attract talent. But with a surplus of low skilled workers, low skill jobs are not going to pay what they once did. Growth in manufacturing is being driven by small and medium sized companies, primarily owned or managed locally by passionate people with ties and commitments to their communities.

Additionally, smaller locally owned manufacturers with an entrepreneurial approach offer more opportunities for professional and personal growth, and are more likely to reward those with initiative

**Growth in manufacturing is being driven by small and medium sized companies...**

and a desire to learn and improve, with opportunities for advancement.

*“Manufacturing jobs are boring and repetitive.”*

Certain jobs can be, and historically some labour intensive processes limited employees to certain basic functions. However in today's world of advanced manufacturing, employees are often working with computerized, technologically advanced machinery and equipment. In addition, employers encourage movement between jobs and departments to offer employees a well-rounded and interesting work environment, while maximizing efficiency through a more flexible workforce. Most manufacturers have an online presence that allows job seekers to research what companies do, so that candidates can determine where they might wish to apply.

*“Manufacturing is dirty work in a dirty environment.”*

For the most part this is completely false. In today's workplace and business environment, where efficiency and continual

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improvement is stressed, there is no place for dirty, littered workplaces. In addition, manufacturers of items such as pharmaceuticals, precision instruments, and food and beverages require the utmost sanitary environments. It is not unusual to see employees in lab coats rather than coveralls, working in brightly lit climate controlled environments.

*“Why train employees who just end up leaving for an extra dollar an hour somewhere else”*

It is usually never as simple as someone leaves a job because they got a slight raise elsewhere. In fact, studies show the opposite is usually the case. Employees who feel valued and enjoy an overall positive workplace experience, will stay in a lower paying job rather than take their chances elsewhere for more money. Sometimes, the amount they forgo can be quite significant. Quality of life, opportunities for personal and professional growth, potential for advancement, family considerations, and other issues that affect workplace satisfaction are much more significant reasons over whether an employee will jump to another job. True, some employees may leave purely for financial reasons, but it is usually for significantly higher wages and benefits and associated with opportunities for advancement and personal and

professional development. The more important question for employers may be, “what happens to my company if I don't train my employees?”

*“Training is too expensive.”*

Yes, training can be expensive. But with many employers claiming that the biggest obstacle to growth is finding suitable skilled employees, what is the alternative? In addition, there are many different options for training depending on the amount required and the amount one wants to invest. True, there is a certain time and monetary investment required, but employers who approach training as an investment rather than a cost are the ones who will reap the benefits down the road. If the major obstacle for future growth is the availability of suitably trained employees, what will cost a company more – training employees or the inability to grow the company?

*“I'm too old/too young/worked in a unionized environment/have gaps in my employment history therefore I will not get hired.”*

Everyone has what they feel may be personal or professional weaknesses that candidates feel employers will use as reasons to not hire them. Employers are not allowed to discriminate based on age,

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gender, ethnicity etc., but there is no reason a candidate cannot be proactive in addressing issues they deem necessary. Worried about being too old? Most employers recognize the experience and expertise of older workers. Worried about being too young? Everyone has life experience outside the workplace where they can demonstrate activities and achievements that highlight soft skills such as teamwork, accountability, and initiative. “I think I am being overlooked because I worked in a unionized facility.” Be upfront and honest, and use the opportunity to dispel the myths many people have about unionized employees and workplaces. Ultimately, the candidate is there because they want the job, and they want to provide for themselves and their family. Don't take yourself out of the running because of what you think others may or may not take issue with, because often it may not be an issue at all.

*“Employers are demanding experience, but how can I get experience if I can't get hired?”*

Manufacturing associations are actively promoting careers in their sector towards youth but the issue can be tough for those without manufacturing experience. Many employers require a certain level of manufacturing experience, for good reason.

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## **Manufacturing associations are actively promoting careers in their sector towards youth...**

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Employers who offer a higher than average starting wage, have the luxury of picking from a pool of more qualified, experienced candidates. Some facilities, despite aesthetic improvements, require manufacturing experience due to the processes and activities in the workplace environment. It also happens that employers go through the recruiting process by screening and hiring inexperienced candidates, who become overwhelmed by the scope and nature of the manufacturing environment, then quit before they get a chance to become acclimatized.

Manufacturing workplaces can be intense, demanding environments for new graduates who may have little practical experience outside a classroom.

There are, however, still some facilities where little to no experience is necessary, and these are the types of places inexperienced candidates may need to start their careers. A good place to begin is by taking advantage of Employment Ontario programs and services, through the Ministry of Training, Colleges and Universities.

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## Summary

The manufacturing sector in the London region features smart people with passion, many of whom are committed to, and active within their local communities. However, many manufacturers face a dilemma in how to attract, and retain, qualified candidates. Many are also challenged by the scale of investment to train their employees for more skilled roles in the future. In many cases both employers and employees overestimate the cost and time commitment, while underestimating the long term benefits of skill development.

Employers with a skill development plan are confident in their ability to fill skilled positions in the future, while those without, overwhelmingly express uncertainty. While there are government programs and initiatives to assist both employers and



individuals in areas such as training and matching suitable candidates with employers looking to fill openings, many express a lack of awareness that such programs exist.

Far from dead, a vibrant manufacturing sector in the London Economic Region is undergoing a transition to a more diversified era of advanced manufacturing, which features innovation and creativity in a variety of sub-sectors.



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This *Employment Ontario* project is funded by the Ontario Government



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