



**WORK
FORCE
PULSE**

**GROUNDING INSIGHT. INFORMED ACTION.
A STRONGER WORKFORCE.**

October 2025 Report

Canada's first Coordinated rapid-response labour market intelligence initiative

Workforce Pulse is a first-of-its-kind initiative from national sectoral and workforce development organizations. It gathered employer-driven insights about the workforce from Canada's most vital economic sectors. As Canada's first coordinated rapid-response labour market intelligence initiative, the Workforce Pulse survey—undertaken in July and August 2025—is a limited employer sentiment snapshot—a view of how businesses at that time, within participating partner networks, were navigating trade disruption and their perspectives on workforce challenges, employment barriers, and their short-term outlook at the time of the survey.

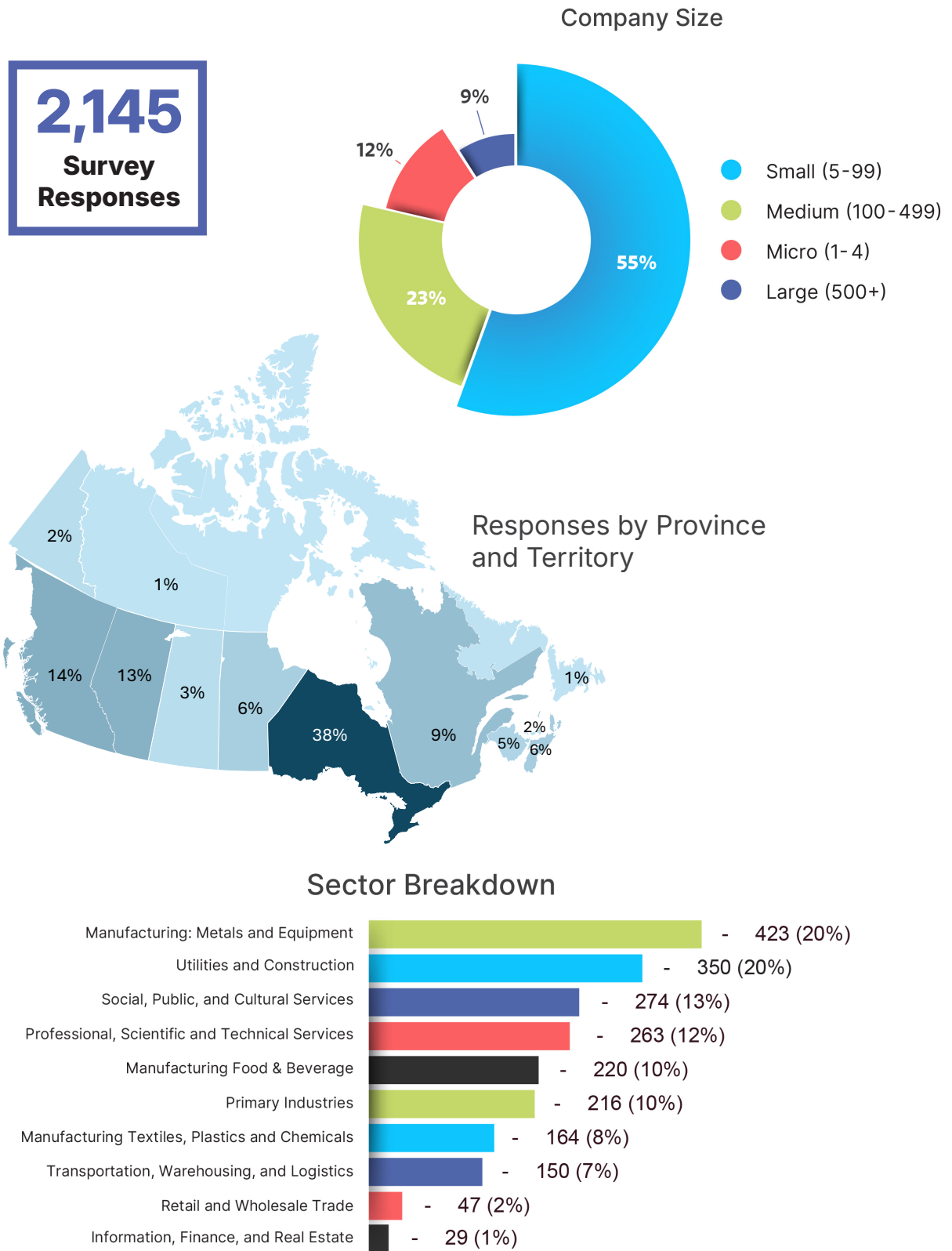
Participating Sectoral and Workforce Development Organizations:

1. BioTalent Canada
2. BuildForce Canada
3. Canadian Agricultural Human Resource Council
4. Canadian Council for Aviation and Aerospace
5. Canada Green Building Council
6. Canadian Skills Training and Employment Coalition
7. Careers in Energy, a division of Energy Safety Canada
8. Electricity Human Resources Canada
9. Environmental Careers Organization of Canada
10. Excellence in Manufacturing Consortium
11. Food Processing Skills Canada
12. Mining Industry Human Resources Council
13. Tourism HR Canada
14. Trucking HR Canada



Workforce Pulse October 2025

In July and August 2025, over 2,100 Canadian employers shared their perspectives through the Workforce Pulse survey, delivered in partnership with 14 national sectoral and workforce development organizations. The survey provided a limited snapshot of employer sentiment at mid-summer — how businesses were navigating trade disruptions, policy uncertainty, staffing pressures, and evolving workforce needs.



Stable Labour Outlook, But Employers Struggling to Fill Critical Roles Across Sectors

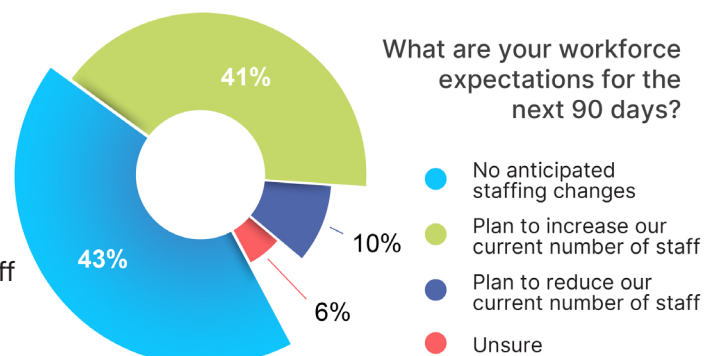
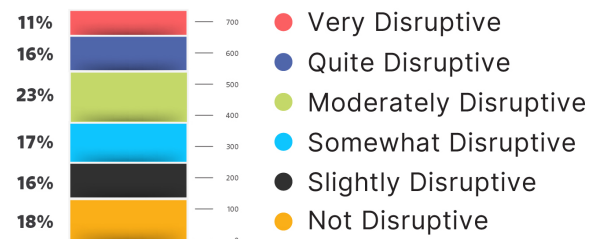
More than 2,100 Canadian employers sent a clear message: despite trade frictions, policy uncertainty, and rising costs, significant job cuts are not on the horizon. Fewer than 10 per cent anticipated reducing staff in the next three months, while the vast majority expected to maintain or even expand their workforce.

Behind the stability, however, employers flagged vulnerabilities. Labour shortages were structural and across every sector, from construction and manufacturing to agriculture, energy, and tourism. Skilled trades, technical, professional, and supervisory roles were consistently in short supply, highlighting a mismatch between the skills available and the skills required in current and forecasted positions.

Workforce Pulse findings reflected both similar cross-sectoral themes and sector-specific differences:

- **Uncertainty dominated.** Employers pointed to tariffs, government policies, lending conditions, global market dynamics, and persistent recruitment and retention challenges as their primary concerns.
- **Impacts varied across industries.** Manufacturing, construction, transportation, and retail — all highly reliant on global supply chains — reported the sharpest disruption and workforce strain. Less tariff-exposed industries such as mining, energy, and electricity reported relative stability but still faced labour shortages.
- **Labour shortages across all sectors.** Employers in every industry reported difficulty recruiting skilled trades, frontline, supervisory, and specialist staff. These shortages are across sectors — construction, manufacturing, agriculture, tourism, energy, and environmental services. Many were compounded by tariff uncertainty and project unpredictability, underscoring that shortages were not isolated but across the board, suggesting a systemic skills mismatch between labour supply and labour demand.
- **In tariff-exposed sectors, workforce planning was reactive rather than strategic.** Rising costs, supply chain disruptions, and demand uncertainty left employers in industries such as manufacturing and transportation responding with short-term adjustments rather than long-term planning. Tariff pressures exacerbated existing vulnerabilities, leading to cautious investment and fragmented workforce strategies.
- **Despite these pressures, most employers expected stability or growth.** Fewer than 10% of employers anticipated staff reductions, while roughly eight in ten expected to maintain or expand their workforce over the next 90 days. This theme of cautious stability ran across sectors, even where disruption and shortages were most acute.

Have the U.S. Tariffs or Canada's imposition of retaliatory tariffs disrupted your business?



The late Summer 2025 Workforce Pulse captured an important early signal — that Canada's labour market was resilient but stretched — defined by broad-based labour shortages, sector-specific vulnerabilities, and a reliance on short-term planning. It highlights a mismatch between the skills available from the existing talent pool and the skills required in open (and forecast to open) positions. These results, confirmed by employers, are now showing up in official labour market data. The Statistics Canada August 2025 labour market data, published in September 2025, confirmed that the instability flagged by employers earlier in the summer was already materializing nationally, underscoring the need for targeted workforce strategies, including investments in training pipelines, sector-specific recruitment and retention supports, and policy measures that address both domestic skill shortages and external shocks. Without such interventions, the strain on Canada's workforce will deepen as the economy slows, leaving employers less able to adapt and workers more exposed to volatility.

It is relevant to note the importance of this Pulse Survey for early signals of employer sentiment, reinforcing the importance of timely intelligence, combined with the workforce expertise of organizations specializing in their sectors, to guide workforce development and policy responses. The coalition of partners has agreed to conduct a late Fall 2025 survey to follow up on these findings to determine how sentiment has changed and is forecast to change. This survey is anticipated for release in Fall 2025.

Sector Highlights

The following list highlights each sector and the impact of the current economic conditions on that sector. The list is organized by tariff impact and then alphabetically by organization, which provides specialized insights unique to the sector in question.

Excellence in Manufacturing Consortium

Sector: Manufacturing

Tariff Impact: Very disruptive

Key Workforce Challenges:

Skilled trades/technical, general labour and supervisory positions are the most challenging to fill.

Other Observations:

Uncertainty is hindering investments and operational decisions, making planning more reactive and less strategic.

Trucking HR Canada

Sector: Transportation and Warehousing

Tariff Impact: Very disruptive

Key Workforce Challenges:

Uncertainty over the tariffs has an immediate impact on employers, especially those who move goods across borders. This has resulted in uncertainty around workload, which has made it difficult for employers to plan for workforce needs.

Other Observations:

Truck drivers remain the most challenging position to fill for trucking and logistics employers despite the challenges imposed by tariffs. The sector remains focused on hiring and retaining staff, along with increasing productivity and streamlining supply chain challenges.

Canadian Council for Aviation and Aerospace

Sector: Aviation and Aerospace

Tariff Impact: Very to somewhat disruptive

Key Workforce Challenges:

75% of respondents indicated skilled trades/technical and professional/specialists are their greatest priority to hire. The remaining unfilled roles are in general labour/frontline/production/customer service.

Other Observations:

Skilled, experienced licensed aircraft engineers are a high priority for most transport respondents.

Canadian Skills Training and Employment Coalition

Sector: Metals & Equipment Manufacturing & Other Industrial Sectors

Tariff Impact: Moderately to quite disruptive

Key Workforce Challenges:

Skilled trades and technical roles remain the hardest to fill, followed by frontline production and professional specialists. Workforce expectations lean toward staff increases, yet uncertainty is driven by workload/project issues and recruitment/retention challenges.

Other Observations:

Despite tariff pressures, half of employers report adequate staffing, but over a third still face shortages. Raising productivity/streamlining supply chains, as well as hiring/retaining staff, are top organizational needs, highlighting both short-term workforce constraints and longer-term competitiveness pressures.

Food Processing Skills Canada

Sector: Food and Beverage Manufacturing

Tariff Impact: Disruptive (though varies by subsector) 71% of respondents were affected by tariffs.

Key Workforce Challenges:

Labour shortages, 25% of respondents indicated they did not have enough staff to meet their current needs. Frontline workers, along with trades and technical positions, are in high demand.

Other Observations:

Employers cited gaps in frontline, trades, and technical positions. Tariff impacts varied by subsector, with rising costs, tighter access to capital, and pauses on hiring and investment. Many products remained CUSMA-compliant, but tariffs from China and Canadian counter-measures added further disruption.

BuildForce Canada

Sector: Construction

Tariff Impact: Somewhat disruptive

Key Workforce Challenges:

Access to skilled labour and management/supervisory positions. Most respondents were still hiring throughout the survey period.

Other Observations:

The ongoing trade friction with the United States has eroded consumer confidence, resulting in lower overall investment, particularly in the residential sector.

Canadian Agricultural Human Resource Council

Sector: Agriculture

Tariff Impact: Somewhat disruptive

Key Workforce Challenges:

Farm labour and supervisor positions are challenging to fill. The need for skilled labour and technicians is also a challenge across the sector.

Other Observations:

Producers are concerned about increased labour costs and their effect on budgets. Producers are actively seeking employees to avoid production delays or reductions.

Canada Green Building Council

Sector: Green Building

Tariff Impact: Somewhat disruptive

Key Workforce Challenges:

Results reflect the building sector's ongoing skilled labour shortage – likely driven by retirements and a slowdown in new entrants.

Other Observations:

The need to recruit additional workers was highlighted by nearly all industry respondents, demonstrating the need to increase recruitment. Some respondents also noted the need for skills development.

Tourism HR Canada

Sector: Tourism

Tariff Impact: Somewhat disruptive

Key Workforce Challenges:

Frontline workers and management/supervisory positions are driving labour challenges.

Other Observations:

Sector-level tariff impacts were unevenly felt across tourism, but those with the highest levels of disruption also had incidences of staffing shortages.

Environmental Careers Organization of Canada

Sector: Environmental Consulting and Not-For-Profits

Tariff Impact: Slightly to somewhat disruptive

Key Workforce Challenges:

Two-thirds of environmental consulting firms and half of not-for-profits reported that professionals/specialists are the most difficult roles to fill.

Other Observations:

Workforce planning has been primarily impacted by workload or project uncertainty (environmental consulting) and budget constraints (not-for-profit organizations).

Careers in Energy, a division of Energy Safety Canada

Sector: Energy Exploration, Production and Energy Services

Tariff Impact: Slightly disruptive

Key Workforce Challenges:

Skilled trades/technical, general labour and supervisory positions are the most challenging to fill.

Other Observations:

Nearly 9 in 10 employers expect to maintain or grow staff over the next 90 days. Workload or project uncertainty is the primary workforce-related concern for 40% of employers over the next 90 days.

Electricity Human Resources Canada

Sector: Electricity

Tariff Impact: Slightly disruptive

Key Workforce Challenges:

Respondents report that workload and project uncertainties are their primary workforce-related uncertainties.

Other Observations:

Most respondents expect to either maintain or increase their staffing levels in the near future, suggesting that the tariffs are unlikely to directly affect the electricity sector. However, the broader economic impact of the tariffs could lead to indirect effects over time.

BioTalent Canada

Sector: Bio-economy

Tariff Impact: Slightly disruptive

Key Workforce Challenges:

Respondents identified professional/specialist roles as the most difficult to fill (48%), with additional challenges in technical trades, sales/marketing, and leadership roles.

Other Observations:

Despite concerns related to financial support and budget constraints affecting workforce planning, many organizations plan to increase their staff (44%), while nearly as many anticipate no changes. Only a small percentage expect reductions.

Mining Industry Human Resources Council

Sector: Mining

Tariff Impact: Not disruptive

Key Workforce Challenges:

Skilled trades/technical occupations are the most challenging to fill. The immediate focus for most organizations is hiring and retaining staff.

Other Observations:

To date, mining companies participating in the survey have reported little impact from tariffs, regardless of their size.

About the Workforce Pulse Survey

The Workforce Pulse survey was conducted by 14 national sectoral and workforce development organizations to provide a rapid-response snapshot of employer sentiment on staffing, hiring, and workforce challenges in the context of ongoing trade and economic disruptions. The pulse survey included basic questions to gauge respondents' current human resources situation, their expectations for the next 90 days and the extent to which their organization is affected by the tariffs imposed by the United States.

Survey Questions

- All 14 partner surveys applied the same seven core questions covering staffing levels, hiring expectations, workforce needs, and tariff impacts.
- Partners had the option to include two supplemental questions:
 - "What is your organization's most important need this month?"
 - "What is your organization's primary workforce-related uncertainty over the next 90 days?"

Who Responded

- Sample size: 2,145 employers.
- Business size: 12% micro (1–4 employees), 55% small (5–99), 23% medium (100–499), 9% large (500+).
- Sectors: Manufacturing (38%) and construction (16%) were the largest groups.
- Regions: Most responses came from Ontario (38%), B.C. (14%), Alberta (13%), and Quebec (9%).
- Industry mix: Goods-producing industries accounted for 64% of responses, reflecting high participation from tariff-exposed sectors.

How Data Was Collected

- Timing: July 8 to August 4, 2025.
- Method: Online survey in English and French, distributed via partner networks, newsletters, social media, and events.
- Format: 1–3 minutes to complete; seven core questions plus optional sector-specific questions.
- Anonymity: Responses were confidential; only the first three digits of postal codes were collected.

Limitations

- Non-probability sample: Results are not representative of the entire Canadian economy and no margin of error applies.
- Sector/region variation: Some sectors and regions are better represented than others.
- Opinion-based: Perceptions of disruption differ.

The Workforce Pulse Multi-Sector Initiative is funded by the Government of Canada under the Future Skills program



Future Skills
Centre

Centre des
Compétences futures