



Sectoral Profile

Clothing Manufacturing, Leather and Allied Products NAICS 315 and 316

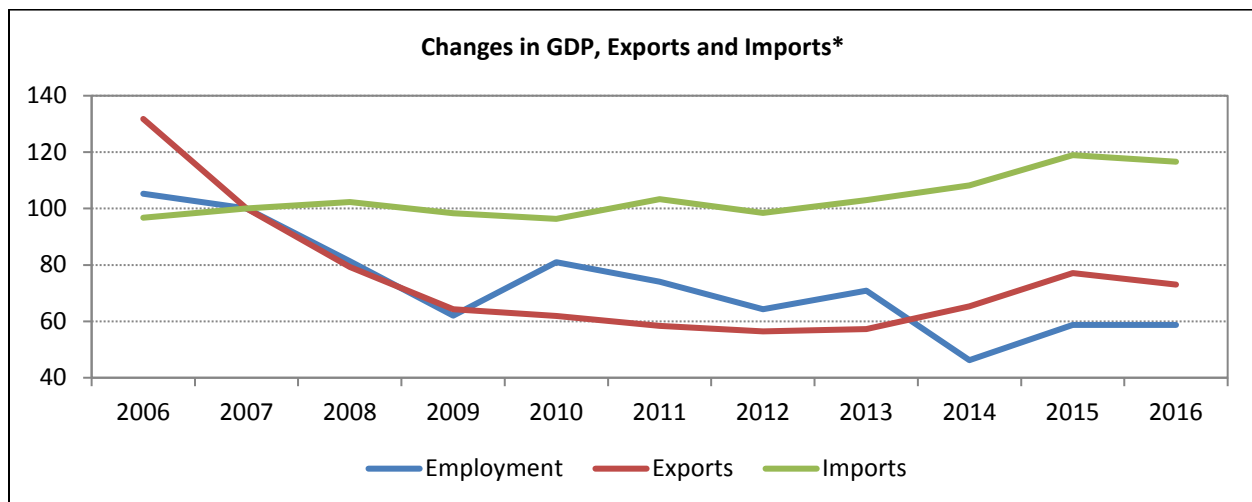
Quebec Region

2018–2020*



- The domestic market is filled by import products
- To stand out, Quebec manufacturers had to create products and find production niches that could not be filled by big international corporations

In the early 2000s, liberalization of trade brought the end of trade measures that protected the Canadian industry. To compete with low-wage countries, you had to move your production to these countries. Moreover, due to their size and financial resources, large international retailers gained a significant share in clothing distribution in Quebec. They control the creation, manufacturing and marketing of their clothes and clothing accessories, often through their own network of retail stores. This means fewer purchases from Quebec manufacturers.



* Data are expressed as indices with 2007 = 100

Sources: Statistics Canada, Employment – Labour Force Survey
Industry Canada, Imports and exports – Trade Data Online

To stand out, some companies invested in new equipment in order to yield productivity gains. In other cases, custom or small-batch manufacturing, special orders and just-in-time production, which greatly reduces shipping time, have earned these businesses recognition for flexibility. This quality has quickly become a niche that multinational companies cannot fill because it is difficult to incorporate into a business model based on mass production and standardized products. Others have abandoned the traditional production method and only

* This document is the result of analyses performed using information available as at April 5, 2018.

kept high-value added activities such as design, pattern creation and product line planning. Even distribution is sometimes done through the company that manufactures the product.

This does not mean that there are no employment prospects. The aging workforce will create replacement needs every year. However, the industry faces a recruiting problem because of the negative image of the large layoffs in the last 15 years and because of competition for workers.

Note that two regions posted positive outlooks over the 2018-2020 period. In the Laurentides region, about 200 new jobs will be added in 2018 after a plant expansion in Boisbriand. As for the Chaudière-Appalaches region, a company is developing new markets which should bring about some new positions.

Sectoral Dynamics for the Regions

Québec 2018-2020	In the Economic Regions	AAGR
Annual average growth: -1.2% Loss of approx.: 625 positions Yearly dynamics: 2018: ↘ 2019: ↘ 2020: ↘	Laurentides	11.4%
	Chaudière-Appalaches	0.5%
	Abitibi-Témiscamingue	0.0%
	Côte-Nord / Nord-du-Québec	0.0%
	Saguenay-Lac-Saint-Jean	0.0%
	Gaspésie-Les-Îles	0.0%
	Outaouais	0.0%
	Capitale-Nationale	0.0%
	Lanaudière	-0.6%
	Estrie	-1.1%
	Bas-Saint-Laurent	-1.1%
	QUÉBEC	-1.2%
	Montréal	-1.3%
	Montréal CMA	-1.3%
Centre-du-Québec	-1.8%	
Mauricie	-1.8%	

n/a: not applicable

Source: 2018-2020 Sectoral Outlook annual exercise

Labour Market Analysis Directorate, Service Canada – Quebec Region, April 5, 2018.

In clothing manufacturing and leather product manufacturing industries, basic apparel production activities facing stiff global competition are the most likely to be affected by the anticipated dynamics. In this case, the following occupations are the most likely to be affected (according to the occupation by industry matrix):

- 9446 Industrial sewing machine operators
- 6342 Tailors, dressmakers, furriers and milliners
- 9619 Other labourers in processing, manufacturing and utilities
- 0911 Manufacturing managers
- 9445 Fabric, fur and leather cutters
- 9447 Inspectors and graders, textile, fabric, fur and leather products manufacturing
- 5243 Theatre, fashion, exhibit and other creative designers
- 9217 Supervisors, textile, fabric, fur and leather products processing and manufacturing

- 1521 Shippers and receivers
- 6343 Shoe repairers and shoemakers
- 5245 Patternmakers - textile, leather and fur products
- 9616 Labourers in textile processing
- 9441 Textile fibre and yarn, hide and pelt processing machine operators and workers
- 6411 Sales and account representatives - wholesale trade (non-technical)
- 9442 Weavers, knitters and other fabric making occupations
- 7452 Material handlers.

SIZE AND DISTRIBUTION OF AND CHANGES IN THE INDUSTRY IN QUEBEC

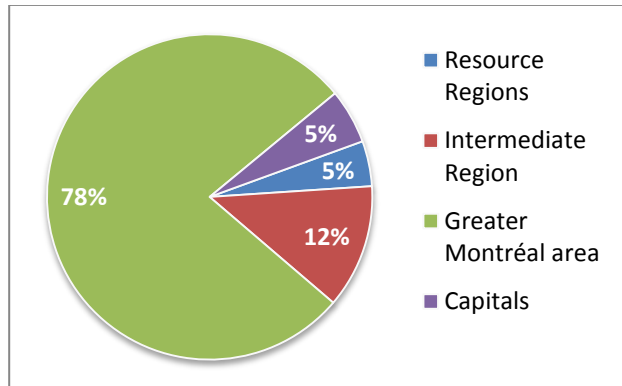
	Employment 2015–2017 Average			10-year Change in Employment	
	Employment In thousands	Provincial distribution	Regional employment share	In thousands	as a %
All of Quebec	17.9	100.0%	0.4%	-14.7	-45.2%
Resource Regions					
Abitibi-Témiscamingue	x	x	x	x	x
Bas-Saint-Laurent	x	x	x	x	x
Côte-Nord / Nord-du-Québec	x	x	x	x	x
Gaspésie-Îles-de-la-Madeleine	x	x	x	x	x
Saguenay-Lac-Saint-Jean	x	x	x	x	x
Intermediate Regions					
Centre-du-Québec	x	x	x	x	x
Chaudière-Appalaches	x	x	x	x	x
Estrie	x	x	x	x	x
Mauricie	x	x	x	x	x
Greater Montréal area					
Lanaudière	x	x	x	x	x
Laurentides	x	x	x	x	x
Laval	2.1	11.6%	1.0%	-0.5	-19.5%
Montérégie	2.2	12.1%	0.3%	-2.4	-52.6%
Montréal	9.2	51.3%	0.9%	-7.0	-43.4%
Capitals					
Capitale-Nationale	x	x	x	x	x
Outaouais	x	x	x	x	x

x: confidential data, fewer than 1,500 people employed in this region

Source: Historical estimates based on Statistics Canada’s Labour Force Survey

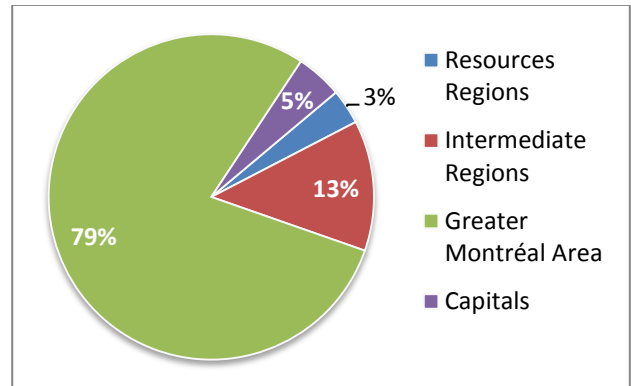
SOME CHARACTERISTICS OF THE INDUSTRY IN QUÉBEC

Establishment distribution by Region



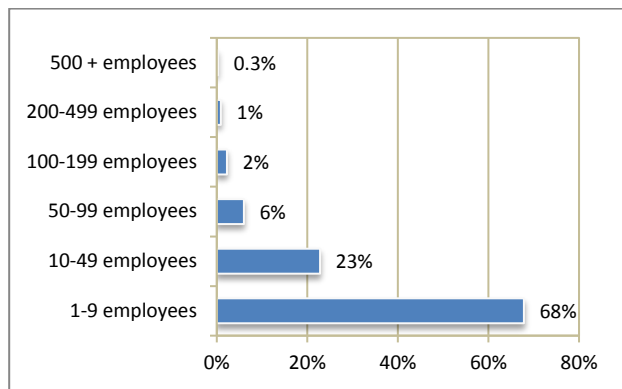
Source: Statistics Canada, Establishment Counts by Economic Region, industry, and Employee Size Ranges, December 2015

Employment distribution by Region



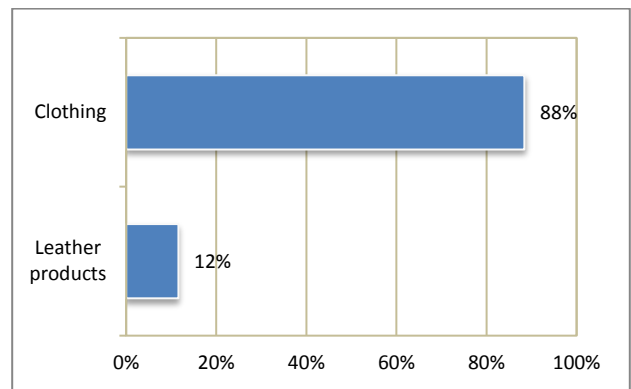
Source: Statistics Canada, Labour Force Survey; based on average employment in 2014-2016

Size of establishment



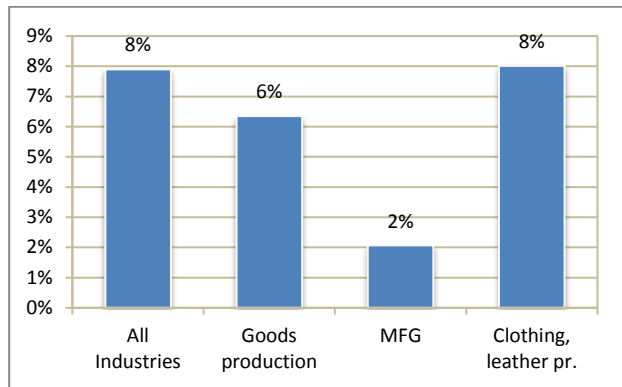
Source: Statistics Canada, Establishment Counts by Economic Region, industry, and Employee Size Ranges, December 2015

Employment by industry subsectors



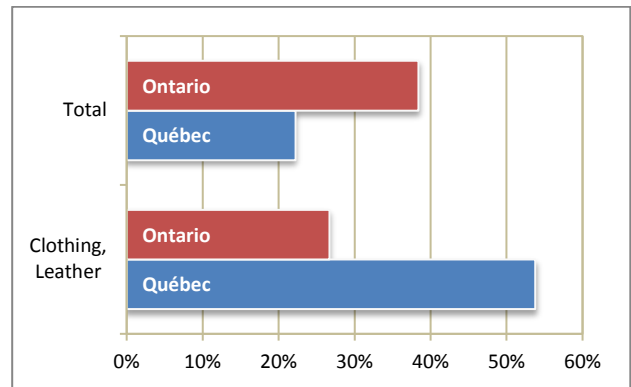
Source: Statistics Canada, Survey of Employment, Payrolls and Hours; based on average employment in 2014-2016

Self-employed jobs compared to Total employment



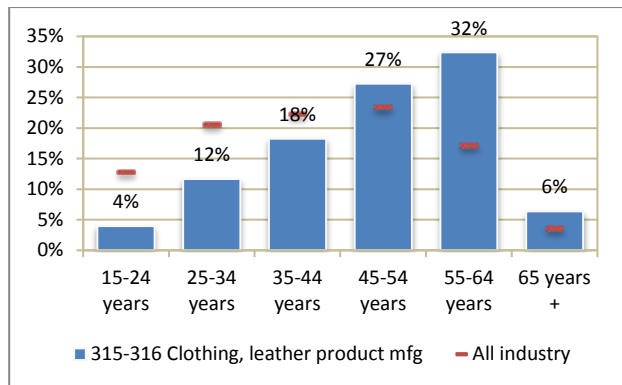
Source: Statistics Canada, CANSIM 383-0031 Labour statistics, based on average employment in 2014-2016

Share of total employment and industry in Canada



Source: Statistics Canada, Survey of Employment, Payrolls and Hours; based on average employment in 2014-2016

Employed Labour Force Aged 15 Years and Over



Source: Statistics Canada, 2016 Census, special tabulation for ESDC

Employment distribution by skill type

National Occupational Classification	
0. Management	9%
1. Business, finance and administration	11%
2. Natural and applied sciences and related	1%
3. Health	0%
4. Education, law and social, community and government services	0%
5. Art, culture, recreation and sport	8%
6. Sales and service	17%
7. Trades, transport and equipment operators	3%
8. Natural resources, agriculture and related production	0%
9. Manufacturing and utilities	51%

Source: Statistics Canada, 2016 Census, special tabulation for ESDC

FOR MORE INFORMATION

- Job Bank (Canada) – [Job Market Trends and News](#): Information on jobs, skills and local labour market trends is important for making career decisions. In addition, information on wages, labour supply, labour demand and other factors helps employers recruit, train and retain workers and make business and investment decisions.
- North American Industry Classification System (NAICS) Canada 2012: Clothing manufacturing [NAICS 315](#) and Manufacture of leather and allied products [NAICS 316](#)

Note: In preparing this profile, the authors took care to base their research on labour market information that was accurate and relevant at the time of publication. Since labour market conditions are dynamic, some of the data presented here may have changed since this document was published. Users are encouraged to consult other sources for additional information on the local economy and labour market. Information contained in this document does not necessarily reflect official policies of Human Resources and Skills Development Canada.

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For further information, please contact the LMI team at:

http://www.esdc.gc.ca/cgi-bin/contact/edsc-esdc/eng/contact_us.aspx?section=lmi

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