Future Ready

Artificial Intelligence in Manufacturing: The Evolution of Technology & Jobs in the Sector

MARCH 2024

About Future Ready

The Future Ready program is a $19 million program funded in part by Employment and Social Development Canada's Sectoral Workforce Solutions Program to support companies in onboarding new and diverse workers to Canadian manufacturing. The initiative will also aid Canadian manufacturers in identifying their critical skills gaps to support the future profitability and growth of their organization through NGen's highly regarded Transformation Leadership Program. Through these approaches, the program aims to provide demand-driven solutions for the manufacturing sector, one of the sectors hardest hit by the pandemic, and a key to the recovery of the Canadian economy.

This project is funded in part by the Government of Canada's Sectoral Workforce Solutions Program

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Introduction

In recent years, rapid advancements in the field of artificial intelligence (AI) have paved the way for significant innovations across various industries and sectors, transforming and revolutionizing operations, enhancing efficiency, and creating new opportunities for growth and development. Among the sectors that are experiencing substantial changes through AI is manufacturing. In manufacturing, AI has not only made it possible to streamline operations, but also introduced a new level of precision, flexibility, and efficiency. Combined with other cutting-edge advancements in manufacturing technologies, AI is paving the way towards Industry 4.0, signaling transformation in industrial production.

In Canada, manufacturing holds significant economic importance, as it substantially contributes to GDP, exports, and employment. As a sector known for its diverse and robust operations, Canada's manufacturing can significantly benefit from the adoption of these AI-driven advancements. The adoption and implementation of AI in manufacturing not only elevates the quality and precision of Canadian-made products, but also reduces cost, enhances the sector's productivity, competitiveness, and environmental sustainability[1]. However, the process of integrating AI into Canada's manufacturing operations involves several key requirements and challenges, including investment in AI research, development and adoption, upskilling the workforce to navigate the new technological upgrades, and establishing partnerships between tech companies and manufacturers. More importantly, as the sector inches closer to AI adoption, understanding the implications of AI on manufacturing jobs becomes of significant importance, especially as it relates to employment and skills.

In a recent report prepared as part of the Future Ready project, several Industry 4.0 technologies were identified as disruptors of manufacturing tasks[2]. AI, which is at the core of Industry 4.0 technologies, has the potential of automating routine and even complex tasks. While the implementation of AI can eliminate repetitive, demanding, and in some cases, complex tasks, and create roles that require high levels of skill, it also poses the risk of displacing or altering some manufacturing roles. This may influence employment levels in some traditional manufacturing roles within the sector.

This report explores the multi-layered impact of AI on manufacturing jobs and skills, drawing insights from reports and case studies which can be used as a foundation for impact analysis and workforce planning in Canada's manufacturing sector. By examining the experiences of companies and manufacturing plants of AI adoption in manufacturing, this report aims to shed light on the implications and changes which are

shaping workforce dynamics, skill requirements, and employment patterns in the sector.

Through an analysis of the reports and case studies, this report will explore the evolution of AI technologies in the manufacturing sector. The first section will provide an overview of AI technologies commonly deployed in product manufacturing, including robotics, machine learning, predictive analytics, and computer vision. The impact of AI on manufacturing jobs is then explored. By drawing on findings from reports, news, and case study examples, this section will explore how AI adoption is reshaping some traditional manufacturing roles and tasks, from assembly line workers and machine operators to engineers and managers. The report also touches on the opportunities and challenges for the workforce arising from AI integration in manufacturing, including job displacement, skill mismatches, and the need for workforce reskilling and upskilling initiatives. Finally, implications are outlined to support a smooth transition to an AI-enabled manufacturing future in Canada's manufacturing sector, highlighting issues such as workforce development, education, and labour market policies. Overall, this report aims to provide a comprehensive understanding of the impact of AI on manufacturing jobs in Canada, offering valuable insights for policymakers, industry leaders, and stakeholders as they navigate the AI adoption and integration.

AI in Manufacturing: Advancements and Applications

AI is a product of recent technological advancements in multiple areas and fields including computer science, data analytics, engineering and other related domains. AI constitutes the creation of software models and machines capable of performing tasks that typically require human intelligence. These tasks include learning from past experiences, solving complex problems, and making decisions based on incomplete or evolving data or information[3]. AI's ability to manage and process large volumes of data at speeds far beyond human capabilities makes it more efficient at identifying data patterns and insights that inform decision-making processes.

However, despite its capabilities, AI still has flaws and limitations. One significant limitation has been the potential for error or bias within AI systems, which can arise from incorrect or incomplete information or data sets used in training. These errors can lead to incorrect judgement or decisions made by AI, especially when processes are automated without human intervention or scrutiny. AI algorithms can also be complex, making it difficult for humans to understand how certain decisions or conclusions were reached, complicating its deployment and use in certain settings.

In the context of manufacturing, the introduction of AI has offered multiple applications and benefits, which has been improving process efficiency and product quality, as well as contributing to overall innovation in the sector. This includes using algorithms to identify issues and predict equipment failure before it happens, allowing robotic systems to adapt and respond to changes in their environment, and improving computer vision technologies that inspect products for defects and improve the process as they go[1]. These applications and benefits are detailed in the following section in this report.

The integration of AI in manufacturing processes and equipment also represents a step toward achieving Industry 4.0 systems in design, development and production settings. Along with other advancements and technologies in manufacturing, significant improvements can be made to quality and efficiency.

Applications of AI in Manufacturing

With the significant recent advancements in AI and other manufacturing technologies, have advanced significantly over the past years. The section below provides an overview of how AI and other related technologies commonly deployed in the manufacturing sector, including robotics, machine learning, predictive analytics, and computer vision. The section also provides an overview of some applications and benefits of AI in manufacturing.

Robotics

Robots and robotic arms have been a staple in manufacturing for decades. Recent advancements in AI and its integration into robotic technologies have improved their capabilities. While robotics had a broad range of applications and were considered to be highly efficient and precise, AI has allowed robotics to perform tasks faster, improve their accuracy, and learn from the information collected from sensors. With the integration of AI technologies, these robots can better adapt to dynamic environments and optimize production processes in real-time.

Advancements in robotic technologies has also allowed the development of collaborative robots, or cobots, which can work alongside human workers safely and efficiently. Cobots are equipped with sensors and AI algorithms that allow them to detect and respond to changes in their surroundings, enabling collaboration on the factory floor[4].

Machine Learning

Machine learning, an application of AI, enables machines to learn from data and improve their performance over time without explicit programming. In the manufacturing sector, machine learning is being used to optimize various processes, such as production scheduling, quality control, and predictive maintenance[3].

For example, machine learning algorithms can analyze historical production data to identify patterns and trends, helping manufacturers optimize production schedules and minimize downtime. Similarly, machine learning can be applied to quality control processes to detect defects and anomalies in real-time, ensuring product quality and reducing waste.

Predictive Analytics

Predictive analytics involves the use of statistical techniques and AI algorithms to analyze historical and real-time data to make predictions about future events or outcomes. In manufacturing, predictive analytics is being used to forecast demand, optimize inventory levels, and anticipate equipment failures[5].

By analyzing data from sensors and equipment, predictive analytics can identify data patterns indicative of potential equipment failures, allowing manufacturers to schedule maintenance proactively and avoid unplanned downtime. Additionally,

predictive analytics can help manufacturers anticipate changes in customer preferences and demand, and adjust production schedules accordingly, reducing inventory costs and improving customer satisfaction.

Computer Vision

Computer vision technologies enable machines and AI to interpret and analyze visual information from images or videos. In the manufacturing sector, computer vision is being used for a variety of applications, including quality control, object recognition, and robotic guidance[6].

Computer vision algorithms can analyze images of products to detect defects or deviations from quality standards, allowing manufacturers to identify and address issues early in the production process. Additionally, computer vision can be used to guide robots and automated systems in performing tasks such as picking and placing objects on assembly lines, improving efficiency and accuracy.

Supply Chain Optimization

One application of AI is supply chain optimization. AI-powered systems and models can for instance revolutionize the way manufacturers forecast demand, enabling more accurate predictions that inform inventory management and logistics. This application of AI ensures that production planning is both efficient and responsive, significantly reducing waste by aligning production with actual market needs. Consequently, manufacturers can achieve a leaner operation, minimizing excess inventory and optimizing the supply chain from end-to-end[7].

Designing & Testing

In the area of design and prototyping in manufacturing, AI applications are revolutionizing the way products are conceived and developed. Through the use of AI tools, the design process is not only accelerated but also enhanced with the capability to suggest improvements, run simulations, and test prototypes virtually. This results in a significant reduction in the time required to bring innovations and products to market, as well as a decrease in development costs. By enabling more efficient exploration of design alternatives and quicker iterations, AI facilitates a more agile and innovative product development lifecycle.

Improving Efficiency

One of the primary benefits of AI in manufacturing is its ability to improve efficiency across the production process. By automating repetitive tasks, optimizing resource allocation, and streamlining workflows, AI technologies enable manufacturers to achieve higher levels of productivity and cost-effectiveness[8,9]. For example, AI-powered predictive maintenance systems can reduce downtime and maintenance costs by identifying equipment failures before they occur, while AI-driven production planning and optimization algorithms can minimize waste and maximize resource utilization.

Impact of AI on Manufacturing Labour & Skills

The adoption of AI systems in manufacturing settings has multifaceted implications on the sector's labour market, as well as the skills required in manufacturing. AI integration in manufacturing will require the sector to contract or hire workers in more technologically advanced roles, with higher levels of digital literacy and proficiency. Workers with a background, skills and experience in areas such as data analytics, computer science, programming, robotics, and other fields can be key to the integration, operation and maintenance of advanced AI-related systems. Investing in training workers and workforce entrants is also essential to ensuring that manufacturers can fully leverage the benefits of these advancements, and remain competitive regionally and globally.

The adoption of AI in manufacturing is also expected to introduce labour-related challenges, particularly concerning the elimination of tasks and job displacement[10]. As repetitive and routine tasks are partially or fully automated, certain manufacturing roles face the risk of becoming obsolete. AI has also the potential of automating complex and non-routine tasks. The changes to, or elimination of, tasks in manufacturing due to AI-driven technologies and automation raise concerns about potential job losses, and emphasize the need for workers to upskill, and in some cases, transition to other roles in manufacturing.

In the section below, five cases of AI deployment and integration within a manufacturing setting are explored, focusing on the impacts and effects on operations, workforce dynamics, and skill requirements. These cases span a variety of applications, from enhancing production efficiency and safety, to improving product development and manufacturing processes. This analysis sheds light on the critical factors for successfully integrating AI into manufacturing environments, including the importance of upskilling, the impact on job roles, and the consideration of age-related and skill-based disparities among workers.

1. SOFT ROBOTICS & NVIDIA

A partnership between Soft Robotics and NVIDIA allowed for an efficient and innovative way of handling of items in food manufacturing such as poultry[11]. Combining advancements in the technologies of computer vision, robotics and AI, a system was developed to identify and accurately pick up individual chicken pieces from a pile, a task that posed significant challenges when carried manually by workers due to the chicken parts' inconsistent shapes and slippery nature. This AI-enabled technique demonstrates AI's complex capabilities, and consequently allowed for improved production efficiency, and safer product handling.

As it relates to job dynamics and roles in a specific capacity, this example illustrates that the integration of AI and automation technologies, especially in food processing industries such as meat-packing, is not only a way to improve operational efficiency, but also a means to address workforce shortages. The meat-packing industry, which is heavily reliant on manual labour for tasks such as handling chicken, faces significant workforce and recruiting challenges. This is also the case in many other similar sectors and industries, particularly those with significant risks of injury and health concerns. This shortage is prompting a push towards automation according to Soft Robotics, citing that "handling raw chicken is a job better suited for a robot".

2. INVISIBLE AI & AUTOMOTIVE SUPPLIERS

Invisible AI, a company that develops AI solutions for the manufacturing sector, has been implementing solutions to help manufacturers optimize their production lines and overall productivity and efficiency[12]. Combining visual input from the production floor, along with data and signals from other sensors and machinery, their AI system assists in directing the production team's attention to where it is needed, and streamlining operations.

In a deployment case of their AI solution to one of the Tier 2 automotive suppliers, their system was capable of assisting the manufacturer in achieving significant improvements, and doubling of the production line's throughput by leveraging AI to identify and address inefficiencies. In this case, AI is more efficient compared to human capabilities in analyzing and recommending ways to improve workflow. Production managers, supervisors and frontline operators utilize Invisible AI's system to identify production issues in real-time.

In another application involving an automotive Original Equipment Manufacturer (OEM), AI insights from the Invisible AI system were used to streamline operations. By analyzing and consolidating certain operations, the OEM was able to increase production efficiency by 5%. This has allowed the reallocation 20% of the workforce to more critical areas of production.

3. THYSSENKRUPP BILSTEIN & UNIVERSAL ROBOTS

A Thyssenkrupp Bilstein plant in Hamilton, Ohio integrated nine Universal Robots cobots into their operations to enhance high-tech automotive suspension manufacturing[13]. The plant's Industry 4.0 group investigated the different potential use cases and applications of these cobots on the production floor, which, instead of performing one specific task, are capable of adapting and learning various tasks as part of their machine learning AI capabilities. For Thyssenkrupp Bilstein's plant, the nine cobots can be stationed at various tasks based on the immediate needs of the organization. These cobots are designed to collaborate with humans, significantly enhancing efficiency and safety in roles like machine tending and product inspection.

According to Thyssenkrupp Bilstein, machine operators at the plant were involved in pinpointing where the collaborative automation opportunities were on the production floor. Through the deployment of

AI-enabled cobots, the company aims to improve efficiency, expand business, and help remove repetitive ergonomic issues for workers. In fact, one of the machine operators at the plant indicates that deploying the cobots has made her job easier, and has contributed to better flow in production. Working alongside cobots has relieved her of a lot of aches and pains from physically performing certain tasks. All she has to do is load certain components into the machinery and let the cobot do the rest. Similar observations and findings were established in Future Ready's report "Technological Innovation and Workforce Diversity in the Advanced Manufacturing Sector", where it was noted that cobots and robots are providing opportunities for people with physical limitations, disabilities, and older workers to continue to participate and contribute in the sector[14].

According to Thyssenkrupp Bilstein, the engineering and Industry 4.0 team developing the cobot applications had no prior robotics experience. Some training was required to bring the team up-to-speed on building certain applications and developing the interface for the machines. As for machine operators, operating and interacting with the cobots can be done using an intuitive interface on a tablet.

For Thyssenkrupp Bilstein, expanding their operation to three times its original size without the use of cobots would have been challenging, especially in today's tight labour market conditions. The company was able to retain their existing workers, and no jobs were lost as a result of the deployment of the cobots.

4. ROLLS-ROYCE & DIGITAL TWIN TECHNOLOGY

Rolls-Royce is an example of a company which has been using AI-enabled solutions to develop sophisticated digital twins of their products and components[15]. This approach involves creating a virtual replica of physical engines, enabling the company to simulate, analyze, and optimize the engines' performance under various conditions without the need to develop multiple physical prototypes or variations for testing. Rolls-Royce can also predict maintenance needs of products by simulating the conditions their products go through, thereby significantly reducing downtime and enhancing the operational efficiency. This kind of insight is crucial in the aerospace industry, where maintenance precision and timing are essential for safety and efficiency.

In terms of workforce implications, there are multiple aspects for the impact of the implementation of an AI-driven solution by Rolls-Royce. For engineers, the use of the digital twin technology necessitates the use of advanced software tools and analytics, requiring skills in computer-aided design, computational fluid dynamics, numerical simulations, and predictive modeling. This does not fundamentally shift the way engineers develop components and products however, it improves accuracy and efficiency, and reduces cost and development time. Another impact is on aircraft maintenance workers who can use the pre-emptive insight and information from Rolls Royce, and replace parts and components before they become problematic.

Therefore, the use of AI and digital twin technology in this case in the aerospace industry does not displace jobs, but rather improves how tasks such as product development, manufacturing and maintenance are performed. While this technological advancement has opened up new avenues for innovation and efficiency, human input and contribution remain key to operations.

5. OTHER CASES OF AI USE IN MANUFACTURING

In an AI deployment case highlighted in a report by the Organisation for Economic Co-operation and Development (OECD) on the impact of AI in the workplace, a German manufacturer of home appliances implemented an AI system designed to enhance the efficiency and effectiveness of their assembly line operations[16]. This AI technology was developed to evaluate assembly line data for the purpose of detecting anomalies and providing insights into their causes. By automatically collecting data from various stations along the production line and making it accessible through cloud technology, the system offered a significant improvement in the speed and accuracy of problem detection and diagnosis over previous methods. Before the introduction of this AI system, maintenance workers relied on manual data analysis in Excel or conducted physical inspections of the production line to identify issues. With the new system in place, data visualization software and automatic notification of anomalies have become central to production line surveillance and maintenance, allowing for a more data-driven approach. This has enabled predictions and insights that were previously beyond the capabilities of the workers, as noted by the implementation manager: “AI allows us to get a grip on problems that we would otherwise be completely at the mercy of. Specifically, all the problems where I have [immense] datasets that humans can't fully analyze.”

The integration of AI in manufacturing in this case demands new skills, notably affecting production planning experts. It requires an understanding of AI, data science, and software use. According to the report, older workers found this transition challenging, hindered by their attitudes toward AI and reluctance to learn new technologies. One of the workers noted that older workers' resistance due to unfamiliarity with tech, suggesting targeted training could help. While training might ease the transition, significant information and communications technology (ICT) skill gaps have led to older workers being reassigned to other tasks, and replaced by younger, tech-savvy employees in tech-related tasks. This case reflects the impact of AI, where not all workers can easily adapt without training, and highlights the particular vulnerability of low-skilled workers to AI's demands for data and technology understanding.

Observations and Implications for AI Integration in Canadian Manufacturing

Building on the case studies of AI integration in manufacturing, several key themes emerge, each highlighting the potential of AI, as well as the challenges and opportunities it presents for the workforce, operational efficiency, and the broader economic landscape. These observations can be particularly informative and useful for the Canadian manufacturers, especially as the sector navigates AI adoption and integration. The observations can also assist in understanding the potential implications of AI on Canada's manufacturing labour force and their skills.

Enhancing Operational Efficiency and Product Quality

Across the cases, a consistent observation can be made which is the significant improvement in operational efficiency and product quality resulting from AI integration. These examples offered in the cases reflect a broader trend where AI technologies, including machine learning, computer vision, and robotics, are not only automating tasks but also enabling more agile and responsive manufacturing processes.

Workforce Implications & Job Displacement

It is clear from the five AI-deployment and integration cases in this report that AI led to job reorganization rather than displacement. A similar observation was made by the OECD in their report, which indicates that while automation may render some tasks obsolete, it also gives rise to new roles where humans have a comparative advantage and can make unique contributions. This reorganization moves some concerns beyond the view of job loss to a more sophisticated understanding of job transformation. AI can also influence a wide range of roles, from assembly line workers and machine operators, to engineers and managers. In many cases, the use of AI suggests a shift toward higher-value tasks and roles that AI and robotics cannot replicate.

Skills Requirements

A pivotal aspect revealed through these case studies is the evolving nature of workforce requirements in an AI-enhanced manufacturing landscape. The transition towards more data-driven and technologically sophisticated operations necessitates a workforce that is not only technically proficient, but also adaptable to new tools and methodologies. This underscores the importance of upskilling and reskilling initiatives to prepare workers for the future of AI in manufacturing.

Digital Divide and Social Implications

The deployment of AI in manufacturing also raises ethical considerations and social implications, particularly concerning workforce displacement and the digital divide. Although the ethical and social aspects are beyond the scope of this report, it should be noted that, as observed in several

cases, AI and AI-enabled technologies can lead to concerns about job loss and the marginalization of workers with no sufficient training or skills. This issue is further compounded by the challenges of upskilling and integrating older and less tech-savvy workers into a technologically advanced work environment.

Other Strategic Considerations for Canadian Manufacturing

As Canada's manufacturing sector approaches AI adoption, several other strategic considerations emerge. A unique implication for Canada, given its commitment to environmental sustainability, is the potential of AI to revolutionize green manufacturing practices. Canadian manufacturers have the opportunity to lead in sustainable production by using AI to optimize energy use, reduce waste, and enhance material efficiency.

Furthermore, for Canada to capitalize on AI's potential, fostering innovation ecosystems that bring together manufacturers, technology providers, academic institutions, and government agencies is essential. Such ecosystems can accelerate AI research and development tailored to manufacturing needs, pilot innovative applications of AI in production, and facilitate knowledge exchange. Special attention could be given to small and medium-sized enterprises (SMEs) in their digital transformation, as well as to industries where Canada has a competitive advantage, such as aerospace, automotive, and natural resources, to drive sector-specific innovations.

Transferrable Skills

With the adoption and integration of AI-enabled systems in the sector, the focus on worker skills should not only be limited to the acquisition of new skills. In order to integrate, operate or collaborate with AI systems, and in some cases, have the agility to shift into new job tasks, responsibilities and roles, workers will need to utilize pre-existing skill sets. These skills, which are transferable skills among roles and occupations, are not job or field-specific, and when applied in new contexts, provide workers with the ability to pivot to meet the demands of new technologies involved in the application of AI.

Technical skills, especially computer literacy and the ability to work with and analyze data trends, will allow workers to engage with and manage AI operations. Proficiency in programming languages such as Python, C++, and Java is fundamental to the advanced application of AI and machine learning algorithms. Being adept in data analysis, software development and computer science will also enable workers to transition to working with new systems in a manufacturing setting. These technical skills will allow workers to bridge their current skills and job tasks with the tools and processes of AI that redefining manufacturing processes. Soft skills are highly adaptable and equally important to transitioning to the use of new technologies. Communication and teamwork enable workers to articulate and collaborate on solutions that require AI technologies. Problem-solving skills well be critical for workers to analyze and apply more sophisticated and complex output from AI systems.

Applying these transferrable skills in a manufacturing setting is a key part of preparing the workforce for the demands of the future. Workers who possess these skills and the knowledge will be well-positioned to excel, innovate and grow within AI-augmented manufacturing systems.

Technical Skills	Soft Skills	Problem Solving Skills
Data Analysis	Communication	Decision-Making
Programming & Software Development	Leadership	Innovation
Computer Science	Mentorship	Creativity
Python & C++ (Programming Language)	Teamwork	Research
Microsoft Office	Adaptability	Curiosity

NGen's Role and Contributions

NGen is helping lead the integration of AI into Canada's manufacturing sector, emphasizing innovation, sustainability, and workforce development. Through initiatives like the AI for Manufacturing Challenge (AI4M), NGen is actively promoting the use of AI to solve real-world manufacturing challenges, enhancing productivity and driving economic growth. This program invites manufacturers to propose AI-driven projects with the potential to significantly impact Canada's manufacturing landscape by improving efficiency, quality, and sustainability.

NGen also announced the launch of $55 million in new projects focused on AI for Manufacturing, underscoring its commitment to advancing Canada to the forefront of manufacturing technology. This funding is aimed at supporting collaborative efforts that bring together industry, academia, and technology providers to develop and implement cutting-edge AI solutions within the manufacturing sector. These projects not only aim to foster technological innovation but also ensure Canadian manufacturers are well-equipped to leverage AI for a competitive edge on a global scale.

Recognizing the critical role of a skilled workforce in the adoption of AI, NGen places a strong emphasis on skills training and development, especially through initiatives like Future Ready and AMP UP. By facilitating access to new learning opportunities, NGen is ensuring that workers are prepared for the evolving demands of the AI-enabled manufacturing environment, contributing to a resilient, adaptable, and skilled workforce.

Concluding Remarks

The development and integration of AI in Canadian manufacturing operations has the potential of bringing significant innovations, which may improve efficiency, productivity, and innovation, and help in addressing complex challenges and issues, some of which are related hiring and labour markets. Through a detailed analysis and the exploration of various cases of AI adoption in manufacturing settings, some observations and finding can be used as a basis for impact analysis and workforce planning within Canada's manufacturing sector, as it adopts and integrates AI technologies.

The integration of AI into manufacturing operations has been shown to lead to changes in workforce and workplace dynamics rather than outright job displacement. It is observed that the emergence of AI-driven technologies necessitates a workforce that is not only technically proficient but also adaptable to new tools and methodologies. This underscores the critical importance of initiatives aimed at upskilling and reskilling the workforce to prepare for the future of manufacturing influenced by AI.

The adoption of AI-enabled technologies is of strategic importance to fostering innovation ecosystems that brings together manufacturers, technology providers, academic institutions, and government. With such collaborations for accelerating AI research and development, adoption and integration, along with proper labour market analysis, policies and initiatives, Canada can ensure that its manufacturing and other industrial sectors can fully benefit from AI and its technologies.

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