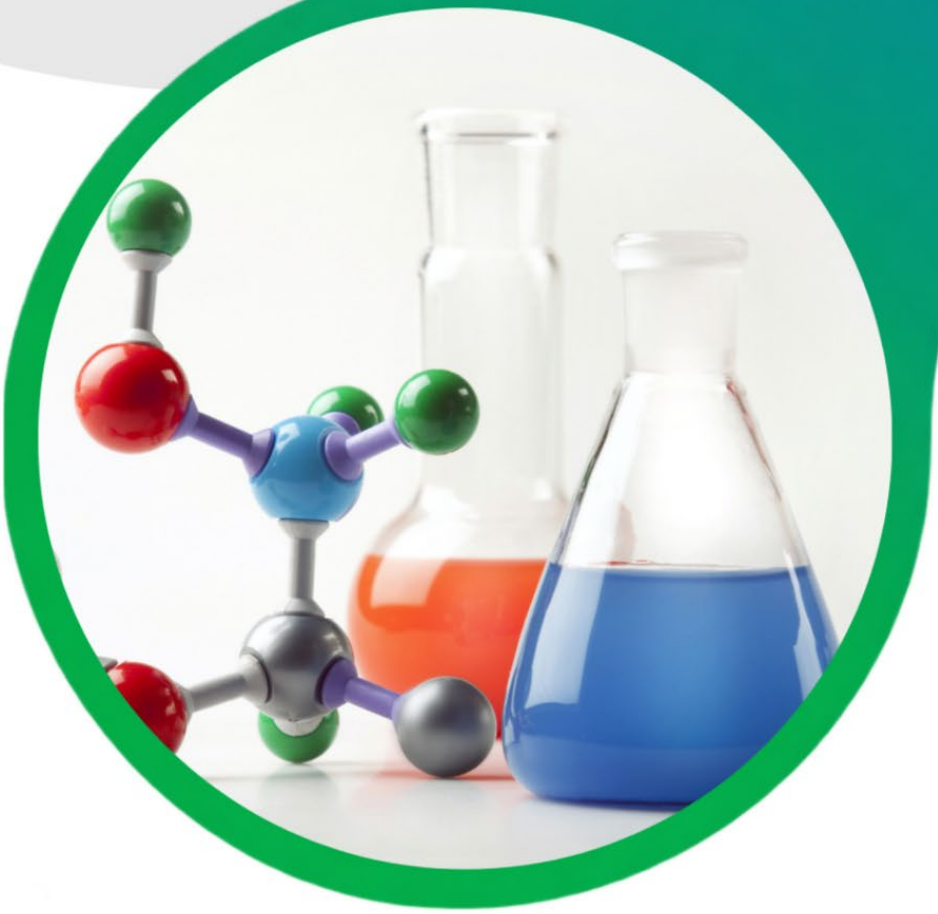
ASSOCIATION CANADIENNE DE L'INDUSTRIE DE LA CHIMIE

# ECONOMIC REVIEW OF CHEMISTRY 2026



CHEMISTRY INDUSTRY ASSOCIATION OF CANADA

The Chemistry Industry Association of Canada (CIAC) is the association for leaders in Canada's chemistry and plastic sectors. In 2025 the Chemistry and plastics sectors shipped $102 billion worth of products. The sectors are responsible for 176,670 Canadian jobs and pay more than $13.7 billion in wages. The Association represents nearly 120 members and partners across the country. We provide coordination and leadership on key issues including innovation, investment, plastics, taxation, health and safety, environment, and regulatory initiatives. CIAC's Chemistry members are audited against the Ethic and Principles of Responsible Care®, a globally recognized sustainability initiative. In addition to implementing Operation Clean Sweep® for the prevention of pre-production pellet loss to the environment, CIAC's Plastics Division focuses on achieving a circular economy and represents the interests of the entire value chain, including resin producers, processors/converters, equipment suppliers, recyclers and brand owners.

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# President's Message

I am pleased to present the Chemistry Industry Association of Canada's (CIAC) 2026 Economic Review of Chemistry and Plastics. This annual review provides readers with an economic profile of the industry and quantitative insight into its importance to Canada's economy and to the prosperity of Canadians. This report examines economic performance in 2025 a year marked by weaker global demand and continued softness across many of the industries that drive chemical and plastic products consumption. Elevated cost of living and higher interest rates constrained activity in residential real estate, commercial construction, and business investment, while automotive production and sales remained below pre-pandemic levels in many markets.

The global chemical industry is also confronting a changing competitive landscape. Significant new production capacity is coming online around the world, creating supply-demand imbalances that are expected to influence global markets for years to come. While production rationalization in Europe, Japan and South Korea should help rebalance some regional markets, sustained global overcapacity will continue to place pressure on prices, margins and investment decisions.

The conditions shaping the industry's outlook have continued to evolve through 2026. The Review of the Canada-United States-Mexico Agreement (CUSMA/USMCA/T-MEC), ongoing trade uncertainty, and heighted geopolitical tensions, including recent disruptions affecting global energy markets and key shipping corridors such as the Strait of Hormuz, have reinforced the importance of resilient North American supply chains and reliable access to competitive energy and feedstocks.

Despite these headwinds, Canada's chemical industry remains underpinned by enduring structural advantages. Abundant, competitively priced energy and feedstocks, highly integrated North American manufacturing base, efficient transportation infrastructure, and preferential access to global markets continue to position Canada as an attractive location for investment and growth. As economic conditions improve and policy makers focus on strengthening Canada's competitiveness, Canada's chemistry and plastics industries are well positioned to support economic growth, innovation, and high-quality jobs across the country.

Yours sincerely,

Greg Moffatt
President and CEO
Chemistry Industry Association of Canada

# Introduction[1]

Using data from Statistics Canada (unless otherwise stated), CIAC's 2026 Economic Review of Chemistry and Plastics provides a statistical review of key industry indicators including shipments, imports, exports, and employment from the year 2025. The report also includes a section on specialty chemicals, statistics for the key provinces of Quebec, Ontario and Alberta, and for the segments of the industry of primary interest to CIAC members.

## Industrial Classification

Industries in Canada are classified using the 2022 North American Industry Classification System (NAICS), maintained by Statistics Canada and its counterpart organizations in the United States and Mexico. This report uses data for NAICS 325, Chemical Manufacturing, which covers establishments primarily engaged in manufacturing chemicals and chemical preparations from organic and inorganic raw materials. It also covers NAICS 326 Plastic and Rubber Product Manufacturing.

This report focuses on the overall chemical industry (NAICS 325), the industrial chemicals subset chemistry with NAICS 3251 and 3252, and plastic product manufacturing (NAICS 3261). Industrial chemicals account for most CIAC member chemical-manufacturing activity, while NAICS 3261 represents downstream CIAC member establishments that convert new or recycled plastic resins into intermediate and final products.

- NAICS 3251 Basic chemicals – establishments primarily engaged in manufacturing organic and inorganic chemicals using processes such as thermal cracking, distillation, and chemical reaction.
- NAICS 3252 Synthetic resins, rubbers, and fibres – establishments primarily engaged in manufacturing polymers such as polyethylene, polypropylene, butyl rubber, polyamides, and fibres made from these resins. The basic process is polymerization, such as converting ethylene into polyethylene.
- NAICS 3261 - establishments primarily engaged in manufacturing intermediate or final products from plastics resins, using such processes as compression moulding, extrusion moulding, injection moulding, blow moulding and casting. The production process in most of these industries is such that a wide variety of products can be produced. The plastics resins used by these establishments may be new or recycled.

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## Chemistry Industry at a Glance

Chemical industry[2] shipments in Canada in 2025 were $72.9 billion, exports were $49.9 billion, and imports totaled $29.9 billion.

The chemical manufacturing industry employed 93,700 workers in 2025 which constituted six per cent of all manufacturing jobs in Canada. In addition to the direct jobs, other jobs are supported by the purchasing activity of the chemistry industry and by the subsequent expenditure-induced activity. CIAC has estimated that for every job in the chemistry industry, another six indirect jobs are created in other parts of the economy, so in total the chemistry industry supports 562,200 jobs in Canada. For Industrial Chemicals, shipments in 2025 were $29 billion, exports were $23.4 billion, imports were $29.9 billion, and employment was 20,700 indirectly supporting 124,200 jobs in the broader Canadian economy.

Industrial chemicals are a keystone industry within the Canadian economy, converting and adding value to raw resources such as natural gas, crude oil, minerals, metals and biomass, creating intermediate products that are used as inputs by other parts of the chemistry industry, and by almost all other manufacturing segments. Major consumer industries include plastic and rubber products (NAICS 326), forest products (NAICS 321 and 322), transportation equipment (NAICS 336), oil and gas extraction (NAICS 211), clothing (NAICS 315), construction (NAICS 23), and pharmaceuticals (NAICS 3254).

### Table 1: Principal Statistics for the Chemical Industry

| | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|---|---|---|---|---|
| **Shipments, $ billion** | 51.6 | 51.3 | 52.9 | 56.0 | 53.3 | 68.1 | 78.2 | 77.4 | 77.0 | 72.9 |
| **Employment, 000** | 84.3 | 86.6 | 85.8 | 86.4 | 81.8 | 78.5 | 90.8 | 90.0 | 94.5 | 93.7 |
| **Imports, $ billion** | 53.3 | 55.8 | 59.8 | 61.8 | 62.3 | 72.9 | 89.6 | 84.5 | 86.6 | 86.6 |
| **Exports, $ billion** | 35.9 | 33.7 | 38.0 | 37.4 | 36.0 | 41.6 | 52.8 | 51.8 | 55.6 | 49.9 |

### Table 2: Principal Statistics for the Industrial Chemical Sector

| | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|---|---|---|---|---|
| **Shipments, $ billion** | 24.1 | 26.2 | 28.9 | 26.0 | 22.4 | 29.3 | 34.2 | 32.8 | 33.7 | 29.0 |
| **Employment, 000** | 15.7 | 16.4 | 16.4 | 15.8 | 14.9 | 15.8 | 17.1 | 20.3 | 21.2 | 20.7 |
| **Imports, $ billion** | 18.8 | 19.8 | 21.3 | 20.8 | 20.0 | 22.1 | 31.3 | 28.8 | 26.5 | 29.9 |

[2] Chemical industry and industrial chemicals are defined on page 1.

## Plastic Product Manufacturing Industry at a Glance

Plastic product manufacturing (NAICS 3261) is one of Canada's larger manufacturing industries. In 2025, the sector shipped $35.8 billion, directly employed 82,972 people, paid $5.44 billion in wages, exported $14.8 billion and imported $17.0 billion. More than 1,800 Canadian companies participate in the sector.

### Table 3: Principal Statistics for Plastic Product Manufacturing (NAICS 3261)

| | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|---|---|---|---|---|
| **Shipments, $ billion** | 26.0 | 26.4 | 27.5 | 27.7 | 26.3 | 31.3 | 36.3 | 35.5 | 35.4 | 35.8 |
| **Employment, 000** | 89.2 | 89.9 | 92.3 | 79.0 | 78.9 | 84.2 | 85.7 | 84.1 | 84.8 | 83.0 |
| **Imports, $ billion** | 11.7 | 12.3 | 13.0 | 13.1 | 13.1 | 14.5 | 17.0 | 16.1 | 16.7 | 17.0 |
| **Exports, $ billion** | 10.4 | 10.7 | 11.3 | 11.5 | 11.4 | 13.0 | 14.9 | 14.9 | 15.5 | 14.8 |

## Manufacturing Shipments (Revenue)

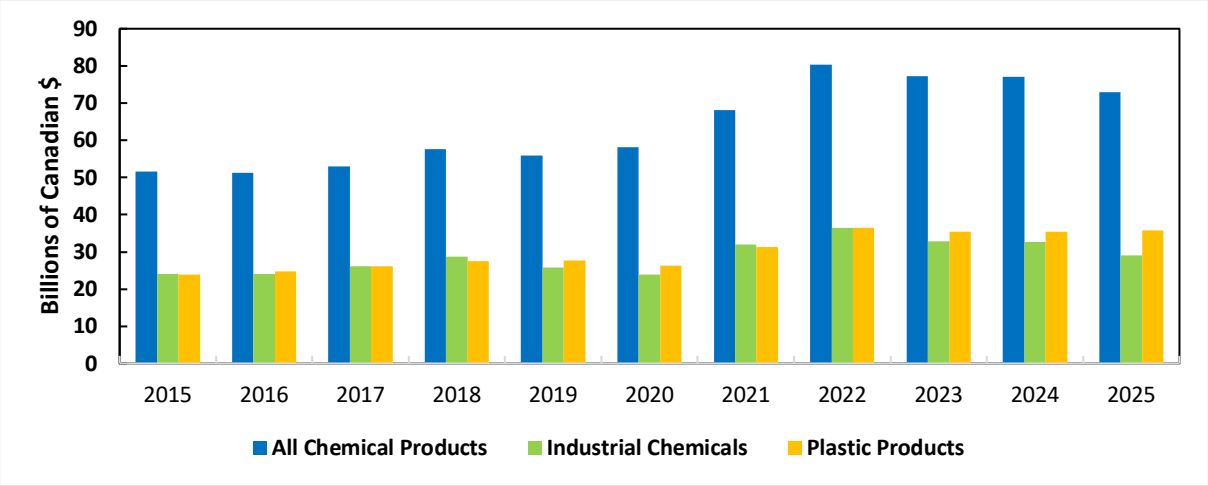
In 2025, Canada's chemical industry manufactured $72.9 billion worth of products, a 5.4 per cent decrease from 2024 levels.

Shipments of industrial chemicals were $29.0 billion in 2025, an 8.1 per cent decrease from 2024. Plastic product manufacturing shipments were $35.8 billion, a 1.2 per cent increase from $35.4 billion in 2024 (Table 4, Figure 1).

### Table 4: Manufacturing Shipments

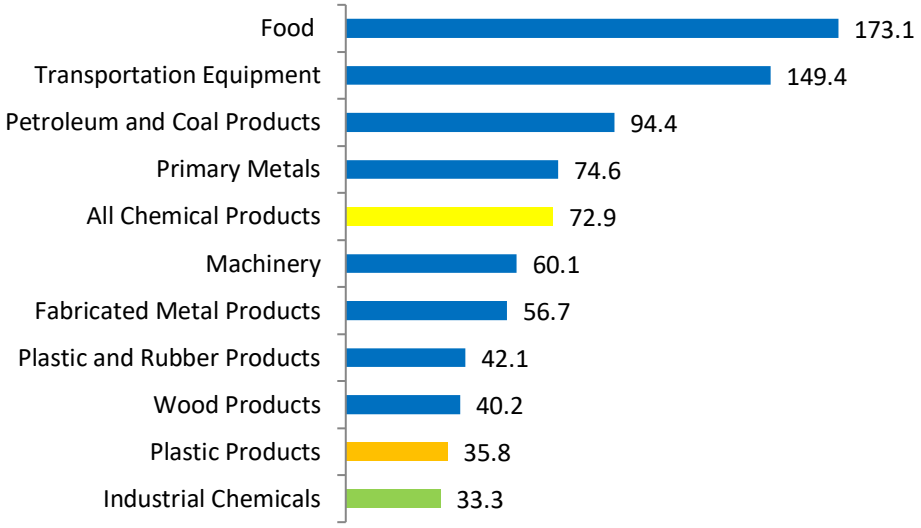
| Manufacturing Shipments, $ Billion | 2024 | 2025 | Change 2024-25 |
|---|---|---|---|
| **All chemicals** | 77.1 | 72.9 | -5.4% |
| **Industrial chemicals** | 31.5 | 29.0 | -8.1% |
| **Plastic products** | 35.4 | 35.8 | 1.2% |

## Figure 1: Annual Chemical Industry Shipments in Billions CAD




Within the NAICS system, there are 21 manufacturing industries at the 3-digit level. Among these industries, chemicals (NAICS 325) rank as the 5th largest based on value of shipments (Figure 2).

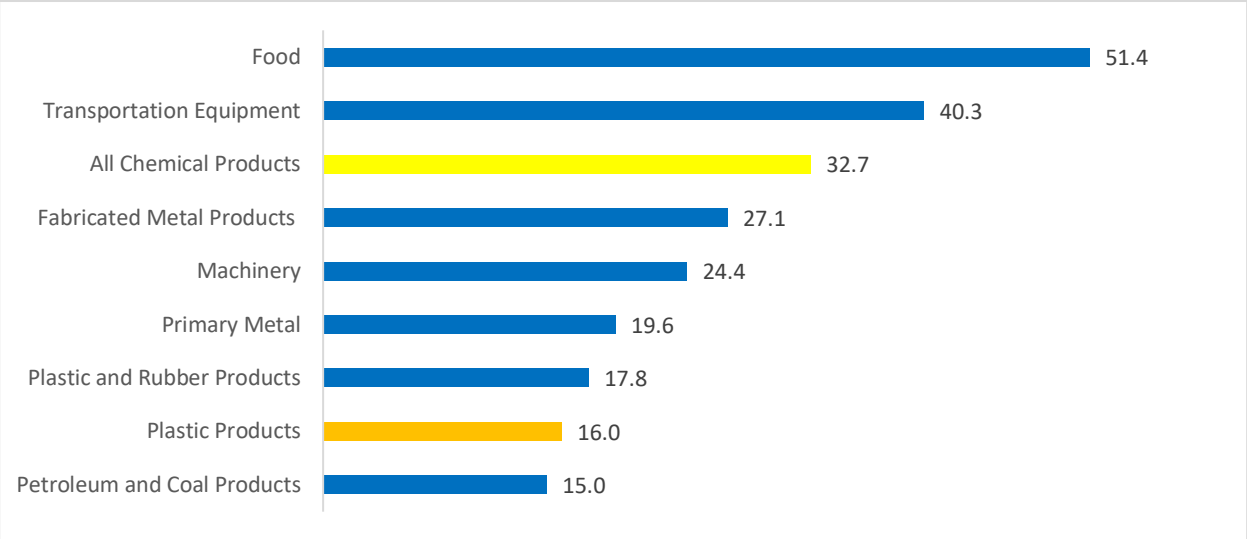
## Figure 2: Top Manufacturing Sectors by Shipment Value, $ Billions, 2025



## Value Added

Value added measures the value of an industry's output less the intermediate inputs required in production. Compared with all manufacturing industries, chemicals ranked 3rd in 2024. Plastic product manufacturing generated $16.0 billion in value added and ranked 8th (Figure 3).

### Figure 3: Top 10 Manufacturing Industries by Value Added, in Billions CAD, 2024




## Employment

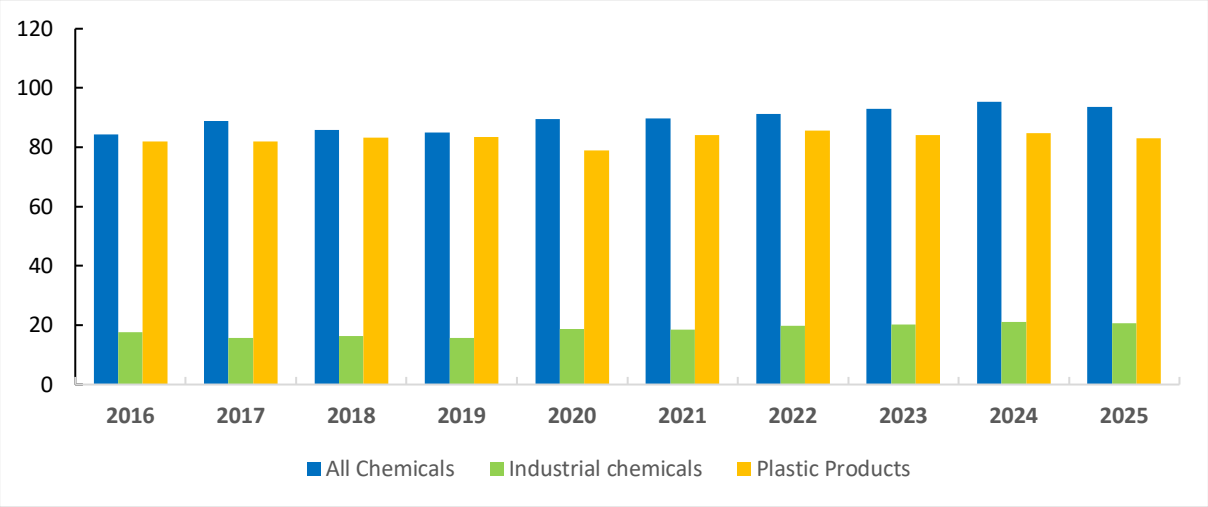
The chemical industry employed 93,700 workers in 2025 and industrial chemicals employed 20,700. Plastic product manufacturing employed 82,972 people, down 2.1 per cent from 84,776 in 2024. Chemical and industrial-chemical employment peaked in 2003 and has generally declined since, while Plastic Products employment remained above 79,000 throughout 2019-2025 (Table 5, Figure 4).

In addition to the direct jobs, additional jobs are supported by the purchasing activity of the chemical industry and by the subsequent expenditure-induced activity. For every job in the chemical industry, it is estimated that another six jobs in other sectors are indirectly linked to the industry. On this basis, the chemical industry supports about 562,200 jobs, with industrial chemicals supporting about 124,200 jobs in the overall Canadian economy. Canada's plastic product manufacturing industry supports an estimated 51,500 indirect jobs throughout the Canadian economy, based on Statistics Canada's input-output employment multipliers and annual manufacturing shipments.

### Table 5: Employment in the Canadian Chemical and Plastics Industries

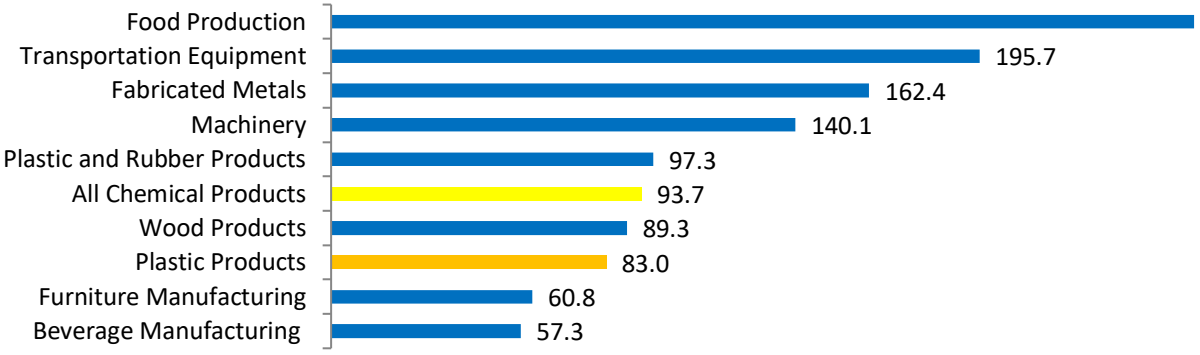
| Total Employment, Thousands | 2024 | 2025 | Change 2024-2025 |
|---|---|---|---|
| **All Chemicals** | 95.4 | 93.7 | -1.9% |
| **Industrial Chemicals** | 21.2 | 20.7 | -2.2% |
| **Plastic products** | 84.8 | 83.0 | -2.1% |

## Figure 4: Chemical and Plastic Industry Employment in Thousands of Employees




Based on employment, chemicals rank 6th among all manufacturing industries (Figure 5). Plastic Product manufacturing employed 83,000 Canadians and ranked 8th among manufacturing industries.

## Figure 5: Top 10 Manufacturing Industries by Employment (in Thousands of People)



## Salaries and Wages

Total salaries and wages paid by the chemical industry were $8.47 billion in 2025, including $2.05 billion in industrial chemicals. Plastic product manufacturing paid $5.44 billion in salaries and wages, down 2.4 per cent from $5.57 billion in 2024 (Table 6).

### Table 6: Total Salary and Wages Paid by the Chemical Industry

| Total Salaries and Wages, $ Billion | 2024 | 2025 | Change 2024-25 |
|---|---|---|---|
| **All Chemicals** | 8.1 | 8.47 | 4.5% |
| **Industrial Chemicals** | 1.98 | 2.05 | 3.8% |
| **Plastic products** | 5.57 | 5.44 | -2.4% |

Chemicals ranked 4th among manufacturing industries with average earnings of $86,600 in 2025. Industrial chemicals averaged $99,500, while Plastic Products averaged approximately $65,500 based on total wages and employment. The all-manufacturing average was $74,400 (Figure 7, Table 7).

### Figure 7: Top Manufacturing Industries Based on Average Earnings Per Employee in Thousands of CAD

### Table 7: Average Salaries in the Chemical and Plastics Industries

| Average Salaries and Wages, $ Thousand | 2024 | 2025 | Change 2024-25 |
|---|---|---|---|
| **All Chemicals** | 85.0 | 86.6 | 1.9% |
| **Industrial Chemicals** | 93.0 | 99.5 | 6.1% |
| **Plastic products** | 65.7 | 65.5 | -0.2% |

## International Trade

Canada exported $49.9 billion worth of chemicals and chemical products to the world in 2025, a 10.3 per cent decrease compared to 2023. Imports were basically flat at $86.6 billion (Table 8 and Figure 8). The United States represents the dominant export market and the dominant source of imports. In 2025, 74 per cent of exports, worth $37 billion went to the United States and 55 per cent of imports worth $47.7 billion originated there. The next largest export markets are China $2.3 billion (4.6 per cent), followed by Netherlands $1.2 billion (2.4 per cent), the U.K $1.4 billion (2.4 per cent) and Germany 1.2 billion (2.1 per cent). The next largest sources of imports were China $5 billion (5.8 per cent), Germany $4.0 billion (4.6 per cent), Ireland $2.9 billion (3.3 per cent), and Switzerland $2.7 billion (3.1 per cent).

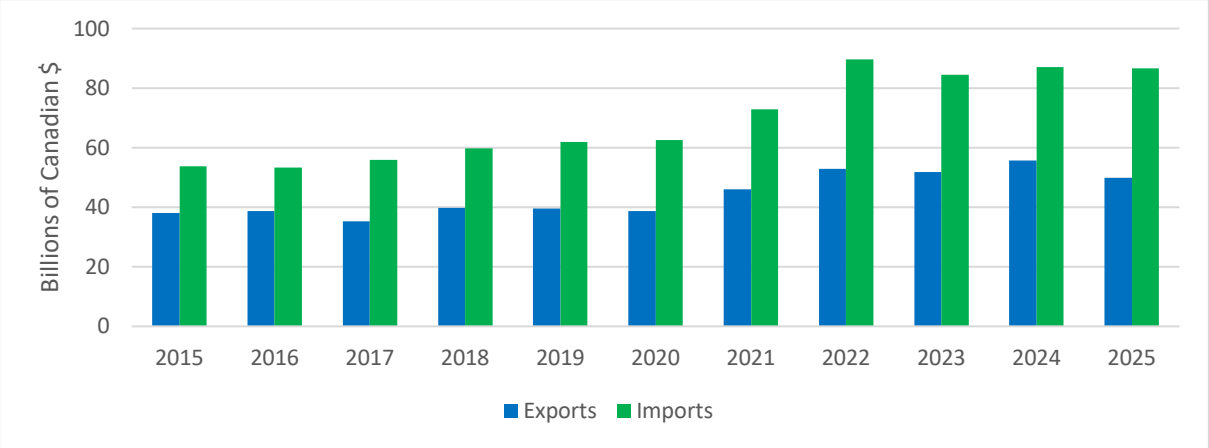
For industrial chemicals, Canadian exports decreased by 12.6 per cent to $23.4 billion in 2025. Imports decreased by 4.4 per cent to $29.9 billion (Table 8 and Figure 9). Both imports and exports of industrial chemicals are dominated by bulk commodities like polyethylene, ethylene glycol and styrene. Again, the United States is the primary trading partner with 70 per cent of exports worth $16.3 billion and 63 per cent of imports worth $18.8 billion. The next largest export markets are China $1.5 billion (6.4 per cent) and the Netherlands $945 billion (4 per cent). The next largest import partners were China $3.3 billion (12.4 per cent) and Germany $785 million (2.6 per cent) and India at $547 million (1.8 per cent).

For plastic products, imports increased 1.9 per cent to $17.0 billion in 2025, while exports decreased 4.2 per cent to $14.8 billion. The United States was responsible for $9.95 billion (58 percent) of imports of Plastic Products, followed by China at 3.5 billion (21 percent), with Mexico and Germany each with $400 million (2.5 percent each). Exports of plastic products overwhelmingly flow to the United States $13.9 billion (94 percent).

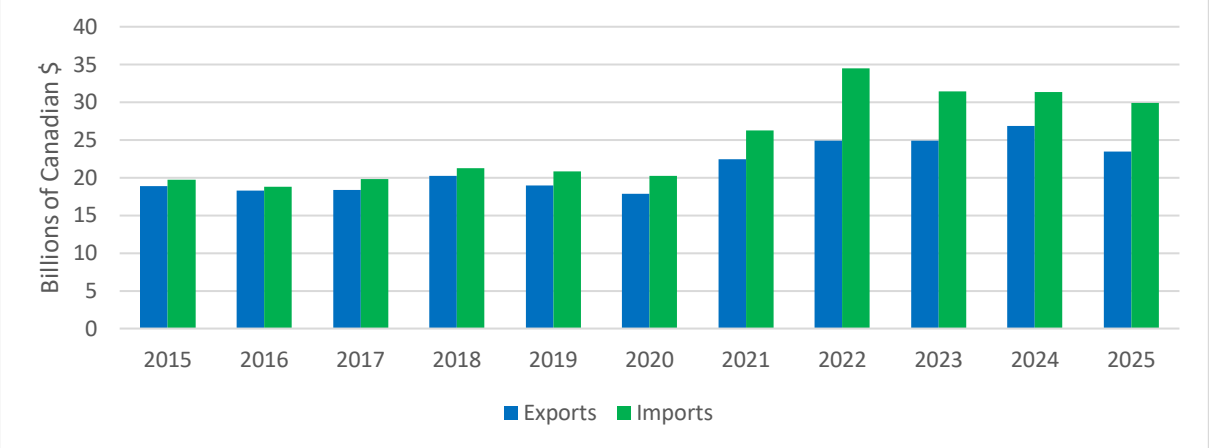
### Table 8: Trade in the Chemistry and Plastic Sectors

| Value of Trade, $ Billion | | 2024 | 2025 | Change 2024-25 |
|---|---|---|---|---|
| **All Chemicals** | **Imports** | 87.0 | 86.6 | Flat |
| | **Exports** | 55.6 | 49.9 | -10.3% |
| **Industrial Chemicals** | **Imports** | 31.3 | 29.9 | -4.4% |
| | **Exports** | 26.8 | 23.4 | -12.6% |
| **Plastic products** | **Imports** | 16.7 | 17.0 | 1.9% |
| | **Exports** | 15.5 | 14.8 | -4.2% |

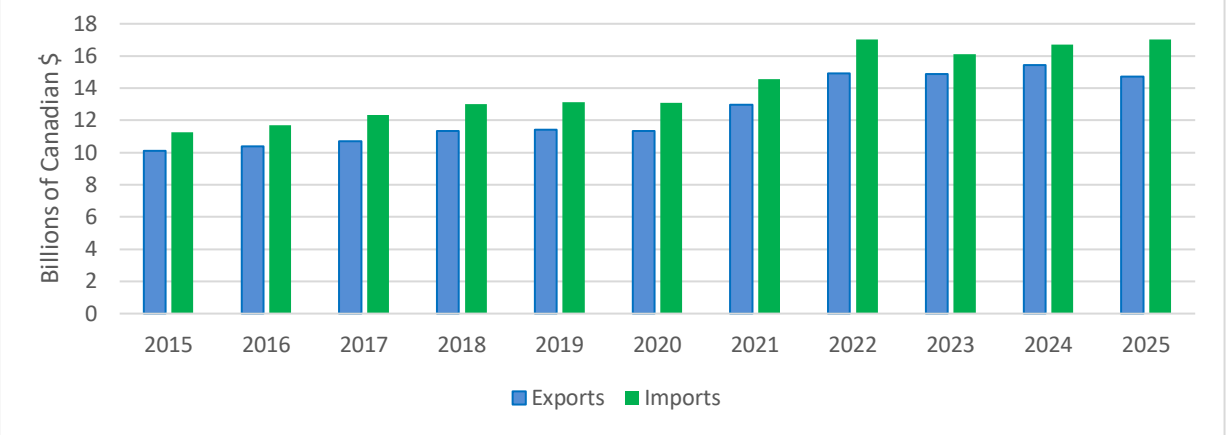
## Figure 8: Trade of All Chemicals in Billions of CAD




## Figure 9: Trade of Industrial Chemicals in Billions of CAD

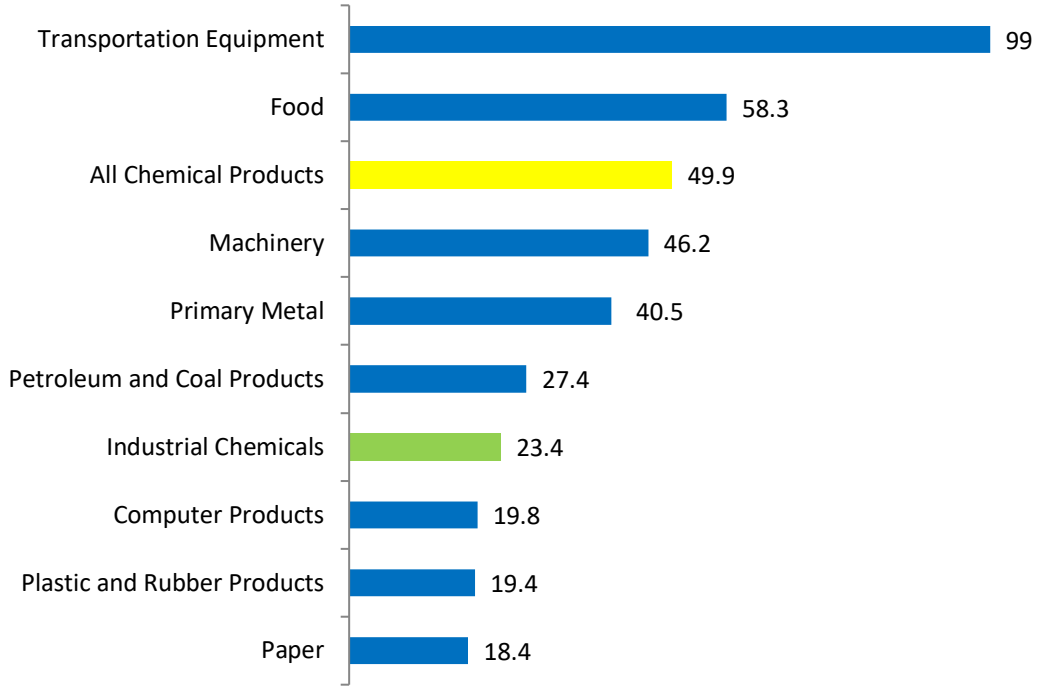



## Figure 10: Trade of Plastic Products in Billions of CAD



The chemistry industry was the 3rd largest exporter among all manufacturing industries in 2025. (Figure 10). Plastic Product manufacturing was the 11th largest exporter in 2025.

### Figure 11: Leading Manufacturing Industries by Exports in Billions of CAD




## Profits

Profits for the chemical sector depend on factors such as capacity utilization, energy and raw material costs, supply-demand balance and competition with foreign producers. Operating profits in 2025 for the chemical industry were $11.2 billion and $3.2 billion for industrial chemicals (Table 9). For Plastic products operating profit is estimated at 3.8 billion, a substantial increase of 22.5 percent from 2024 owing to the cyclical low price for resin inputs seen in 2025.

### Table 9: Operating Profits in the Chemistry and Plastic Sectors

| Operating profit, $ billion | 2024 | 2025 | Change 2024-25 |
|---|---|---|---|
| **Total chemicals** | 11.2 | 11.2 | Flat |
| **Industrial chemicals** | 3.20 | 3.0 | -5.6% |
| **Plastic products** | 3.09 | 3.8 | 22.5% |

Operating profits for industrial chemicals have remained stable since the COVID-19 Pandemic but have been trending downwards since 2016. A wave of investment globally has pressured prices of many industrial chemicals in the last decade.

## Productivity

One measure of manufacturing productivity is the value of revenue per employee. For all chemicals, output per employee in 2025 was $778,720. For industrial chemicals, it rises to $1.40 million. For Plastic Products the figure is $431,000. Output per employee is much higher for industrial chemicals, reflecting the capital-intensive nature of the industry compared to chemicals overall and the plastic products sector. These numbers have remained steady over the past decade.

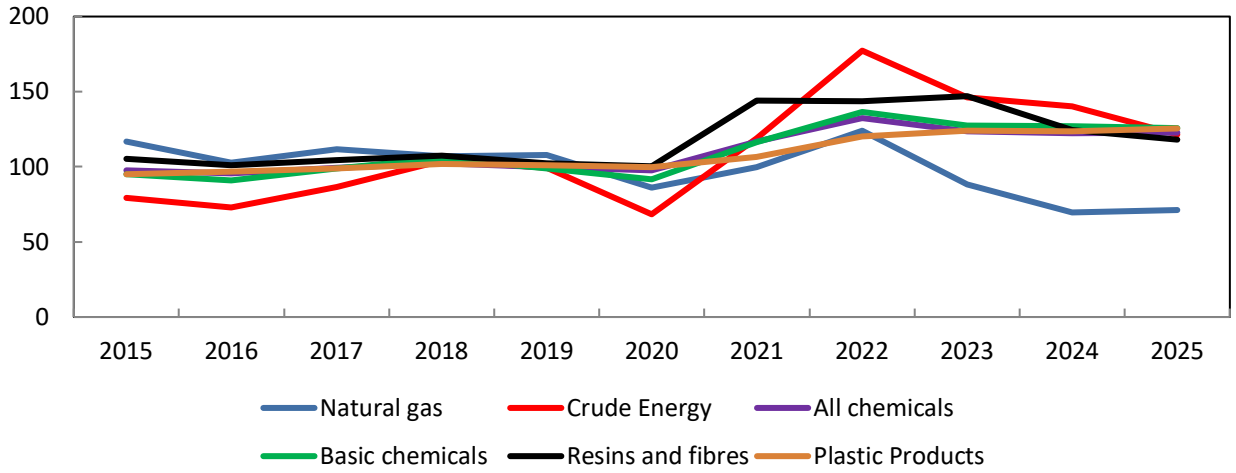
### Table 10: Productivity in the Chemistry and Plastic Sectors

| Output per employee, $ thousand | 2024 | 2025 |
|---|---|---|
| All chemicals | 802 | 778 |
| Industrial chemicals | 1,830 | 1,400 |
| Plastic Products | 430 | 431 |

## Price Index

The Industrial Product Price Index (IPPI) reflects the prices that producers in Canada receive as the goods leave the plant. Natural gas and crude oil are two important sources of feedstocks for the chemical industry (see Figure 12). Natural gas is the dominant feedstock in North America and prices have trended mostly downward since 2008 as supply from domestic and U.S. shale production overwhelmed demand.

### Figure 13: Price Index, 2020=100

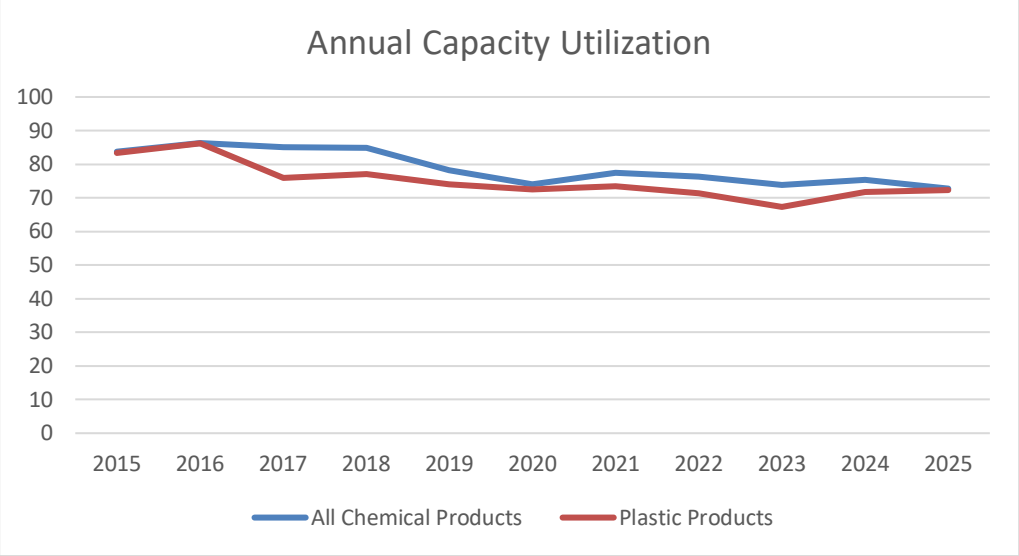


## Capacity Utilization

Capacity utilization refers to the extent to which an industry uses its installed productive capacity (Figure 13). Thus, it compares actual output with the maximum potential output that could be achieved if all capacity was fully used. While separate data is not available for industrial chemicals, it would be expected to have utilization rates higher than the industry average since continuous production processes are employed, whereas the segment of the industry producing formulated products relies on batch processes.

Capacity Utilization for Chemicals has not recovered since a sharp decline in 2018/2019. A similar reduction occurred in Plastic Products in 2016 and has remained between 70-80 percent over the last decade.

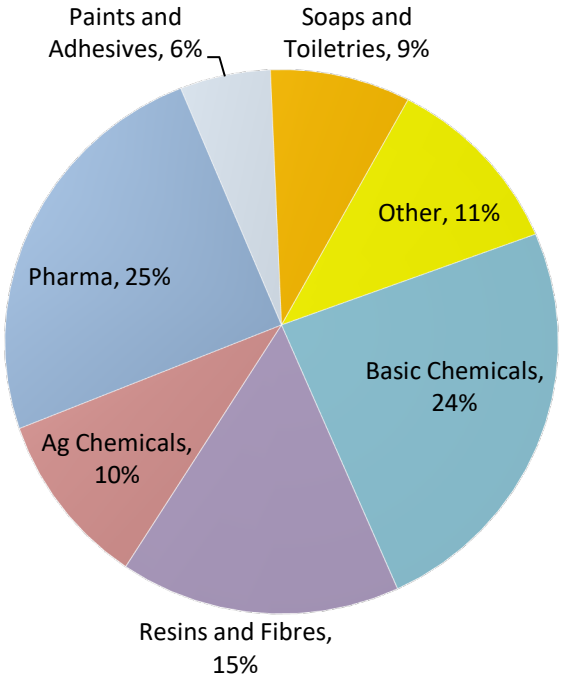
### Figure 14: Capacity Utilization in the Chemical and Plastic Product Sectors, %



## Other Chemical Manufacturing Subsectors

As mentioned previously, the Canadian chemical industry is comprised of seven sub-industries. Figure 14 shows the relative size of these industries by shipment value in 2025. Industrial chemicals accounted for 40 per cent of the total industry.

### Figure 15: Distribution by Chemical Sub-Industries Based on Shipments




While NAICS 3251 and 3252 are the focus of this report, the following tables provide some data on the other sub-industries.

### Table 11: Principal Statistics for Pesticides, Fertilizers and Other Agricultural Chemicals (NAICS 3253)

| | Shipments, $ million | Employment | Imports, $ million | Exports, $ million |
|---|---|---|---|---|
| 2019 | 6,272 | 4,882 | 4,033 | 1,424 |
| 2020 | 7,750 | 7,008 | 4,014 | 1,997 |
| 2021 | 7,358 | 7,188 | 5,077 | 2,088 |
| 2022 | 10,366 | 7,301 | 7,216 | 3,021 |
| 2023 | 9,297 | 6,831 | 6,224 | 2,497 |
| 2024 | 8,691 | 6,840 | 6,217 | 2,299 |
| 2025 | 7,279 | 6,136 | 6,840 | 2,449 |

## Table 12: Principal Statistics for Pharmaceuticals (NAICS 3254)

| | Shipments, $ million | Employment | Imports, $ million | Exports, $ million |
|---|---|---|---|---|
| 2019 | 13,796 | 31,748 | 21,546 | 12,319 |
| 2020 | 13,770 | 33,391 | 22,574 | 12,318 |
| 2021 | 13,065 | 34,023 | 26,621 | 13,248 |
| 2022 | 15,138 | 34,022 | 30,205 | 15,187 |
| 2023 | 16,276 | 33,945 | 28,155 | 14,080 |
| 2024 | 17,704 | 35,367 | 29,270 | 16,709 |
| 2025 | 18,170 | 35,684 | 29,076 | 14,496 |

## Table 13: Principal Statistics for Paints, Coatings and Adhesives (NAICS 3255)

| | Shipments, $ million | Employment | Imports, $ million | Exports, $ million |
|---|---|---|---|---|
| 2019 | 3,185 | 7,502 | 2,563 | 902 |
| 2020 | 3,057 | 6,716 | 2,442 | 817 |
| 2021 | 3,360 | 6,859 | 2,599 | 903 |
| 2022 | 4,237 | 6,675 | 3,090 | 1,092 |
| 2023 | 4,284 | 6,879 | 3,193 | 1,076 |
| 2024 | 4,255 | 6,868 | 3,232 | 1,003 |
| 2025 | 4,122 | 6,429 | 3,309 | 938 |

## Table 14: Principal Statistics for Soaps, Cleaning Compounds and Toilet Preparations (NAICS 3256)

| | Shipments, $ million | Employment | Imports, $ million | Exports, $ million |
|---|---|---|---|---|
| 2019 | 4,911 | 14,437 | 7,025 | 3,829 |
| 2020 | 4,673 | 13,113 | 7,815 | 3,721 |
| 2021 | 5,512 | 12,536 | 7,069 | 3,943 |
| 2022 | 6,023 | 13,665 | 8,364 | 4,370 |
| 2023 | 6,609 | 13,607 | 9,091 | 5,090 |
| 2024 | 6,695 | 13,669 | 9,712 | 4,952 |
| 2025 | 6,382 | 13,533 | 10,011 | 4,903 |

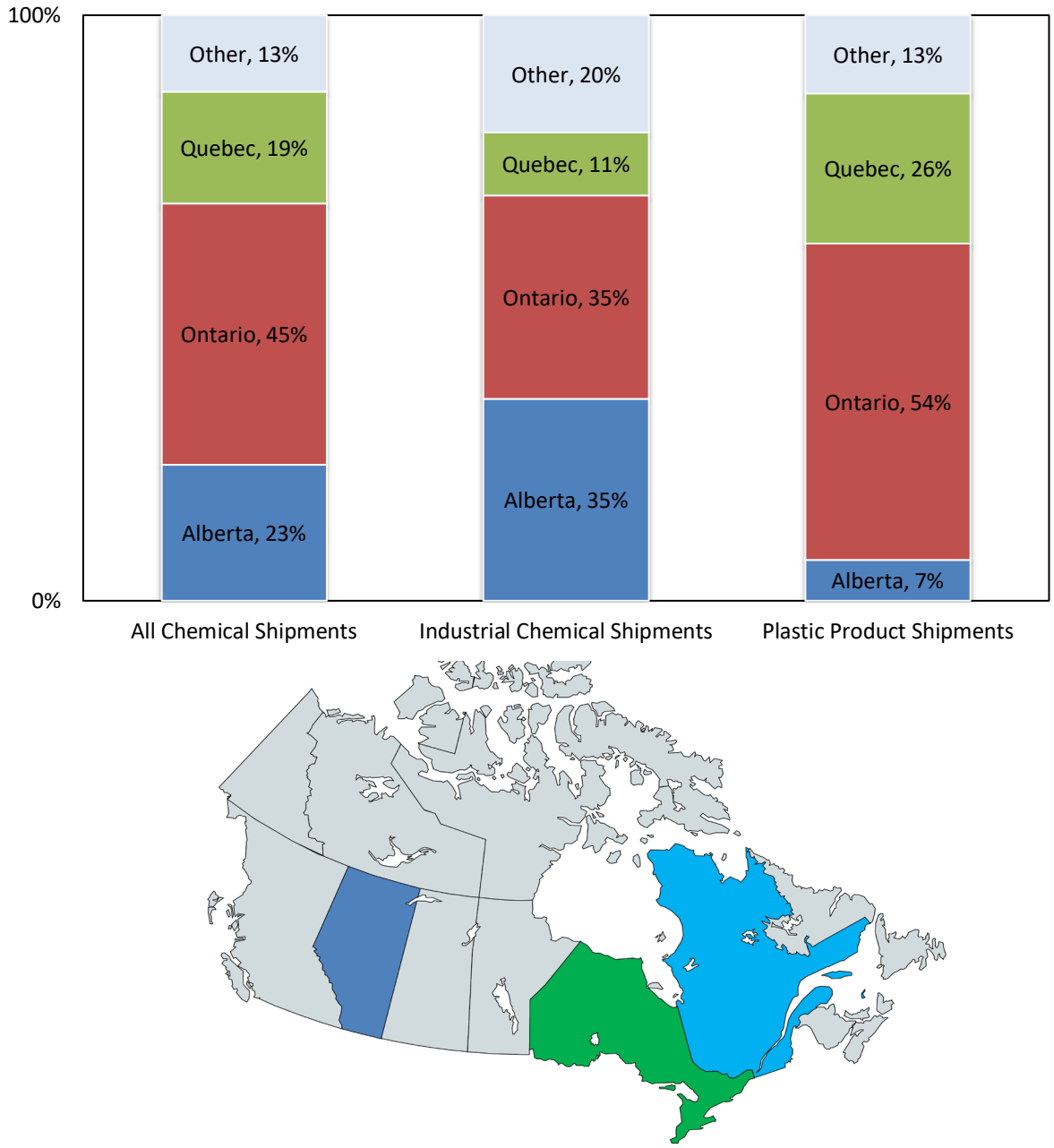
## Table 15: Principal Statistics for Other Chemical Products (NAICS 3259)

| | Shipments, $ million | Employment | Imports, $ million | Exports, $ million |
|---|---|---|---|---|
| 2019 | 5,543 | 10,710 | 5,927 | 2,457 |
| 2020 | 5,488 | 10,468 | 5,468 | 2,457 |
| 2021 | 6,617 | 10,801 | 5,276 | 3,285 |
| 2022 | 8,094 | 11,351 | 6,419 | 4,285 |
| 2023 | 8,220 | 11,441 | 6,371 | 4,174 |
| 2024 | 8,238 | 11,521 | 6,860 | 3,849 |
| 2025 | 8,373 | 11,116 | 5,668 | 3,718 |

## Provincial Statistics

The overall chemical industry, industrial chemicals segments of chemistry and the plastic product manufacturing are concentrated in the provinces of Ontario, Alberta and Quebec (Figure 15). Further information about these three main provinces is contained in the following portions of the analysis.

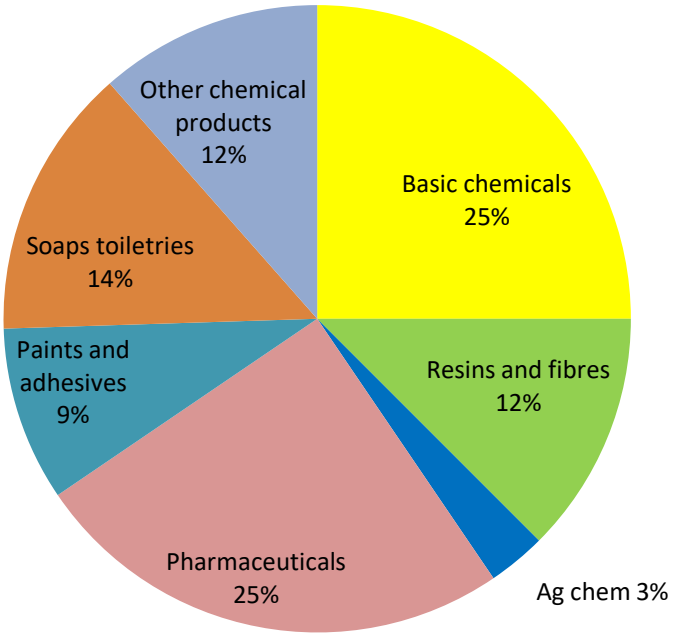
### Figure 16: Provincial Distribution of the Chemical and Plastics Industries, by Value of Shipments



## a. Ontario

In 2025, Ontario's chemical industry shipped $32.5 billion and industrial chemicals shipped $11.7 billion. Plastic product manufacturing shipped $19.3 billion, representing 55 per cent of national plastic product shipments (Figure 16).

### Figure 17: Composition of the Ontario Chemical Industry



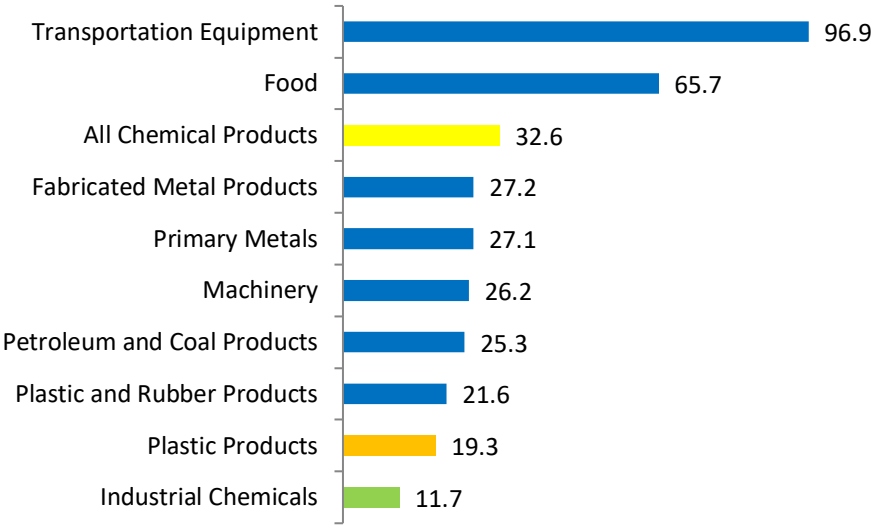

The largest cluster for the industrial chemical industry is in the Sarnia region, with the next largest concentrations in the Golden Horseshoe and along the St. Lawrence Seaway.

### Table 16: Ontario Chemical and Plastic Industry Shipments

| Shipments, $ billion | 2024 | 2025 | Change 2024-25 |
|---|---|---|---|
| All chemicals | 35.5 | 32.5 | -8.5% |
| Industrial chemicals | 12.8 | 11.7 | -8.6% |
| Plastic products | 19.5 | 19.3 | -1% |

Based on shipments, chemicals was the 3rd largest of all manufacturing industries in the province in 2025 (Figure 17). Plastic Product manufacturing is ranked as the 9th largest industry.

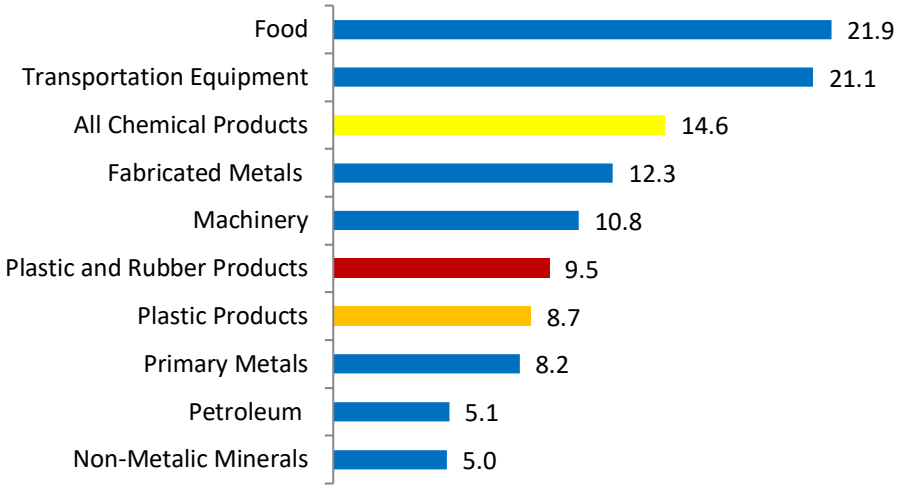
### Figure 17: Top 10 Manufacturing Industries in Ontario by Value of Shipments, $ Billions




## • Value Added

Based on value added, chemicals also ranked 3rd among all manufacturing industries in 2024 (latest data available) (Figure 18).

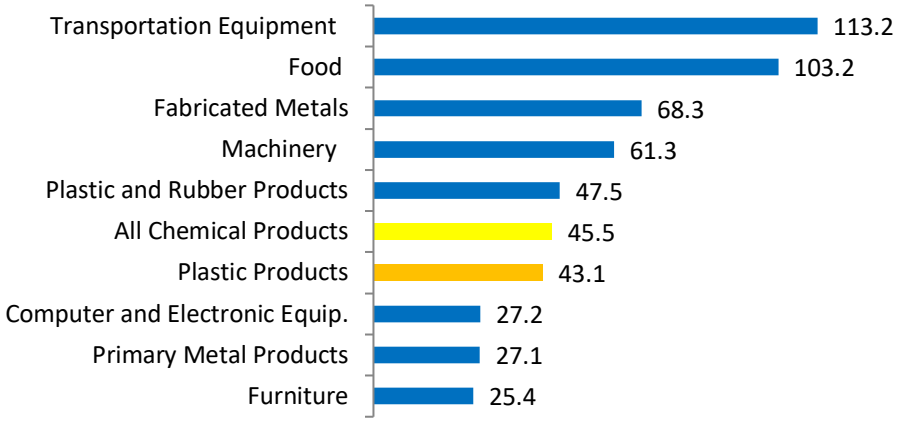
### Figure 18: Top 10 Industries by Value Added in Ontario, $ Billions



## Employment Ranking

The chemical industry directly employed 45,500 people in Ontario in 2025 and industrial chemicals employed 9,660. Plastic product manufacturing employed 43,130 people, representing 52 per cent of national employment, across approximately 827 companies. Chemicals ranked 7th and Plastic Products ranked immediately after it among Ontario manufacturing industries (Figure 19).

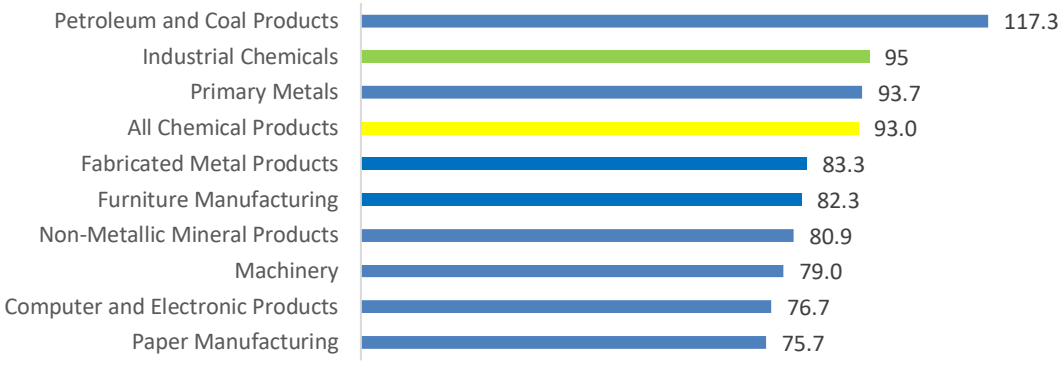
### Figure 19: Top Manufacturing Industries by Number of Employees in Ontario in Thousands




## Salaries and Wages

The chemical industry paid $3.6 billion in salaries and wages in Ontario in 2025 and industrial chemicals paid $941 million. Plastic product manufacturing paid $2.79 billion, equal to an average of approximately $64,700 per employee. The average across all Ontario manufacturing industries was $73,880 (Figure 20).

### Figure 20: Top 10 Manufacturing Industries by Average Salary in Ontario in $ Thousands



## Trade

The value of exports by the chemical industry from Ontario in 2025 was $27.3 billion, while imports were $56.4 billion (Table 17). The United States was the destination for 75 per cent of exports valued at $23.9 billion, followed by Japan $850 million (2.7 per cent), the Netherlands $781 million (2.6 per cent) the United Kingdom $735 million (2.4 per cent) and China $571 million (1.9 per cent). The United States was also the source for most imports worth $31.1 billion (55 per cent), followed by Switzerland $3.9 billion (6.9 per cent); Germany $2.9 billion (5.1 per cent) and China (3.5 per cent).

For industrial chemicals, exports from Ontario were $9.3 billion, while imports were $17.2 billion (Table 16) in 2025. The United States was the destination for 75 per cent of exports valued at $8.1 billion, followed by the Netherlands (5.8 per cent) and the United Kingdom (3.7 per cent). The United States was also the source of most imports (78 per cent), followed by China (5.5 per cent).

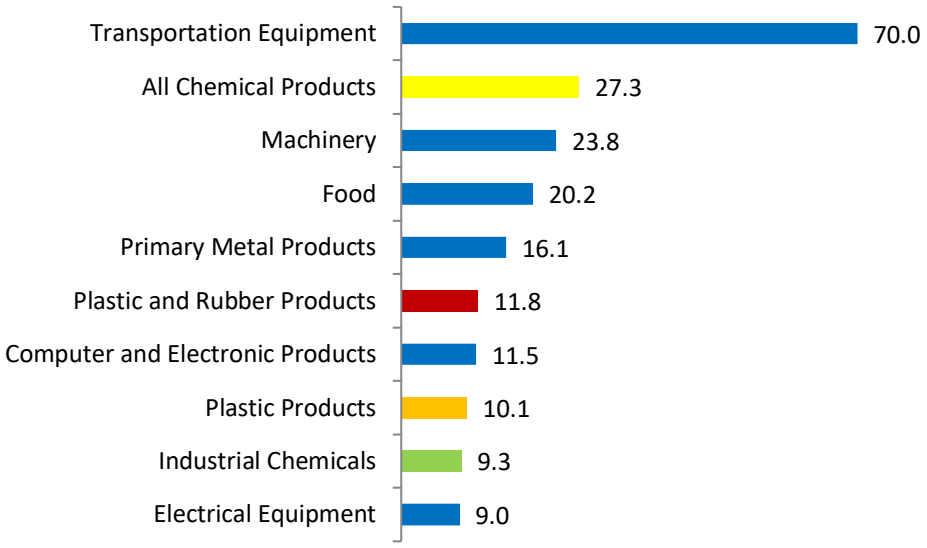
For plastic products exports were $10 billion in 2025, a decrease of 3 per cent from 2024, while imports were flat year over year at $10.7 billion. The United States is the destination for 96 percent of Ontario's plastic product exports. Ontario's imports come primarily from the U.S. with 7.1 billion (70 per cent) and China at $1.7 billion (17 per cent) and Mexico with $345 million (2.8 per cent).

### Table 17: Trade by the Chemical and Plastics Industries in Ontario

| Value of trade, $ billion | | 2024 | 2025 | Change 2024-25 |
|---|---|---|---|---|
| **All chemicals** | **Imports** | 56.6 | 55.5 | -1.9% |
| | **Exports** | 29.1 | 27.3 | -6.2% |
| **Industrial chemicals** | **Imports** | 18.3 | 17.2 | -6% |
| | **Exports** | 10.8 | 9.3 | -13% |
| **Plastic products** | **Imports** | 10.7 | 10.7 | Flat |
| | **Exports** | 10.3 | 10.0 | -3% |

Chemicals is the 2nd largest exporter among all manufacturing industries (Figure 21).

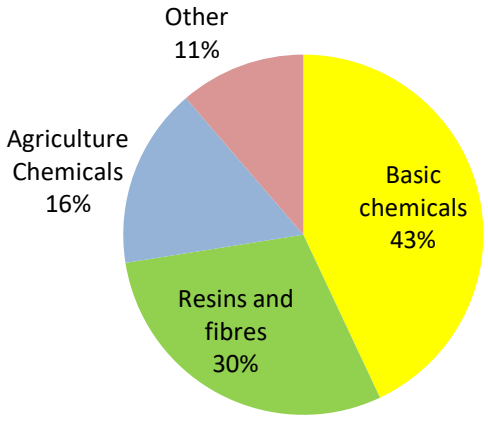
### Figure 21: Top Manufacturing Industries by Value of Exports from Ontario, $Billions




## b. Alberta

In 2025, Alberta's chemical industry shipped $16.9 billion and industrial chemicals shipped $11.9 billion. Plastic product manufacturing shipped $2.5 billion, equal to 7 per cent of national shipments (Figure 22).

### Figure 22: Composition of the Alberta Chemical Industry



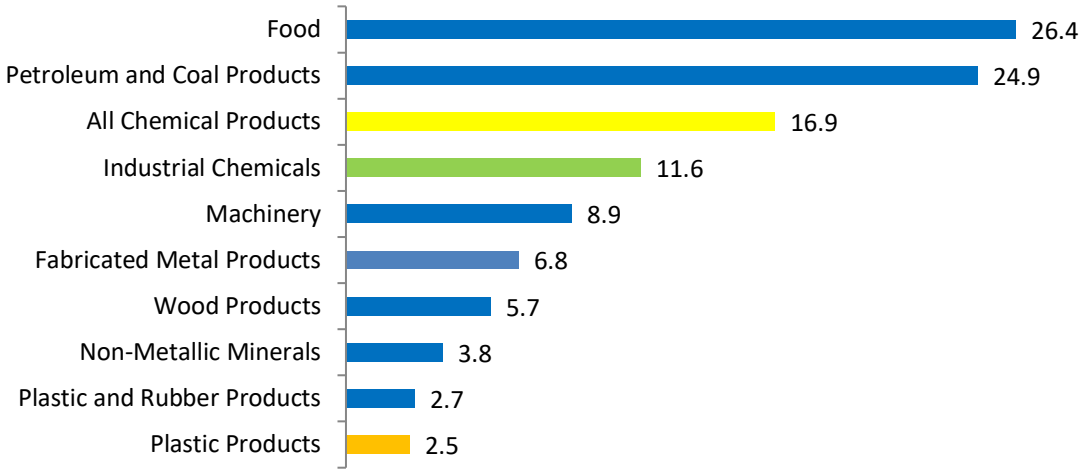

The industrial chemical industry in Alberta is in the Industrial Heartland region northeast of Edmonton, in central Alberta, near Red Deer, and in Medicine Hat.

### Table 18: Alberta Chemical and Plastics Industries Shipments

| Shipments, $billion | 2024 | 2025 | Change 2024-25 |
|---|---|---|---|
| All chemicals | 17.5 | 16.9 | -3.5% |
| Industrial chemicals | 12.3 | 11.9 | -2.9% |
| Plastic products | 2.5 | 2.5 | Flat |

Based on value of shipments, chemicals ranked 2nd among all manufacturing industries in the province in 2025 (Figure 23) and plastic products is ranked 10th.

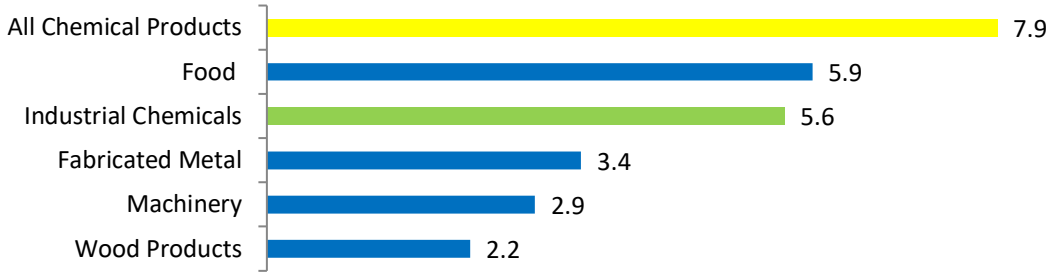
### Figure 23: Top Manufacturing Industries in Alberta by Value of Shipments, $Billion [3]




## • Value Added

Based on value added, chemicals ranked 1st among all manufacturing industries (Figure 24) based on 2024 data (latest available).

### Figure 24: Top Industries by Value Added in Alberta, $ Billion

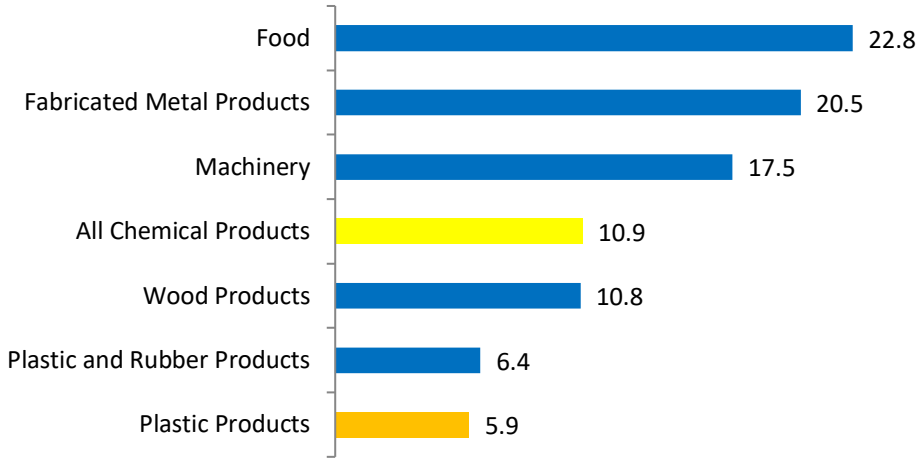



[3] The top 10 industries cannot be ranked because data for many industries has been suppressed by Statistics Canada.

## Employment Ranking

The chemical industry employed 10,919 people in Alberta in 2025 and industrial chemicals employed 5,795. Plastic product manufacturing employed 5,900 people.

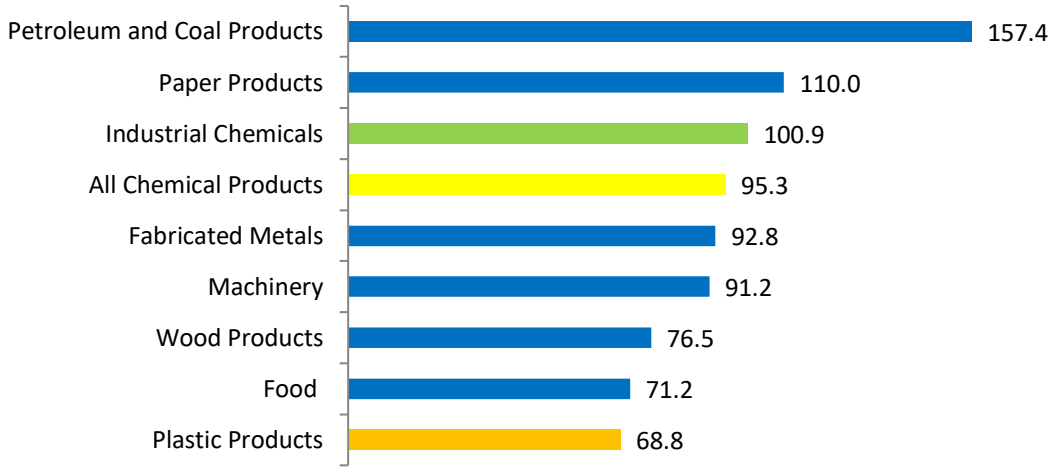
### Figure 25: Top Manufacturing Industries by Employment in Alberta




## Salaries and Wages

The chemical industry paid $1.04 billion in salaries and wages in Alberta in 2025. Industrial chemicals averaged $100,900 per employee. The average salary for industrial chemicals was $100,900. Plastic product manufacturing paid $403 million, equal to an average of approximately $68,300 per employee (Figure 26).

### Figure 26: Top Manufacturing Industries by Average Salary in Alberta, $ Thousands



## Trade

The value of exports by the chemical industry from Alberta in 2025 was $9.4 billion, while imports were $4.7 billion (Table 19). The United States was the destination for 77 per cent of exports worth $7.2 billion. Followed by China $1.2 billion (13 per cent) and Mexico $118 million (1.5 per cent). The United States was also the source of most imports $3.4 billion (74 per cent), followed by China $501 million (12 per cent) and the U.K. $75 million (1.6 per cent).

For industrial chemicals, exports from the province in 2025 were $7.4 billion, while imports were $2.8 billion. The United States was the destination for $5.3 billion (76 per cent) of exports. followed by China $1.36 billion (12 per cent) and Mexico $115 million (1.5 per cent). The United States was also the source of most imports $1.99 billion (74 per cent), followed by China $365 million (14 per cent).

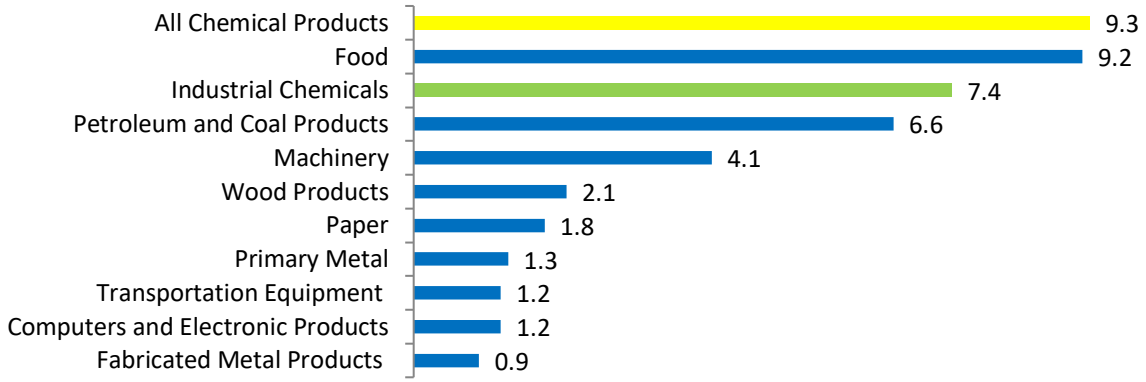
For plastic products exports were $438 million in 2025, a decrease of 30.2 per cent from 2024, while imports increased by 6.4 per cent to $830 million. The United States is the destination for 96 percent of Alberta's plastic product exports. Alberta's imports come primarily from the U.S. with $357 million (43 per cent) and China at $264 million (32 per cent) and Mexico with $31 million (3.7 per cent).

### Table 19: Trade by the Chemical and Plastics Industries in Alberta

| Value of trade, $ billion | | 2024 | 2025 | Change 2024-25 |
|---|---|---|---|---|
| **All chemicals** | **Imports** | 4.8 | 4.7 | -2% |
| | **Exports** | 9.9 | 9.4 | -5.1% |
| **Industrial chemicals** | **Imports** | 2.9 | 2.8 | -3.4% |
| | **Exports** | 8.2 | 7.4 | -9.8% |
| **Plastic products** | **Imports** | 0.78 | 0.83 | 6.4% |
| | **Exports** | 0.55 | 0.44 | -30.2% |

Chemicals rank 1st among manufacturing industries in terms of exports from Alberta (Figure 27).

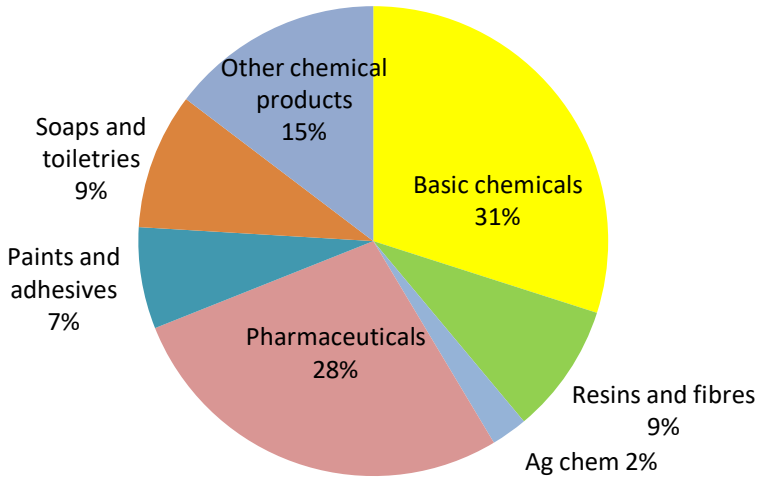
### Figure 27: Top Manufacturing Industries by Value of Exports from Alberta, $ Billion



## c. Quebec

In 2025, Quebec's chemical industry shipped $13.9 billion a decrease of 7 percent from 2025.

### Figure 28: Composition of the Quebec Chemical Industry



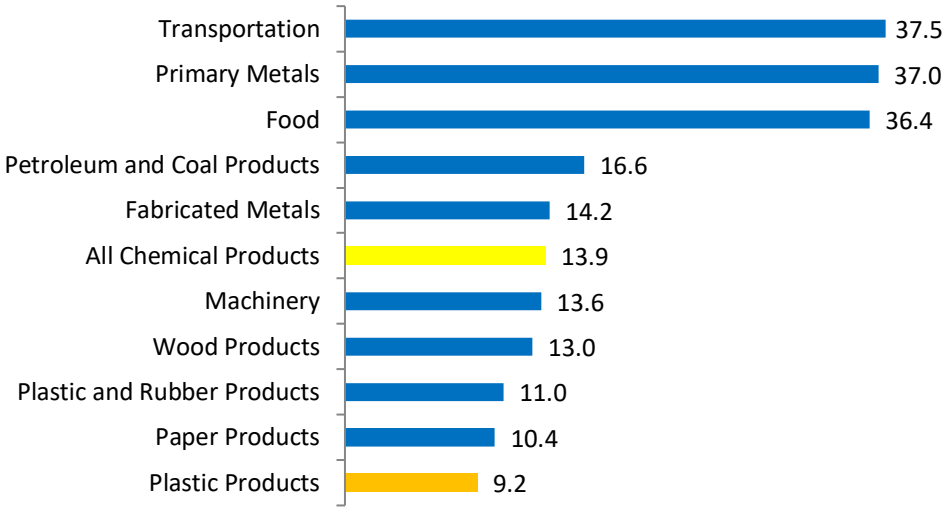

In 2025, shipments of industrial chemicals were $3.6 billion, a 29.4 per cent decrease from 2024 (Table 20). Plastic product shipments increased by 2.2 per cent to $9.2 billion in 2025. The industrial chemical industry in Quebec is concentrated in the eastern end of Montreal and along the south shore of the St. Lawrence River.

### Table 20: Quebec Chemical and Plastics Industries Shipments

| Shipments, $billion | 2024 | 2025 | Change 2024-25 |
|---|---|---|---|
| All chemicals | 14.9 | 13.9 | -7% |
| Industrial chemicals | 5.1 | 3.6 | -29.4% |
| Plastic products | 8.99 | 9.2 | 2.2% |

Based on shipments chemicals was the 6th largest manufacturing industry and plastic products was 11th (Figure 29).

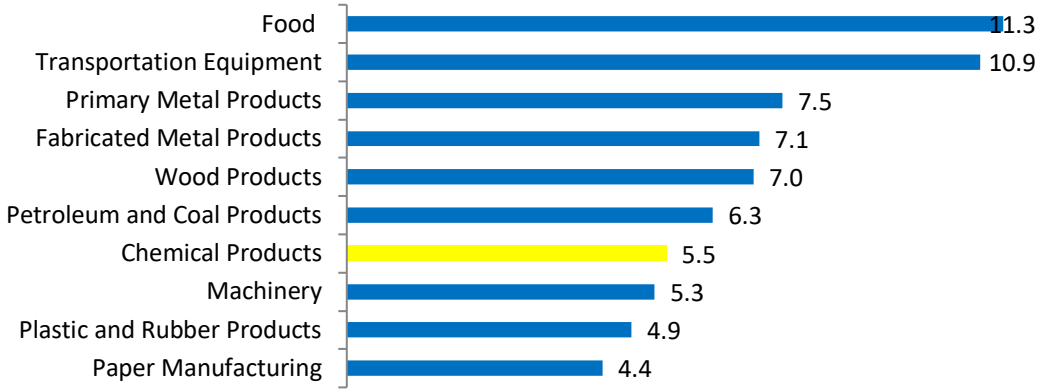
### Figure 29: Top Manufacturing Industries in Quebec by Value of Shipments, $ Billion




## • Value Added

Based on value added, chemicals ranked 6th among all manufacturing industries in Quebec in 2024 (latest available) (Figure 30).

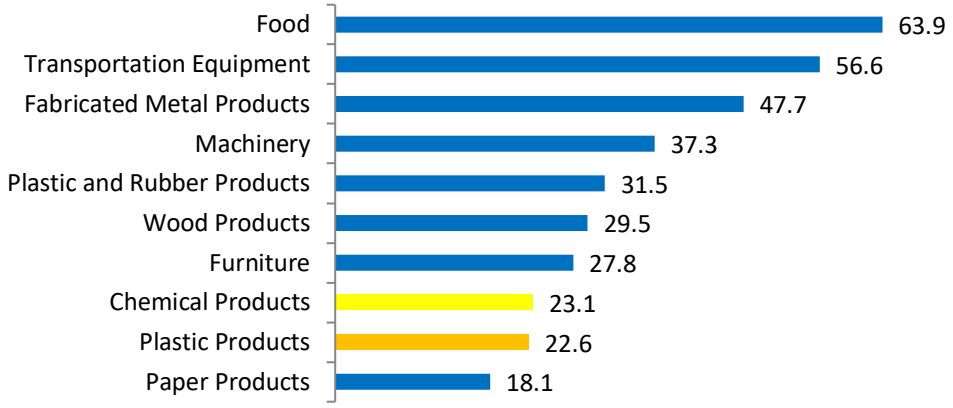
### Figure 30: Top 10 Manufacturing Industries by Value Added in Quebec




## • Employment Ranking

The chemical industry employed 23,100 people in Quebec in 2025 and industrial chemicals employed 3,475. Plastic product manufacturing employed 22,600 people, representing 27 per cent of national NAICS 3261 employment, across approximately 503 companies (Figure 31).

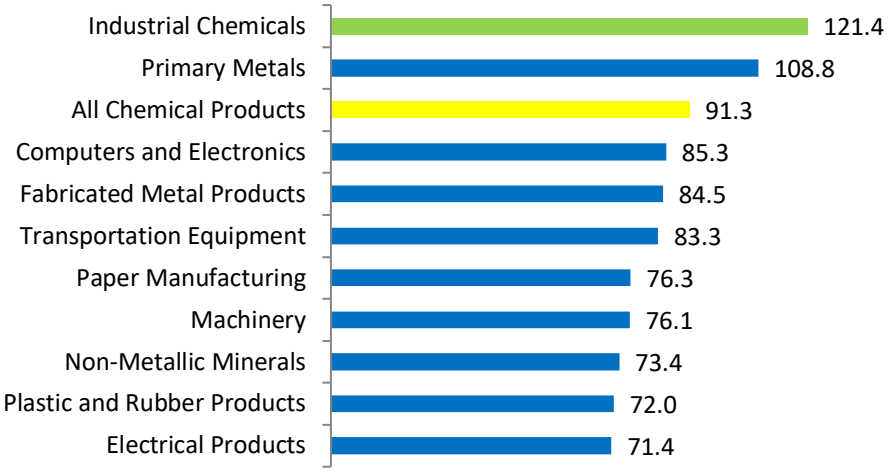
### Figure 31: Top Manufacturing Industries by Employment in Quebec




## • Salaries and Wages

The chemical industry paid $1.9 billion in salaries and wages in Quebec in 2025. Plastic product manufacturing paid $1.61 billion, equal to an average of approximately $71,200 per employee. Industrial chemicals averaged $121,400 and all Quebec manufacturing averaged $69,090 (Figure 32).

### Figure 32: Top Manufacturing Industries by Average Salary in Quebec, $ Thousands



## Trade

The value of exports by the chemical industry from Quebec in 2025 was $6.6 billion and imports were $13.5 billion (Table 21). The United States was the destination for $6.2 billion in exports (78 per cent), followed by Mexico $241 million (3.1 per cent) and Belgium $166 million (2.1 per cent). Quebec is different from the other provinces in that a much lower proportion of its imports come from the United States with $3.5 billion (34 per cent) compared to other provinces. Other major import markets are Germany $1.05 billion (8.4 per cent), France $895 million (7.2 per cent), Belgium $804 million (6.8 per cent) and China $709 million (6.3 per cent).

For industrial chemicals, exports from the province in 2025 were $2.8 billion, and imports were $4.6 billion. The United States was the destination for $3.2 billion in exports (85 per cent), followed by Mexico $175 million (4.8 per cent). The United States was the source of $1.9 billion in imports (43 per cent), followed by China $511 million (11 per cent) and Kazakhstan $261 million (6 per cent).

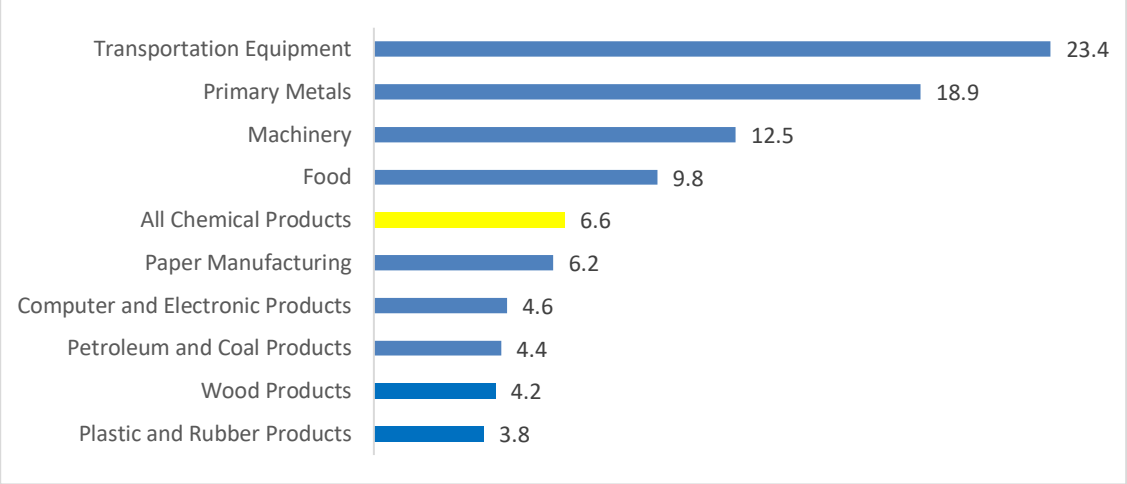
For plastic products exports were $2.61 billion in 2025, decrease of 7.1 per cent from 2024, while imports of $1.9 billion were an increase of 18.8 per cent from 2024. The United States is the destination for many Quebec's plastic product exports with $2.4 billion (91 per cent). Mexico at $60 million (2.3 per cent) is the second largest export destination. Quebec's imports come mostly from the U.S. with 580 million (30 per cent) and China with 544 million (29 per cent) and Germany with $144 million (7.6 per cent).

### Table 21: Trade by the Chemical and Plastics Industries in Quebec

| Value of trade, $ billion | | 2024 | 2025 | Change 2024-25 |
|---|---|---|---|---|
| **All chemicals** | **Imports** | 12.6 | 13.5 | 7.1% |
| | **Exports** | 7.9 | 6.6 | -16.5% |
| **Industrial chemicals** | **Imports** | 4.5 | 4.6 | 2.2% |
| | **Exports** | 3.6 | 2.8 | -22% |
| **Plastic products** | **Imports** | 1.6 | 1.9 | 18.8% |
| | **Exports** | 2.8 | 2.6 | -7.1% |

Compared to all other manufacturing industries, chemicals were the 5th largest export (Figure 33).

## Figure 33: Top 10 industries by Value of Exports from Quebec, $ Billion



# Industry Profiles

The segments of the chemical industry of primary interest to CIAC members are profiled according to the following categories:

- Petrochemicals and other organic chemicals
- Inorganic chemicals
- Synthetic resins, rubbers and fibres
- Specialty chemicals

## a. Petrochemicals and Other Organic Chemicals

Statistics Canada reports data on organic chemicals in two industry groups:

- NAICS 32511 – Petrochemicals
- NAICS 32519 – Other organic chemicals.
-

The petrochemicals industry only includes hydrocarbons. The main petrochemicals produced by CIAC members in Canada are ethylene, propylene, butylenes, butadiene, higher olefins, alkanes, benzene, toluene, xylenes, and styrene. Ethylene is the largest-volume petrochemical; it is always consumed very close to the point of production so almost none is traded.

Organic chemicals that contain atoms other than hydrogen and carbon are captured in the other organic chemicals industry. CIAC members are producers of all of the largest-volume chemicals in this category in Canada: methanol, isopropyl alcohol, and ethylene glycol.

### Table 22: Principal Statistics for Petrochemicals and Other Organic Chemicals

| | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| **Establishments** | | | | | |
| Petrochemicals | 27 | X | X | X | X |
| Other organic chemicals | 136 | X | X | X | X |
| **Shipments $M** | | | | | |
| Petrochemicals | 6,876 | 7,700 | 6,086 | 5,936 | 5,248 |
| Other organic chemicals | 6,214 | 7,807 | 7,673 | 7,246 | 5,615 |
| **Employment** | | | | | |
| Petrochemicals | 1,933 | 2,175 | 2,418 | 2,419 | 2,420 |
| Other organic chemicals | 2,852 | 3,464 | 3,852 | 3,853 | 3,854 |
| **Exports $M** | | | | | |
| Petrochemicals | 2,269 | 2,504 | 2,211 | 2,111 | 1,921 |
| Other organic chemicals | 4,396 | 5,320 | 6,340 | 5,750 | 4,119 |
| **Imports $M** | | | | | |
| Petrochemicals | 1,088 | 1,418 | 1,106 | 1,107 | 1,187 |
| Other organic chemicals | 11,430 | 13,026 | 10,720 | 11,000 | 12,840 |

## Commodity Data

Statistics Canada reports production data for a limited number of organic chemicals (Table 23).

### Table 23: Canadian Production of Specific Organic Chemicals, Kilotonnes

| | 2020 | 2021 | 2022 | 2023 | 2024 |
|---|---|---|---|---|---|
| Benzene | 727 | 610 | 724 | 689 | 580 |
| Toluene | 395 | 112 | 157 | 139 | 124 |
| Xylenes | 584 | 584 | 654 | X | X |
| Butadiene | 228 | 241 | 220 | 256 | 273 |
| Propylene | 542 | 485 | 475 | 850 | 450 |
| Formaldehyde | 138 | 121 | 141 | 94 | 94 |

More data exists for imports and exports than for domestic production. Table 24 shows the exports for a select range of organic chemicals, in both tonnage and dollar value terms.

### Table 24: Canadian Exports of Select Organic Chemicals, Kilotonnes

| | Value, $M | Quantity, kt | Top Markets |
|---|---|---|---|
| Benzene | 202 | 229 | USA 90%<br>Belgium 10% |
| Butadiene | 95 | 78 | USA 99% |
| Ethylene glycol | 889 | 923 | China 59%<br>USA 40% |
| Higher olefins | 231 | 145 | USA 97%<br>China 1% |
| Isopropyl alcohol | 99 | 75 | USA 99% |
| Methanol | 132 | 237 | USA 99% |
| Propylene | 58 | 56 | USA 99% |
| Styrene | 378 | 107 | USA 100% |

### Table 25: Canadian Imports of Select Organic Chemicals, Kilotonnes

| | Value, $M | Quantity, kt | Top Markets |
|---|---|---|---|
| Benzene | 38.6 | 27.9 | USA 99% |
| Butadiene | 7.3 | 2.3 | USA 65%<br>South Korea 35% |
| Ethylene glycol | 15.8 | 13.8 | USA 98% |
| Higher olefins | 4.7 | 4 | Saudi Arabia 59%<br>USA 35% |
| Isopropyl alcohol | 29 | 15.2 | USA 64%<br>South Korea 8%<br>China 5% |

| | | | |
|---|---|---|---|
| Methanol | 177 | 294 | Trinidad and Tobago 63%<br>USA 24%<br>Equatorial Guinea 12% |
| Propylene | 5.8 | 0.686 | USA 85%<br>China 10%<br>Taiwan 3% |
| Styrene | 68.4 | 2.7 | USA 99% |

- **CIAC Members Producing Petrochemicals and Organic Chemicals in Canada**

  - ARLANXEO Canada Inc.
  - BASF Canada
  - Borouge International
  - Diamond Petrochemical Canada Corp.
  - Dow Chemical Canada ULC
  - Evonik Oil Additives Canada Inc.
  - Imperial Oil
  - INEOS Canada Partnership
  - Inter-Pipeline Ltd.
  - Lanxess Canada Co./Cie
  - Jungbunzlauer Canada Inc.
  - MEGlobal Canada ULC
  - Methanex Corporation
  - Syensqo
  - Wanhua Chemical Canada Inc.
  - W.R. Grace Canada Corp

## b. Industrial Gases

Statistics Canada reports data on Industrial gases as part of basic chemicals within NAICS 32512 - Industrial Gas Manufacturing. Industrial Gas manufacturers produce organic and inorganic gases in compressed - liquid and solid forms. Some of the most used industrial gases include acetylene, carbon dioxide, helium, hydrogen, nitrogen, dry ice and oxygen. Manufacturing processes also include industrial gas separation and air separation configurations.

Often Industrial Gas manufacturers will co-locate on larger manufacturing sites utilize feedstock streams produced as co-products from the larger facility. However, this is not a hard rule, with diverse customer markets and a relatively small physical footprint industrial gas manufacturers can also locate closer to demand in light industrial areas.

### Table 26: Principal Statistics for Industrial Gases

| | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| **Establishments** | 115 | 115 | 113 | 116 | 118 |
| **Shipments $M** | 1,321 | 1,525 | 1,601 | 1,498 | 1,525 |
| **Employment** | 1,146 | 1,146 | 1,071 | 1,240 | 1,165 |
| **Exports $M**[4] | 138 | 157 | 228 | 284 | 287 |
| **Imports $M** | 180 | 179 | 263 | 303 | 314 |

[4] Exports and Imports sometimes exceed shipments due to different databases used to collect the two sets of data.

## • CIAC Members Producing Industrial Gases

- Air Liquide
- Linde Canada Inc.
- StormFisher Hydrogen

## c. Inorganic Chemicals

Statistics Canada reports data on inorganic chemicals as part of basic chemicals within NAICS 32518. Under this category there are two sub-industry classifications:

- NAICS 325811 – Alkali and chlorine
- NAICS 325819 – Other inorganic chemicals.
-

Since 2010, shipment and employment data have been suppressed at the 6-digit NAICS level and only reported at the 5-digit level.

The main inorganic chemicals produced by CIAC members in Canada are chlorine, sodium hydroxide, hydrochloric acid, hydrogen peroxide, sodium chlorate, sodium silicates, sulphuric acid, and titanium dioxide.

### Table 27: Principal Statistics for Inorganic Chemicals

| | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| **Establishments** | | | | | |
| Chlor-alkali | 5 | 5 | 5 | 5 | 5 |
| Other inorganic chemicals | 104 | 104 | 104 | 104 | 104 |
| **Shipments $M** | 3,568 | 3,568 | 5,288 | 5,288 | 5,288 |
| **Employment** | 4,469 | 4,902 | 5,016 | 5,341 | 5,341 |
| **Exports $M** [5] | | | | | |
| Chlor-alkali | 135 | 230 | 251 | 259 | 249 |
| Other inorganic chemicals | 4,108 | 5,093 | 6,090 | 8,086 | 7,240 |
| **Imports $M** | | | | | |
| Chlor-alkali | 411 | 619 | 630 | 529 | 575 |
| Other inorganic chemicals | 3,285 | 4,217 | 3,352 | 3,443 | 3,651 |

[5] Exports and Imports sometimes exceed shipments due to different databases used to collect the two sets of data.

## Commodity Data

Statistics Canada reports production data for a limited number of inorganic chemicals (Table 26).

### Table 28: Canadian Production of Specific Inorganic Chemicals, Kilotonnes

| | 2020 | 2021 | 2022 | 2023 | 2024 |
|---|---|---|---|---|---|
| Carbon black | 237 | 188 | 228 | 213 | 215 |
| Chlorine | x | 367 | 448 | 428 | 417 |
| Hydrogen peroxide | 237 | 234 | 235 | 212 | 240 |
| Sodium hydroxide* | 450 | 445 | 460 | 450 | 445 |

*estimated

More data exists for imports and exports than for domestic production.

### Table 29: Canadian Exports of Select Inorganic Chemicals, Kilotonnes

| | Value, $M | Quantity, kt | Top markets |
|---|---|---|---|
| Carbon black | 355 | 203 | USA 80%<br>China 4%<br>Belgium 4% |
| Chlorine | 186 | 172 | USA 100% |
| Ammonia | 1,055 | 1,109 | USA 100% |
| Hydrochloric Acid | 80 | 256 | USA 99% |
| Hydrogen Peroxide | 61 | 101 | USA 99% |
| Sodium Chlorate | 278 | 326 | USA 84%<br>Japan 9% |
| Sodium Hydroxide | 57 | 57.5 | USA 99% |
| Aluminum Sulphate | 3.1 | 8.9 | USA 99% |
| Sodium Silicate | 14.9 | 23.7 | USA 99% |
| Sulphuric Acid | 315 | 1,816 | USA 99% |
| Titanium Dioxide | 5.8 | 1.7 | Germany 67%<br>India 10%<br>Brazil 8%<br>USA 6% |

### Table 30: Canadian Imports of Select Inorganic Chemicals

| | Value, $M | Quantity, kt | Top Markets |
|---|---|---|---|
| Carbon black | 119 | 45 | USA 82%<br>China 12% |
| Chlorine | .780 | .58 | USA 98% |
| Hydrochloric Acid | 18.2 | 37 | USA 99% |
| Hydrogen Peroxide | 10.5 | 3.0 | USA 94%<br>Switzerland 3% |
| Sodium Chlorate | 1.3 | 0.55 | USA 96% |
| Sodium Hydroxide | 12.9 | 13.4 | USA 82% |

| | | | |
|---|---|---|---|
| | | | China 15% |
| Sodium Silicates | 20.3 | 22.7 | USA 95% |
| Sulphuric Acid | 27 | 146 | USA 99% |
| Titanium Dioxide | 57 | 13.6 | China 56%<br>France 18%<br>USA 9%<br>Germany 4% |

## • CIAC Members Producing Inorganic Chemicals in Canada

- Arkema Canada Inc.
- Asahi-Kasei Batter Separator Corp.
- CCC Sulphur Products
- Chemtrade
- Diamond Petrochemicals Corp.
- ERCO Worldwide
- Evonik Canada Inc.
- KRONOS Canada Inc.
- Linde Canada Inc.
- National Silicates Limited
- Cabot Canada Ltd.
- NorFalco Sales Inc., GLENCORE Canada Corporation
- Qinty Electronics
- Vale Base Metals
- W.R. Grace Canada Corp

## d. Synthetic Resins, Rubbers and Fibres

There are two industry sub-groups within this classification:

- NAICS 32521 – Synthetic resins and rubbers
- NAICS 32522 – Synthetic fibres.

Since 2013, shipment and employment data have been suppressed at the 5-digit NAICS level and only reported at the 4-digit level.

The main synthetic resins and rubbers produced in Canada are polyethylene, ethylene vinyl acetate, polystyrene, PVC, polyacrylamides, PET, nylons, urea and phenol formaldehydes, latex emulsions, unsaturated polyesters, silicones, and butyl and halobutyl rubbers. Synthetic fibres are produced in Canada using a variety of domestically produced and imported resins.

### Table 31: Principal Statistics for Synthetic Resins Rubbers and Fibres

| | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| **Establishments** | | | | | |
| Synthetic resins and rubbers | 105 | X | X | X | X |
| Synthetic fibres | 23 | X | X | X | X |
| **Shipments $M** | 12,241 | 13,016 | 10,930 | 11,321 | 11,343 |
| **Employment, 000** | 6,554 | 6,887 | 7,494 | 7,519 | 7,519 |
| **Exports $M** | | | | | |
| Synthetic resins and rubbers | 10,943 | 10,048 | 8,825 | 9,574 | 8,928 |
| Synthetic fibres | 291 | 260 | 250 | 250 | 250 |
| **Imports $M** | | | | | |
| Synthetic resins and rubbers | 10,941 | 12,492 | 10,701 | 10,956 | 10,588 |
| Synthetic fibres | 485 | 537 | 513 | 491 | 491 |

## • Commodity Data

Within these industries, Statistics Canada reports production data only for polyethylene (Table 29).

### Table 32: Canadian Production of Synthetic Resins, Kilotonnes

| | 2020 | 2021 | 2022 | 2023 | 2024 |
|---|---|---|---|---|---|
| Polyethylene | 3,871 | 4,052 | 3,820 | 3,790 | 4,084 |

Table 33: Canadian Exports of Select Synthetic Resins and Rubbers

| | Value, $M | Quantity, kt | Top Markets |
|---|---|---|---|
| Butyl and halobutyl rubbers | 302 | 65.4 | USA 35%<br>China 27%<br>Belgium 8% |
| Polyethylene | 5,081 | 3,948 | USA 86%<br>Mexico 4% |
| Polypropylene | 745 | 524 | 95% USA<br>Mexico 2% |

Table 34: Canadian Imports of Select Synthetic Resins and Rubbers

| | Value, $M | Quantity, kt | Top Markets |
|---|---|---|---|
| Butyl and Halobutyl Rubbers | 13.0 | 2.6 | Belgium 40%<br>USA 45% |
| Polyethylene | 1,367 | 742 | USA 96% |

- **CIAC Members Producing Synthetic Resins, Rubbers and Fibres in Canada**

  - ARLANXEO Canada Inc.
  - BASF Canada
  - Borouge International
  - Dow Chemical Canada ULC
  - DuPont Canada
  - Inter-Pipeline Ltd.
  - Imperial Oil

## e. Specialty Chemicals

This profile is different from the others in the series. There is no Statistics Canada aggregation that provides data for an industry called specialty chemicals. Examples of the types of specialty chemicals produced by CIAC members include fatty acids, maleic anhydride, plasticizers, citric acid, photochemicals, and additives for lubricants, plastics and rubber. Therefore, a number of assumptions have been made to derive an approximation for the size of this industry grouping.

- Assumption #1: Specialty chemicals are a subset of NAICS 32519 – Other organic chemicals. Very little, if any, specialty chemicals fall within the petrochemical industry as it is comprised primarily of commodity products. For this analysis it is assumed that inorganic chemicals and synthetic resins and rubbers can also be excluded.
- Assumption #2: The ratio of specialty chemical to commodity chemical exports can be used to estimate the value of shipments and employment attributable to specialty chemicals. This assumption allows the use of relatively detailed trade data to gain a measure of the level of specialty chemical production in Canada. However, deciding which products are commodity versus which are specialty remains subjective.

There are about 15 facilities in Canada producing ethanol that are captured within the other organic chemical industry. Since ethanol is primarily used for fuel, these facilities are not considered part of specialty chemicals.

Estimated statistics for the total other organic chemicals industry and the specialty component are shown in Table 31. The data for the other organic chemicals industry includes both commodity and specialty chemicals and is repeated from the Petrochemicals profile. It is presented again to provide an indication of the relative size of the commodity versus specialty element of the industry.

### Table 35: Estimated Principal Statistics for Specialty Chemicals

| | 2021 | 2022 | 2023 | 2024 | 2025 |
|---|---|---|---|---|---|
| **Establishments** | | | | | |
| Other organic chemicals | 145 | X | X | X | X |
| Specialty chemicals | 113 | X | X | X | X |
| **Shipments $M** | | | | | |
| Other organic chemicals | 5,635 | 7,881 | 7,596 | 7,842 | 7,842 |
| Specialty chemicals | 2,660 | 2,600 | 2,600 | 2,600 | 2,400 |
| **Employment, 000** | | | | | |
| Other organic chemicals | 2,852 | 3,464 | 3,464 | 3,464 | 3,854 |
| Specialty chemicals | 1,880 | 2,335 | 2,335 | 2,335 | 2,335 |
| **Exports $M** | | | | | |
| Other organic chemicals | 4,396 | 5,837 | 6,428 | 5,853 | 4,119 |
| Specialty chemicals | 1,620 | 1,620 | 1,620 | 1,620 | 1,620 |
| **Imports $M** | | | | | |
| Other organic chemicals | 8,152 | 11,806 | 11,968 | 14,181 | 12,840 |
| Specialty chemicals | 2,720 | 4,840 | 4,840 | 5,670 | 5,670 |

## • Commodity Data

Table 36 shows the exports for a select range of specialty chemicals, in both tonnage and dollar value terms in 2025.

## Table 36: Canadian Exports of Select Specialty Chemicals, Tonnes

| | Value, $M | Quantity, kt | Top Markets |
|---|---|---|---|
| Palmitates and stearates | 11.5 | 3.4 | USA 83%<br>Hong Kong 4%<br>China 3% |
| Dinonyl or didecyl orthophthalates | 4.6 | 1.5 | USA 99% |
| Azo compounds | .85 | 0.14 | USA 83%<br>Japan 10% |
| Cyanine dyes | 34.6 | 1.90 | USA 100% |
| Azo dyes | 3.8 | 0.2 | USA 92%<br>Spain 2%<br>China 2% |
| Other fatty acids | 10.6 | 7.6 | USA 85%<br>Germany 10% |

## Table 37: Canadian Imports of Select Specialty Chemicals. Kilotonnes

| | Value, $M | Quantity, kt | Top Markets |
|---|---|---|---|
| Palmitates and stearates | 101 | 35.8 | USA 42%<br>Malaysia 42%<br>India 4%<br>Indonesia 2% |
| Dinonyl or didecyl orthophthalates | 13.8 | 4.54 | Germany 35%<br>Sweden 30%<br>USA 28% |
| Azo compounds | 5.6 | 0.213 | Mexico 89%<br>USA 4%<br>Japan 3% |
| Cyanine dyes | 4.81 | 0.235 | USA 50%<br>China 19%<br>Germany 12%<br>India 9% |
| Azo dyes | 34 | 2.87 | USA 42%<br>China 24%<br>Germany 15%<br>India 15% |
| Other fatty acids | 100 | 344.7 | Malaysia 40%<br>India 15%<br>Indonesia 10% |

## CIAC Members Producing Specialty Chemicals in Canada

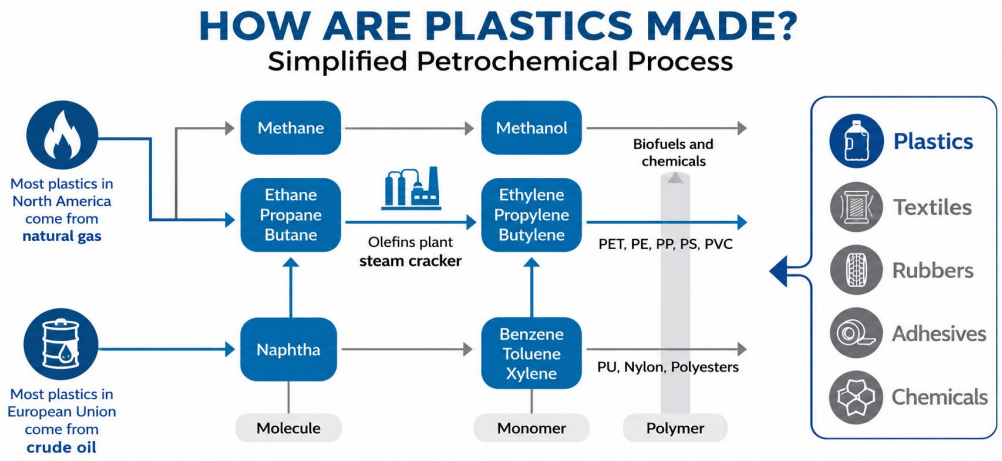
- BASF Canada
- Evonik Oil Additives Canada Inc.
- Imperial
- Innospec Canada Ltd.
- Jungbunzlauer Canada Inc.
- Lanxess Canada Co./Cie
- Syensqo
- W.R. Grace Canada Corp

# Plastic Products Value Chain

## a. What is the Plastic Manufacturing Industry?

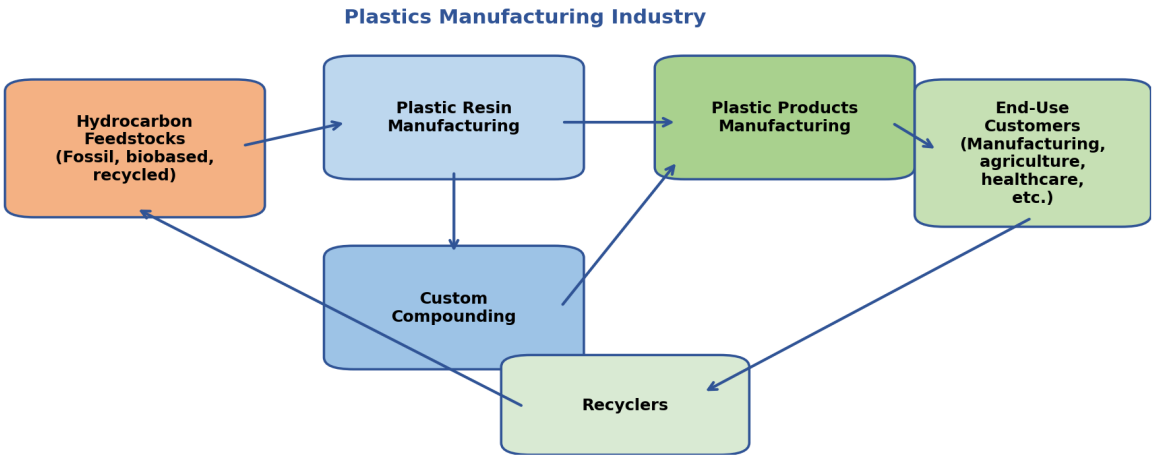
The plastics manufacturing process begins with polymerization, which links chemical monomers into resin pellets and other plastic materials. Resin producers supply the material foundation for a broad downstream manufacturing base.

### Figure 34: Simplified Plastic Resin Manufacturing Process




Some resins are further processed by custom compounders that mix and blend resins made elsewhere or reformulate resins from recycled plastic products. Fabricated plastic product manufacturers then use those resins to make products and components for manufacturing, construction, agriculture, healthcare and many service industries.

### Figure 35: Simplified Plastics Supply Chain



Most Canadian plastic resin manufacturing currently relies on fossil-based feedstocks such as natural gas liquids, with Alberta and British Columbia as the primary domestic sources. Ontario and Quebec resin producers receive feedstocks from Western Canada or the United States. Bio-based and recycled feedstocks are increasing, while Canada remains a major producer of polyethylene and polypropylene grades.

## b. Resins Used in Canada's Plastic Products Value Chain

Plastic product manufacturers select resins according to the strength, clarity, barrier, heat, flexibility, weathering and processing properties required by the final application.

### Table 38: Resins Used in Canada's Plastic Products Value Chain

| Name | Description | Benefits | Typical Uses |
|---|---|---|---|
| Polyethylene Terephthalate (PET) | Polyester-family thermoplastic; Resin Identification Code #1; commonly recycled through curbside and bottle-return programs. | Strong oxygen, water and $CO_2$ barrier; high compression and tensile strength; solvent resistance; clear, smooth surface. | Soft-drink and water bottles, food containers, oven film, microwavable trays and carpet fibre. |
| High Density Polyethylene (HDPE) | Thermoplastic; Resin Identification Code #2; commonly recycled in Canada. | High impact strength and stiffness; excellent moisture barrier; easy processing; relatively high melting point. | Shampoo and detergent bottles, juice containers, milk jugs, cereal liners, wire and cable insulation. |
| Polyvinyl Chloride (PVC) | Thermoplastic; Resin Identification Code #3; used in rigid and flexible applications. | Grease, oil and solvent resistance; weatherability; compression strength; clarity; self-extinguishing properties. | Water pipe, windows, doors, wiring, blood bags, medical tubing and pharmaceutical blister packs. |
| Low Density Polyethylene (LDPE) | Thermoplastic; Resin Identification Code #4; used in rigid and flexible applications. | Resistance to acids, bases and vegetable oils; toughness and transparency; excellent heat sealing. | Carton coatings, beverage cups, squeezable bottles, shrink/stretch film, bags and cable insulation. |
| Polypropylene (PP) | Thermoplastic; Resin Identification Code #5; used in rigid and flexible applications. | Clarity, low moisture-vapour transmission, strength and stiffness, low brittleness, and resistance to oil and grease. | Food containers, bottle caps, toys, prescription bottles, carpet fibre, hot-fill and microwave packaging. |
| Polystyrene (PS) | Thermoplastic; Resin Identification Code #6; available as GPPS, HIPS, EPS and XPS. | Stiffness and moisture barrier; GPPS clarity; XPS insulation performance; can incorporate flame retardants. | Food trays, cups, plates, cutlery, protective packaging, CD cases and building insulation. |
| Other Plastics (#7) | All plastics not covered by Resin Identification Codes 1-6. | Properties vary by resin and application. | Includes engineering and specialty plastics such as PC, ABS, PMMA, PU and nylon. |

| Name | Description | Benefits | Typical Uses |
|---|---|---|---|
| Polycarbonate (PC) | Engineering thermoplastic for transparent, impact-resistant applications. | High impact strength and optical clarity. | Water-cooler bottles, optical media and reusable beverage containers. |
| Acrylonitrile Butadiene Styrene (ABS) | Rubber-modified engineering thermoplastic. | Strong, rigid and impact resistant. | Automotive components, appliance housings and consumer products. |
| Acrylic (PMMA) | Transparent thermoplastic often marketed as Plexiglas®. | Excellent clarity and weather resistance. | Arena boards, architectural glazing and permanent signage. |
| Polyurethane (PU) | Thermoset polymer used in flexible and rigid foams. | Cushioning and insulation performance. | Mattresses, pillows, furniture cushions and automotive seating. |
| Nylon (PA) | High-strength, wear-resistant engineering thermoplastic. | Durable, abrasion resistant and lightweight. | Automotive and industrial parts, textiles and fibres. |

## c. Detailed Review of Plastic Product Manufacturing in Canada

The following profiles summarize the principal NAICS 3261 subsectors. Values are in Canadian dollars and national economic data cover 2019 through 2025.

### 1. 32611 - Plastic packaging materials and unlaminated film and sheet manufacturing

Manufacturers in NAICS 32611 convert resins such as LDPE, LLDPE, HDPE, PET and PP into plastic bags and pouches, plastic film and unlaminated sheet, polyethylene and acrylic sheet, and specialized photographic and X-ray sheet. Everyday applications include shrink and stretch film, grocery and bread bags, garbage bags, clamshells, oven film and microwave trays.

In 2025, this subsector shipped $7.5 billion, employed 13,953 people and paid $944 million in wages. It represented 20.9 per cent of Plastic Products shipments and 16.8 per cent of employment. Imports were $3.7 billion and exports were $2.9 billion, producing an $829 million trade deficit.

#### Table 39: National Economic Data for NAICS 32611

| Year | Shipments ($M) | Employment | Imports ($M) | Exports ($M) | Wages ($M) |
|---|---|---|---|---|---|
| 2019 | 5,426 | 12,852 | 2,906 | 2,604 | 828 |
| 2020 | 5,427 | 13,321 | 3,043 | 2,566 | 802 |
| 2021 | 6,516 | 14,295 | 3,301 | 3,142 | 906 |
| 2022 | 7,504 | 14,831 | 3,828 | 3,254 | 974 |
| 2023 | 7,229 | 14,566 | 3,464 | 2,995 | 962 |
| 2024 | 7,280 | 14,256 | 3,664 | 3,172 | 966 |
| 2025 | 7,479 | 13,953 | 3,745 | 2,916 | 944 |

### 2. 32612 - Plastic pipe, pipe fitting, and unlaminated profile shape manufacturing

NAICS 32612 includes unsupported plastic profile shapes, plastic pipe and fittings, lay-flat tubing, non-rigid rods and tubes, and plastic sausage casings. PVC and HDPE are widely used in construction, windows and doors, wiring, medical applications, and moisture-resistant wire and cable systems.

In 2025, the subsector shipped $3.05 billion, employed 6,098 people and paid $375 million in wages. It represented 8.5 per cent of Plastic Products shipments and 7.3 per cent of employment. Imports were $2.63 billion and exports were $1.63 billion, producing a trade deficit of approximately $1.0 billion.

#### Table 40: National Economic Data for NAICS 32612

| Year | Shipments ($M) | Employment | Imports ($M) | Exports ($M) | Wages ($M) |
|---|---|---|---|---|---|
| 2019 | 2,479 | 6,639 | 1,437 | 1,170 | 431 |
| 2020 | 2,185 | 5,902 | 1,368 | 1,255 | 330 |
| 2021 | 2,805 | 6,372 | 1,572 | 1,508 | 377 |
| 2022 | 3,437 | 6,482 | 1,895 | 1,842 | 427 |
| 2023 | 3,080 | 6,366 | 1,772 | 1,864 | 388 |
| 2024 | 3,013 | 6,231 | 1,834 | 1,919 | 384 |
| 2025 | 3,050 | 6,098 | 2,634 | 1,629 | 375 |

### 3. 32613 - Laminated plastic plate, sheet (except packaging), and shape manufacturing

NAICS 32613 covers establishments that laminate plastic profile shapes such as plates, sheets and rods, generally by bonding or impregnating profiles with plastic resins under heat and pressure. Products include laminated sheet and window material, often made with clear and durable acrylic and other engineering plastics.

In 2025, this subsector shipped $336 million, employed 878 people and paid $50.9 million in wages. It accounted for 0.9 per cent of Plastic Products shipments and 1.1 per cent of employment. Imports were $1.61 billion and exports were $775 million, producing an $835 million trade deficit.

#### Table 41: National Economic Data for NAICS 32613

| Year | Shipments ($M) | Employment | Imports ($M) | Exports ($M) | Wages ($M) |
|---|---|---|---|---|---|
| 2019 | 375 | 982 | 1,154 | 701 | 68.6 |
| 2020 | 258 | 844 | 1,092 | 687 | 46.5 |
| 2021 | 300 | 917 | 1,212 | 735 | 53.8 |
| 2022 | 334 | 932 | 1,406 | 853 | 53.9 |
| 2023 | 329 | 916 | 1,411 | 857 | 49.3 |
| 2024 | 332 | 897 | 1,451 | 862 | 52.2 |
| 2025 | 336 | 878 | 1,610 | 775 | 50.9 |

### 4. 32614 - Polystyrene foam product manufacturing

NAICS 32614 covers establishments converting polystyrene resins into foam products. Applications extend beyond recognizable protective packaging to thermal insulation, foam coolers, meat and poultry trays, yogurt and other food containers, egg cartons, dinnerware and profile shapes.

In 2025, this subsector shipped $1.64 billion, employed 3,744 people and paid $241 million in wages. It represented nearly 5 per cent of Plastic Products shipments and 4.5 per cent of employment. Imports were $721 million and exports were $343 million, producing a $378 million trade deficit.

## Table 42: National Economic Data for NAICS 32614

| Year | Shipments ($M) | Employment | Imports ($M) | Exports ($M) | Wages ($M) |
|---|---|---|---|---|---|
| 2019 | 1,344 | 3,623 | 152 | 220 | 210 |
| 2020 | 1,292 | 3,552 | 135 | 199 | 198 |
| 2021 | 1,513 | 3,912 | 122 | 257 | 242 |
| 2022 | 1,794 | 3,979 | 150 | 302 | 271 |
| 2023 | 1,763 | 3,909 | 140 | 304 | 261 |
| 2024 | 1,619 | 3,825 | 148 | 354 | 276 |
| 2025 | 1,637 | 3,744 | 721 | 343 | 241 |

### 5. 32615 - Urethane and other foam product (except polystyrene) manufacturing

NAICS 32615 covers establishments converting plastic resins other than polystyrene into foam products. Examples include foam coolers, insulation, cushioning, polyurethane foam products, shipping pads, shaped protective material, carpet underlay, bedding, seating and automotive applications.

In 2025, the subsector shipped $1.87 billion, employed 3,659 people and paid $218 million in wages. It represented 5.2 per cent of Plastic Products shipments and 4.4 per cent of employment. Imports were $388 million and exports were $315 million.

## Table 43: National Economic Data for NAICS 32615

| Year | Shipments ($M) | Employment | Imports ($M) | Exports ($M) | Wages ($M) |
|---|---|---|---|---|---|
| 2019 | 1,076 | 3,435 | 380 | 220 | 180 |
| 2020 | 1,094 | 3,464 | 371 | 238 | 176 |
| 2021 | 1,444 | 3,823 | 424 | 328 | 202 |
| 2022 | 1,605 | 3,889 | 483 | 332 | 223 |
| 2023 | 1,622 | 3,820 | 492 | 310 | 230 |
| 2024 | 1,618 | 3,819 | 541 | 306 | 224 |
| 2025 | 1,866 | 3,659 | 388 | 315 | 218 |

### 6. 32616 - Plastic bottle manufacturing

NAICS 32616 covers establishments that blow-mould or cast plastic bottles. PET is common in beverage and condiment bottles; HDPE is used in shampoo, juice, detergent and milk containers; and PP is commonly used for caps, closures and flexible, durable bottles.

In 2025, this subsector shipped $919 million, employed 2,448 people and paid $173 million in wages. It accounted for nearly 3 per cent of Plastic Products shipments and employment. Imports were $614 million and exports were $540 million, producing a $74 million trade deficit. Plastic containers other than bottles are classified in NAICS 326198.

#### Table 44: National Economic Data for NAICS 32616

| Year | Shipments ($M) | Employment | Imports ($M) | Exports ($M) | Wages ($M) |
|---|---|---|---|---|---|
| 2019 | 708 | 2,607 | 670 | 393 | 135 |
| 2020 | 725 | 2,773 | 658 | 475 | 134 |
| 2021 | 729 | 2,558 | 641 | 478 | 134 |
| 2022 | 874 | 2,602 | 725 | 498 | 161 |
| 2023 | 885 | 2,556 | 710 | 450 | 160 |
| 2024 | 908 | 2,556 | 697 | 512 | 169 |
| 2025 | 919 | 2,448 | 614 | 540 | 173 |

### 7. 32619 - Other plastic product manufacturing

NAICS 32619 covers plastic products not classified elsewhere, including plumbing fixtures, motor-vehicle plastic parts, plastic windows and doors, closures and containers, flooring, hardware, blister packaging, countertops, pool covers and tableware. The group uses a wide range of resins, including PVC and PP.

In 2025, this subsector shipped $21.35 billion, employed 64,720 people and paid $3.43 billion in wages. It represented nearly 60 per cent of Plastic Products shipments and 78 per cent of employment. Imports were $8.46 billion and exports were $7.98 billion, producing a $476 million trade deficit.

#### Table 45: National Economic Data for NAICS 32619

| Year | Shipments ($M) | Employment | Imports ($M) | Exports ($M) | Wages ($M) |
|---|---|---|---|---|---|
| 2019 | 16,390 | 62,872 | 6,446 | 6,090 | 3,375 |
| 2020 | 15,414 | 59,319 | 6,433 | 5,753 | 3,430 |
| 2021 | 17,904 | 67,624 | 7,274 | 6,551 | 3,255 |
| 2022 | 20,668 | 68,793 | 8,557 | 7,590 | 3,560 |
| 2023 | 18,952 | 67,565 | 8,141 | 7,996 | 3,679 |
| 2024 | 20,222 | 66,126 | 8,356 | 8,124 | 3,659 |
| 2025 | 21,353 | 64,720 | 8,456 | 7,980 | 3,430 |

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