Two futures for jobs in an AI era

2026 Global AI Jobs Barometer

Manufacturing
Analysis

Key findings

AI is driving productivity, accelerating skills change and starting to create a redesign of entry level work

AI is strongly linked to significant productivity gains

Since 2022 when AI use soared, companies in the sectors most exposed to AI have tripled their lead in workforce productivity growth over the least AI-exposed companies.

Companies achieving the biggest productivity gains are boosting wages and headcount

Rather than replacing jobs at scale, leading organisations are using AI to amplify human performance and create value.

Harnessing AI is accelerating skills transformation

Skills required for the most AI exposed jobs are changing twice as fast as in least exposed roles - a 75% increase over last year's gap.

Redesigned entry level pathways

AI exposed junior roles are 7x more likely (than the least AI exposed junior roles) to demand traditionally senior skills like leadership and strategic thinking.

A two-track labour market

Jobs professionalised by AI – where AI does the basic work leaving more expert tasks for people (22% of advertised jobs) - are thriving while jobs democratised by AI – where AI takes on the complex work (52% of advertised jobs) - fall behind.

40%

Productivity growth is 40% higher at most vs least AI exposed companies.

52%

The most AI exposed companies see faster headcount growth than the least AI exposed (52% vs 36%) and higher wage growth (24% vs 17%).

2.5x

The most AI exposed jobs are adding tasks that rely on human-intensive skills like empathy, judgment and creativity 2.5x faster - than the least AI exposed roles.

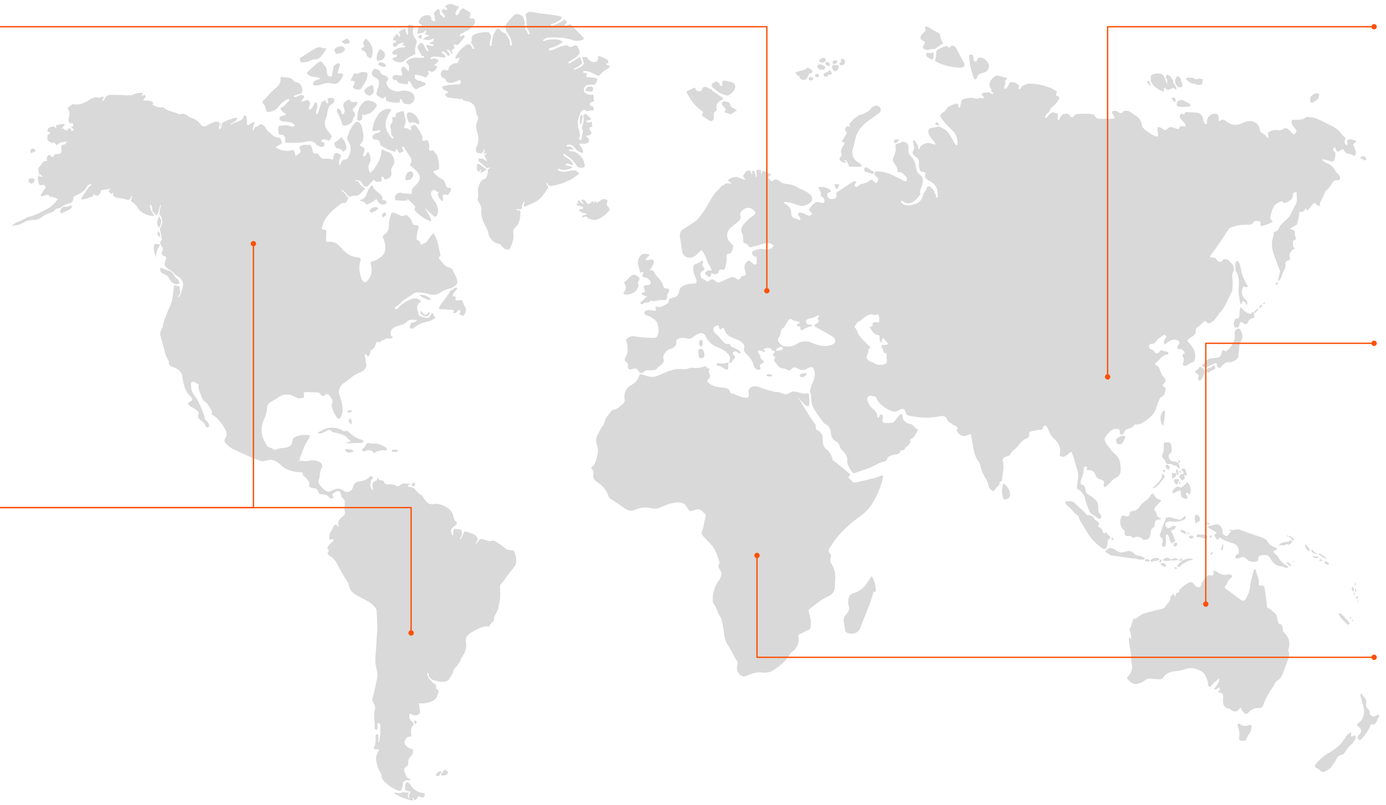
35%

AI-exposed 'seniorised' entry level roles are thriving with 35% growth since 2019 while other entry level roles decline in number.

42%

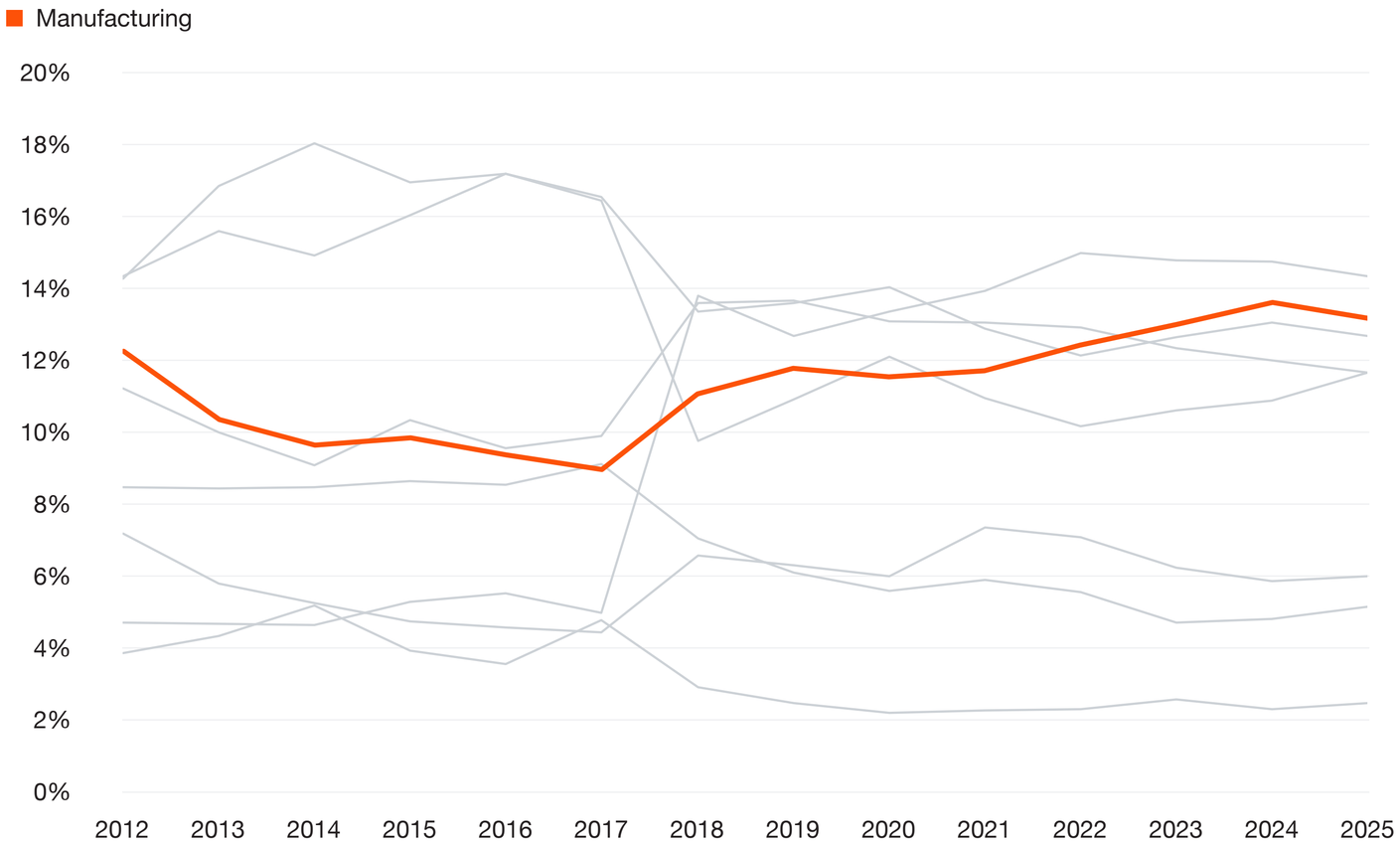
Professionalised jobs are growing twice as fast as Democratised jobs with 42% higher wage growth since 2021.

The 2026 AI Jobs Barometer examines over one billion job ads from 6 continents to reveal how AI is affecting jobs, skills, wages, and labour productivity



Manufacturing is one of the largest sources of labour demand from the key sectors analysed in 2025

Share of total job postings in the Manufacturing sector, globally (%, 2012 to 2025)



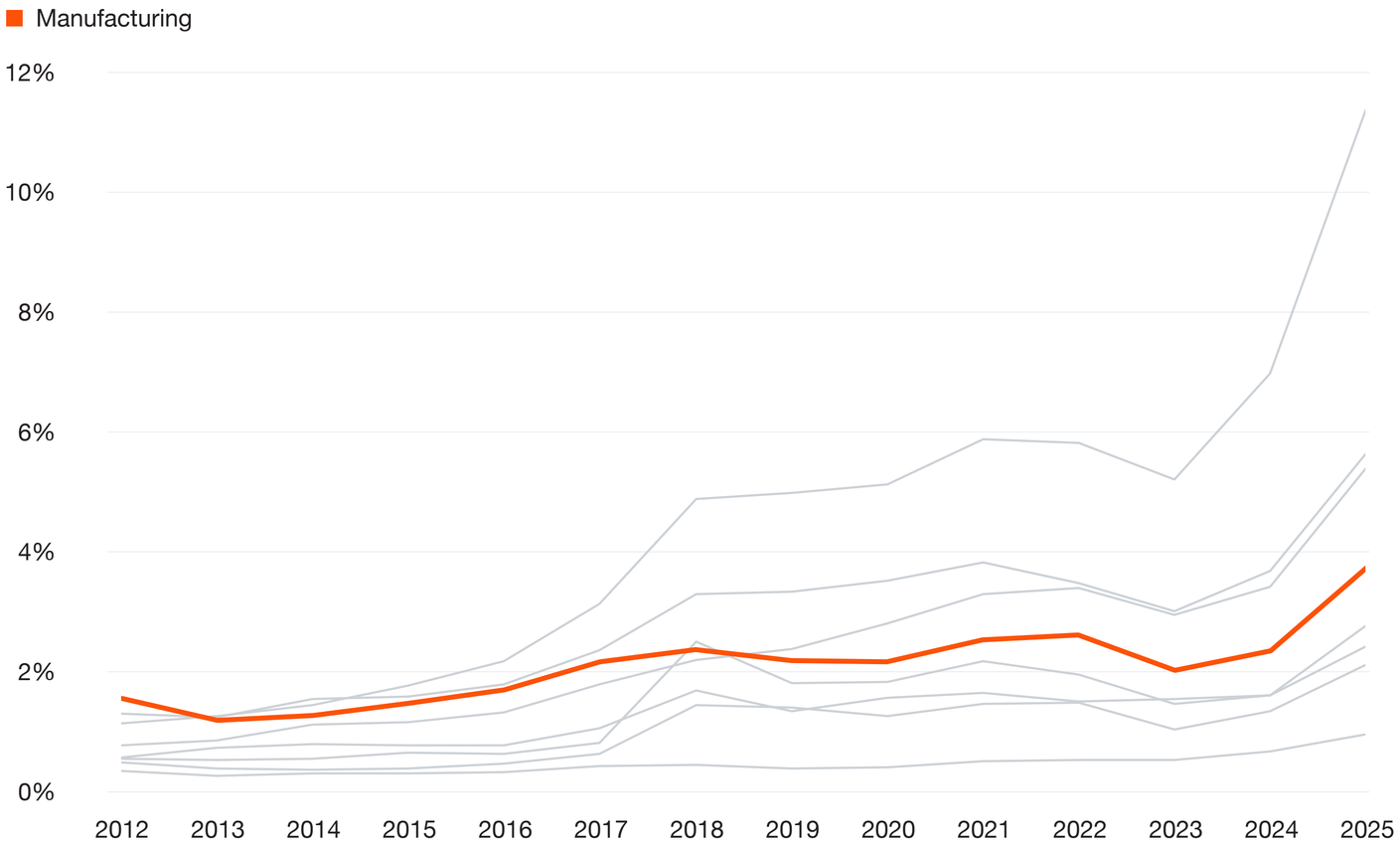
Source: PwC analysis, Lightcast data

Findings

- In 2025, Manufacturing accounts for 13.1% of total job postings, placing it among the higher-demand sectors.
- This substantial share is consistent with the sector's scale and operational workforce requirements.
- As a production-heavy industry, labour demand remains structurally significant.

AI hiring in Manufacturing is rising steadily and is in the mid-range of the key sectors with respect to share of AI job postings

Share of AI jobs within the Manufacturing sector, globally (%, 2012 to 2025)



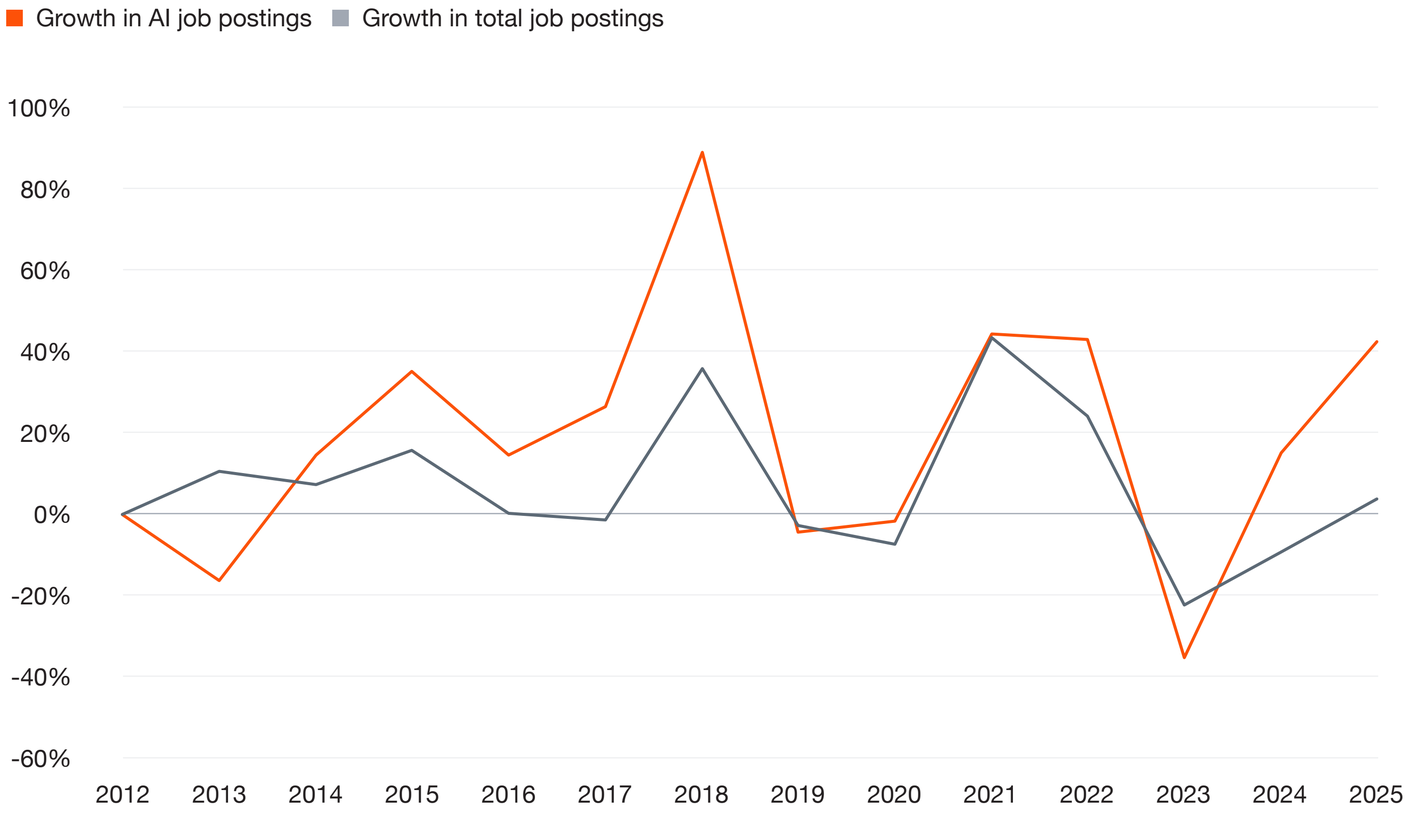
Source: PwC analysis, Lightcast data

Findings

- In 2025, AI roles account for 3.7% of total job postings, up from 2.3% in 2024. This marks a notable increase in AI hiring intensity year-on-year.
- While AI penetration remains moderate relative to the most digitally intensive sectors, the upward shift suggests growing integration of AI into production, optimisation and supply chain functions.
- The trajectory indicates gradual but expanding adoption across the sector.

This aligns with the accelerating growth in AI hiring for Manufacturing, even as overall sector hiring remains modest

Growth in total job postings and AI job postings for the Manufacturing sector, globally (%, 2012 to 2025)



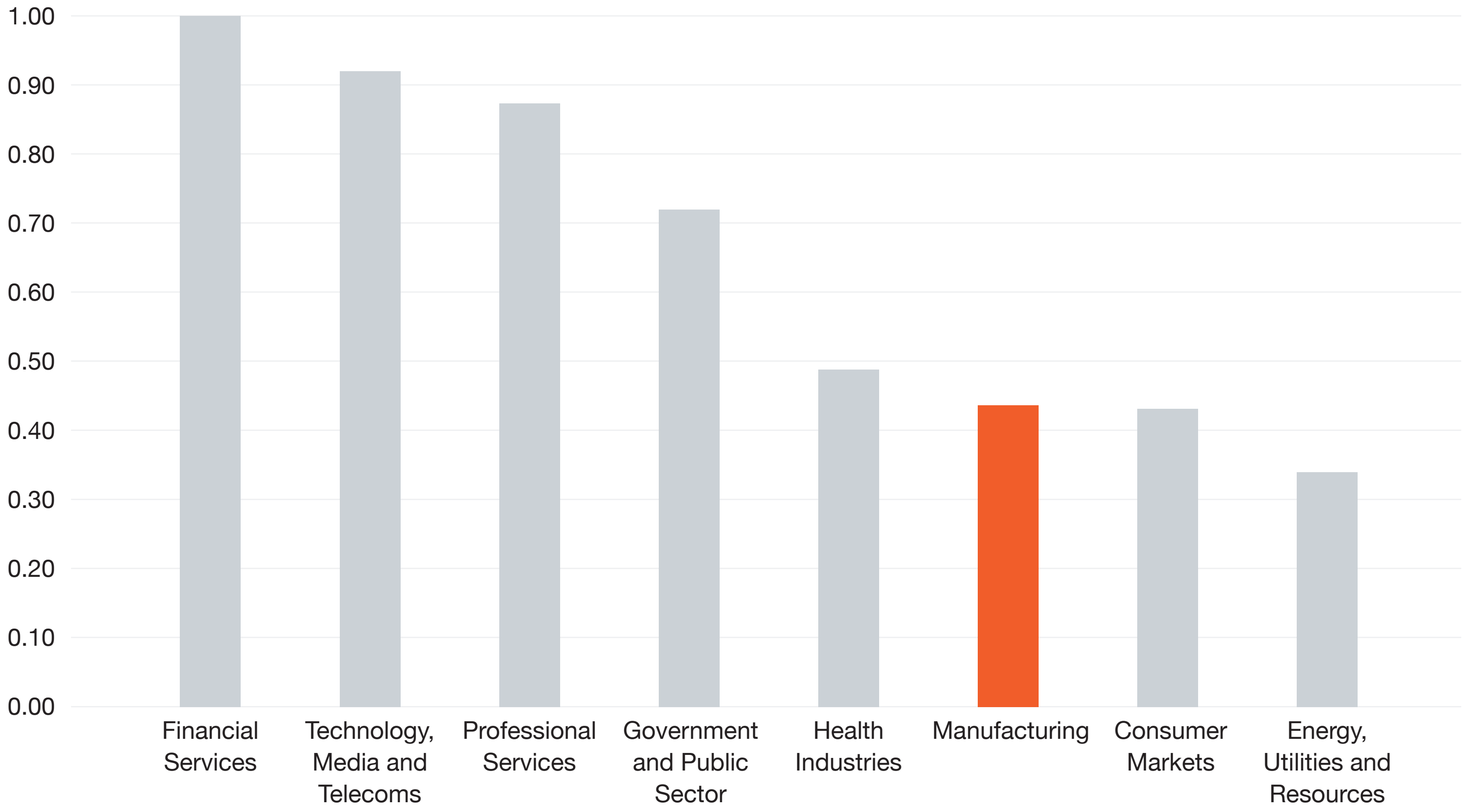
Source: PwC analysis, Lightcast data

Findings

- Total job postings contracted by 9.1% in 2024 before rebounding to 3.8% growth in 2025. Over the same period, AI roles expanded by 15.1% in 2024 and accelerated further by 42.4% in 2025.
- While part of the AI uplift coincides with the wider recovery in hiring, AI growth substantially outpaces overall job growth.
- The widening growth gap reinforces the increase in AI hiring share observed earlier.

Manufacturing sees a higher AI share of job postings than more exposed sectors, suggesting greater capitalisation of AI capabilities

PwC AI industry exposure by sector (2026)



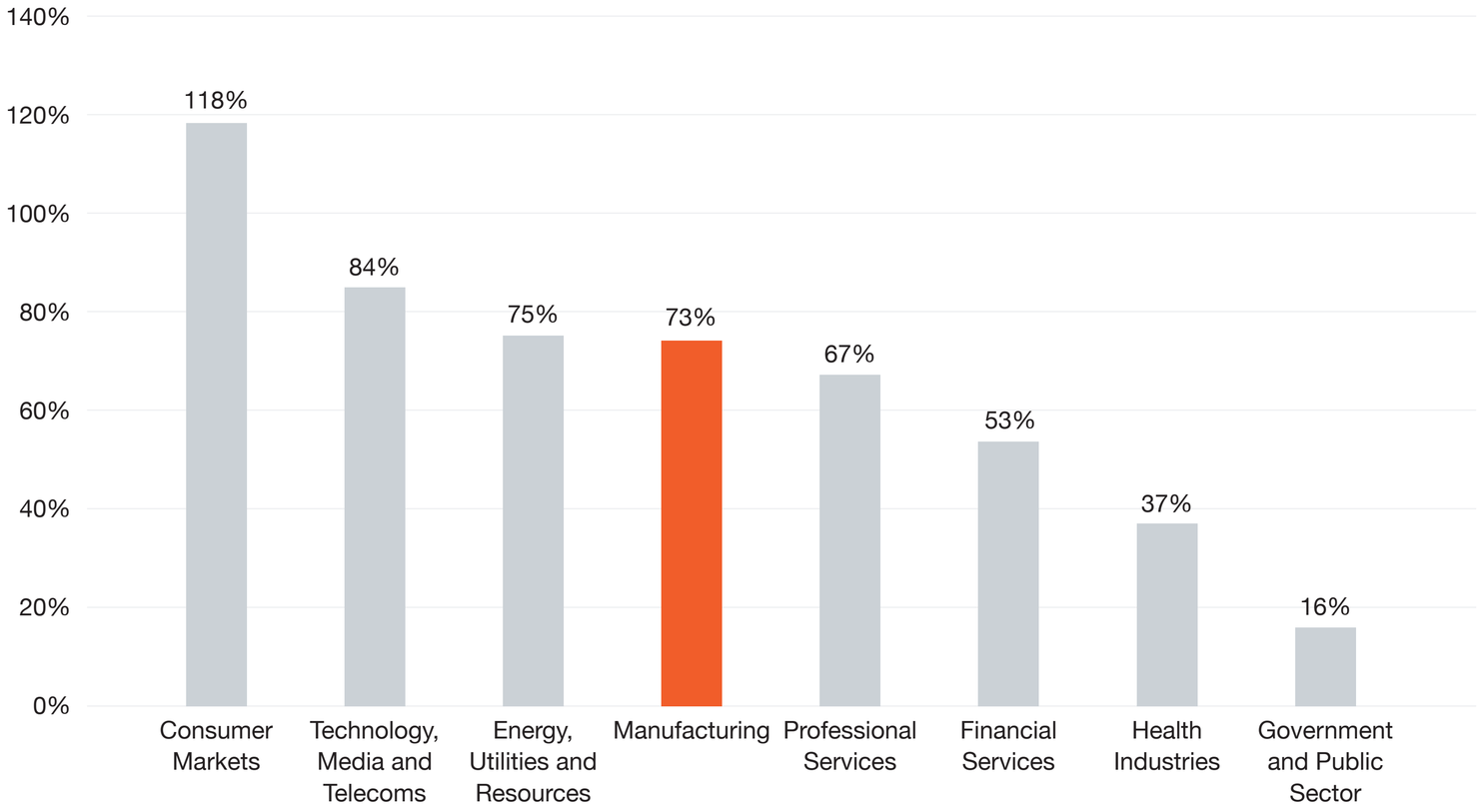
Source: PwC analysis, Lightcast data

Findings

- Manufacturing sits in the lower range of our AI Industry Exposure Index, helping to explain why its AI hiring share remains below that of more digitally intensive sectors.
- However, the share of AI hiring intensity is comparatively higher than in some sectors with similar or greater exposure.
- This suggests that, although overall exposure is moderate, firms are actively capitalising on the tasks that can be augmented or automated with AI.

AI enabled roles in Manufacturing command a substantial wage premium

Average wage premium for AI related skills by sector, globally (%, 2025)



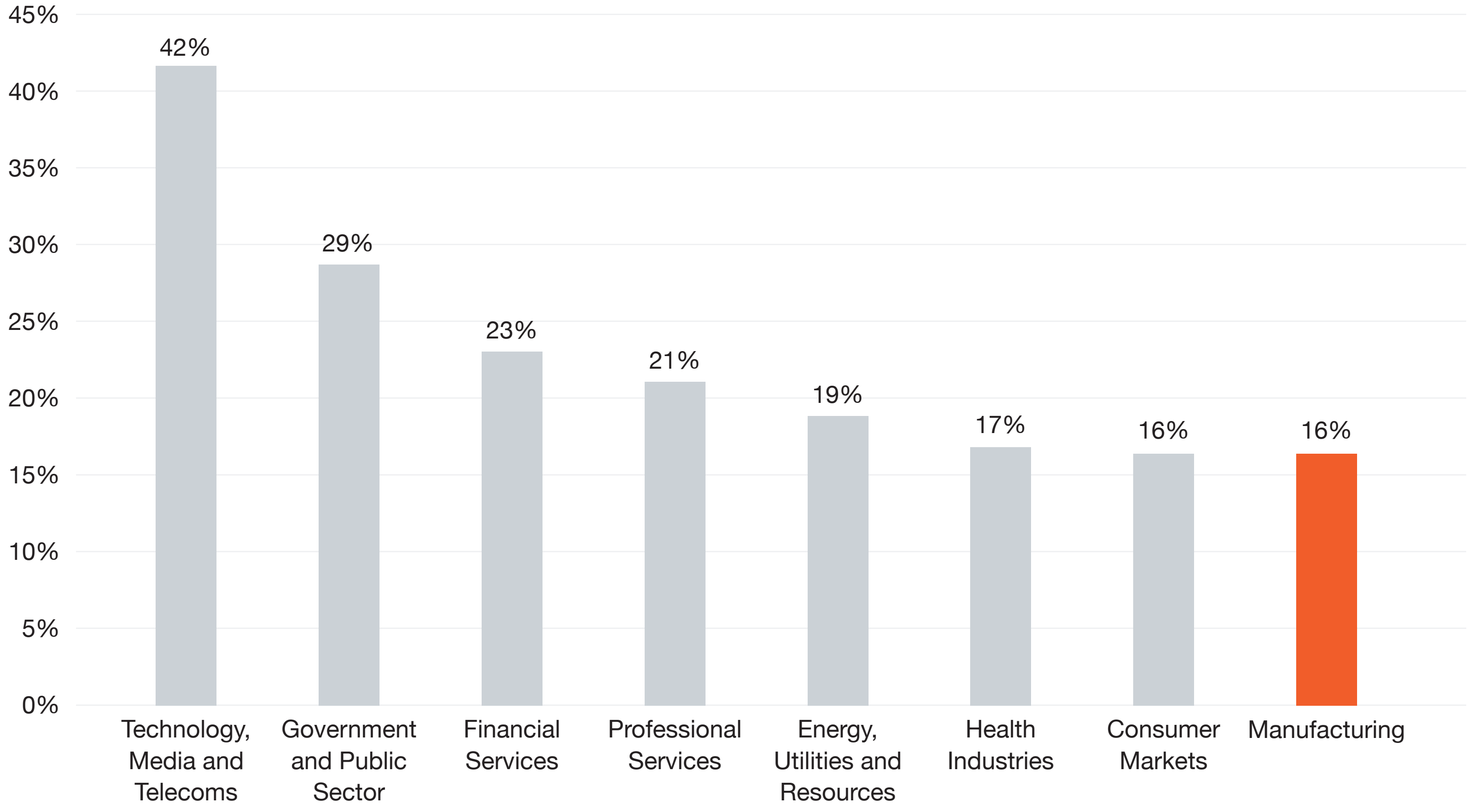
Source: PwC analysis, Lightcast data
Notes: (i) To calculate wage premiums, we split job postings within a sector by AI and non-AI jobs. From here we estimate the wage premium (difference) within the sector for wages in the AI group compared to the non-AI group. This analysis is not a growth rate but rather a snapshot of a given year. Note that only the eight PwC aligned sectors are shown in the visual.

Findings

- In 2025, AI-enabled employees in Manufacturing earn a wage premium of 73% relative to non-AI roles. This places Manufacturing among the higher-premium sectors despite its more moderate AI exposure.
- The size of the premium likely reflects the concentration of AI talent in highly specialised functions. This could include roles which are technically complex and closely linked to productivity gains, which may explain why compensation levels are comparatively elevated.

Lower AI exposure in Manufacturing is reflected in its relatively weak productivity growth, though gains remain notable

Growth rate in productivity by sector, globally (%, 2018-2025)



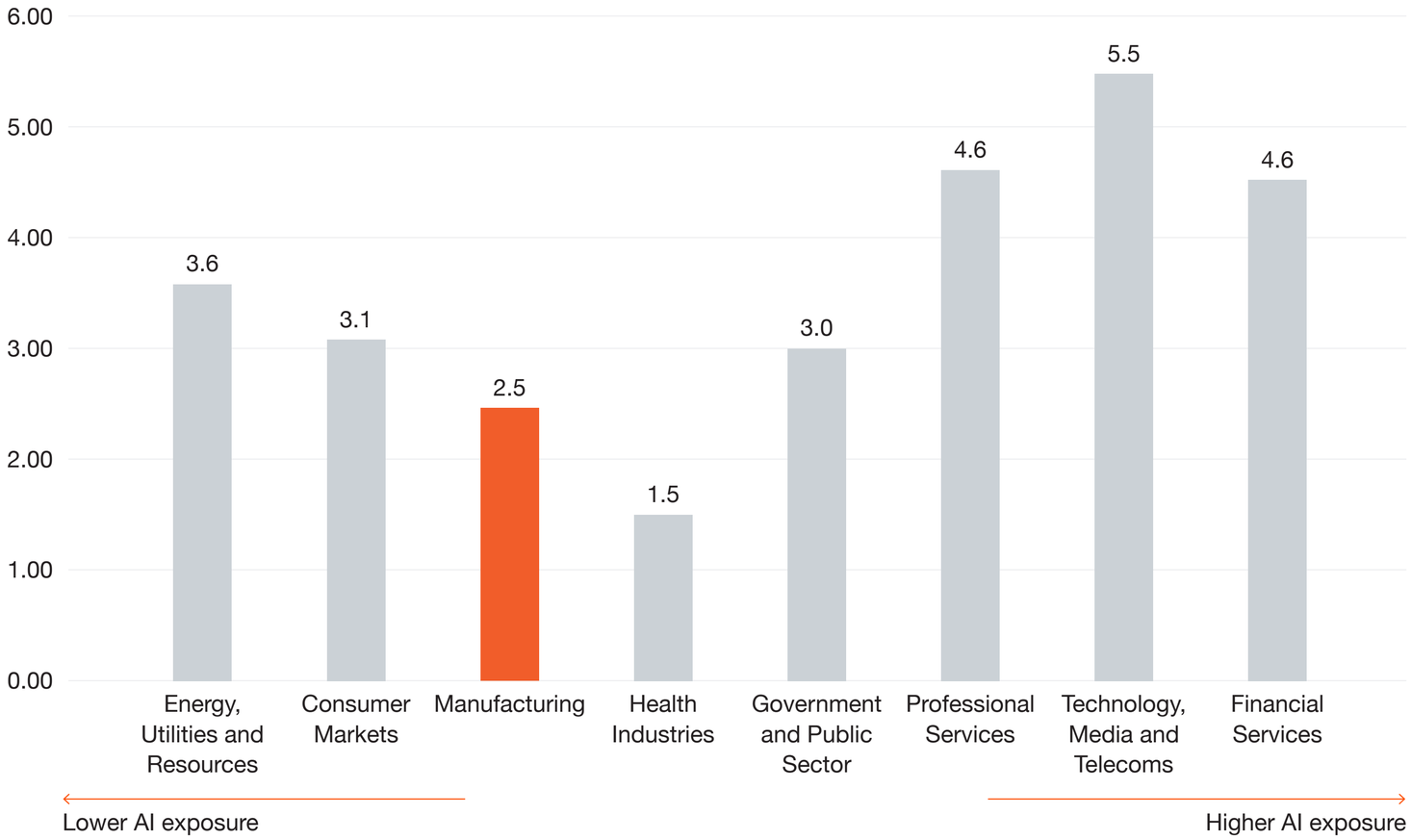
Source: PwC analysis, ORBIS data
Notes: Productivity is measured by turnover per employee using ORBIS data. We compute the growth rate in productivity between 2018 and 2024/25 at company level and aggregate up to sector level. Includes company data from all countries in the 2026 AIJB scope. 2025 data is used for companies where available, otherwise we default to 2024 data. Sectors are mapped from two-digit 2022 NAICS to the closest match(es) amongst the eight key PwC sectors. See productivity analysis appendix for all data cleaning filters applied.

Findings

- Manufacturing records productivity growth of 16%, the lowest across sectors, though still representing a meaningful improvement over the period.
- This aligns with its lower level of AI exposure, suggesting more limited scope for AI-driven efficiency gains.
- Overall, while productivity is improving, the sector lags behind more AI-intensive industries, consistent with its more gradual pace of AI adoption.

Skills transformation in Manufacturing remains relatively modest, consistent with its moderate AI exposure

Net skill change by AI exposure for key sectors, 2019-2025, globally



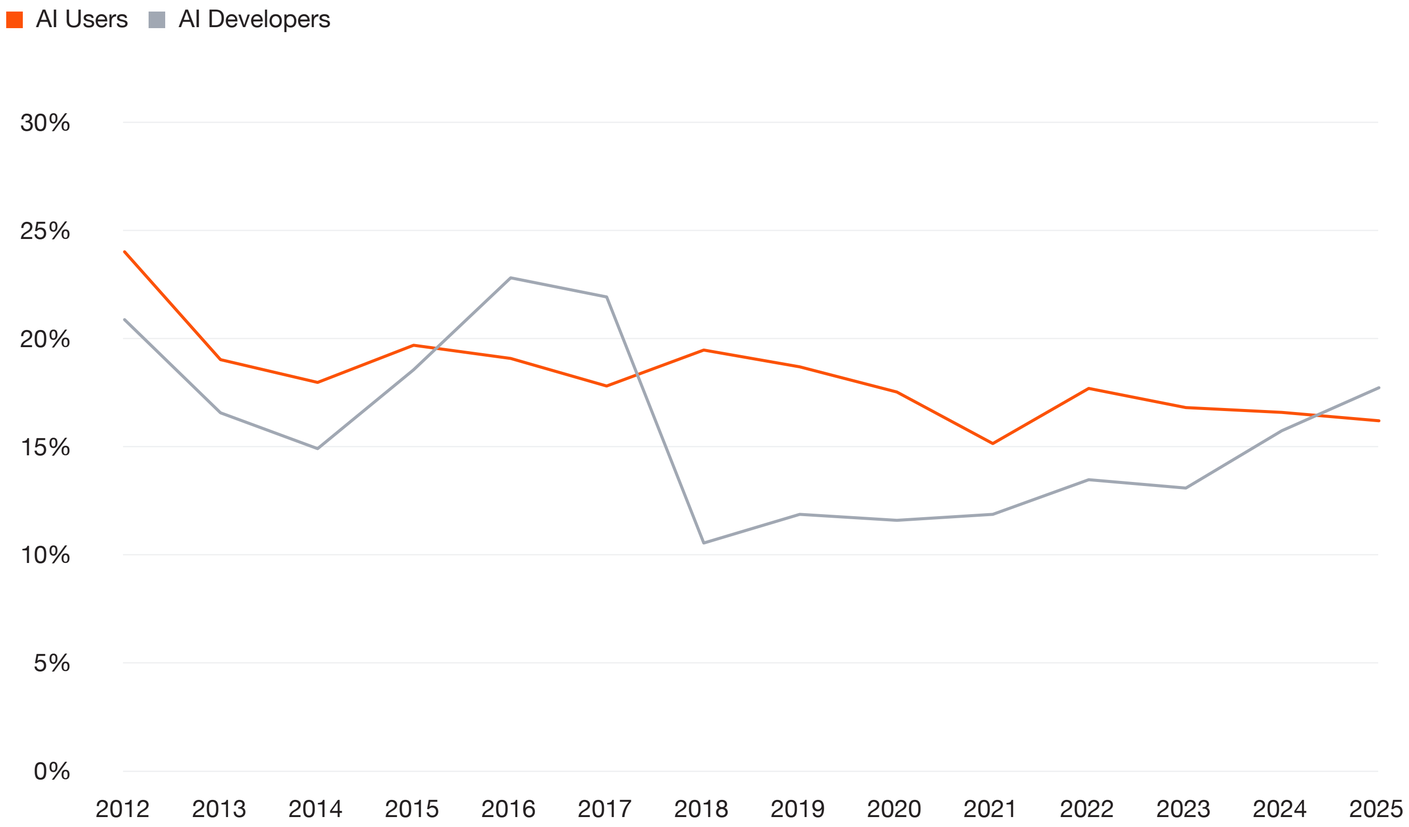
Source: PwC analysis, Lightcast data
Notes: Net skill change is calculated as the aggregation of the percentage point difference between 2019 and 2025 of the share of a skill making up an occupation.

Findings

- Between 2019 and 2025, Manufacturing records a comparatively lower level of net skills change relative to more digitally intensive sectors. This aligns with its mid-to-lower positioning on the AI Exposure Index.

The Manufacturing sector captures a substantial share of global AI skill demand for AI capabilities

Share of global skill mentions for the Manufacturing sector, by user category (%, 2012 - 2025)



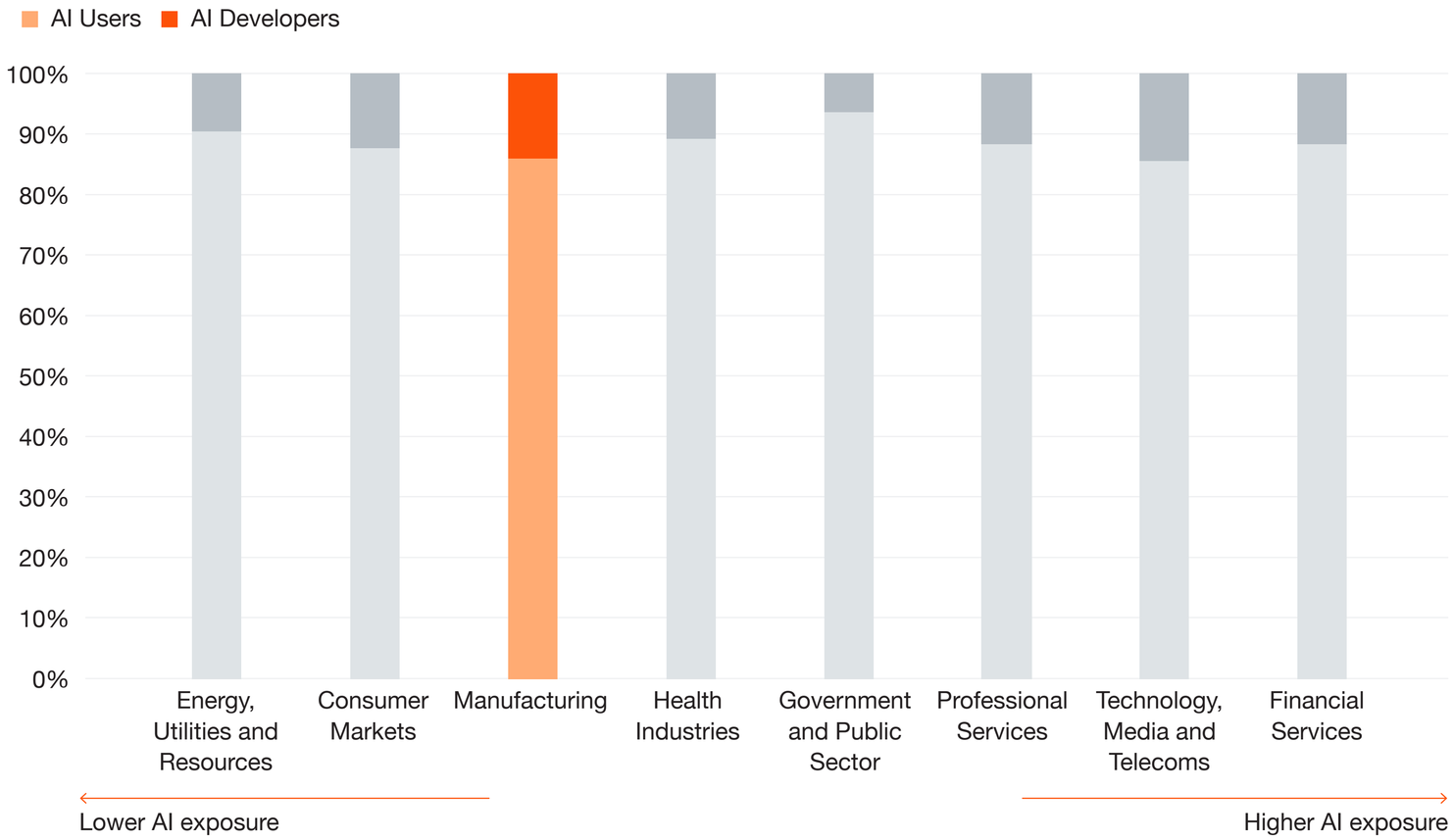
Source: PwC analysis, Lightcast data

Findings

- In 2025, the Manufacturing sector accounts for 16.2% of global AI users (applied AI and basic literacy) skill mentions and 17.7% of AI developer capability mentions (advanced AI development).
- This suggests firms may be increasing focus on embedding AI into business processes and products at scale.
- Additionally, the skill mentions share for AI developer capabilities has been increasing in recent years, indicating focus on innovation.

Within Manufacturing, AI hiring is led by applied roles, supported by a meaningful layer of specialist technical talent

Shares of AI User and AI Developer job postings of all AI related roles, Manufacturing, 2025, globally (%)



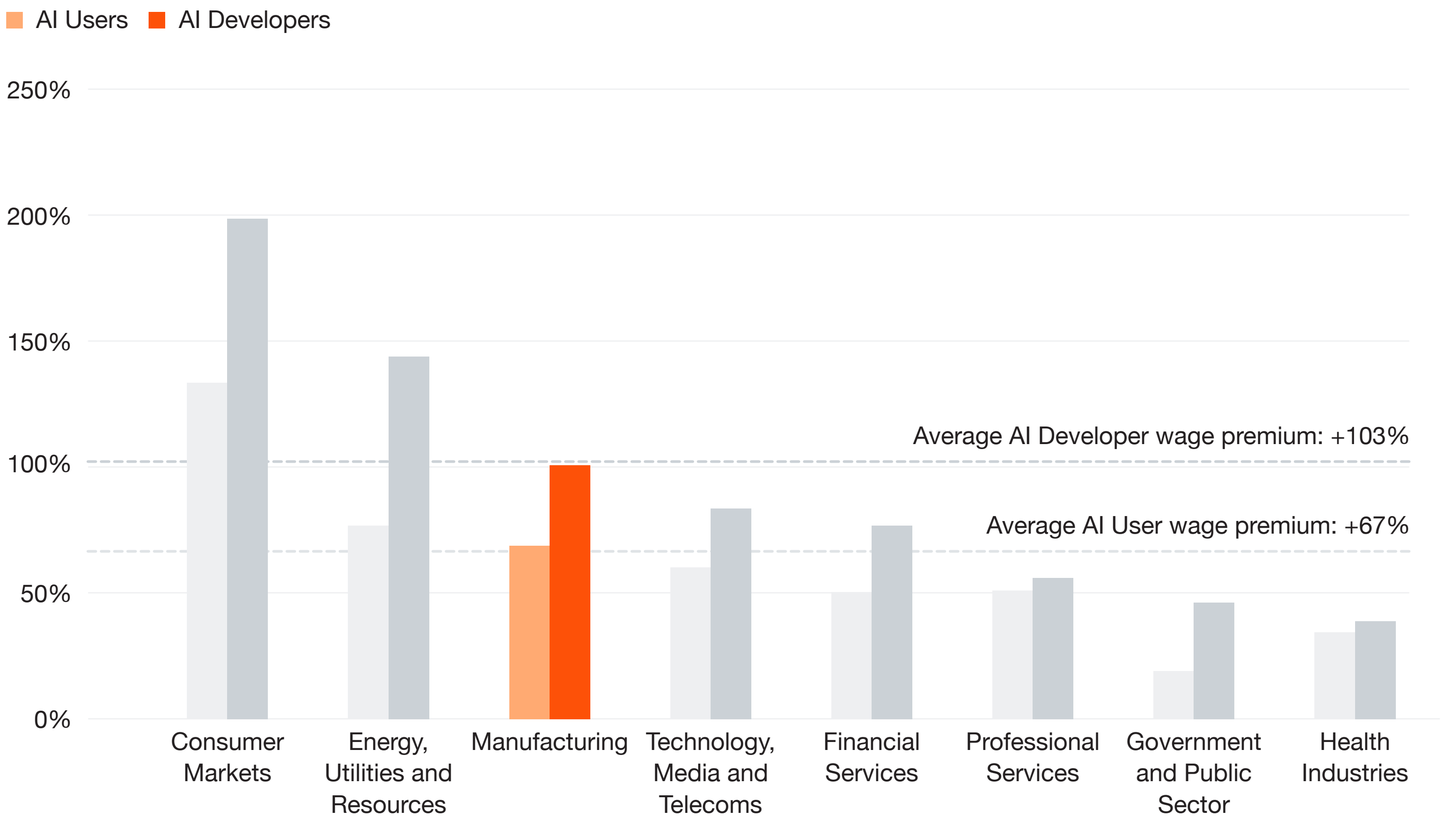
Source: PwC analysis, Lightcast data
Notes: We only include the countries for which data is available from 2012 in our sample.

Findings

- In 2025, AI user roles account for 86% of AI related job postings in Manufacturing, compared with 14% for AI developer roles. This shows that, while most demand is still focused on applied AI roles, Manufacturing has a relatively larger technical talent requirement than most other sectors.
- That mix reflects the fact that AI value in Manufacturing often depends on developing, integrating and maintaining AI enabled systems within production, engineering and operational environments, rather than only driving broad based end user adoption. The relatively higher developer share also suggests a smaller base of user roles than in more office based sectors, where AI can be deployed more widely across day to day knowledge work.

Despite representing a smaller share of hiring, developer roles in Manufacturing command the stronger wage premium

AI User and AI Developer wage premiums, Manufacturing, globally, 2025 (%)



Source: PwC analysis, Lightcast data
Notes: We only include the countries for which data is available from 2012 in our sample. To calculate wage premiums, we split job postings within a sector by AI and non-AI jobs. From here we estimate the wage premium (difference) within the sector for wages in the AI group compared to the non-AI group. This analysis is not a growth rate but rather a snapshot of a given year. Note that only the eight PwC aligned sectors are shown in the visual.

Findings

- In 2025, AI user roles in Manufacturing carry a wage premium of +69%, while AI developer roles carry a premium of +102% relative to non AI roles in the sector. This indicates that although most AI hiring is concentrated in user roles, the market places a stronger premium on advanced technical AI capability.
- Both premiums sit around the overall cross sector averages, suggesting that AI skills are clearly valued in Manufacturing, though without the more extreme uplifts seen in the highest premium sectors. As in some other industrial sectors, this may point to AI demand being concentrated in a narrower set of specialist roles, particularly where technical capability is needed to build, adapt and embed AI into production and operational environments.

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