



FOOD PROCESSING HR COUNCIL
CONSEIL DES RH DU SECTEUR DE LA
TRANSFORMATION DES ALIMENTS



FULL REPORT



Who is Processing Your Food?

2011 Food & Beverage Labour
Market Information Study



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Table of Contents

Acknowledgements.....	2
Executive Summary.....	3
Introduction.....	6
Methodology.....	6
The Canadian Food Processing Sector.....	6
Trade Balance.....	7
Trends in the Food and Beverage Processing Industry.....	9
Labour trends.....	13
Occupational Trends & Jobs in Demand.....	16
Key HR Issues and Trends.....	17
Short-term Hiring Expectations.....	21
Skills Development, Knowledge Transfer and Professional Development.....	22
Who's Processing food Where? And who's investing?.....	26
Looking to the Future.....	33
Conclusion.....	34
References.....	36
Appendix 1: Canadian institutions offer educational programs in the agri-food sector.....	42
Appendix 2: Survey Questionnaire.....	47
Appendix 3: Detailed Labour Market Data: Charts & Tables.....	63



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Executive Summary

The Food Processing HR Council (FPHRC) undertook a Labour Market Information Research Project of the Canadian Food and Beverage processing sector in order to assist firms forecast and plan for their business and HR needs. This report highlights the latest industry trends, detailed supply and demand analysis of workers, demographics, wage rates, age breakdown, recruiting practices, impact of newcomers to Canada, college/university enrolments and more. In addition to the main report, FPHRC extrapolated sub-sector specific statistics for the following commodity groups; Animal Food, Grain and Oilseed Milling, Sugar and Confectionary Product Manufacturing, Fruit and Vegetable Preserving and Specialty Food Manufacturing, Dairy Product Manufacturing, Meat Product Manufacturing, Seafood Product Preparation and Packaging, Bakeries and Tortilla Manufacturing and Beverage Manufacturing.

The food and beverage processing industry is the largest manufacturing sector in Canada. Approximately 6,500 establishments in this sector employ approximately 250,000 workers. Food processing in Canada is concentrated in Ontario, Quebec and British Columbia due to the population and location of large urban centers in these provinces. Annual exports of food and beverage products were over \$20 billion in 2010.

The uncertain global economy and the high Canadian dollar, as well as increased input prices have put pressure on the food processing industry, resulting in declining performance and productivity. These factors have led to changes in business planning, forcing greater emphasis on marketing, branding and communications to help Canadian firms maintain and improve market share. Consumer preferences are also having a large impact on processing and the products that food and beverage manufacturers are using. Improved technology is helping firms increase productivity and meet the needs of consumers, which is leading to a trend of fewer employees and fewer establishments within the industry.

Concentration in both the retail and food distribution sectors are having an impact on industry profitability, as small firms are finding it more difficult to place their products on grocery store shelves and distributors are able to charge more for their services. Legislation regarding environment, food safety and labelling pose additional challenges for the food and beverage processing industry and have a significant impact on human resource management in the sector. Globalization of the industry leaves domestic processors competing for market share with imported products which have lower production costs due to less regulatory control and lower wages in other countries.

Overall there has been a decline in the number of employees in the food and beverage processing sector; however, it is declining at a slower rate than in all manufacturing sectors. Unionization rates in food and beverage manufacturing are slightly higher than in the general population and are particularly high in the meat processing and beverage manufacturing industries.

Hourly wages for workers in the food and beverage manufacturing sector are significantly lower than in other manufacturing industries as well as the industrial aggregate. Hourly wages for Ontario and Alberta are the highest, given the competition that exists for workers in these provinces,



while Saskatchewan currently has the lowest wage for hourly workers. Compensation for salaried workers is more comparable to the manufacturing and industrial averages.

Health & safety, recruitment & retention and skills & knowledge transfer are the three key HR issues that the industry face.

Health & Safety have numerous impacts on staffing, making it a primary consideration in HR planning.

Employers in the food and beverage manufacturing industry face many of the same barriers to recruitment as those in other manufacturing industries. Most firms rely on traditional recruitment methods such as referrals to fill vacancies, although some organizations are broadening the scope of their recruitment strategies. Barriers to recruitment such as competition from other manufacturing sectors and other industries, as well as the perception of the industry by the public, are significant and must be overcome in order for organizations to fulfill staffing needs and remain productive. Retention is also a significant problem in the industry. Barriers to retention focus on the fact that many current employees tend to see employment in the industry as a short-term job, rather than a long-term career. Additionally immigration laws require that temporary foreign workers return to their home countries at the end of their work term. Employers are using many of the available HR tools, as well as a variety of incentives to plan labour force needs and attract and retain employees in the industry.

FPHRC conducted an industry survey with over 400 respondents, and the respondents noted that their expectation is to increase or keep the current hiring levels for all categories. The estimated number of new hires over the next 3 years is 21,437.

As new employees enter the industry, skills development, knowledge transfer and professional development will become central to all human resource activities. Training should be focused on areas such as language training for immigrants and temporary foreign workers, food safety training and training for the use of new technology.

There are a number of post-secondary training programs available in agri-food processing across the country. Additionally, food technology centres often offer courses or assist in the creation of customized training programs in food processing. As new delivery methods become available, the accessibility to training from these types of locations will increase. Most companies also offer a number of professional development opportunities to their employees. The most important training topics identified for the future were food safety, quality control and machinery operation & maintenance.

Barriers to training include employee motivation and the cost to train employees who only intend to be with the organization short term. Other barriers include the availability of programs, either due to transportation costs, lack of instructors, lack of programs available in the area or lack of programs available for specific skills that were required.

In the council's short two year lifespan, 34% of survey respondents were aware of the FPHRC; therefore, the council has to continue marketing itself and the value it provides to the industry,



including the development and use of national occupational standards and national certification and accreditation systems.

As economic conditions remain uncertain, but are likely to improve, the food and beverage manufacturing industry will continue to see competition for employees and will have to adopt new strategies for recruitment and retention. They will also need to focus on training efforts to ensure that the workforce has the necessary skills to stay competitive.

The Story Behind The Name...

No doubt, food is delicious... but, where does it come from?

Often, when we think of food, we usually envision its place of origin; for example: milk, cheese and beef come from cattle. Rarely do we think of all the processes that our food undergoes between the place of origin (the farm) and the final destination (our household).

In fact, pretty much all food and drink that we consume on a daily basis involves some type of processing before it reaches us! Yes, even organic foods are processed in some fashion. Processing occurs with numerous products, including: fresh produce, dairy products, meats, seafood, breads, pastas, beverages, and simple ingredients such as flour and sugar.

The reality is that the majority of products sold in a grocery store today have been through some type of "food processing phase" before it appears on the store shelf, freezer or refrigerator!

Who is Processing Your Food? is designed to trigger curiosity and to shed light on the processing phases of our food, and the people who help transform the raw materials into a consumable product!

Learn more about a generally overlooked industry and WHO is required to make these processes safe and successful!



Introduction

The Food Processing HR Council (FPHRC) undertook a Labour Market Information Research Project of the Canadian food and Beverage processing sector in order to assist firms forecast and plan for their business and HR needs. This report highlights the latest industry trends, detailed supply and demand analysis of workers, demographics, wage rates, age breakdown, recruiting practices, impact of newcomers to Canada, college/university enrolments and more.

Methodology

In order to analyze the food processing industry labour market, the FPHRC commissioned consultants to:

- review background material, reports and statistics on the food processing labour market;
- conduct in-depth stakeholder interviews with 26 industry participants to collect preliminary information regarding general trends in the industry;
- conduct a national telephone survey with 411 employers;
- facilitate seven focus groups across the country with employers from various subsectors and firm sizes.

A final report was submitted to the Food Processing HR Council. The George Morris Centre used this report as well as additional information to provide further analysis and recommendations based on their experience and knowledge of management, productivity and public policy in the agri-food sector.

The Canadian Food Processing Sector

The FPHRC defines the food processing sector as those establishments under NAICS Code 311 (Food Manufacturing) as well as beverage manufacturing (NAICS 3121). Approximately 6,500 (Statistics Canada^b) establishments in this sector employ approximately 250,000 workers (Statistics Canada^a). Around 90% of food processors in Canada are staffed by less than 100 employees.

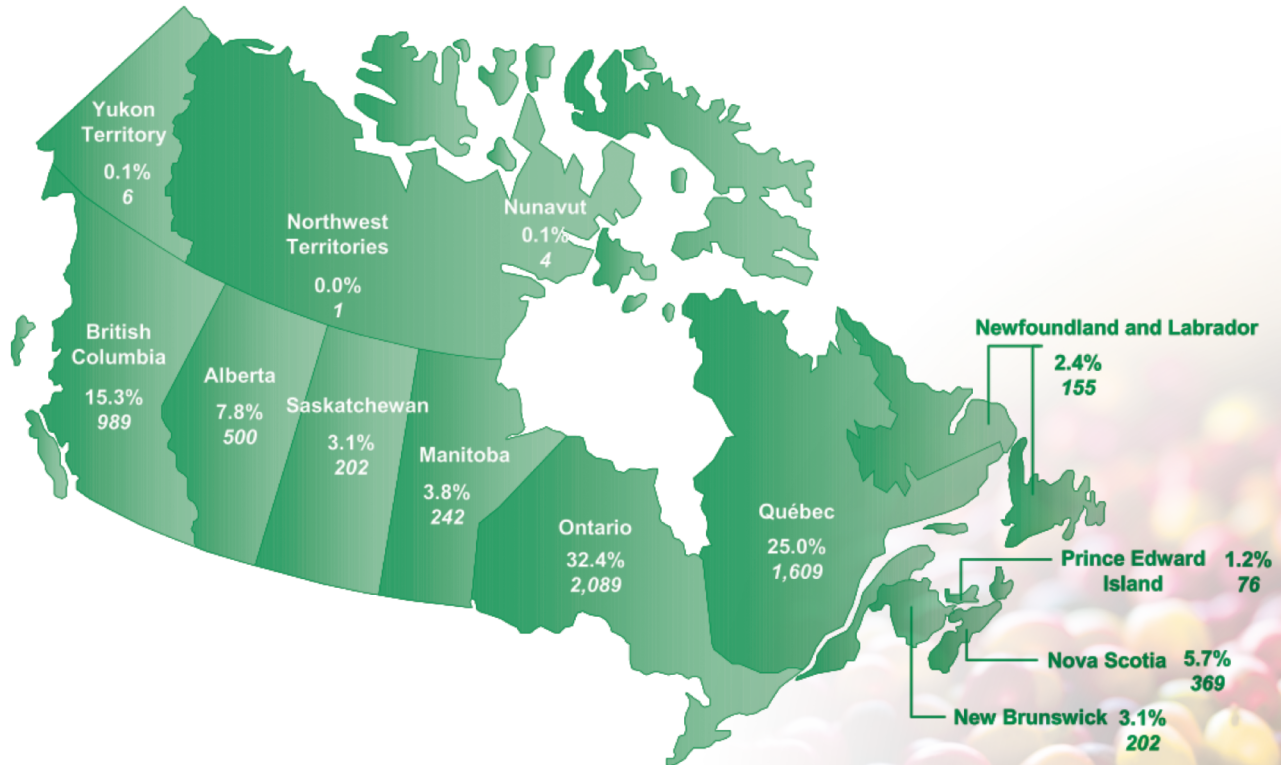
The food and beverage processing industry accounts for 17% of total manufacturing shipments, worth a total of \$89 billion, making it the largest manufacturing industry in Canada and contributing 2% of the national GDP (Agri-food Canada, Agriculture and Agri-Food Canada).



Food processing establishments are concentrated in Ontario, Quebec and British Columbia. Processors established in these provinces have access to a large potential labour pool, as well as proximity to consumers of final products – both domestic and in the US.

Food Processing Subsectors	
•	Animal Food Manufacturing
•	Grain and Oilseed Milling
•	Sugar and Confectionary Product Manufacturing
•	Fruit and Vegetable Preserving and Specialty Food Manufacturing
•	Dairy Product Manufacturing
•	Meat Product Manufacturing
•	Seafood Product Preparation and Packaging
•	Bakeries and Tortilla Manufacturing
•	Other Food Manufacturing
•	Beverage Manufacturing

Food and Beverage Manufacturing Establishments in Canada



Source: Industry Canada, from Statistics Canada, Canadian Business Patterns Database, December 2009

Who Is Processing Your Food?



Trade Balance

While demand for processed food is growing in Canada, the US and traditional European markets, there is much greater potential for growth in other less-developed countries as a result of increasing populations and increased per capita incomes.

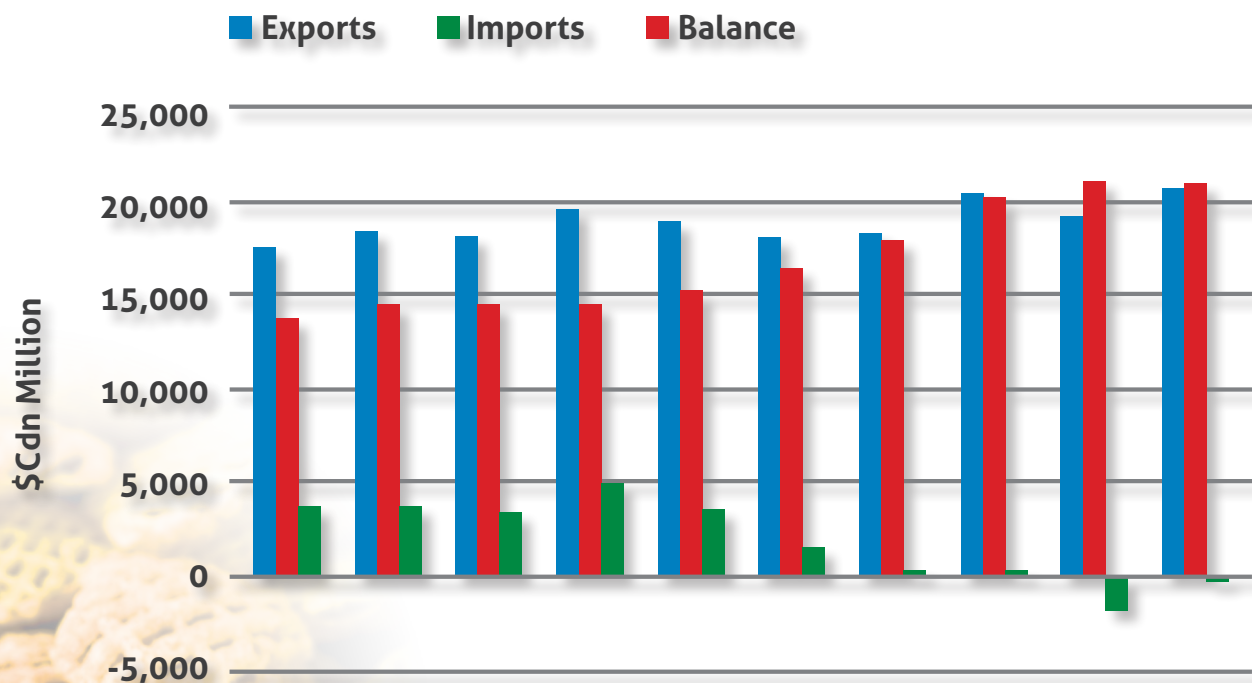
Net trade in Canada's processed food and beverage industry has declined substantially over the last decade. Canadian imports have increased much faster than exports and as a result, net trade has declined from a balance of about \$5 billion to approximately negative \$1 billion.

The United States remains Canada's top export market representing 66% of total export sales in 2010, followed by China and Japan. The total value of exports to the US has remained relatively stable over the course of the last decade. It is sales into other markets such as China, South Korea and Russia that account for the growth in Canadian food and beverage exports.

Major competitors for domestic markets in the industry include imports from the United States, Italy, France, China and Brazil.

While NAFTA allows for tariff-free trade between Canada and the United States, industry sources suggest that borders remain 'thick' with non-tariff barriers.

Canada's Trade in Processed Food and Beverage Products



Source: Industry Canada, Trade Data Online.



Trends in the Food and Beverage Processing Industry

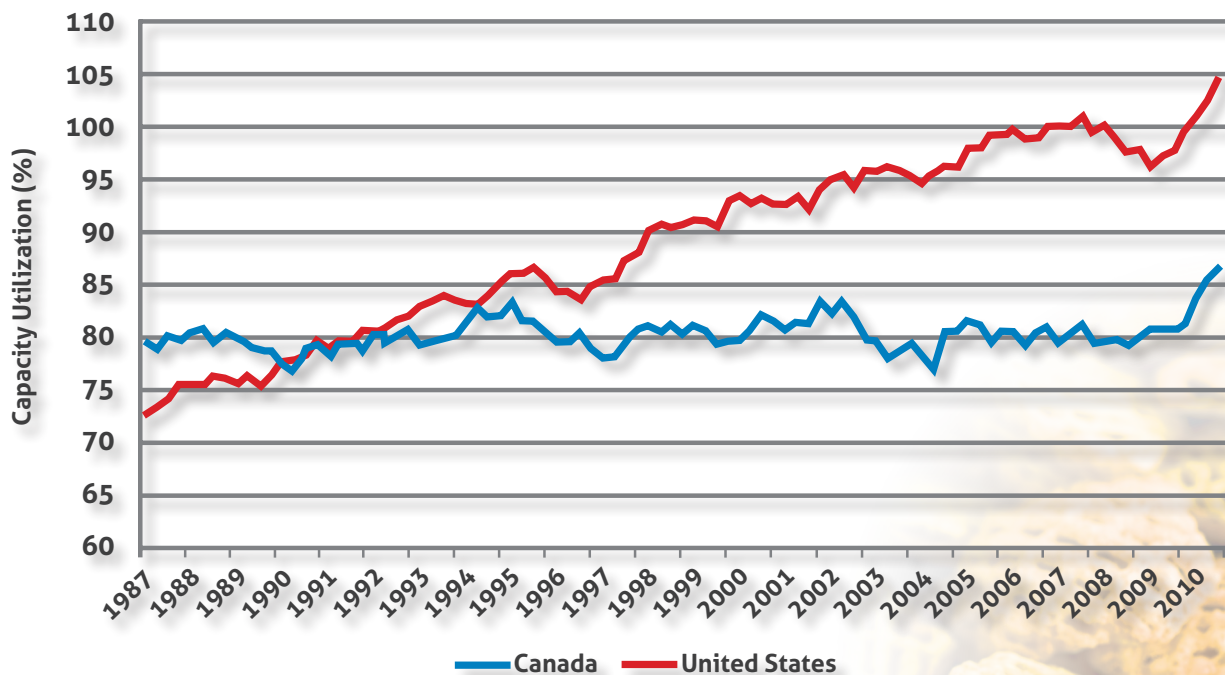
Declining Performance and Competitiveness

Growth in the Canadian food and beverage processing industry is dependent on the industry's competitiveness relative to both other sectors in the economy and to the food processing industries in other countries, since the industry must compete with these others industries for capital and labour.

The productivity gap in Canada has been well documented as a competitive challenge to the economy in many industries, and food processing is no exception (Hodgson and Triplett, 2007; Conference Board of Canada, 2010). The figure below shows that since the early 1990s capacity utilization in the United States has grown significantly to reach over 100% in the last few years, whereas Canada's capacity utilization has remained flat and has not improved much beyond 80%. The inability to utilize productive assets to their full potential is surely a drain on food processing productivity in Canada.

Factors impacting competitiveness and productivity include rising input costs, the strengthening Canadian dollar, low levels of R&D and investment and lack of access to capital.

Capacity Utilization Rates in Food Processing, Canada and the United States



Source: Statistics Canada, CANSIM database, Table V4331089; US Federal Reserve, data download program.



Changing Consumer Preferences

Consumers are becoming more health, environment and safety conscious and purchasing decisions are reflecting this increased awareness and interest. Consumers are demanding more information on the products they consume, particularly in food and beverage products, and processors are required to adjust their processes, input and marketing to reflect these demands. Some specific attributes considered are:

- Fat levels – both transfat and total fat
- Low sodium
- Safety and traceability
- Environmental packaging
- Special diet requirements (e.g.: gluten free)
- Vegetarian
- On-farm production practices (e.g.: organic, free-from antibiotics)

Other demographic shifts such as the increasing ethnic population in Canada and expanding consumer demand for specialty foods are also changing the food and beverage processing industry. Growth in this area is expected as new companies will enter this market or existing companies will shift or expand operations to take advantage of this opportunity. Retailers are already offering more variety of products such as Kosher or Halal foods as well as increased specialty food offerings to meet the needs of their customers.



With a growing proportion of two-income families in Canada, there is increasing demand for convenience foods and quick, ready-to-cook meals. Additionally, smaller families and individuals are looking for smaller portions and package sizes.

Focus on Value Proposition

Increased competition for both domestic and foreign markets is resulting in declining margins for many processors. In order to maintain or increase market share and remain competitive in the industry, processors are finding it necessary to adopt new marketing methods, adopt new business practices and undertake

more in-depth strategic planning. Advertising, branding and communications are becoming more critical to success in the industry. Private brands within the industry are growing, although strong national or international brands still dominate.

Technology and Innovation

Technology and innovation have proven to improve productivity and aid companies in maintaining a competitive edge in the marketplace. As global competition intensifies, investment in new technologies and innovations will become more crucial to improve productivity, add value and reduce costs.

New technology and innovations include:

- Labour-savings through automation
- Sustainability and waste elimination
- Energy and resource efficiencies
- Packaging improvements
- Supply chain logistics improvements
- Flexible manufacturing

Most new technologies in food processing are developed outside of Canada but adopted by Canadian processors.

Flexible manufacturing: Compared to large-scale, one-line US plants, Canadian plants for the most part are smaller and typically produce a number of product lines.

With the underlying trend of differentiation in food products, flexible manufacturing allows plants to produce a number of niche products, servicing consumer demand more effectively. This could be part of Canada's competitive advantage.

Consolidated But Changing Retail Environment

The food retail environment in Canada is highly concentrated. In 2010, Canada's top four national grocers (Loblaw, Sobeys, Metro and Safeway) accounted for 88% of market share. With this concentration, the major food buyers have market power and any change in demand by one or two of the major customers could cause a significant shift in processor's demand.

At the same time, non-traditional food distributors such as Wal-Mart, Zellers, Costco, pharmacies, dollar stores, specialty distributors and alternative outlets such as public markets are increasing their share of the market, providing new markets and opportunities for food and beverage manufacturers.

Regulatory Complexity

In today's global food market, the regulatory environment is becoming more complex and food processors need to be proficient in understanding regulatory requirements and how to navigate compliance.

- Food safety and traceability: CFIA regulates the industry and nearly all firms participate in HACCP¹ or QMP² to provide quality control. Food safety requirements are expected to become more stringent in coming years, putting additional pressure on the industry to meet requirements. CFIA has recently confirmed its intention to name companies who violate food safety regulations in order to improve accountability and transparency.
- Packaging and labelling requirements.
- Health claims and new ingredients: a lengthy and inconsistent process in Canada has hampered processors' ability to innovate and bring new products to market in a timely fashion.
- Environmental and waste disposal.

Globalization of Food Processing

There is a growing trend towards the creation of strong global brands. This is being accelerated by mergers and acquisitions of processing facilities by multinational companies. This, combined with a strong Canadian dollar and low cost of production in countries such as China, Brazil, Thailand and India, has created greater competition for the domestic market in Canada. The European Confederation of Food and Drink Industries (CIAA) has noted that emerging economies are seeing growth in value-added product industries, resulting in a decreased market share for European companies globally. Similar results can be expected in North America, as manufacturers continue to face more competition.

What Do These Trends Mean for the Food Processing Labour Market?

In sum, the trends show that Canadian food processors are engaged in a complex and competitive business environment. But with complexity comes opportunity. In order to take advantage of the opportunities, the food processing industry must employ a dedicated and skilled workforce.

The bottom line is that a more professional and well-trained workforce will be required to meet the demands of the future.

As the industry makes technological advances, more advanced skills are required. For example, it seems there will be a need for more skilled machine operators than line operators; engineers, food scientists and nutritionists, etc. will also be affected. Savvy marketers will be required to stay ahead of changing consumer demands, utilizing packaging and production processes to sell products.

Overall, these changes will have an impact on the current workforce and on the types of skills required – causing attraction, training and retention of appropriately skilled workers an increasingly crucial challenge.

¹ Hazard Analysis Critical Control Points

² Quality Management Program

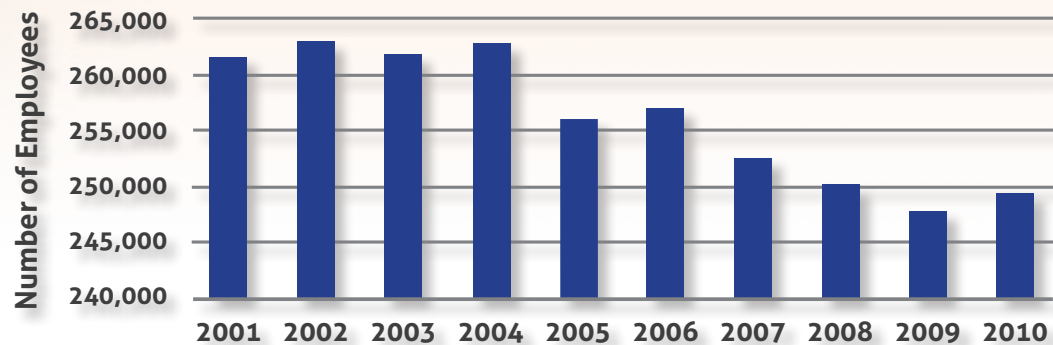


Labour Trends

Declining Employment

Over the past decade, the number of employees in the food and beverage manufacturing industry has decreased by 4%, from 262,081 to 249,560. This decline in employment has occurred as sales have grown and has partially resulted from an investment in automation which has required fewer employees but likely more skilled employees as a result.

Total Number of Employees in Food and Beverage Processing

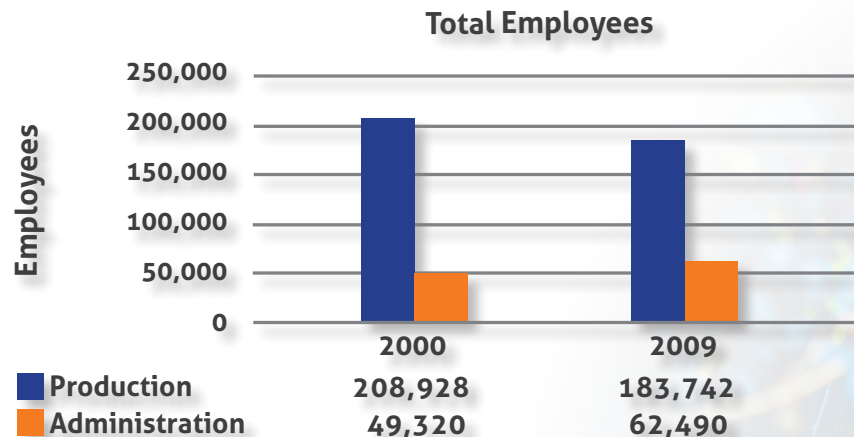


Source: Statistics Canada, Table 281-0024

Food and beverage processing accounted for 17% of total manufacturing employment in 2010, compared to just over 13% in 2001.

Between 2001 and 2010, employment in total manufacturing in Canada declined by 26%.

In addition, employment numbers from Statistics Canada indicate that the number of Production employees has dropped while the number of Administrative employees has risen. Although the salary of production employees has steadily increased it has not increased as fast as the Administrative employees.



High Union Participation Rates

According to the 2009 Statistics Canada Labour Force Survey, 36% of workers employed in the industry were unionized. Unionization is particularly prevalent in the meat product manufacturing and beverage manufacturing subsectors with 56.5% and 42.3% unionization respectively. This compares to 33.7% of workers unionized in all industries in Canada (Human Resources and Skills Development Canada).

Lower Than Average Hourly Wages

Hourly wages

In 2008, average hourly wages in the food and beverage manufacturing sector were \$18.14 per hour for employees who are paid by the hour. This has increased slightly from \$17.44 in 2004. Hourly wages are significantly less than the average for all manufacturing sectors (\$21.98) and the industrial aggregate (\$20.16). Alberta and Ontario have the highest wages consistently, likely due to competition between employers for workers. In Ontario this is likely between food processors and other manufacturers such as the automobile industry, while Alberta's oil industry is a draw for labour in that province. In 2008 Saskatchewan had the lowest wages at \$15.96 per hour; however this is likely to change in the near future as the unemployment rate in Saskatchewan is currently the lowest in Canada, meaning food and beverage processors are going to have to pay more to attract workers.

Salaried workers

For salaried workers in the industry, the average hourly wage was \$30.27 per hour. Salaried employee wages are on par with other manufacturing sectors and slightly higher than all industrial employment. Ontario, Alberta and Quebec are the highest paying provinces for salaried employees, while the Atlantic provinces and British Columbia have the lowest salaried wages.

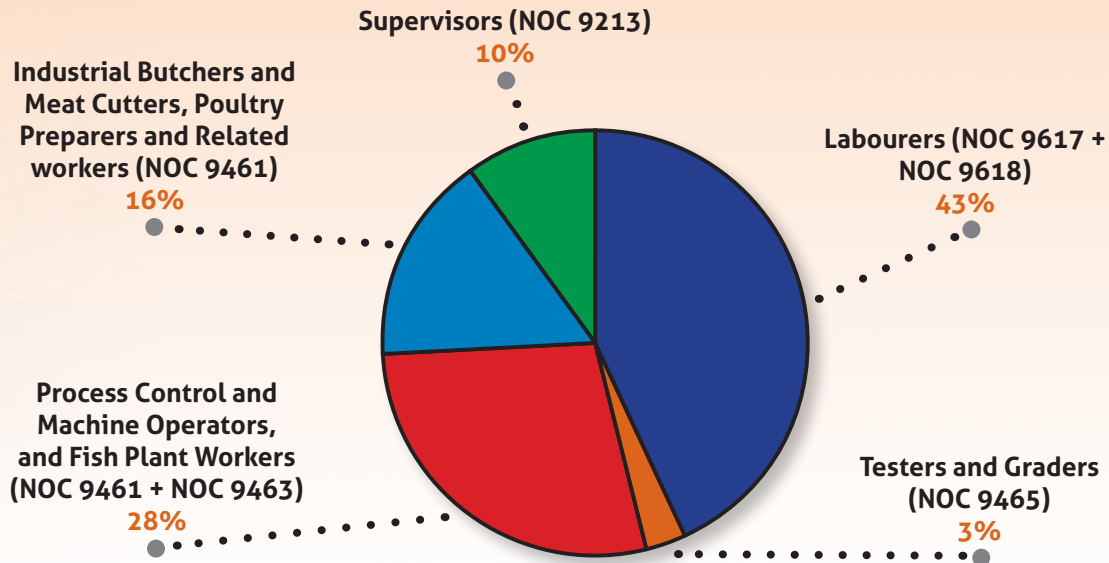
Occupation Demographics

Currently, labourers make up over 40% of the total industry workforce (this includes food, beverage, tobacco and fish processing labourers), followed by process control and machine operators accounting for 28%. As the occupations get more skilled and specific, the proportion of employees falls.

A higher proportion of males are employed as supervisors (72%), process control and machine operators and industrial butchers (67% for NOC 9461) and meat cutters (71%). Females dominate the labourer positions (54%), positions such as machine operators in fish processing plants (63% for NOC 9463) and testers and graders (58%).



Food and Beverage Processing Industry Workforce Composition by NOCs



Source: Statistics Canada, 2006 Census of Population.



Workforce Highlights

- This is a male dominated industry: Females represent only 39.9% of workers in the food and beverage processing industry, compared to 47.4% in all industries.
- 74.5% of the workforce is between the ages of 25-54, higher than all industries at 69.5%
- 69.1% of employees list English as their mother tongue, 27.7% French, 0.9% English and French and 2.3% or 5,750 people neither English nor French.
 - B.C. had the largest workforce population with neither French nor English as their mother tongue (7.5%), followed by Ontario 3.1% and Alberta 3.0%
- Immigrants make up 26.7% or 66,750 people of the food and beverage manufacturing workforce, compared to 21.1% in all industries.
 - British Columbia (47.3%) has the highest proportion of immigrant workers, followed by Ontario (40.6%) and Alberta (38.7%)



- Aboriginal peoples make up 1.0% of the workforce, which is comparable to Aboriginal employment in all industries.
 - Aboriginal people made up 3.8% of the Canadian population in 2006
 - Saskatchewan has the highest proportion of Aboriginal food and beverage processing employees at 5.3%
- Seasonal foreign workers are employed by approximately 10% of the organizations surveyed.
 - Latin American and other Caribbean countries and Mexico are the most common countries of origin for these workers
 - The Fruit & Vegetable and Specialty food subsector employs the highest proportion of seasonal foreign workers in the industry, with nearly 20% of organizations in this subsector hiring 50-74% of their workforce as temporary foreign workers.
- 3,500 employees industry-wide retire per year (1.5% of the total workforce) and it is estimated that 13% (32,500) will retire in the next few years. As in other industries, there is a shift from older workers who are reaching retirement age to a younger, less experienced workforce. As employees reach retirement age, firms will have more difficulty balancing a workforce that is both younger and less experienced than the current workforce. Firms must also ensure that institutional memory is passed on. These younger workers also have different expectations than older employees with respect to job expectations and work/life balance.

Occupational Trends and Jobs in Demand

As technology improves and production practices become more automated, there will be a growing need for skilled, technologically proficient employees, while it is expected that the need for unskilled labour will decrease. Opportunities for those trained to operate new advanced technology will be available. Maintenance positions will also become critical, as equipment failures have major impacts on production lines and productivity.

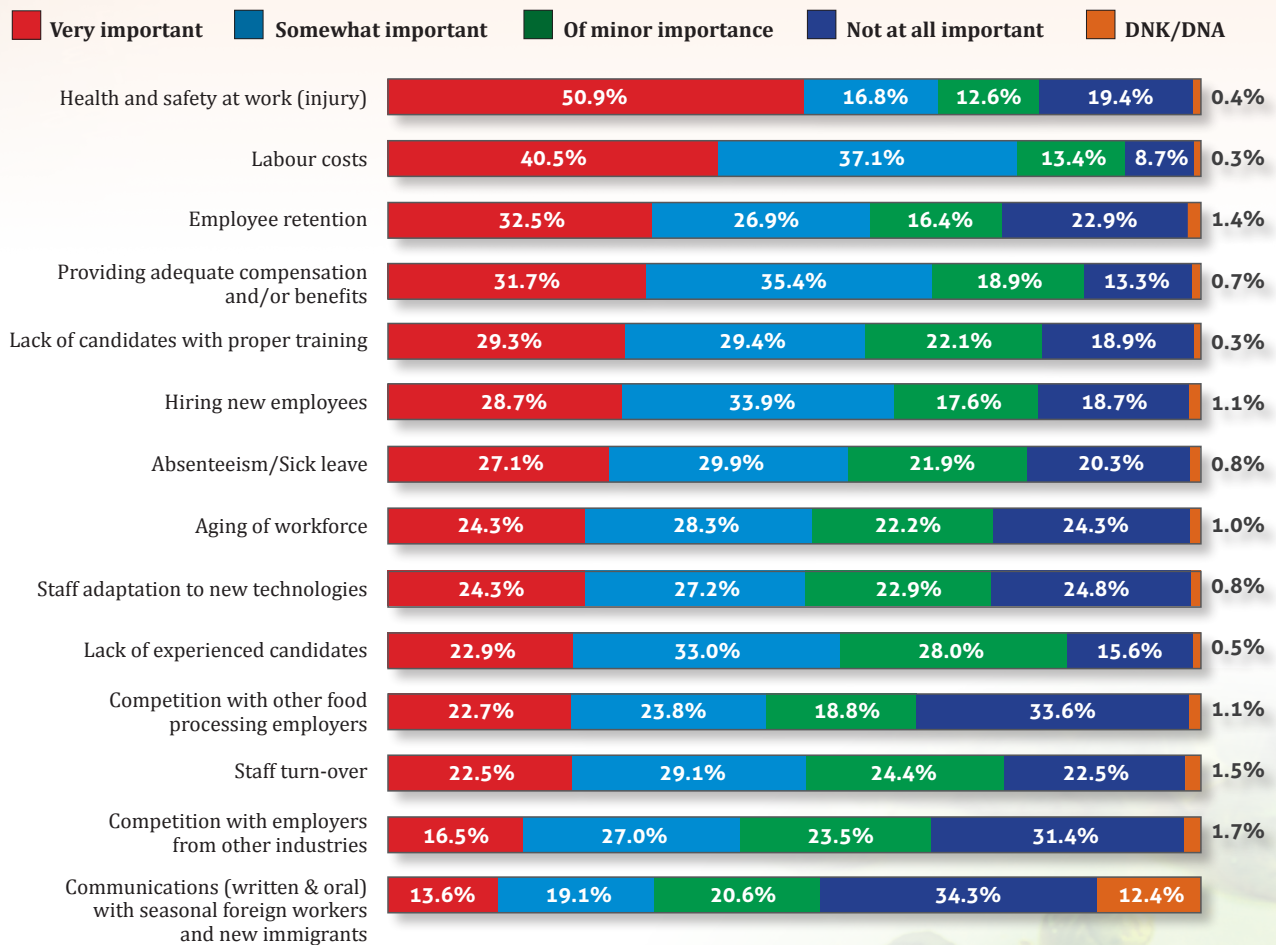
In order to meet high food safety and quality standards, we can expect an increased demand in food science technicians, quality assurance technicians and HACCP and QMP specialists.



Key HR Issues and Trends

Employers surveyed (n=411) were asked to rate the importance of potential HR issues to their firm. Health and safety was identified as the most important issue by the highest number of respondents (51%). However labour costs were considered either very important or somewhat important by 77.6% of respondents.

Is Each of These a Potential Human Resource Challenge That Could Affect Your Organization?



Health and Safety

Improving health and safety in the workplace is an important goal in the industry. Accidents and unsafe working conditions have a negative impact on other human resource issues in the industry, including: labour costs, absenteeism and sick leave, recruitment and retention, productivity and employee morale.

Retention and Recruitment

The food and beverage manufacturing industry faces many of the same constraints to retention and recruitment as other industries.

Barriers to Recruitment

Employers surveyed suggested that the food and beverage manufacturing sector face the following difficulties in recruiting employees.

- Competition both within the food and beverage processing sector as well as from other manufacturing industries put significant pressure on firms in the industry in creating and maintaining a well-trained steady workforce.
- Lower wages relative to other manufacturing industry is a significant barrier to recruitment.
- Public perception of the industry is that there is no long-term career potential.
- Working conditions: shift work, labour intensive, cold, damp, and wet environments.
- Lack of knowledge among potential employees, including high school students and other youth about the industry and the variety of positions available.
- Difficult to find employees with necessary skills as there are no specific secondary or post-secondary training programs for most labour positions.
- Cost of undertaking proper recruitment activities is expensive and timely and presents a challenge for some firms.

Despite these challenges, only 44% of firms surveyed indicated that they use incentive programs to attract and retain staff. Adoption and expansion of these programs will help firms to attract new employees to the industry and keep experienced staff.

Current Recruitment Methods

Respondents were asked to indicate what tools they use to recruit new employees. Values indicate the percentage of survey respondents who indicated that these methods were currently used in their organization. Firms use a number of sources to find new employees.

- Employee referrals – 50.4%
- Internet – 43.4%
- Ads in media – 40.7%
- Résumé bank – 37.3%
- Local or provincial employment centre – 34.1%
- Private placement agencies/ Head hunters – 24.6%
- Personal contacts of managers – 23.3%
- Schools, Colleges, Universities – 22.4%
- Co-op internship, Apprenticeship – 14.1%
- Internal transfers – 12.8%
- Jobs in food website – 12.6%
- Job fair – 9.1%
- Trade publications – 4.9%



Hiring Difficulty

Of the employers surveyed, 63% mentioned that hiring new employees is an HR challenge and 59% mentioned that there is a lack of candidates with the proper training, leading to difficulties in hiring for specific occupations.

Employers face the biggest challenge in finding appropriate candidates for the following occupations:

- Skilled workers & operators: 32%
- Precision workers: 27%
- Labourers: 25%
- Supervisors: 20%
- Technicians/technologists (e.g. quality control): 18%

Processors expect these same occupations to continue to be difficult to fill over the next five years.

Barriers to Retention

- Harsh working conditions
- Young employees have different expectations from employers than older employees

Temporary Seasonal Employees

Temporary seasonal employees help organizations to maintain or increase production on a short term basis – especially in fruit and vegetable processing that has extreme peak production periods.

- Processors sometimes find it difficult to motivate employees who will only be employed for a short period of time.
- Training and orientation are crucial but time consuming when retraining must occur each year – this can affect productivity.

Current Use of HR Tools

Food and beverage manufacturers employ a number of human resource tools in order to improve organizational efficiency. Values indicate the percentage of survey respondents who indicated that these methods were currently used in their organization.

- Job and task descriptions – 88.4%
- Training and development programs – 85%
- New employee orientation – 79%
- Recruiting and selection process – 73.1%
- Formal performance evaluation and goal setting – 70.6%
- Non-monetary incentives/benefits package – 64.7%
- Provide information about salary scale/structure – 63.5%
- Work enrichment programs – 48.8%
- Career planning (written developmental plans) – 34.6%
- Graduated retirement – 31.3%

Temporary Foreign Workers

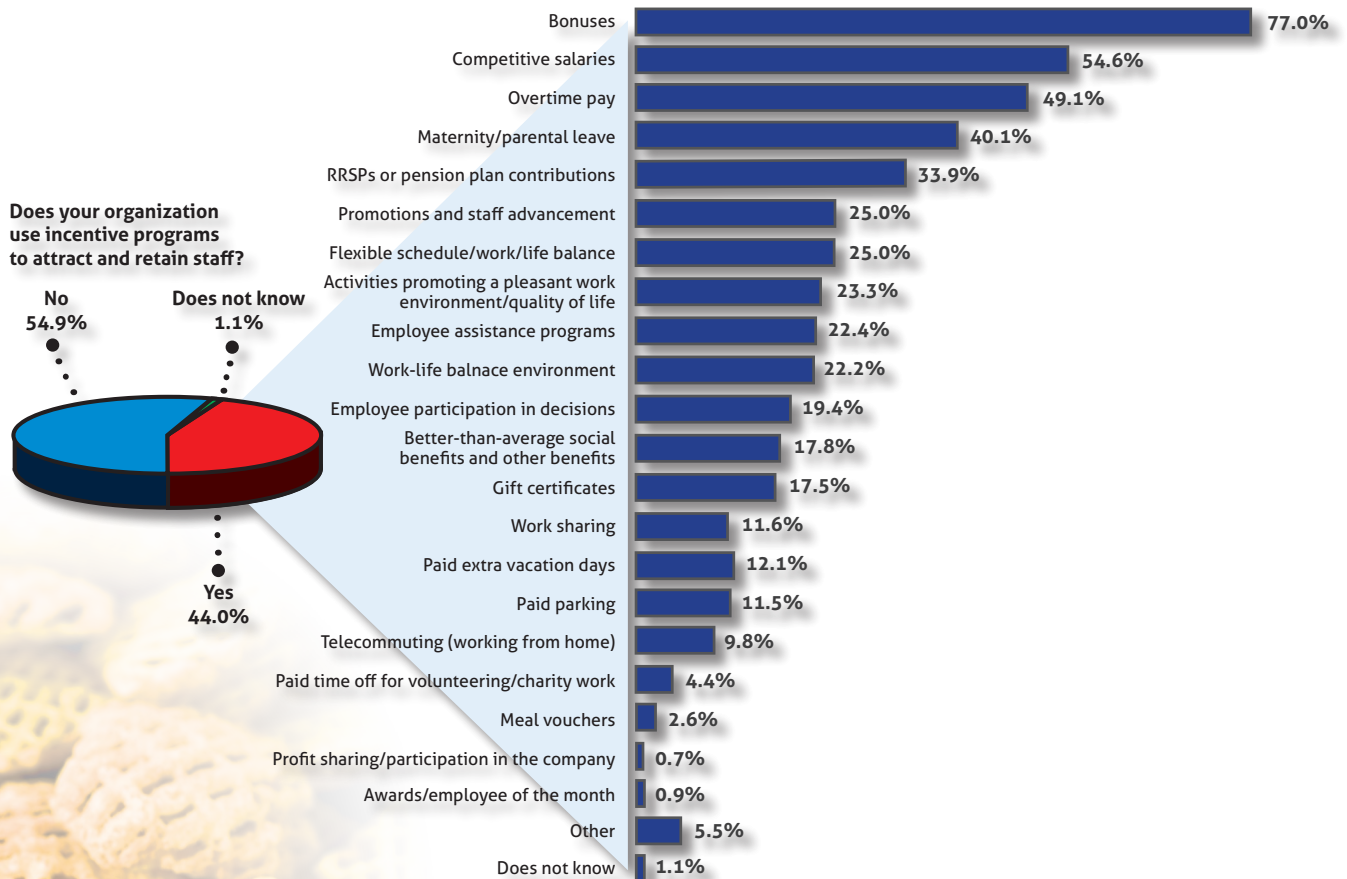
When processors cannot source sufficient domestic labour, temporary foreign workers are an alternative source.

A Move to Less Traditional Incentives

Benefits and incentives play an important role in attracting and retaining a productive workforce. While many firms use traditional incentives such as bonuses, sufficient salaries, overtime pay, etc., some firms are also turning to less traditional incentives such as profit sharing in the company, work sharing, telecommuting and awards.

As firms become more aware of the range of incentives offered by other companies, they will be able to incorporate these programs into their own organizations to improve recruitment and retention efforts. As pressure to remain profitable under unstable economic conditions increases, firms will be required to consider more of these options as alternatives to salary increases in order to maintain employee satisfaction.

Current use of Incentives (n=411)



Short-Term Hiring Expectations

Based on short-term hiring intentions, the industry has estimated it will hire 21,437 employees in the next three years³. These projected hires will account for both retirement replacement (assuming approximately the same numbers as the past three years of 10,000 retirees) and industry growth. This represents a hiring rate of 8.6% over the three years (4.6% of which is related to industry growth).

Regional Hiring Expectations

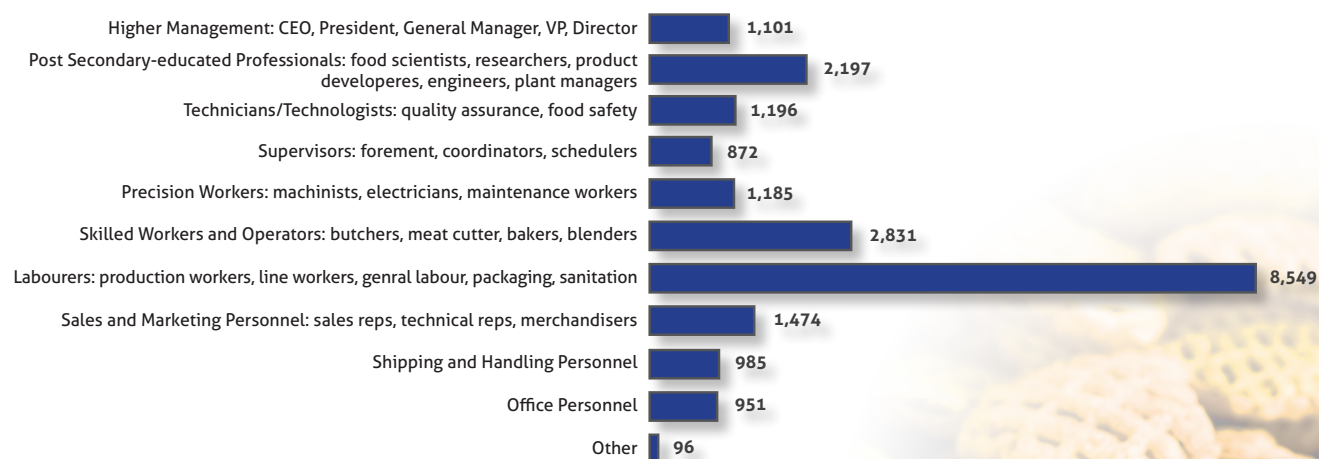
The following table shows the estimated hires by region. Relative to their food processing industries, Quebec and the Atlantic Provinces will be hiring in greater proportion, while Ontario and the west will be hiring less.

	Western Canada	Ontario	Quebec	Atlantic Provinces
# of hires	5,481	6,231	5,847	3,874
% of hires	26%	29%	27%	18%
% of establishments	31%	32%	25%	12%

Occupational Hiring Expectations

In the next three years, 40% of the projected hirings in the industry will be for general labourers, followed by skilled workers (13.2%) and professionals with post-secondary education (10.2%).

Projected Hirings by Occupation



Labourers and skilled workers were identified as some of the most difficult occupations to hire in the food processing industry. Therefore, processors must start developing recruitment and retention plans in order to successfully obtain and retain these hires.

³ Employers surveyed (representing 948 establishments) estimated 6,147 hires. Based on an industry of 3,306 establishments employing 10 or more people, 21,437 hires were extrapolated ($6,147/948 * 3,306 = 21,437$).



Skills Development, Knowledge Transfer and Professional Development

Overall, organizations have maintained or increased (85.4%) their training budgets for 2010 over 2009. This shows a commitment to encourage industry employee professional and skills development. Employers also indicated that they intend to increase or maintain the number of employees who are trained, as well as the number of training hours per employee over the next three years.

Required Skills

LANGUAGE TRAINING FOR NEW IMMIGRANTS AND TEMPORARY FOREIGN WORKERS: One of the issues identified by employers was the need for language training for workers whose first language is not French or English, particularly for workers with temporary work permits employed in seasonal positions. The concern is that language barriers may result in health and safety concerns for these employees.

Additionally, employers would also benefit from language training in the languages of their employees' mother tongue.

FOOD SAFETY TRAINING: As consumer preferences and legal requirements shift toward greater food safety standards, it becomes increasingly evident that companies need employees who understand and adhere to these regulations. Establishments will need to adopt and expand on food safety plans and to communicate the goals and requirements of these plans to their staff. Most of these food safety training programs will need to be designed and implemented on-site to provide the best application of policies and procedures.

TRAINING FOR NEW TECHNOLOGY: For the introduction of new technology to increase productivity, it is imperative that employees be appropriately trained on the use of such technology. Additionally, low level training on troubleshooting and maintenance should be conducted so that small problems can be fixed with minimal disruption to the manufacturing process. As firms adopt more technology and processing lines become more automated, processors will need to hire or train employees with greater technological knowledge. Equipment manufacturers often do not provide adequate training for use, maintenance and repair of new machinery.

Training Programs

Several colleges and other post-secondary institutions offer educational programs in food processing. There were over 5,000 students enrolled in such programs in 2008, with 1,000 graduates. Some 2,000 of these students were enrolled in food processing apprenticeship programs in 2008. The

number of enrolments in food and food processing-related programs continues to increase.

At the high school level, no programs specifically related to food processing are available, leaving a training gap which requires considerable on the job training. For a full list of Canadian educational institutions offering agri-food programs, see Appendix 1.

The Guelph Food Technology Centre offers training in a number of food safety, quality and technical areas. GFTC trains over 3,000 professionals annually. The Food Processing HR Council, the Saskatchewan Food Industry Development Centre Inc., the Canadian Institute of Fisheries Technology in Nova Scotia and the Canadian International Grains Institute offer assistance in building courses in food safety and quality assurance⁴, as well as workshops and online training.

Most stakeholders surveyed indicated that the current number of spaces in post-secondary programs available does not adequately meet the needs of the industry, particularly in the case

of skilled workers (e.g. butchers, meat cutters, bakers, blenders). Additionally, as new technologies are introduced to the workplace, skills learned in these programs become quickly outdated. While training programs are growing, this growth is not meeting the industry demands.

Delivery methods for training programs are expected to change as new technologies such as Skype improve communication. For large multi-site firms, this will allow training of employees in several locations at the same time.

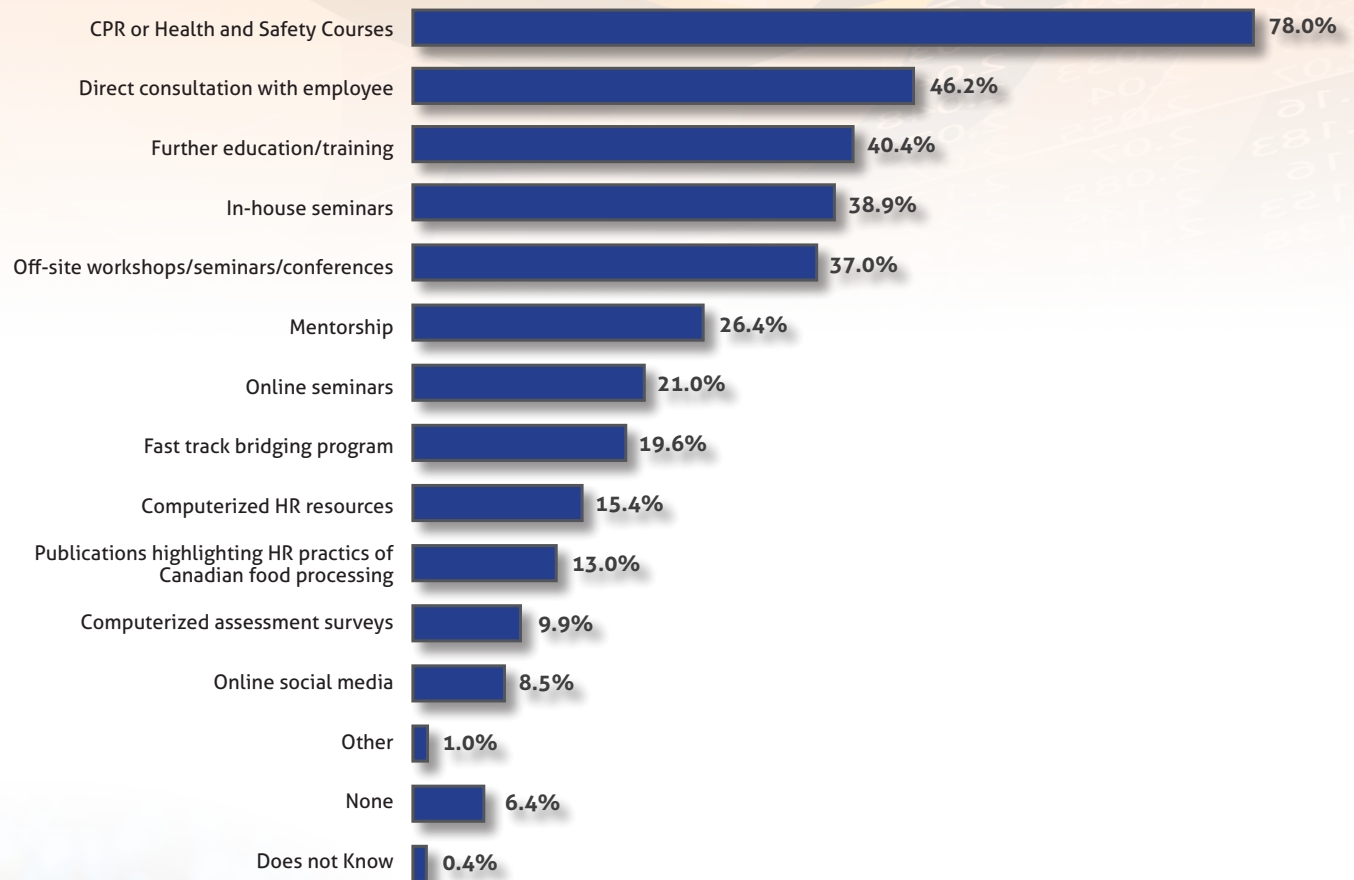
Employers have noted that many employees do not have adequate backgrounds to take full advantage of further training.

⁴ Saskatchewan Food Industry Development Centre Inc. http://www.foodcentre.sk.ca/Food_Industry_Training_Centre/

Professional Development Activities

Food and beverage processors are using a variety of methods to provide training, skills development and professional development to their employees. Given the importance of health and safety in the workplace, it is not surprising that most workplaces undertake this activity as part of employee development.

Tools and Activities Used to Meet Employee Development Goals



Barriers To Training

The following potential barriers to training have been identified:

- Employees may not have the necessary background (particularly education) to take further training
- Not cost efficient to train employees who do not intend on staying with the company
- Language barriers for immigrants and seasonal foreign workers
- Training hinders plant production activities and productivity
- Younger workers may not be interested in taking training that is offered, unless required
- Training for skills applicable to position are not available
- Cost of training
- Scheduling/attending course during work hours
- Accessibility of training for non-urban locations
- Specialized training needed
- Transportation costs
- Availability of instructors

Top 5 Topics for Training

Employers identified topics for potential training within the industry:

1. Food Safety
2. Quality Control
3. Machinery Operation & Maintenance
4. Labelling
5. Refrigeration



Who is Processing Food Where? And Who's Investing?

Dairy Products (NAICS 3115)

The dairy market in Canada is largely a mature market – consumption per capita is declining and more substitutes for dairy products are being developed.

Number of establishments: 454 in 2009, accounting for 7% of all food and beverage processing establishments

- The majority of dairy processing in Canada occurs in Ontario and Quebec.

Employment: 22,200 employees

- 89% of establishments have fewer than 100 employees

Big players in Canadian dairy processing

- **Saputo:** 26 plants; also in US, Argentina, Germany, UK
- **Parmalat:** 18 plants in Canada; multinational
- **Agropur:** 26 plants, also in US, Argentina
- **GayLea:** 5 plants, Ontario-based

Recent investments in dairy processing in Canada

- **Danone Canada:** \$50 million spent to expand in QC to produce DanActive probiotic drink line.
- **Agropur:** In 2010, spent \$4 million in Victoria, BC, on a new air filtration treatment system and multi-million dollars in QC on a new cheese line.



Grain and Oilseed Processing (NAICS 3112)

“Canada offers access to an abundant supply of different grain and oilseed commodities” (DFAIT, 2009), which has made grain and oilseed manufacturing one of the most significant food processing subsectors. Canada is a world leader in exporting grain and oilseed-based products. This category includes both milling (primary processed) and further processed such as breakfast cereals.

Number of establishments: 164 in 2009, accounting for 3% of all food and beverage processing establishments

- The majority of processing takes place in Ontario, Quebec and Alberta

Employment = 7,200 employees across Canada

- 90% of establishments employ less than 100 employees

Recent investments in grain and oilseed processing

- JRI: \$100 mil. canola crushing plant in SK in 2010, 70 jobs
- Kellogg Canada: \$100 million investment in Belleville to build a new plant in 2007, with approximately 100 employees. This was the first new Kellogg’s plant to be built in North America in over 20 years.
 - In 2011 Kellogg announced plans to invest in a new cereal line at this plant creating 40 more jobs.

Leading primary processing companies

- **Viterra** – the largest grain handler in Canada and among the world’s largest industrial oat processors – Can-Oat Milling Products Inc.

Leading cereal manufacturers in Canada – the following four companies account for approximately 90% of cereal manufacturing in Canada:

- **General Mills Canada Corp.**
 - Retail manufacturing facilities in MB and ON, and foodservice manufacturing facilities in ON, QC and AB.
- **Kellogg Canada**
- **Post Foods Canada Corporation**
- **Quaker Oats** – owned by Pepsico

Sugar and Confectionary Manufacturing (NAICS 3113)

- Foreign ownership in the sector is high as all of the major manufacturers have a plant in Canada.
 - “Canada is the only place in the world where the five major multi-national confectionery manufacturers are located”*.
 - Hershey, Mars Inc., Nestle, Ferrero, Cadbury, Kraft
- Sugar-free confectionery is the fastest growing segment.

Number of establishments: 260 in 2009, accounting for 4% of all food and beverage processing establishments

- 82% of processing takes place in Ontario, Quebec and British Columbia

Employment = 9,200 employees across Canada

- 89% of establishments have less than 100 employees

Sugar refining

- **Rogers** sugar beet processing plant in Taber, AB – the only plant to produce sugar from sugar beets. In the late 1990s Rogers completed a \$40 million expansion.

Confectionery processors

- Italian confectioner **Ferrero** opened a manufacturing plant in Brantford in October 2006. In 2004 construction began on the plant: Ferrero invested \$250 million and the Government of Canada invested \$5.5 million and \$1.7 million for employee recruitment. The plant employs 700 persons and services both the US and Canadian markets.

Bakeries and Tortilla Manufacturing (NAICS 3118)

Number of establishments: 1,747; 27% of all food and beverage processors in Canada in 2009

- The majority of these establishments are found in Ontario, Quebec and British Columbia

Employment: 37,625 employees

- 94% of establishments have less than 100 employees

Leading companies

- Canada Bread (Maple Leaf Foods) – leading manufacturer and marketer of value-added flour based products
 - Fresh Bakery – 22 bakeries and 5,100 employees across Canada
 - An investment of \$100 million to build Canada’s largest bakery facility in Hamilton, Ontario
 - Frozen Bakery – growing market for frozen partially-baked products – 5 bakeries in Canada
- Weston Foods (George Weston Ltd.) consists of Weston Bakeries, Ready Bake Foods and ACE Bakery – 35 operations and 4,000 employees across Canada
- Saputo Inc. is not only the largest dairy processor but also the largest snack cake manufacturer.

Meat Manufacturing (NAICS 3116)

Number of establishments: 868 in 2009, accounting for 14% of all food and beverage processing establishments.

- The majority of processing takes place in Ontario, Quebec and Alberta.

Employment: 68,000 employees

- Over 80% of meat processors have less than 100 employees

Poultry processing

- Ontario and Quebec dominate chicken and turkey production
- There are over 50 federally inspected chicken and turkey plants
 - 30 are in Ontario and Quebec
- The largest companies in Canada are Maple Leaf, Olymel, Maple Lodge, Lilydale and Exceldor

Beef packing

- There are two large beef packers in Canada:
 - Cargill Foods: 2 plants – High River, AB and Guelph, ON
 - XL Foods: 2 plants – Brooks and Calgary, Alberta
 - Both packers have recently invested up to \$50 million in value added processing

Pork packing

- There are two large pork packers in Canada:
 - Maple Leaf Foods: 2 plants – Brandon, MB and Lethbridge, AB
 - Olymel: 4 plants – Red Deer, AB and Princeville, Valley Junction and St-Esprit, QC
- Canadian slaughter takes place relatively evenly between east and west.
- The major investment has taken place in the west with the expansion of the Brandon plant to a double shift in 2008.



Fruit and Vegetable Preserving and Specialty food Manufacturing (NAICS 3114)

Number of establishments: 371 (2009); 6% of all food and beverage processing establishments in Canada.

Employment = 19,900 employees across Canada

- 83% of establishments have less than 100 employees;
- Employment has been declining steadily in the last 20 years in fruit and vegetable preserving;
- Employment in Canadian frozen food manufacturing has nearly doubled since 1990

Frozen food manufacturing predominately takes place in Ontario and Quebec; however Prince Edward Island, New Brunswick, Alberta and Manitoba are very important due to frozen potato manufacturing in those provinces.

Growth in the frozen food industry over the last 20 years has occurred as a result of the popularity of convenience-type foods and the development of innovative new food products.

Leading companies

- Heinz Canada – has four plants across Canada: Heinz' Leamington, Ontario plant is the second largest Heinz plant in the world and one of the most complex producing more than 480 products. This plant produces all of the Heinz ketchup sold in Canada.
- McCain Foods Ltd.
 - McCain is the world's largest producer of frozen potato products and oven-ready frozen products.
 - In 2008 McCain invested \$65 million into a new state-of-the-art potato processing plant built in Florenceville, NB, to replace its first ever plant.
- George Weston Ltd.
- Bonduelle North America
 - Canada's leading processors of canned and frozen vegetables – also processes frozen fruit, canned soups, sauces, baked beans and more
 - Private label and branded products
 - Seven plants in Canada: 3 in Ontario, 4 in Quebec

New investment

- In July 2011 Dr. Oetker announced plans to build its first North American pizza plant in London, ON
 - Creating 430 direct and indirect jobs



Animal Food Manufacturing

Number of establishments: 474 (2009); 7% of all food and beverage processing establishments

Employment: 9,401 employees, approximately 2/3 of these are employed in Ontario and Quebec.

- 96% of establishments have fewer than 100 employees

Leading companies

Purina Pet Care (owned by Nestlé Canada),

- Employs 520 nationally
- Processing facilities in Mississauga, ON; Innisfail, AB

Ridley Inc. employs approximately 900 in Canada and the US

- Feed Operations under Feed-Rite. Canadian headquarters, Winnipeg, MB
- Plants located in: Alberta (2); Saskatchewan (2); Manitoba (5); Ontario (1)

Shur-Gain and Landmark Feeds (Nutra) approximately 900 employees in 11 mills in Ontario, Quebec, Atlantic Canada and New York

Unifeed (Viterra Inc.) – Mill Facilities in BC (1), AB (5), MB (2)

Mars Canada Inc., Bolton, ON. Brands include: Pedigree, Royal Canin, Whiskas, Cesar, Natural Defense

Beverage Manufacturing

Number of establishments: 728 (2009); 11% of all food and beverage establishments in Canada

- Over 90% of beverage processors employ fewer than 100 employees

Employment: 28,535 employees

- The majority of processing takes place in Ontario, British Columbia and Quebec

Leading companies

Molson Canada (Molson Coors Brewing Co.) 3,100 employees. Breweries in Granville Island, BC; Vancouver, BC; Creemore, ON; Toronto, ON; Montreal, QC; Moncton, NB; St. Johns, NL. PepsiCo. Canada (PepsiCo Inc.) – approximately 5,000 employees in beverage processing in Canada.

Cott Corporation – 215 employees in Canada. Bottling in Scoudouc, NB; Point-Claire, Quebec; Mississauga, ON; Calgary, AB; Surrey, BC

Andrew Peller Limited – Wineries in Ontario, Nova Scotia and British Columbia. \$263 million in sales in 2010

A.Lassonde Inc. – Based in Rougemont, QC. Plants in Quebec (1), Ontario (2), Nova Scotia (1), Alberta (1)

There has been significant growth in the winery industry in the past couple years, both in traditional grape and fruit wines. Additionally, a number of new craft breweries have entered the industry.

Seafood Packaging and Processing (NAICS 3117)

The Canadian seafood processing industry is a significant global player, with over 70% of total revenues being exported to over 80 countries world-wide, mainly to the United States, followed by China and Japan.

Number of establishments: 681 (2009), accounting for 11% of all food and beverage establishments in Canada.

- Over 80% of these establishments have less than 100 employees

Employment = 27,600 employees across Canada

- The majority of processing takes place in Nova Scotia, New Brunswick, Newfoundland and British Columbia.

Leading processors

- High Liner Foods – one of North America’s largest marketers of prepared seafoods
- Freshwater Fish Marketing Corporation – buys, processes and markets all freshwater fish caught for commercial sale in MB, SK, AB, NWT and northern ON
- Canfisco – based in Vancouver, BC, it is the largest packer of canned salmon in Canada (under the Gold Seal label) and produces many other fresh and frozen products.



Looking to the Future

- Economic conditions and unemployment rates will greatly affect the availability of workers in the industry in the short term. As economic conditions improve, the industry should expect that wage increases will be necessary to attract and retain employees. As competition for workers increases, food and beverage manufacturers should look to expand traditional sourcing methods, such as referrals, to alternative recruitment methods to ensure maximum exposure.
- Improving public perception of the careers available in the industry, the skills required and working conditions will likely increase young people's interest in the food and beverage sector. The industry has worked to improve working conditions for employees, particularly entry level labour positions; this work must continue in order to attract and retain workers.
- Adopting new technology will be necessary to meet regulatory and consumer expectations; this will require a workforce with more technological knowledge.
- As the workforce ages, companies will be forced to replace workers who retire, either through adoption of labour-saving technology or with younger, less experienced workers.
- Employers are impressed with the motivation of foreign seasonal workers and immigrants who are working in the industry. The industry should work to develop programs to recruit more of these employees and provide services to make applying for temporary work visas for these employees easier.
- Temporary foreign workers and new immigrants would benefit from language training both at the workplace and in the community.
- Short courses, allowing current workers to catch up on policies and procedures as improvements are made, would be beneficial.
- The industry should take greater interest in educational programs offered in agri-food processing, to ensure that graduates are receiving the skills necessary to meet industry needs. Additionally, continued on-the-job training will be required to tailor general education to the specific needs of the firm.
- Workplace health and safety and labour costs are expected to remain the most important HR issues facing the industry, particularly as health and safety has significant impacts on other issues such as employee satisfaction, sick leave and staff turnover. Labour costs will remain an issue despite increasing automation, as workers will be needed to maintain machinery and perform quality control.
- Adoption of new innovative incentives will become more important as the industry looks to retain its employee base and recruit new employees while maintaining overall payroll costs.

Conclusion

The uncertain global economy and the high Canadian dollar, as well as increased input prices have put pressure on the food processing industry, resulting in declining performance and productivity. These factors have led to changes in business planning, forcing greater emphasis on marketing, branding and communications to help Canadian firms maintain and improve market share. Consumer preferences are also having a large impact on the processing and products that food and beverage manufacturers are using. Improved technology is helping companies to increase productivity and meet the needs of consumers, which is leading to a trend of fewer employees and fewer establishments within the industry.

Concentration in both the retail and food distribution sectors are having an impact on industry profitability, as small firms are finding it more difficult to place their products on grocery store shelves and distributors are able to charge more for their services. Legislation regarding environment, food safety and labelling pose additional challenges for the food and beverage processing industry and have a significant impact on human resource management in the sector. Globalization of the industry leaves domestic processors competing for market share with imported products which have lower production costs due to less regulatory control and lower wages in other countries.

Overall there has been a decline in the number of employees in the food and beverage processing sector; however, it is declining at a slower rate than in all manufacturing sectors. Unionization rates in food and beverage manufacturing are slightly higher than in the general population and are particularly high in the meat processing and beverage manufacturing industries.

Hourly wages for workers in the food and beverage manufacturing sector are significantly lower than other manufacturing industries as well as the industrial aggregate. Hourly wages for Ontario and Alberta are the highest, given the competition that exists for workers in these provinces, while Saskatchewan currently has the lowest wage for hourly workers. Compensation for salaried workers is more comparable to the manufacturing and industrial averages.

Health & safety, recruitment & retention and skills & knowledge transfer are the three key HR issues that the industry face.

Health & safety have numerous impacts on staffing making it a primary consideration in HR planning.

Employers in the food and beverage manufacturing industry face many of the same barriers to recruitment as those in other manufacturing industries. Most firms rely on traditional recruitment methods such as referrals to fill vacancies, although some organizations are broadening the scope of their recruitment strategies. Barriers to recruitment such as competition from other manufacturing sectors and other industries as well as the perception of the industry by the public are significant and must be overcome in order for organizations to fulfill staffing needs and remain productive. Retention is also a significant problem in the industry. Barriers to retention focus on the fact that many current employees tend to see employment in the industry as a short term

job, rather than a long-term career. Additionally immigration laws require that temporary foreign workers return to their home countries at the end of their work term. Employers are using many HR tools available, as well as a variety of incentives to plan labour force needs and attract and retain employees in the industry.

Overall, survey respondents noted that their expectation is to increase or keep the current hiring levels for all categories. The estimated number of new hires over the next 3 years is 21,437.

As new employees enter the industry skills development, knowledge transfer and professional development will become central to all human resource activities. Training should be focused on areas such as language training for immigrants and temporary foreign workers, food safety training and training for the use of new technology.

There are a number of post-secondary training programs available in agri-food processing across the country. Additionally food technology centres often offer courses or assist in the creation of customized training programs in food processing. As new delivery methods become available, the accessibility to training from these types of locations will increase. Most companies also offer a number of professional development opportunities to their employees. The most important training topics identified for the future were food safety, quality control and machinery operation & maintenance.

Barriers to training include motivation of employees and the cost to train employees who only intend to be with the organization short term. Other barriers include availability of programs, either due to transportation costs, lack of instructors, lack of programs available in the area or lack of programs for specific skills that were required.

In the councils short two year lifespan, 34% of survey respondents were aware of the FPHRC; therefore, the council has to continue marketing itself and the value it provides to the industry, including the development and use of national occupational standards and national certification and accreditation systems.

As economic conditions remain uncertain, but are likely to improve, the food and beverage manufacturing industry will continue to see competition for employees and will have to adopt new strategies for recruitment and retention. They will also need to focus on training efforts to ensure that the workforce has the necessary skills to stay competitive.

For More Detailed Information

Please see the Reference Document that includes the complete set of data that was produced from the stakeholder surveys, interviews and secondary research.

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Appendix 1:

Canadian Institutions Offer Educational Programs in the Agri-Food Sector

Province	College/University	Programs
Alberta	University of Alberta	<ul style="list-style-type: none"> • BSc in Nutrition and Food Science • MSc and PhD in Agricultural, Food and Nutritional Science • MEng in Agricultural, Food and Nutritional Science • PhD in Food Engineering, Food Science and Technology
Alberta	Northern Alberta Institute of Technology	<ul style="list-style-type: none"> • Certificate in Baking • Certificate in Retail Meat Cutting • Diploma in Food and Nutrition Management
Alberta	Southern Alberta Institute of Technology	<ul style="list-style-type: none"> • Certificate in Nutrition and Healthy Lifestyles
Alberta	Lethbridge College Alberta	<ul style="list-style-type: none"> • Certificate in Food Handling • One-year certificate programs and two-year diploma programs are offered in Manufacturing Process Technology. Topics covered include lean manufacturing, food processing and manufacturing processes and maintenance, quality and team development
Alberta	Olds College	<ul style="list-style-type: none"> • Bachelor of Science – Food and Nutrition • Bachelor of Science – Food Science and Technology • Bachelor of Science – Nutrition and Food Science
Alberta	Grande Prairie Regional College	<ul style="list-style-type: none"> • Certificate in Culinary Arts
British Columbia	University of British Columbia	<ul style="list-style-type: none"> • BSc, MSc and PhD in Food Science • BSc in Food Market Analysis • MSc and PhD in Human Nutrition

Province	College/University	Programs
British Columbia	Vancouver Community College	<ul style="list-style-type: none"> • Diplomas in Advanced Baking and Pastry Arts • Baking and Pastry Arts (Baker) Apprenticeship • Certificate in Baking & Pastry Arts – ESL Program • Certificate in FoodSafe
British Columbia	Malaspina University College	<ul style="list-style-type: none"> • Certificate in Baking Professional and Pastry Arts
British Columbia	British Columbia Institute of Technology-BCIT	<ul style="list-style-type: none"> • Associate Certificate in Food Safety – Part-time program • Diploma in Food Technology – Full-time program
British Columbia	Vancouver Island University	<ul style="list-style-type: none"> • Certificate in Professional Baking
British Columbia	Art Institute of Vancouver	<ul style="list-style-type: none"> • Baking & Pastry Arts Level 1 (Certificate) • Baking & Pastry Arts Level 2 (Certificate)
Manitoba	University of Manitoba	<ul style="list-style-type: none"> • BSc, MSc, and PhD in Food Science
Manitoba	Red River College of Applied Arts, Science, & Technology	<ul style="list-style-type: none"> • Certificate in Professional Baking
New Brunswick	Université de Moncton	<ul style="list-style-type: none"> • BSc in Food Science and Technology – Biotechnology
New Brunswick	Collège Communautaire du Nouveau-Brunswick	<ul style="list-style-type: none"> • Certificate in Food Safety
Newfoundland and Labrador	College of the North Atlantic	<ul style="list-style-type: none"> • Certificate in Baking – 1-year program • Diploma in Food Service & Nutrition Management – 2-year program – offered every alternate year (2005, 2007, 2009...)
Newfoundland and Labrador	Memorial University of Newfoundland	<ul style="list-style-type: none"> • MSc and PhD Food Science • Diploma in Food Technology • Diploma in Advanced Food Safety
Nova Scotia	Dalhousie University	<ul style="list-style-type: none"> • BSc, MSc and PhD in Food Science • MSc in Fisheries Engineering
Nova Scotia	Mount St. Vincent University	<ul style="list-style-type: none"> • BSc, MSc in Human Nutrition

Province	College/University	Programs
Nova Scotia	St. Francis Xavier University	<ul style="list-style-type: none"> • Bachelor's in Human Nutrition
Nova Scotia	Acadia University	<ul style="list-style-type: none"> • Bachelor's in Nutrition
Nova Scotia	Nova Scotia Community College	<ul style="list-style-type: none"> • Certificates in Baking & Pastry Arts and Boulanger & Baking Arts
Prince Edward Island	Holland College	<ul style="list-style-type: none"> • Certificate in Pastry Arts
Ontario	University of Guelph	<ul style="list-style-type: none"> • Certificate in Food Science • BSc, MSc and PhD in Food Science • MSc in Food Safety and Quality Assurance
Ontario	Ryerson University	<ul style="list-style-type: none"> • Certificate in Food Science • Bachelor's in Nutrition and Food
Ontario	University of Toronto	<ul style="list-style-type: none"> • Bachelor's and MSc in Nutrition and Food Science
Ontario	University of Western Ontario via Brescia College	<ul style="list-style-type: none"> • Bachelor's in Food and Nutrition
Ontario	Algonquin College of Applied Arts & Technology	<ul style="list-style-type: none"> • Certificate in Baking Techniques
Ontario	Canadore College	<ul style="list-style-type: none"> • Diploma in Food & Nutritional Management • Diploma in Food & Nutritional Administration
Ontario	Centennial College	<ul style="list-style-type: none"> • Diploma in Food & Nutrition Management
Ontario	Collège d'Alfred (affiliated with University of Guelph)	<ul style="list-style-type: none"> • Associated Diploma in Food, Nutrition & Risk Management
Ontario	George Brown College	<ul style="list-style-type: none"> • Post-College Diploma in Food & Nutrition Management
Ontario	Kemptville College	<ul style="list-style-type: none"> • Associate Diploma via Continuing Education in Health Care Food Service Workers – Full Time program • Diploma in Health Care Food Service – Part-Time program • Certificate in Food Service Worker – New, Fall 2006 • Diploma in Food Nutrition & Risk Management

Province	College/University	Programs
Ontario	The Institute of Food Processing Technology – Conestoga College	<ul style="list-style-type: none"> • Food Safety Training • Food Processing Techniques Certificate • Food Processing Technician Diploma • Process-Operator Food Manufacturing Apprenticeship Program
Quebec	Université de Montréal	<ul style="list-style-type: none"> • Certificate in Food Technology and Safety
Quebec	Institut de technologie agroalimentaire campus St-Hyacinthe	<ul style="list-style-type: none"> • D.C.S. in Technology of Food Process and Quality
Quebec	Institut de technologie agroalimentaire campus La Pocatière	<ul style="list-style-type: none"> • D.C.S. in Technology of Food Process and Quality
Quebec	Cégep régional de Lanaudière (Joliette)	<ul style="list-style-type: none"> • D.C.S. in Technology of Food Process and Quality
Quebec	Cégep de la Gaspésie et des Îles	<ul style="list-style-type: none"> • D.C.S. in Seafood Product Processing
Quebec	Université Laval	<ul style="list-style-type: none"> • Certificate in Food Science and Quality • Certificate in Food Technology and New Foods • Bachelor of Food Science and Technology • Bachelor of Food Engineering • Doctorate in Food Science and Technology • Master of Food Science and Technology (with or without thesis) • Master of Agri-Food Engineering (with or without thesis) • Micro-program in Agro-Economics – Food Distribution • Micro-program in Food Science and Technology – Food Science and Quality (distance program) • Micro-program in Food Science and Technology – Food Products and New Foods (12 credits, distance program) • Doctorate in Food Science and Technology • Doctorate in Food Microbiology

Province	College/University	Programs
Quebec	McGill University	<ul style="list-style-type: none"> • BSc in Food Science • BSc in Food Chemistry • Bachelor of Engineering – Bioresources (Food and Bioprocessing) • Bachelor of Food Science & Nutritional Science • Master of Food Science and Agricultural Chemistry (thesis and non-thesis) • MSc and PhD in food science and agricultural chemistry • Post-Bachelor Certificate in Food science
Saskatchewan	Saskatchewan Institute of Applied Science & Technology	<ul style="list-style-type: none"> • Diploma in Food & Nutrition Management • Applied Certificate in Meat Processing
Saskatchewan	University of Saskatchewan	<ul style="list-style-type: none"> • BSc, MSc and PhD in Food Science • Master of Agriculture (MAgr) • MSc in Nutrition • PhD in Nutrition

Sources:

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For Quebec: Comité sectoriel de main d'oeuvre en transformation alimentaire, http://www.csmota.qc.ca/?rub=62&sous_rub=72&ssous_rub=105

The Institute of Food Processing Technology (IFPT) officially opened in September 2011, at Conestoga College. The first of its kind in Canada, the IFPT offers Certificate, Diploma and Apprenticeship Programs to develop a highly skilled workforce for the food and beverage processing industry.

Appendix 2:

Survey Questionnaire

FPHRC
LABOUR MARKET INFORMATION
INTELLIGENCE RESEARCH PROJECT
SURVEY QUESTIONNAIRE

Name: _____

Title: _____

- | | | | |
|--------------------------------|---|----------------------------------|---|
| • CEO/President | 1 | • Controller | 4 |
| • General Manager | 2 | • Facility Manager/Supervisor | 5 |
| • HR Manager/HR Vice-President | 3 | • Other (<i>specify:</i> _____) | 9 |

Phone number: _____

Organization: _____

Location (*city and province*) _____

2. Sizing, Scoping and General Trends

1. Does your organization have more than 10 employees?

- Yes 1
- No 2

Important Note to Interviewer:

If the answer to Question 1 is “No”, thank respondent and end.

Who Is Processing Your Food? _____



2. Within the **food and beverage processing** activities of your organization (enterprise/business/company), how can you describe your **main area of activity** in Canada and what are your secondary activities (if any)? (*Read out the 10 categories to respondent, multiple answers possible.*)

	Main activity (One answer only)	Other activities (Multiple answers possible)
• Animal Food Manufacturing	1	1
• Grain and Oilseed Milling	2	2
• Sugar and Confectionery Product Manufacturing	3	3
• Fruit and Vegetable Preserving and Specialty Food Manufacturing	4	4
• Dairy Product Manufacturing	5	5
• Meat Product Manufacturing	6	6
• Seafood Product Preparation and Packaging	7	7
• Bakeries and Tortilla Manufacturing	8	8
• Beverage Manufacturing	9	9
• Other Food Manufacturing. This last category includes: Snack Food Manufacturing (bars, chips, pretzels, peanut butter...) Coffee and Tea Manufacturing Flavouring Syrup and Concentrate Seasoning and Dressing All Other Food Manufacturing (<i>specify: _____</i>)	10	10

Important Note to Interviewer:

If the main activity described is not one of those listed above, thank respondent and end.

3. How many establishments (i.e. facilities, plants, offices) does your organization have in each province/territory?

- Alberta _____
- British Columbia _____
- Manitoba _____
- New Brunswick _____
- Newfoundland and Labrador _____
- Northwest Territories _____
- Nova Scotia _____
- Nunavut _____
- Ontario _____
- Prince Edward Island _____
- Quebec _____
- Saskatchewan _____
- Yukon _____

4. Do you work in an establishment of your organization, or in its head office?

- Establishment 1
- Head Office 2

If answer to Question 4 = 1, go to Question 6.

5. Under normal circumstances, how many employees **in total** work **in Canada** for your **organization**?

	Full Time		Part Time	
	Permanent	Seasonal/ Contractual	Permanent	Seasonal/ Contractual
Total number of employees				

Go to Question 7.



6. Under normal circumstances, how many employees **in total** work in your **establishment**?

	Full Time		Part Time	
	Permanent	Seasonal/ Contractual	Permanent	Seasonal/ Contractual
Total number of employees				

7. What proportion of your staff is unionized?

_____ %

8. What proportion of your **production** workers are **seasonal foreign workers** with a **temporary** work permit?

_____ %

If answer to Question 8 = 0%, go to Question 10.

9. What is their country of origin? Specify: _____ *(Several countries possible.)*

10. Does your organization have facilities or provide service in Aboriginal communities?

- Yes 1
- No 2
- DNK 9

If the answer is "Yes", specify _____



3. Recruiting

We'll now move on to issues related to recruiting in **food and beverage processing**.

11. In the blank space (-----) that follows, use "establishment" if the answer to Question 4 was "Establishment" (=1), and use "organization in Canada" if the answer to Question 4 was "Head Office" (=2).
12. At each of the levels I read to you, tell me if you think the number of employees in your ----- will decrease, remain stable, or increase over the next 3 years (*calendar years 2011 to 2013*)?

	Increase	Remain Stable	Decrease	Not Applicable	DNK
• Higher Management (<i>e.g., CEO, President, General Manager, Vice-Presidents, Directors</i>)	1	2	3	8	9
• Post secondary-educated professionals (<i>e.g., food scientists, researchers, product developers, engineers, plant managers</i>)	1	2	3	8	9
• Technicians/Technologists (<i>e.g., quality assurance technicians, food safety technicians</i>)	1	2	3	8	9
Food and Beverage Processing Operational Staff					
• Supervisors (<i>e.g., foremen, coordinators, schedulers</i>)	1	2	3	8	9
• Precision workers (<i>e.g., machinists, electricians, maintenance workers</i>)	1	2	3	8	9
• Skilled workers and operators (<i>e.g., butchers, meat cutters, bakers, blenders</i>)	1	2	3	8	9
• Labourers (<i>e.g., production workers, line workers, general labour, helpers, handy men, packaging technicians, sanitation workers</i>)	1	2	3	8	9

	Increase	Remain Stable	Decrease	Not Applicable	DNK
Other Staff					
• Sales and marketing personnel (e.g., sales representatives, technical representatives, merchandisers, sales clerks)	1	2	3	8	9
• Shipping and handling personnel (e.g., shippers, receivers, storekeepers, delivery drivers)	1	2	3	8	9
• Office personnel (e.g., administration, accounting, finance, purchasing, IT, Human Resources, etc.)	1	2	3	8	9
Other Occupations					
• Specify: _____	1	2	3	8	9

13. How many new employees do you expect to hire in the next 3 years (calendar years 2011 to 2013)?

	Number of New Hires 2011-2013
• Higher Management (e.g., CEO, President, General Manager, Vice-Presidents, Directors)	_____
• Post secondary-educated professionals (e.g., food scientists, researchers, product developers, engineers, plant managers)	_____
• Technicians/Technologists (e.g., quality assurance technicians, food safety technicians)	_____
Food and Beverage Processing Operational Staff	
• Supervisors (e.g., foremen, coordinators, schedulers)	_____
• Precision workers (e.g., machinists, electricians, maintenance workers)	_____
• Skilled workers and operators (e.g., butchers, meat cutters, bakers, blenders)	
• Labourers (e.g., production workers, line workers, general labour, helpers, handy men, packaging technicians, sanitation workers)	_____

		Number of New Hires 2011-2013
Other Staff		
<ul style="list-style-type: none"> • Sales and marketing personnel (e.g., sales representatives, technical representatives, merchandisers, sales clerks) • Shipping and handling personnel (e.g., shippers, receivers, storekeepers, delivery drivers) • Office personnel (e.g., administration, accounting, finance, purchasing, IT, Human Resources, etc.) 	_____	
Other Occupations		
<ul style="list-style-type: none"> • Specify: _____ 	_____	

14. Which tool(s) do you mainly use to recruit employees in food and beverage processing?
(Read only if necessary, multiple answers possible.)

- Resume bank 1
- Schools, colleges, universities 2
- Employee referrals 3
- Private placement agencies, head hunters 4
- Local or provincial employment centre 5
- Ads in media 6
- "Jobs In Food" Web site 7
- Internet 8
- Job fair 9
- Personal contacts of managers 10
- Trade publications and associations 11
- Co-op internship, apprenticeship 12
- Internal transfers 13
- Other (specify: _____) 99

15. I'm going to read you a list of occupations for which difficulties to hire qualified candidates may be encountered. For each of these occupations, I want you to tell me if you are meeting such difficulties now, and if you expect to meet some in the next 5 years.

	Now	5 Years
• Higher Management (e.g., CEO, President, General Manager, Vice-Presidents, Directors)	1	1
• Post secondary-educated professionals (e.g., food scientists, researchers, product developers, engineers, plant managers)	2	2
• Technicians/Technologists (e.g., quality assurance technicians, food safety technicians)	3	3
Food and Beverage Processing Operational Staff		
• Supervisors (e.g., foremen, coordinators, schedulers)	4	4
• Precision workers (e.g., machinists, electricians, maintenance workers)	5	5
• Skilled workers and operators (e.g., butchers, meat cutters, bakers, blenders)	6	6
• Labourers (e.g., production workers, line workers, general labour, helpers, handy men, packaging technicians, sanitation workers)	7	7
Other Staff		
• Sales and marketing personnel (e.g., sales representatives, technical representatives, merchandisers, sales clerks)	8	8
• Shipping and handling personnel (e.g., shippers, receivers, storekeepers, delivery drivers)	9	9
• Office personnel (e.g., administration, accounting, finance, purchasing, IT, Human Resources, etc.)	10	10
Other Occupations		
• Specify: _____	11	11
• None	98	98
• DNK/DNA	99	99

16. To fulfill your labour needs, have you in the past recruited, or are you currently recruiting...
(Multiple answers possible)

	Yes	No
• People from visible minorities?	1	2
• Aboriginal people?	1	2
• New immigrants?	1	2
• Workers laid off in other industries?	1	2
• Students?	1	2
• People with no formal post-secondary education?	1	2
• People with disabilities?	1	2

4. Human Resource Management Practices

17. I'm going to read you a list of potential challenges that may affect your organization in the area of **food processing human resources**. For each of them, I want you to tell me if this challenge is: Not at all important, Of minor importance, Somewhat important, or Very important.
(Read in rotation.)

	Not at all important	Of minor importance	Somewhat important	Very important
• Staff turn-over	1	2	3	4
• Absenteeism/Sick leave	1	2	3	4
• Staff adaptation to new technologies	1	2	3	4
• Lack of experienced candidates	1	2	3	4
• Lack of candidates with proper training	1	2	3	4
• Labour costs	1	2	3	4
• Providing adequate compensation and/or benefits	1	2	3	4
• Employee retention	1	2	3	4
• Hiring new employees	1	2	3	4
• Competition with other food processing employers	1	2	3	4

	Not at all important	Of minor importance	Somewhat important	Very important
• Competition with employers from other industries (<i>e.g. construction, transport, etc.</i>)	1	2	3	4
• Aging of workforce	1	2	3	4
• Health and safety at work (<i>injury</i>)	1	2	3	4
• Communications (written and oral) with seasonal foreign workers and new immigrants	1	2	3	4
• Other (<i>specify</i>): _____	1	2	3	4

18. Which of the following human resource management practices do you use in your organization? Respond yes or no. (*Read in rotation.*)

	Yes	No	If no, would you consider it very important for future HR development in your organization?	
• New employee orientation programs	1	2	Yes	No
• Recruiting and selection process	1	2	Yes	No
• Job and task descriptions	1	2	Yes	No
• Work enrichment programs (<i>staff retreat, task rotation</i>)	1	2	Yes	No
• Training and development programs (<i>paid for by the organization</i>)	1	2	Yes	No
• Career planning (<i>written staff development plan</i>)	1	2	Yes	No
• Formal performance evaluation and goal setting	1	2	Yes	No
• Communicate salary scale/structure to employees/monetary incentives (<i>bonus, dividend plan, etc.</i>)	1	2	Yes	No
• Non-monetary incentives/Benefits package	1	2	Yes	No
• Graduated retirement	1	2	Yes	No
• Other (<i>specify</i>): _____	1	2	Yes	No

19. Does your organization use incentive programs to attract and retain staff?

- Yes 1
- No 2

20. If the answer is “Yes”, which ones? *(Read if needed.)*

• Competitive salaries	1
• Bonuses <i>(e.g. salary bonus, signing bonus)</i>	2
• Overtime pay	3
• Employee assistance programs <i>(e.g. financial)</i>	4
• RRSPs or pension plan contribution	5
• Work-life balance environment	6
• Maternity/Parental leave <i>(in excess of legislated)</i>	7
• Work sharing	8
• Paid time off for volunteering/Charity work	9
• Telecommuting <i>(working from home)</i>	10
• Promotions and staff advancement <i>(professional growth)</i>	11
• Better-than-average social benefits and other benefits <i>(e.g. work environment, ergonomics, childcare in the workplace, free parking, health/wellness programs and benefits, on-site fitness centre, etc.)</i>	12
• Paid parking	13
• Employee participation in decisions	14
• Flexible schedule/work/life balance <i>(compensatory time in lieu of overtime, closing during Christmas, flex-time, vacation in excess of legal requirements, etc.)</i>	15
• Paid extra vacation days	16
• Meal vouchers	17
• Gift certificates	18
• Activities promoting a pleasant work environment/Quality of life	19
• Other <i>(specify)</i> : _____	99

5. Staff Development and Training

21. As an employer, which of the following tools do you currently use and which could be of MOST use in the future to meet your employees' development plan? (*Multiple answers possible.*)
(*Read in rotation.*)

	Current	Future
• In-house seminars	1	1
• Online seminars	2	2
• Off-site workshops/seminars/conferences	3	3
• Publications highlighting HR practices of Canadian food processing companies/Studies comparing salaries and benefits of Canadian food processing companies (<i>Downloadable HR reference guides and materials</i>)	4	4
• Computerized assessment surveys (<i>staff satisfaction survey</i>)	5	5
• Computerized HR resources (<i>HR templates, metric calculators</i>)	6	6
• Online social media (<i>discussion forums, blogs</i>)	7	7
• Mentorship	8	8
• Direct consultation	9	9
• Fast track bridging program (<i>new staff orientation, in house training</i>)	10	10
• CPR or Health and Safety Courses	11	11
• Further education/training (<i>e.g. professional courses, management training</i>)	12	12
• Other (<i>specify</i>): _____		
• None	98	98
• Don't know	99	99

22. Compared to 2009, is the training budget for 2010 bigger, smaller or similar?

- Bigger 1
- Smaller 2
- Similar 3



23. Over the next three years (*calendar years 2011 to 2013*), do you expect the number of employees who will be trained to increase, remain stable or decrease compared to 2010?

- Increase 1
- Remain stable 2
- Decrease 3

24. Over the next three years (*calendar years 2011 to 2013*), do you expect the average number of training hours per SWM employee to increase, remain stable or decrease compared to 2010?

- Increase 1
- Remain stable 2
- Decrease 3

25. To what extent is your organization faced with each of the following training issues? Is it....
(*Read in rotation.*)

	Not at all	Somewhat	A lot	Not applicable	DNK
• Employee interest toward training	1	2	3	8	9
• Employee loyalty (<i>retention after training</i>)	1	2	3	8	9
• Knowledge transfer to job performance	1	2	3	8	9
• Accessibility outside big cities	1	2	3	8	9
• Availability of instructors	1	2	3	8	9
• Training cost	1	2	3	8	9
• Transportation cost	1	2	3	8	9
• Work schedule/Attending a course during working hours	1	2	3	8	9
• Highly specialized topic/ Not enough providers/ Offer not specialized enough	1	2	3	8	9
• Insufficient offer in my region	1	2	3	8	9
• Other (<i>specify</i>): _____	1	2	3	8	9



26. I'm going to read you a list of potential training topics in the area of **food and beverage processing**. For each of them, I want you to tell me if this topic is: Not at all important, Somewhat important, Very important, Not applicable. (*Read in rotation.*)

	Not at all important	Somewhat important	Very important	Not applicable	DNK
• Food safety (e.g., HACCP – pronounced “haccep”, listeria prevention, pest control)	1	2	3	8	9
• Quality control/quality assurance (e.g., ISO 9000, QMP –Quality Management Program, traceability)	1	2	3	8	9
• New processes (e.g., lean manufacturing, RFID – Radio-frequency identification, process automation, robotics)	1	2	3	8	9
• Labelling (e.g., Canadian content regulations, country of origin regulations)	1	2	3	8	9
• Environmental issues (e.g., sustainability, carbon footprint, packaging reduction)	1	2	3	8	9
• Waste water management	1	2	3	8	9
• Refrigeration	1	2	3	8	9
• Machinery operation and maintenance	1	2	3	8	9
• Health food (fat/trans fat reduction, sugar reduction, sodium reduction)	1	2	3	8	9
• Food flavouring	1	2	3	8	9
• Learning tools to enhance innovation	1	2	3	8	9
• Other (<i>specify</i>): _____	1	2	3	8	9



27. Last year, what was the size of your organization's budget for training?

- Less than \$5,000 01
- \$5,001 to \$10,000 02
- \$10,001 to \$50,000 03
- \$50,001 to \$100,000 04
- \$100,001 to \$500,000 05
- More than \$500,000 06
- *Included in the operation budget (internal) 98
- DNK/DNA 99

28. Were you previously aware of **FPHRC**, i.e., the **Food Processing Human Resource Council**?

- Yes 1
- No 2

29. What would be your level of interest for the development of **national occupational standards** in the **food processing sector**?

- High 1
- Moderate 2
- Low 3

30. What would be your level of interest for the development of a **national certification program** by FPHRC?

- High 1
- Moderate 2
- Low 3



APPENDIX 3

DETAILED LABOUR MARKET DATA:

Who is Processing Your Food?

Charts and Tables



Contents

Industry Statistics	69
1 Industry Performance	70
Table 1: Trade balances (in millions of Canadian dollars)	70
2 Number, Size and Location of Firms	71
Figure 1: Number of firms by Province, December 2009.....	71
Table 2: Number of employer establishments in Canada by employment size category: December 2009	72
Table 3: Number of establishments (employers) in Canada by type and region: December 2009	73
Table 4: Table 281-0024 employment (SEPH), unadjusted for seasonal variation	75
Table 5: Table 281-0024 Employment (SEPH), unadjusted for seasonal variation, by region	76
Table 6: Employment (persons) – Salaried employees paid a fixed salary by NAICS Code	78
Table 7: Employment (persons) – Employees paid by the hour by NAICS Code	79
Table 8: Employment (persons) – Total employment (both types of employees) by NAICS Code	80
Table 9: Food and beverage processing industry locations with more than nine employees only (based on Statistics Canada data)	81
3 Workforce Demographics	82
Figure 2: Gender composition (all industries and food processing).....	82
Table 10: Gender composition of the food and beverage processing industry by NAICS Code	83
Table 11: Food and beverage processing industry workforce composition (NOCs) by gender	84

Figure 3: Age composition (all industries and food and beverage processing industry)..... 85

Figure 4: Age composition of food and beverage processing industry 85

Table 12: Age composition of the food and beverage processing industry by NAICS Code..... 86

Table 13: Age composition of the food and beverage processing industry by province 87

Table 14: Food and beverage processing industry workforce composition (NOCs) by age 88

Figure 5: Employees' mother tongue (all industries and food and beverage processing industry)..... 89

Table 15: Employees' mother tongue by province and territory..... 90

Table 16: Employees' mother tongue in the food and beverage processing industry..... 91

Figure 6: Immigrants and Aboriginal peoples (all industries and food processing)..... 92

Table 17: Proportion of immigrants and Aboriginal peoples in the food and beverage processing industry by NAICS Code..... 93

Table 18: Proportion of immigrants and Aboriginal peoples in the food and beverage processing industry by province and territory by NAICS Code 94

4 Labour and Payroll Statistics 95

Table 19: Unionization rates for the sub-sectors 2009..... 95

Table 20: Average hourly earnings (\$) for employees paid by the hour, including overtime (current dollars) by NAICS Code 96

Table 21: Average hourly earnings (\$) for employees paid by the hour, including overtime (current dollars) by province 97

Table 22: Average hourly earnings (\$) for salaried employees (paid a fixed salary), including overtime (current dollars) by NAICS code 98

Table 23: Average hourly earnings (\$) for salaried employees (paid a fixed salary), including overtime (current dollars) by province 99

Table 24: Average weekly hours for employees paid by the hour, including overtime, by NAICS Code..... 100

Table 25:	Average weekly hours for employees paid by the hour, including overtime, by province	101
Table 26:	College/ University enrolments and graduations, 2004–2005 to 2008–2009	102
Table 27:	College/University enrolments and graduations by institutions, 2008-2009*	103
Table 28:	Information concerning registrations, certificates and completions for “food service” apprenticeship programs for the period from 2004 to 2008	105

Survey Results 107

5 Survey Design 108

Table 29:	Distribution of respondents by main sector and by region (weighted)	108
Table 30:	Distribution of respondents by main sub-sector and by number of employees per establishment.....	109

6 Employment Profile 110

Table 31:	Average number of employees per establishment by region.....	110
Table 32:	Average number of employees per establishment by sub-sector	110
Table 33:	Average number of employees and type of employment by sector	111
Table 34:	Average number of employees and type of employment by region.....	112
Figure 7:	Type of employment by establishment	113
Figure 8:	What proportion of your production workers are seasonal foreign workers with a temporary work permit?.....	113
Table 35:	What proportion of your production workers are seasonal foreign workers with a temporary work permit? Distribution of answers by sub-sector.....	114
Figure 9:	Does your organization have facilities or provide service in Aboriginal communities?	115
Table 36:	Does your organization have facilities or provide service in Aboriginal communities? Distribution of answers by region (n=411)	115

7 Labour and Human Resource..... 116

Figure 10: What proportion of your staff is unionized? 116

Figure 11: Is each of these a potential human resources challenge that could affect your organization?..... 117

Figure 12: Which of the following human resource management practices do you currently use in your organization? 118

Figure 13: Would you consider this practice to be very important for future HR development in your organization? 119

Figure 14: What are the main tools that you use to recruit employees?..... 120

Figure 15: What incentive programs does your organization use to attract and retain staff? 121

Figure 16: To fulfill your labour needs, have you recruited in the past, or are you currently recruiting?..... 122

Figure 17: As an employer, which of the following tools do you currently use to meet your employees' development plan? 123

Figure 18: As an employer, which of the following tools would be of most use in the future to meet your employees' development plan? 124

Figure 19: Compared to 2009, is the training budget for 2010 bigger, smaller or the same? 125

Figure 20: Over the next three years, do you expect the number of employees who will be trained to increase, remain stable or decrease compared to 2010? 125

Figure 21: Over the next three years, do you expect the average number of training hours per employee to increase, remain stable or decrease compared to 2010? 125

Figure 22: To what extent is your organization faced with each of the following training issues? 126

Figure 23: Is each of these a potential training topic in the areas of food and beverage processing industry? 127

Table 37: Organizations' budget for training last year..... 128

8 Hiring Expectations.....129

- Figure 24:** For each of the following occupations, do you think the number of employees in your organization/establishment will increase, remain stable or decrease over the next three years? 129
- Table 38:** How many employees do you expect to hire in the next three years? Distribution of answers by sub-sector..... 130
- Table 39:** How many employees do you expect to hire in the next three years? Distribution of answers by region..... 133
- Table 40:** Projected hirings by occupation..... 135
- Figure 25:** For each of these occupations, are you encountering difficulties now in hiring qualified candidates? (n=411)? 136
- Figure 26:** For each of these occupations, do you expect to encounter difficulties in hiring qualified candidates in the next five years? 137

9 FPHRC Awareness and Interest in National Standards138

- Figure 27:** Were you previously aware of the food processing human resource council (FPHRC)? (n=411) 138
- Figure 28:** What would your level of interest be in the development of national occupation standards in the food processing sector? 138
- Figure 29:** What would your level of interest be in the development of a national certification program by the FPHRC? 138



Industry Statistics



1

Industry Performance

Table 1: Trade Balances (in millions of Canadian dollars)

Food Manufacturing NAICS 311	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Total Exports	16,179	17,145	16,873	18,427	17,936	17,086	17,442	19,641	18,450	19,934
Total Imports	11,993	12,597	12,374	12,279	12,743	13,637	14,807	16,687	17,426	17,176
Trade Balance	4,186	4,548	4,499	6,148	5,193	3,449	2,635	2,954	1,024	2,758

Beverage Manufacturing NAICS 3121	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Total Exports	1,492	1,373	1,325	1,271	1,089	1,050	961	906	818	816
Total Imports	1,918	2,030	2,303	2,370	2,617	2,895	3,233	3,629	3,725	3,855
Trade Balance	-426	-657	-978	-1,099	-1,528	-1,845	-2,272	-2,723	-2,907	-3,039

Total Food And Beverage Manufacturing NAICS 311 – 3121	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Total Exports	17,671	18,518	18,198	19,698	19,025	18,136	18,403	20,547	19,268	20,750
Total Imports	13,911	14,627	14,677	14,649	15,360	16,532	18,040	20,316	21,151	21,031
Trade Balance	3,760	3,891	3,521	5,049	3,665	1,604	363	231	-1,883	-281

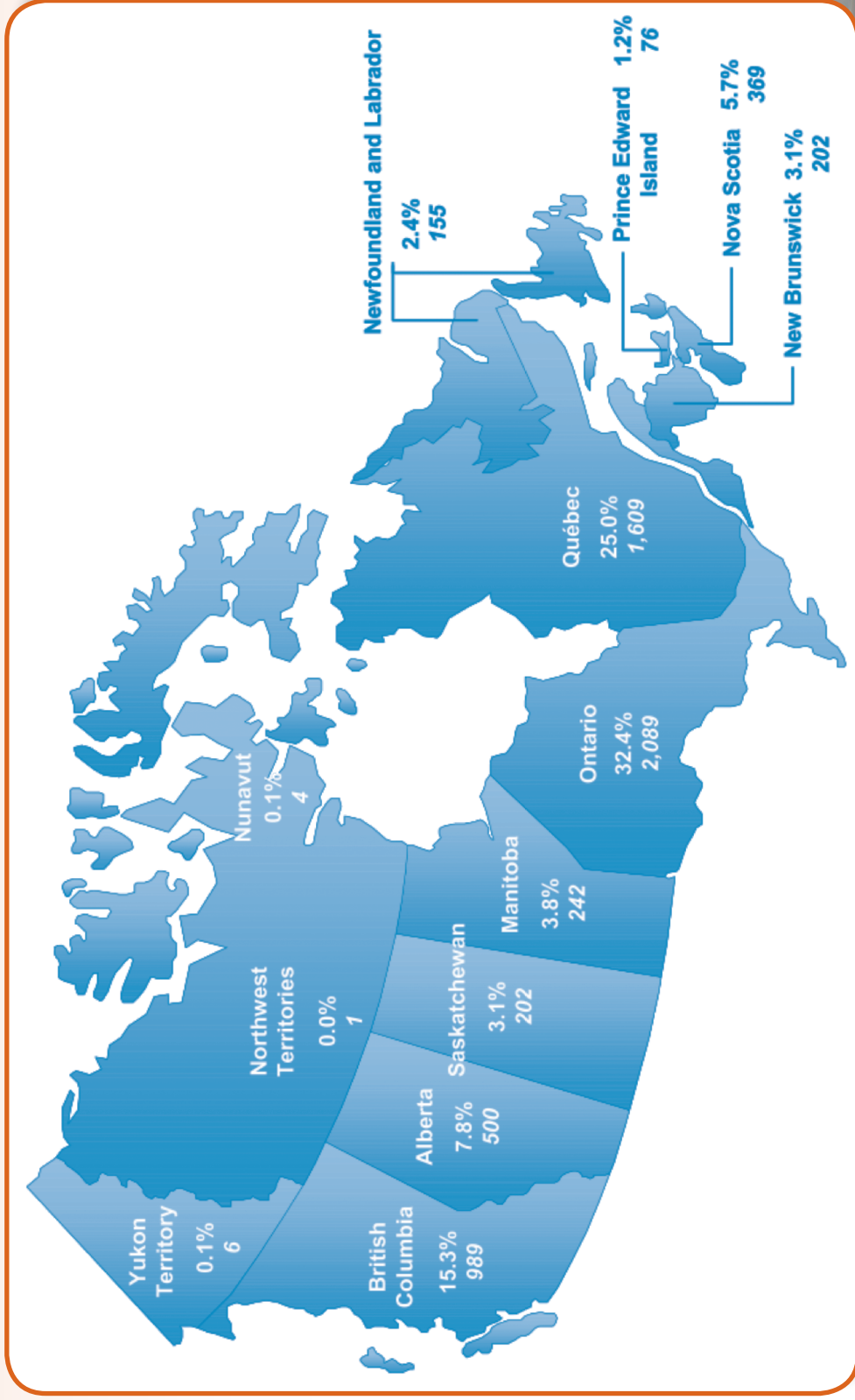
Source: Industry Canada, Trade Data Online, Canadian Industry Statistics (CIS), from Statistics Canada.



2

Number, Size and Location of Firms

Figure 1: Number of firms by province, December 2009



Source: Industry Canada, from Statistics Canada, Canadian Business Patterns Database, December 2009

Table 2: Number of employer establishments in Canada by employment size category: December 2009

	Micro 1 – 4	Small 5 – 99	Medium 100 – 499	Large 500+	Total
Animal Food Manufacturing (NAICS 3111)	103	356	15	0	474
Grain and Oilseed Milling (NAICS 3112)	33	116	12	3	164
Sugar and Confectionery Product Manufacturing (NAICS 3113)	60	171	25	4	260
Fruit and Vegetable Preserving and Specialty Food Manufacturing (NAICS 3114)	92	217	51	11	371
Dairy Product Manufacturing (NAICS 3115)	135	269	47	3	454
Meat Product Manufacturing (NAICS 3116)	219	497	128	24	868
Seafood Product Preparation and Packaging (NAICS 3117)	254	321	100	6	681
Bakeries and Tortilla Manufacturing (NAICS 3118)	473	1,171	93	10	1,747
Other Food Manufacturing (NAICS 3119)	189	458	47	3	697
Beverage Manufacturing (NAICS 3121)	297	377	46	8	728
Total food and beverage processing industry	1,855	3,953	564	72	6,444
	28.8%	61.3%	8.8%	1.1%	100.0%

Source: Industry Canada from Statistics Canada, Canadian Business Patterns Database, December 2009.

Table 3: Number of establishments (employers) in Canada by type and region: December 2009

	Alberta	British Columbia	Manitoba	New Brunswick	Newfoundland-land And Labrador	Northwest Territories	Nova Scotia	Nunavut	Ontario	Prince Edward Island	Quebec	Saskatchewan	Yukon Territory	Canada
Animal Food Manufacturing (NAICS 3111)	61	38	37	10	2	0	11	0	140	4	142	29	0	474
Grain and Oilseed Milling (NAICS 3112)	20	17	17	2	0	0	2	0	51	0	38	17	0	164
Sugar and Confectionery Product Manufacturing (NAICS 3113)	7	46	6	4	1	1	4	0	106	0	83	2	0	260
Fruit and Vegetable Preserving and Specialty Food Manufacturing (NAICS 3114)	29	46	12	8	2	0	9	0	154	4	102	5	0	371
Dairy Product Manufacturing (NAICS 3115)	54	47	18	6	6	0	12	0	132	10	138	30	1	454

Table 3: Number of establishments (employers) in Canada by type and region: December 2009 (cont'd)

	Alberta	British Columbia	Manitoba	New Brunswick	Newfoundland And Labrador	Northwest Territories	Nova Scotia	Nunavut	Ontario	Prince Edward Island	Quebec	Saskatchewan	Yukon Territory	Canada
Meat Product Manufacturing (NAICS 3116)	121	94	50	9	13	0	18	1	274	6	230	52	0	868
Seafood Product Preparation and Packaging (NAICS 3117)	1	97	8	99	93	0	238	3	37	30	74	1	0	681
Bakeries and Tortilla Manufacturing (NAICS 3118)	118	258	54	32	18	0	39	0	656	10	518	42	2	1,747
Other Food Manufacturing (NAICS 3119)	58	134	21	12	5	0	9	0	254	7	184	12	1	697
Beverage Manufacturing (NAICS 3121)	31	212	19	20	15	0	27	0	285	5	100	12	2	728
Total food and beverage processing industry	500	989	242	202	155	1	369	4	2,089	76	1,609	202	6	6,444
	7.8%	15.3%	3.8%	3.1%	2.4%	0.0%	5.7%	0.1%	32.4%	1.2%	25.0%	3.1%	0.1%	100.0%

Source: Industry Canada, from Statistics Canada, Canadian Business Patterns Database, December 2009.

Table 4: Table 281-0024 employment (SEPH), unadjusted for seasonal variation, by NAICS Code Survey of Employment, Payrolls and Hours - 2612

North American Industry Classification System (NAICS)	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Food Manufacturing [311]	231,613	233,158	233,754	235,405	232,170	233,388	229,102	226,263	221,830	221,025
Animal Food Manufacturing [3111]	11,663	12,108	12,347	11,296	10,489	10,038	9,919	9,810	9,683	9,401
Grain and Oilseed Milling [3112]	9021	8,176	8,060	7,620	7,844	8,725	7,787	7,905	7,064	7,308
Sugar and Confectionery Product Manufacturing [3113]	12,271	13,274	13,500	13,933	14,411	13,879	12,990	11,716	10,980	10,764
Fruit and Vegetable Preserving and Specialty Food Manufacturing [3114]	23,003	23,891	23,982	24,979	23,823	23,515	24,316	23,384	22,947	23,161
Dairy Product Manufacturing [3115]	20,888	20,711	19,524	20,418	20,130	21,361	21,346	22,730	23,615	23,490
Meat Product Manufacturing [3116]	60,186	60,942	63,431	63,643	65,626	63,755	64,129	61,625	59,869	58,897
Seafood Product Preparation and packaging [3117]	31,028	30,765	28,093	27,387	24,158	24,620	23,776	22,406	20,125	21,057
Bakeries and Tortilla Manufacturing [3118]	43,811	44,354	45,335	44,614	43,633	44,172	42,861	43,056	42,035	41,275
Other Food Manufacturing [3119]	19,741	18,937	19,483	21,516	22,054	23,323	21,979	23,630	25,512	25,673
Beverage Manufacturing [3121]	30,468	30,245	28,459	27,898	24,277	24,159	23,805	24,237	26,051	28,535
Total Food and Beverage Manufacturing (311 + 3121)	262,081	263,403	262,213	263,303	256,447	257,547	252,907	250,500	247,881	249,560

Source: Statistics Canada. Table 281-0024 - Employment (SEPH), unadjusted for seasonal variation, by type of employee for selected industries classified using the North American Industry Classification System (NAICS), annual (persons).

**Table 5: Table 281-0024 Employment (SEPH), unadjusted for seasonal variation, by region
Survey of Employment, Payrolls and Hours - 2612-2010**

North American Industry Classification System (NAICS)	Canada	Newfoundland And Labrador	Prince Edward Island	Nova Scotia	New Brunswick	Quebec	Ontario	Manitoba	Saskatchewan	Alberta	British Columbia
Food Manufacturing [311]	221,025	6,365	2,451	8,183	11,335	56,636	83,328	7,738	3,525	17,592	23,782
Animal Food Manufacturing [3111]	9,401			x		2,815	3,510	432	373	922	667
Grain and Oilseed Milling [3112]	7,308					658	4,624		525	630	261
Sugar and Confectionery Product Manufacturing [3113]	10,764					2,802	6,211				1,053
Fruit and Vegetable Preserving and Specialty Food Manufacturing [3114]	23,161					4,121	10,665			825	1,963
Dairy Product Manufacturing [3115]	23,490			909		10,785	7,435				1,524
Meat Product Manufacturing [3116]	58,897			760		16,750	19,682	3,134	1,715	9,183	5,954
Seafood Product Preparation and Packaging [3117]	21,057	5,177	x	4,273	4,196	1,690	632				3,498
Bakeries and Tortilla Manufacturing [3118]	41,275			921		10,642	19,776	1,058		2,486	4,952
Bakeries and Tortilla Manufacturing [3118]	41,275			921		10,642	19,776	1,058		2,486	4,952

**Table 5: Table 281-0024 Employment (SEPH), unadjusted for seasonal variation, by region
Survey of Employment, Payrolls and Hours - 2612-2010 (con't)**

North American Industry Classification System (NAICS)	Canada	Newfoundland and Labrador	Prince Edward Island	Nova Scotia	New Brunswick	Quebec	Ontario	Manitoba	Saskatchewan	Alberta	British Columbia
Other Food Manufacturing [3119]	25,673					6,373	10,793			2,330	3,910
Beverage Manufacturing [3121]	28,535	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
Total Food and Beverage Manufacturing (311 + 3121)	249,560	6,365	2,451	8,183	11,335	56,636	83,328	7,738	3,525	17,592	23,782

Source: Statistics Canada. Table 281-0024 - Employment (SEPH), unadjusted for seasonal variation, by type of employee for selected industries classified using the North American Industry Classification System (NAICS), annual (persons).

X: suppressed to meet confidentiality requirements of the Statistics Act.



Table 6: Employment (persons) – Salaried employees paid a fixed salary by NAICS Code

North American Industry Classification System (NAICS)	2004	2005	2006	2007	2008	2009
Manufacturing (31-33)	462,436	470,478	478,554	452,727	437,115	407,577
Food Manufacturing (311)	48,934	57,307	57,341	54,708	53,183	41,515
• Animal Food Manufacturing (3111)	3,259	3,561	3,417	3,351	..	F
• Grain and Oilseed Milling (3112)	2,205	2,641	2,897	2,367	2,321	F
• Sugar and Confectionery Product Manufacturing (3113)	3,785	4,722	4,633	4,169	3,839	F
• Fruit and Vegetable Preserving and Specialty Food Manufacturing (3114)	4,775	5,452	5,381	5,496	5,185	F
• Dairy Product Manufacturing (3115)	5,056	5,903	6,203	6,161	6,337	4,799
• Meat Product Manufacturing (3116)	11,459	14,096	13,718	13,356	12,516	9,833
• Seafood Product Preparation and Packaging (3117)	5,302	5,451	5,309	5,120	4,835	2,958
• Bakeries and Tortilla Manufacturing (3118)	7,893	9,197	9,132	8,557	8,352	5,705
• Other Food Manufacturing (3119)	5,200	6,284	6,651	6,130	6,604	6,416
Beverage Manufacturing (3121)	6,971	6,276	8,327	8,726	..	F
Total food processing (NAICS 311 + NAICS 3121)	55,905	63,583	65,668	63,434	..	..
Food Manufacturing (311) as a percentage of Manufacturing (31-33)	10.6%	12.2%	12.0%	12.1%	12.2%	10.2%
Food processing as a percentage of Manufacturing (31-33)	12.1%	13.5%	13.7%	14.0%	..	..

Symbol legend: .. Not available

F Too unreliable to be published

Source: Statistics Canada Statistics Canada. Table 281-0024 - Employment (SEPH), unadjusted for seasonal variation, by type of employee for selected industries classified using the North American Industry Classification System (NAICS), and calculations by Zins Beauchesne and Associates.

Table 7: Employment (persons) – Employees paid by the hour by NAICS Code

North American Industry Classification System (NAICS)	2004	2005	2006	2007	2008	2009
Manufacturing (31-33)	1,272,472	1,247,424	1,253,662	1,233,371	1,150,918	997,167
Food Manufacturing (311)	169,403	162,433	167,324	167,217	166,546	172,091
• Animal Food Manufacturing (3111)	7,210	6,356	6,259	6,272	..	F
• Grain and Oilseed Milling (3112)	5,046	4,921	5,619	5,178	5,346	F
• Sugar and Confectionery Product Manufacturing (3113)	7,579	7,697	7,927	8,162	7,343	F
• Fruit and Vegetable Preserving and Specialty Food Manufacturing (3114)	18,851	17,415	17,469	18,268	17,703	F
• Dairy Product Manufacturing (3115)	13,801	13,087	14,376	14,536	15,745	18,117
• Meat Product Manufacturing (3116)	47,956	48,233	47,833	48,936	47,437	47,848
• Seafood Product Preparation and Packaging (3117)	18,765	16,618	17,968	17,548	16,618	16,206
• Bakeries and Tortilla Manufacturing (3118)	35,339	33,431	33,960	33,063	33,541	33,742
• Other Food Manufacturing (3119)	14,856	14,674	15,912	15,256	16,489	18,397
Beverage Manufacturing (3121)	19,022	16,366	14,178	13,074	..	F
Total food processing (NAICS 311 + NAICS 3121)	188,425	178,799	181,502	180,291	..	..
Food Manufacturing (311) as a percentage of Manufacturing (31-33)	13.3%	13.0%	13.3%	13.6%	14.5%	17.3%
Food processing as a percentage of Manufacturing (31-33)	14.8%	14.3%	14.5%	14.6%	..	..

Symbol legend: .. Not available

F Too unreliable to be published

Source: Statistics Canada Statistics Canada. Table 281-0024 - Employment (SEPH), unadjusted for seasonal variation, by type of employee for selected industries classified using the North American Industry Classification System (NAICS), and calculations by Zins Beauchesne and Associates.

Table 8: Employment (persons) – Total employment (both types of employees) by NAICS Code

North American Industry Classification System (NAICS)	2004	2005	2006	2007	2008	2009
Manufacturing (31-33)	1,734,908	1,717,902	1,732,216	1,686,098	1,588,033	1,404,744
Food Manufacturing (311)	218,337	219,740	224,665	221,925	219,729	213,606
• Animal Food Manufacturing (3111)	10,469	9,917	9,676	9,623	..	F
• Grain and Oilseed Milling (3112)	7,251	7,562	8,516	7,545	7,667	F
• Sugar and Confectionery Product Manufacturing (3113)	11,364	12,419	12,560	12,331	11,182	F
• Fruit and Vegetable Preserving and Specialty Food Manufacturing (3114)	23,626	22,867	22,850	23,764	22,888	F
• Dairy Product Manufacturing (3115)	18,857	18,990	20,579	20,697	22,082	22,916
• Meat Product Manufacturing (3116)	59,415	62,329	61,551	62,292	59,953	57,681
• Seafood Product Preparation and Packaging (3117)	24,067	22,069	23,277	22,668	21,453	19,164
• Bakeries and Tortilla Manufacturing (3118)	43,232	42,628	43,092	41,620	41,893	39,447
• Other Food Manufacturing (3119)	20,056	20,958	22,563	21,386	23,093	24,813
Beverage Manufacturing (3121)	25,993	22,642	22,505	21,800	..	F
Total food processing (NAICS 311 + NAICS 3121)	244,330	242,382	247,170	243,725	..	..
Food Manufacturing (311) as a percentage of Manufacturing (31-33)	12.6%	12.8%	13.0%	13.2%	13.8%	15.2%
Food processing as a percentage of Manufacturing (31-33)	14.1%	14.1%	14.3%	14.5%

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Source: Statistics Canada Statistics Canada. Table 281-0024 - Employment (SEPH), unadjusted for seasonal variation, by type of employee for selected industries classified using the North American Industry Classification System (NAICS), and calculations by Zins Beuchesne and Associates

**Table 9: Food and beverage processing industry locations with more than nine employees only
(based on Statistics Canada data)**

Industry Groups (NAICS Code)	Canada	Maritimes	Quebec	Ontario	Man., Sask. & Territories	Alberta	British Columbia
3111 – Animal Food Manufacturing	8.20%	0.45%	2.48%	2.51%	1.18%	1.03%	0.54%
3112 – Grain and Oilseed Milling	2.96%	0.06%	0.48%	0.94%	0.88%	0.42%	0.18%
3113 – Sugar and Confectionery Product Manufacturing	4.08%	0.15%	1.39%	1.72%	0.09%	0.09%	0.64%
3114 – Fruit and Vegetable Preserving and Specialty Food Manufacturing	6.81%	0.42%	2.06%	2.81%	0.27%	0.48%	0.76%
3115 – Dairy Product Manufacturing	7.71%	0.70%	2.66%	2.60%	0.45%	0.54%	0.76%
3116 – Meat Product Manufacturing	15.06%	0.64%	4.30%	4.96%	1.54%	2.00%	1.63%
3117 – Seafood Product Preparation and Packaging	11.01%	7.02%	1.45%	0.51%	0.24%	0.00%	1.78%
3118 – Bakeries and Tortilla Manufacturing	25.38%	1.36%	7.74%	9.10%	1.24%	1.72%	4.20%
3119 – Other Food Manufacturing	10.34%	0.48%	3.18%	3.72%	0.48%	0.82%	1.66%
3121 – Beverage Manufacturing	8.44%	1.00%	1.57%	2.87%	0.45%	0.54%	2.00%
Total	100.00%	12.28%	27.31%	31.76%	6.84%	7.65%	14.16%
Total Number of Locations	3,306	406	903	1,050	226	253	468

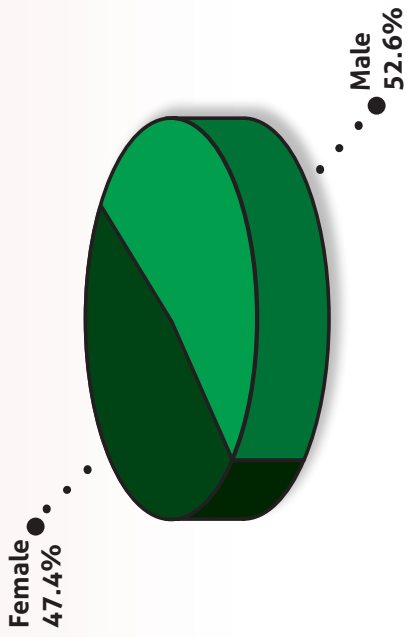
Source: Statistics Canada, Canadian Business Patterns Database, July 2010. These numbers may vary from the statistics presented in chapter 2 because they are based on June 2010 data on locations instead of establishments.

3

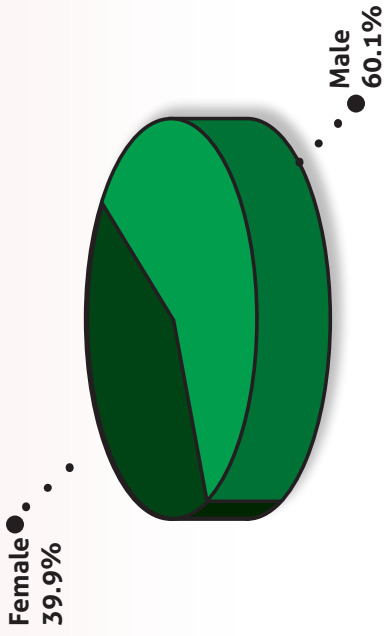
Workforce Demographics

Figure 2: Gender composition (all industries and food processing)

Total – All NAICS Codes



Food and Beverage Processing Industry



Source: Statistics Canada. Employed Labour Force having a usual place of work by gender, age, industries and according to immigrant status and first official language spoken. Canada and provinces. 2006 Census.

Table 10: Gender composition of the food and beverage processing industry by NAICS Code

NAICS Code	Males	Females
Total – All NAICS Codes	52.6%	47.4%
311 Food Manufacturing	58.6%	41.4%
3111 Animal Food Manufacturing	71.3%	28.7%
3112 Grain and Oilseed Milling	73.1%	26.9%
3113 Sugar and Confectionery Product Manufacturing	50.4%	49.6%
3114 Fruit and Vegetable Preserving and Specialty Food Manufacturing	56.3%	43.7%
3115 Dairy Product Manufacturing	67.5%	32.5%
3116 Meat Product Manufacturing	63.6%	36.4%
3117 Seafood Product Preparation and Packaging	51.6%	48.4%
3118 Bakeries and Tortilla Manufacturing	50.6%	49.4%
3119 Other Food Manufacturing	58.8%	41.2%
3121 Beverage Manufacturing	72.9%	27.1%
Food and beverage processing industry (NAICS 311 + NAICS 3121)	60.1%	39.9%

Source: Statistics Canada. Employed Labour Force having a usual place of work by gender, age, industries and according to immigrant status and first official language spoken. Canada and provinces. 2006 Census.

Table 11: Food and beverage processing industry workforce composition (NOCs) by gender

	Male	Female	Total
Supervisors, food, beverage and tobacco processing (NOC 9213)	8,465	3,235	11,700
	72.4%	27.6%	100.0%
Process control and machine operators, food and beverage processing (NOC 9461)	19,070	9,610	28,680
	66.5%	33.5%	100.0%
Industrial butchers and meat cutters, poultry preparers and related workers (NOC 9462)	14,105	5,740	19,850
	71.1%	28.9%	100.0%
Fish plant workers (NOC 9463)	5,515	6,430	11,945
	46.2%	53.8%	100.0%
Testers and graders, food and beverage processing (NOC 9465)	2,290	3,205	5,495
	41.7%	58.3%	100.0%
Labourers in food, beverage and tobacco processing (NOC 9617)	33,680	39,000	72,675
	46.3%	53.7%	100.0%
Labourers in fish processing (NOC 9618)	4,670	7,905	12,575
	37.1%	62.9%	100.0%
Total	87,795	75,125	162,920
	53.9%	46.1%	100.0%

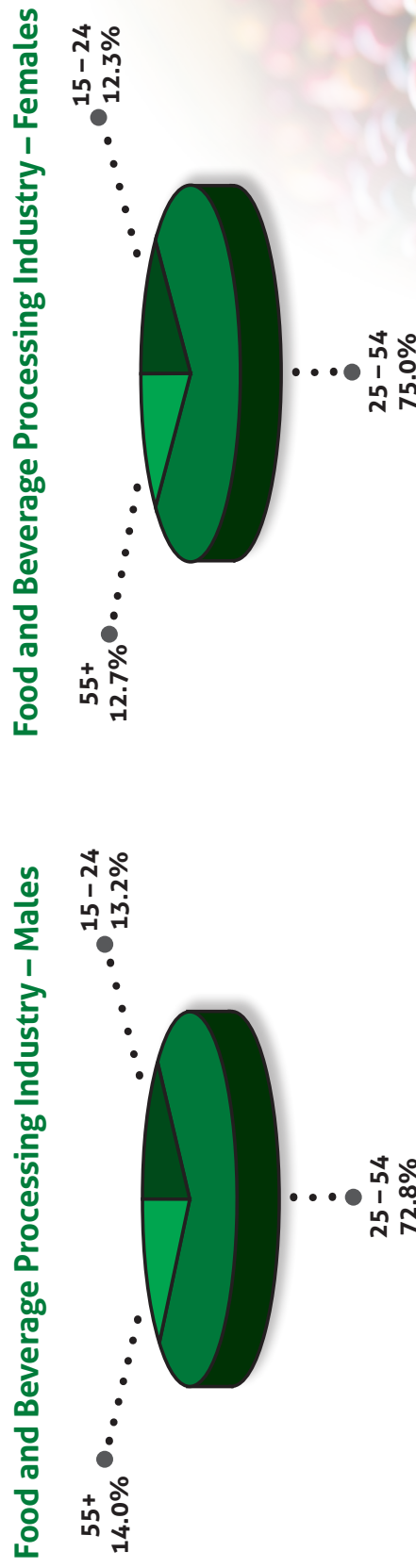
Source: Statistics Canada, 2006 Census of Population, Statistics Canada catalogue no. 97-559-XCB2006011 (Canada, Code01).

Figure 3: Age composition (all industries and food and beverage processing industry)



Source: Statistics Canada. Employed Labour Force having a usual place of work by gender, age, industries and according to immigrant status and first official language spoken. Canada and provinces. 2006 Census.

Figure 4: Age composition of food and beverage processing industry



Source: Statistics Canada. Employed Labour Force having a usual place of work by gender, age, industries and according to immigrant status and first official language spoken. Canada and provinces. 2006 Census.

Table 12: Age composition of the food and beverage processing industry by NAICS Code

NAICS Code	15 – 24 Years	25 – 54 Years	55 Years and Over
Total – All NAICS Codes	15.0%	69.5%	15.5%
311 Food Manufacturing	13.0%	73.5%	13.6%
3111 Animal Food Manufacturing	11.6%	75.5%	12.8%
3112 Grain and Oilseed Milling	6.7%	78.4%	15.0%
3113 Sugar and Confectionery Product Manufacturing	8.2%	75.5%	16.3%
3114 Fruit and Vegetable Preserving and Specialty Food Manufacturing	10.0%	75.4%	14.6%
3115 Dairy Product Manufacturing	13.0%	75.3%	11.7%
3116 Meat Product Manufacturing	14.2%	74.2%	11.6%
3117 Seafood Product Preparation and Packaging	10.5%	70.3%	19.2%
3118 Bakeries and Tortilla Manufacturing	17.1%	70.1%	12.8%
3119 Other Food Manufacturing	11.7%	75.3%	13.0%
3121 Beverage Manufacturing	12.2%	75.0%	12.9%
Food and beverage processing industry (NAICS 311 + NAICS 3121)	12.9%	73.6%	13.5%

Source: Statistics Canada. Employed Labour Force having a usual place of work by gender, age, industries and according to immigrant status and first official language spoken. Canada and provinces. 2006 Census.

Table 13: Age composition of the food and beverage processing industry by province

Region	Age Group		
	15 – 24 Years	25 – 54 Years	55 Years and Over
Food and beverage processing industry	12.9%	73.6%	13.5%
Newfoundland and Labrador	9.1%	72.4%	18.5%
Prince Edward Island	16.8%	64.6%	18.6%
Nova Scotia	9.6%	74.8%	15.5%
New Brunswick	11.0%	73.0%	16.1%
Quebec	14.3%	73.8%	11.9%
Ontario	11.9%	74.1%	14.0%
Manitoba	15.2%	73.7%	11.2%
Saskatchewan	18.9%	70.9%	10.1%
Alberta	14.4%	74.4%	11.2%
British Columbia	11.7%	73.2%	15.1%
Yukon Territory*	N.A.	N.A.	N.A.
Northwest Territories*	N.A.	N.A.	N.A.
Nunavut*	N.A.	N.A.	N.A.

Source: Statistics Canada. Employed Labour Force having a usual place of work by gender, age, industries and according to immigrant status and first official language spoken. Canada and provinces. 2006 Census.

* Data for Yukon, Northwest Territories and Nunavut based on a small number of observations and too unreliable to be used.

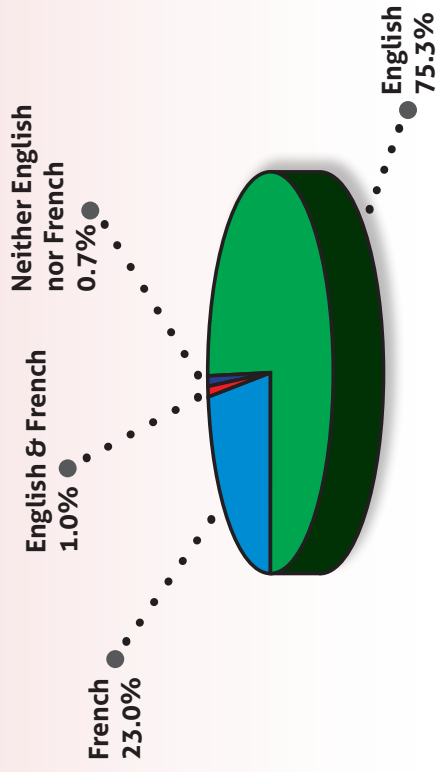
Table 14: Food and beverage processing industry workforce composition (NOCs) by age

	15 – 24 Years	25 – 34 Years	35 – 44 Years	45 – 54 Years	55 Years and Older	Total
Supervisors, food, beverage and tobacco processing (NOC 9213)	620 5.3%	2,570 22.0%	3,635 31.1%	3,260 27.9%	1,615 13.8%	11,700 100.0%
Process control and machine operators, food and beverage processing (NOC 9461)	3,290 11.5%	5,155 18.0%	7,925 27.6%	8,275 28.9%	4,030 14.1%	28,680 100.0%
Industrial butchers and meat cutters, poultry preparers and related workers (NOC 9462)	3,155 15.9%	4,415 22.2%	5,340 26.9%	4,640 23.4%	2,295 11.6%	19,850 100.0%
Fish plant workers (NOC 9463)	1,620 13.6%	1,490 12.5%	2,780 23.3%	3,820 32.0%	2,235 18.7%	11,945 100.0%
Testers and graders, food and beverage processing (NOC 9465)	645 11.7%	1,090 19.8%	1,465 26.7%	1,385 25.2%	910 16.6%	5,495 100.0%
Labourers in food, beverage and tobacco processing (NOC 9617)	14,465 19.9%	13,750 18.9%	17,675 24.3%	18,485 25.4%	8,300 11.4%	72,675 100.0%
Labourers in fish processing (NOC 9618)	1,595 12.7%	1,585 12.6%	2,895 23.0%	4,135 32.9%	2,365 18.8%	12,575 100.0%
Total	25,390 15.6%	30,055 18.4%	41,715 25.6%	44,000 27.0%	21,750 13.4%	162,920 100.0%

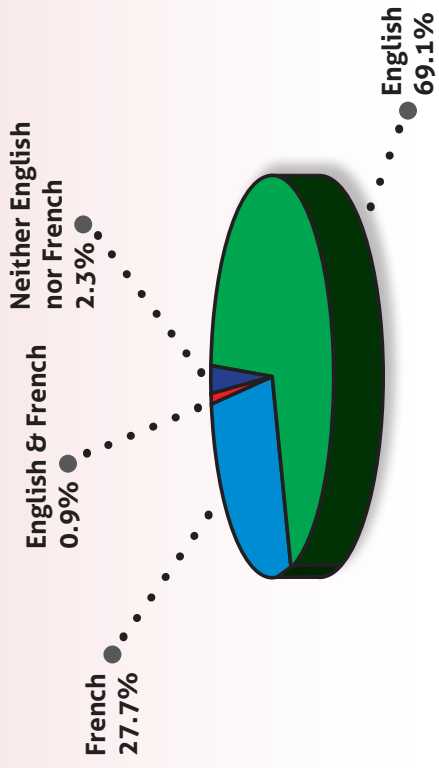
Source: Statistics Canada, 2006 Census of Population, Statistics Canada catalogue no. 97-559-XCB2006012 (Canada, Code01)

Figure 5: Employees' mother tongue (all industries and food and beverage processing industry)

Total – All NAICS Codes



Food and Beverage Processing Industry



Source: Statistics Canada. Employed Labour Force having a usual place of work by gender, age, industries and according to immigrant status and first official language spoken. Canada and provinces. 2006 Census.

Table 15: Employees' mother tongue by province and territory

Province/Territory	English	French	English & French	Neither English nor French
Food and beverage processing industry	69.1%	27.7%	0.9%	2.3%
Newfoundland and Labrador	99.9%	0.2%	0.0%	0.0%
Prince Edward Island	94.6%	5.2%	0.0%	0.0%
Nova Scotia	91.6%	8.0%	0.2%	0.1%
New Brunswick	48.7%	51.1%	0.1%	0.1%
Quebec	7.2%	89.9%	2.4%	0.4%
Ontario	94.0%	2.5%	0.4%	3.1%
Manitoba	94.6%	3.6%	0.0%	1.8%
Saskatchewan	99.5%	0.5%	0.0%	0.0%
Alberta	94.5%	2.1%	0.3%	3.0%
British Columbia	91.0%	1.0%	0.5%	7.5%
Yukon Territory*	82.4%	17.6%	0.0%	0.0%
Northwest Territories*	100.0%	0.0%	0.0%	0.0%
Nunavut*	100.0%	0.0%	0.0%	0.0%

Source: Statistics Canada. Employed Labour Force having a usual place of work by gender, age, industries and according to immigrant status and first official language spoken. Canada and provinces, 2006 Census.

* Very small number of observations. To be interpreted with caution.

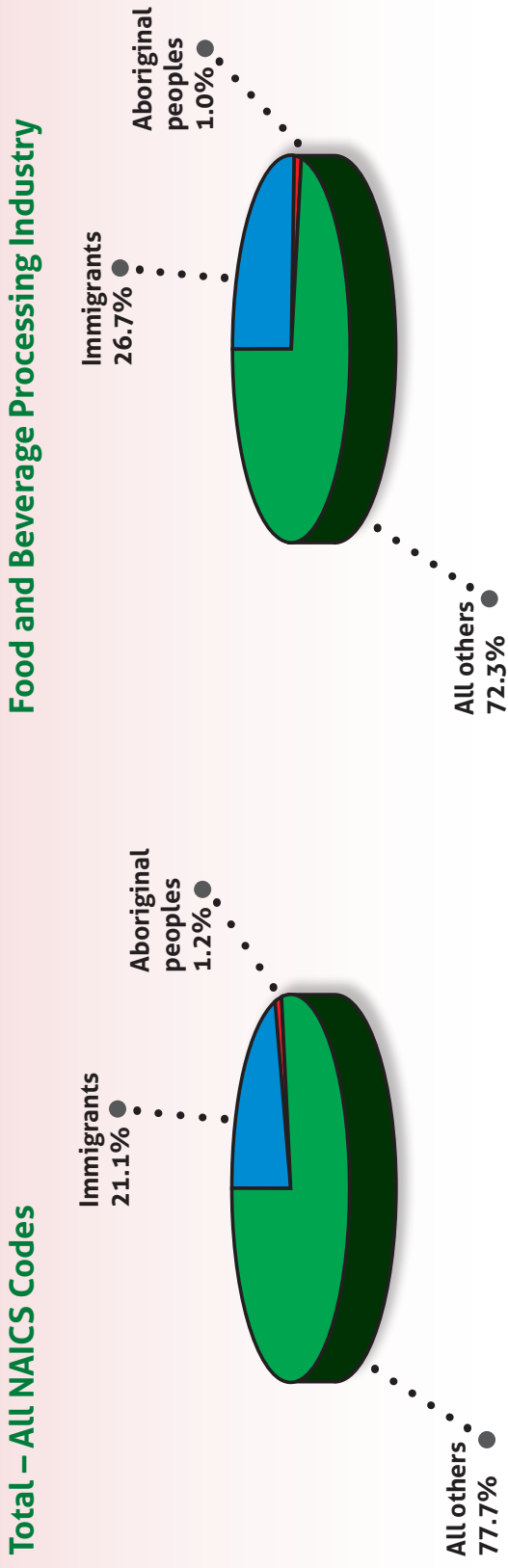


Table 16: Employees' mother tongue in the food and beverage processing industry

NAICS Code	English	French	English & French	Neither English nor French
Total – All NAICS Codes	75.3%	23.0%	1.0%	0.7%
311 Food Manufacturing	68.3%	28.3%	0.9%	2.5%
3111 Animal Food Manufacturing	70.0%	29.7%	0.3%	0.1%
3112 Grain and Oilseed Milling	89.4%	10.0%	0.2%	0.5%
3113 Sugar and Confectionery Product Manufacturing	75.5%	21.6%	0.8%	2.0%
3114 Fruit and Vegetable Preserving and Specialty Food Manufacturing	74.9%	22.6%	0.5%	2.0%
3115 Dairy Product Manufacturing	54.5%	44.0%	0.9%	0.6%
3116 Meat Product Manufacturing	66.8%	28.9%	0.9%	3.4%
3117 Seafood Product Preparation and Packaging	69.3%	28.4%	0.4%	1.9%
3118 Bakeries and Tortilla Manufacturing	67.9%	26.9%	1.4%	3.7%
3119 Other Food Manufacturing	68.5%	27.6%	1.5%	2.4%
3121 Beverage Manufacturing	76.0%	23.1%	0.4%	0.5%
Food and beverage processing industry	69.1%	27.7%	0.9%	2.3%

Source: Statistics Canada. Employed Labour Force having a usual place of work by gender, age, industries and according to immigrant status and first official language spoken. Canada and provinces. 2006 Census.

Figure 6: Immigrants and Aboriginal peoples (all industries and food processing)



Source: Statistics Canada. Employed Labour Force having a usual place of work by gender, age, industries and according to immigrant status and first official language spoken. Canada and provinces. 2006 Census.

Table 17: Proportion of immigrants and Aboriginal peoples in the food and beverage processing industry by NAICS Code

Population Group	Total Immigrants	Immigrants 2001–2006	Immigrants Before 2001	Aboriginal Peoples	All Others
Total – All NAICS Codes	21.1%	3.3%	17.9%	1.2%	77.6%
311 Food Manufacturing	27.8%	5.8%	22.1%	1.0%	71.2%
3111 Animal Food Manufacturing	11.6%	2.2%	9.5%	0.5%	87.9%
3112 Grain and Oilseed Milling	14.3%	1.9%	12.4%	0.6%	85.1%
3113 Sugar and Confectionery Product Manufacturing	37.7%	6.3%	31.4%	0.3%	62.1%
3114 Fruit and Vegetable Preserving and Specialty Food Manufacturing	23.1%	4.2%	18.9%	0.6%	76.2%
3115 Dairy Product Manufacturing	15.3%	2.7%	12.7%	0.5%	84.2%
3116 Meat Product Manufacturing	33.1%	7.7%	25.4%	1.6%	65.3%
3117 Seafood Product Preparation and Packaging	10.1%	1.7%	8.4%	2.6%	87.3%
3118 Bakeries and Tortilla Manufacturing	40.5%	8.3%	32.2%	0.4%	59.1%
3119 Other Food Manufacturing	30.4%	6.8%	23.6%	0.2%	69.3%
3121 Beverage Manufacturing	17.0%	2.5%	14.5%	0.7%	82.2%
Food and beverage processing industry	26.7%	5.4%	21.3%	1.0%	72.3%
Population of immigrants and Aboriginal peoples in the food and beverage processing industry	68,615	13,925	54,695	2,485	185,920

Source: Statistics Canada. Employed Labour Force having a usual place of work by gender, age, industries and according to immigrant status and first official language spoken. Canada and provinces. 2006 Census.



Table 18: Proportion of immigrants and Aboriginal peoples in the food and beverage processing industry by province and territory by NAICS Code

Population Group	Total Immigrants	Immigrants 2001–2006	Immigrants Before 2001	Aboriginal Peoples	All Others
Food and beverage processing industry	26.7%	5.4%	21.3%	1.0%	72.3%
Newfoundland and Labrador	0.3%	0.0%	0.3%	0.4%	99.3%
Prince Edward Island	1.8%	0.0%	2.2%	0.7%	97.0%
Nova Scotia	2.1%	0.3%	1.9%	0.6%	97.3%
New Brunswick	3.5%	0.6%	2.9%	0.6%	96.0%
Quebec	11.4%	2.8%	8.6%	0.2%	88.4%
Ontario	40.6%	7.6%	33.1%	0.4%	59.0%
Manitoba	21.7%	7.2%	14.6%	2.8%	75.5%
Saskatchewan	6.7%	0.8%	5.9%	5.3%	87.8%
Alberta	38.7%	10.9%	27.9%	1.9%	59.4%
British Columbia	47.3%	7.7%	39.6%	3.0%	49.7%
Yukon Territory*	N.A.	N.A.	N.A.	N.A.	N.A.
Northwest Territories*	N.A.	N.A.	N.A.	N.A.	N.A.
Nunavut*	N.A.	N.A.	N.A.	N.A.	N.A.

Source: Statistics Canada. Employed Labour Force having a usual place of work by gender, age, industries and according to immigrant status and first official language spoken. Canada and provinces. 2006 Census.

* Data for Yukon, Northwest Territories and Nunavut based on a small number of observations and too unreliable to be used.

4

Labour and Payroll Statistics

Table 19: Unionization rates for the sub-sectors 2009

	%
3111 Animal Food Manufacturing	18.3%
3112 Grain and Oilseed Milling	27.9%
3113 Sugar and Confectionery Product Manufacturing	36.5%
3114 Fruit and Vegetable Preserving and Specialty Food Manufacturing	36.1%
3115 Dairy Product Manufacturing	38.1%
3116 Meat Product Manufacturing	56.5%
3117 Seafood Product Preparation and Packaging	23.4%
3118 Bakeries and Tortilla Manufacturing	26.8%
3119 Other Food Manufacturing	25.4%
3121 Beverage Manufacturing	42.3%

Source: Statistics Canada's 2009 Labour Force Survey.

Table 20: Average hourly earnings (\$) for employees paid by the hour, including overtime (current dollars) by NAICS Code

North American Industry Classification System (NAICS)	2004	2005	2006	2007	2008	2009
Industrial aggregate excluding unclassified businesses (11-91N)	17.69	18.30	18.76	19.48	20.16	20.44
Manufacturing (31-33)	20.03	20.57	20.51	21.61	21.98	20.86
Food Manufacturing (311)	16.21	17.63	16.24	18.09	17.44	17.66
• Animal Food Manufacturing (3111)	16.75	18.88	17.66	19.98	..	F
• Grain and Oilseed Milling (3112)	21.61	23.95	21.48	28.23	23.23	F
• Sugar and Confectionery Product Manufacturing (3113)	17.42	18.78	17.33	19.90	18.70	F
• Fruit and Vegetable Preserving and Specialty Food Manufacturing (3114)	16.31	17.53	15.82	17.65	17.21	17.06
• Dairy Product Manufacturing (3115)	17.06	18.83	17.39	19.60	18.59	19.43
• Meat Product Manufacturing (3116)	16.05	17.66	16.45	18.35	17.68	17.30
• Seafood Product Preparation and Packaging (3117)	15.19	16.34	15.53	16.92	16.30	16.82
• Bakeries and Tortilla Manufacturing (3118)	14.37	15.66	14.29	15.61	15.38	15.68
• Other Food Manufacturing (3119)	18.67	19.41	17.30	18.17	18.04	18.87
Beverage Manufacturing (3121)	21.01	21.00	24.20	23.52	..	F
Food and beverage processing industry (average)	17.44	18.80	17.75	19.97	18.14	..
Difference in dollars between FP and Manufacturing (31-33)	-2.59	-1.77	-2.77	-1.82	-3.84	..
Difference in % between FP and Manufacturing (31-33)	-14.8%	-9.4%	-15.6%	-9.2%	-21.2%	..
Difference in dollars between FP and Industrial aggregate (11-91N)	-0.25	0.50	-1.02	0.31	-2.02	..
Difference in % between FP and Industrial aggregate (11-91N)	-1.4%	2.7%	-5.7%	1.6%	-11.1%	..

Symbol legend: .. Not available

F Too unreliable to be published

Source: Statistics Canada. Employed Labour Force having a usual place of work by gender, age, industries and according to immigrant status and first official language spoken. Canada and provinces, 2006 Census.



Table 21: Average hourly earnings (\$) for employees paid by the hour, including overtime (current dollars) by province

Province	2004	2005	2006	2007	2008	2009
Newfoundland and Labrador	15.23	15.87	17.01	17.36	16.63	15.97
Prince Edward Island	14.59	15.70	x	x	16.93	F
Nova Scotia	15.38	17.10	15.14	17.26	16.54	16.89
New Brunswick	15.32	16.79	15.31	16.88	16.73	17.51
Quebec	15.27	16.68	15.52	17.52	16.99	17.11
Ontario	17.08	18.45	16.73	18.99	18.28	18.46
Manitoba	15.49	16.82	15.32	16.77	16.36	16.69
Saskatchewan	14.97	15.63	14.47	16.37	15.96	F
Alberta	17.65	19.56	18.39	20.02	18.87	18.15
British Columbia	16.10	17.88	16.30	16.82	16.16	17.05
Average	15.71	17.05	16.02	17.55	16.95	17.23

Symbol legend: x Suppressed to meet the confidentiality requirements of the Statistics Act
 F Too unreliable to be published

Source: Statistics Canada, Table 281-0030 – Average hourly earnings for employees paid by the hour (SEPH), unadjusted for seasonal variation, for selected industries classified using the North American Industry Classification System (NAICS), and calculations by Zins Beauchesne and Associates.

Note: The figures above (by province) are only for Food Manufacturing (NAICS 311). They do not include Beverage Manufacturing (NAICS 3121). Data is available for all Canadian provinces, but not for Yukon, the Northwest Territories or Nunavut.



Table 22: Average hourly earnings (\$) for salaried employees (paid a fixed salary), including overtime (current dollars) by NAICS Code

North American Industry Classification System (NAICS)	2004	2005	2006	2007	2008	2009
Industrial aggregate excluding unclassified businesses (11-91N)	25.09	25.82	26.54	27.83	28.78	29.81
Manufacturing (31-33)	28.38	29.14	30.08	30.73	30.64	30.34
Food Manufacturing (311)	25.53	27.52	31.54	29.90	29.62	27.81
• Animal Food Manufacturing (3111)	25.70	26.91	30.52	29.53	..	F
• Grain and Oilseed Milling (3112)	31.33	34.28	36.95	41.12	37.70	F
• Sugar and Confectionery Product Manufacturing (3113)	27.44	29.56	34.35	33.12	32.36	F
• Fruit and Vegetable Preserving and Specialty Food Manufacturing (3114)	26.17	27.78	30.47	27.40	27.39	F
• Dairy Product Manufacturing (3115)	27.61	29.83	33.24	30.97	29.35	28.78
• Meat Product Manufacturing (3116)	25.17	27.08	31.81	31.14	30.82	26.74
• Seafood Product Preparation and Packaging (3117)	21.46	23.06	28.00	26.34	27.01	25.02
• Bakeries and Tortilla Manufacturing (3118)	23.55	26.26	29.40	25.72	26.15	28.52
• Other Food Manufacturing (3119)	26.08	27.81	32.27	30.93	31.37	28.66
Beverage Manufacturing (3121)	33.21	30.35	27.74	26.83	..	..
Food and beverage processing industry (average)	26.77	28.29	31.48	30.31	30.27	..
Difference in dollars between FP and Manufacturing (31-33)	-1.61	-0.85	1.40	-0.42	-0.37	..
Difference in % between FP and Manufacturing (31-33)	-6.0%	-3.0%	4.4%	-1.4%	-1.2%	..
Difference in dollars between FP and Industrial aggregate (11-91N)	1.68	2.47	4.94	2.48	1.49	..
Difference in % between FP and Industrial aggregate (11-91N)	6.3%	8.7%	15.7%	8.2%	4.9%	..

Symbol Legend: .. Not available, F Too unreliable to be published

Source: Statistics Canada, Table 281-0036 - Average hourly earnings for salaried employees (paid a fixed salary) (SEPH), including overtime, unadjusted for seasonal variation, for selected industries classified using the North American Industry Classification System (NAICS), annual (current dollars), and calculations by Zins Beausnes and Associates.

Table 23: Average hourly earnings (\$) for salaried employees (paid a fixed salary), including overtime (current dollars) by province

Province	2004	2005	2006	2007	2008	2009
Newfoundland and Labrador	25.59	27.47	31.49	27.56	28.87	25.67
Prince Edward Island	17.91	19.73	x	x	26.24	F
Nova Scotia	21.74	24.53	28.53	28.53	27.46	24.61
New Brunswick	23.29	25.81	30.07	27.19	28.63	29.16
Quebec	25.79	28.21	32.51	30.45	29.70	26.44
Ontario	26.79	28.78	32.38	31.30	30.76	29.09
Manitoba	24.73	26.27	30.39	28.61	28.71	26.63
Saskatchewan	25.49	26.94	30.54	28.19	28.69	F
Alberta	25.87	27.64	31.58	30.17	29.91	27.63
British Columbia	23.33	24.34	28.75	26.55	27.09	27.53
Average	24.05	25.97	30.69	28.73	28.61	27.10

Symbol legend: x Suppressed to meet the confidentiality requirements of the Statistics Act
F Too unreliable to be published

Source: Statistics Canada, Table 281-0036 – Average hourly earnings for salaried employees (paid a fixed salary) (SEPH), including overtime, unadjusted for seasonal variation, for selected industries classified using the North American Industry Classification System (NAICS), annual (current dollars), and calculations by Zins Beausnesne and Associates.

Note: The figures above (by province) are only for Food Manufacturing (NAICS 311). They do not include Beverage Manufacturing (NAICS 3121). Data is available for all Canadian provinces, but not for Yukon, the Northwest Territories or Nunavut.



Table 24: Average weekly hours for employees paid by the hour, including overtime, by NAICS Code¹

North American Industry Classification System (NAICS)	2004	2005	2006	2007	2008	2009
Industrial aggregate excluding unclassified businesses (11-91N)	30.9	30.9	30.9	30.5	30.4	30.1
Manufacturing (31-33)	38.1	38.1	38.1	38.2	37.4	36.8
Food Manufacturing (311)	36.3	36.4	37.0	36.7	35.3	35.1
• Animal Food Manufacturing (3111)	37.3	35.5	35.8	35.5	..	F
• Grain and Oilseed Milling (3112)	37.3	36.6	35.7	35.8	38.7	F
• Sugar and Confectionery Product Manufacturing (3113)	35.9	35.4	36.1	35.7	35.2	F
• Fruit and Vegetable Preserving and Specialty Food Manufacturing (3114)	38.5	37.8	38.2	36.7	34.8	F
• Dairy Product Manufacturing (3115)	37.0	36.1	36.3	35.0	34.1	35.7
• Meat Product Manufacturing (3116)	37.3	36.8	37.3	37.3	35.7	35.6
• Seafood Product Preparation and Packaging (3117)	32.5	34.6	34.4	35.3	34.8	34.5
• Bakeries and Tortilla Manufacturing (3118)	36.2	37.0	38.5	37.6	35.1	33.3
• Other Food Manufacturing (3119)	34.1	34.8	36.2	37.4	36.2	33.3
Beverage Manufacturing (3121)	34.5	31.7	31.1	32.5	..	F
Food and beverage processing industry (average)	36.1	35.6	36.0	35.9	35.6	..
Difference in dollars between FP and Manufacturing (31-33)	-2.04	-2.47	-2.14	-2.32	-1.83	..
Difference in % between FP and Manufacturing (31-33)	-5.7%	-6.9%	-6.0%	-6.5%	-5.1%	..
Difference in dollars between FP and Industrial aggregate (11-91N)	5.16	4.73	5.06	5.38	5.18	..
Difference in % between FP and Industrial aggregate (11-91N)	14.3%	13.3%	14.1%	15.0%	14.5%	..

Symbol legend: .. Not available

F Too unreliable to be published

Source: Statistics Canada, Table 281-0033 – Average weekly hours for employees paid by the hour (SEPH), unadjusted for seasonal variation, for selected industries classified using the North American Industry Classification System (NAICS), and calculations by Zins Beauchesne and Associates.

¹ Statistics Canada does not measure average weekly hours for salaried employees (paid a fixed salary).



Table 25: Average weekly hours for employees paid by the hour, including overtime, by province

Province	2004	2005	2006	2007	2008	2009
Newfoundland and Labrador	33.9	37.5	32.9	35.3	36.10	35.8
Prince Edward Island	35.1	35.4	x	x	35.10	F
Nova Scotia	33.7	34.3	35.9	35.7	35.20	36.0
New Brunswick	33.9	35.7	37.1	37.8	36.70	36.6
Quebec	37.1	37.2	37.9	36.7	34.70	34.6
Ontario	37.0	36.8	37.6	36.9	35.30	35.9
Manitoba	37.4	36.8	37.1	37.3	35.50	36.2
Saskatchewan	38.6	39.5	39.5	38.7	36.00	F
Alberta	35.4	34.6	34.5	36.2	35.90	34.9
British Columbia	34.5	34.1	35.4	36.5	35.30	32.3
Average	35.7	36.2	36.4	36.8	35.58	35.3

Symbol legend: x Suppressed to meet the confidentiality requirements of the Statistics Act
 F Too unreliable to be published

Source: Statistics Canada, Table 281-0033 - Average weekly hours for employees paid by the hour (SEPH), unadjusted for seasonal variation, for selected industries classified using the North American Industry Classification System (NAICS), and calculations by Zins Beauchesne and Associates.

Note: The figures above (by province) are only for Food Manufacturing (NAICS 311), they do not include Beverage Manufacturing (NAICS 3121). Data is available for all Canadian provinces, but not for Yukon, the Northwest Territories or Nunavut.



Table 26: College/University enrolments and graduations², 2004-2005 to 2008-2009

Cip Code	Program Description	Enrolments				
		2004	2004	2005	2006	2007
01.0401	Agricultural and Food Products Processing	0	0	0	0	0
01.1001	Food Science	468	108	132	132	153
01.1002	Food Technology and Processing	291	48	69	75	96
01.1099	Food Science and Technology, Other	195	63	36	36	54
19.0501	Foods, Nutrition and Wellness, General	2,250	408	480	549	633
	Total	3,204	627	717	792	936
Cip Code	Program Description	Graduations				
		2004	2005	2006	2007	2008
01.0401	Agricultural and Food Products Processing	0	0	0	0	0
01.1001	Food Science	108	132	132	153	186
01.1002	Food Technology and Processing	48	69	75	96	99
01.1099	Food Science and Technology, Other	63	36	36	54	57
19.0501	Foods, Nutrition and Wellness, General	408	480	549	633	762
	Total	627	717	792	936	1,104

Source: Statistics Canada, Postsecondary Student Information System (PSIS).

² All counts are randomly rounded to a multiple of 3 using the following procedure: counts which are already a multiples of 3 are not adjusted; counts 1 greater than a multiple of 3 are adjusted to the next lowest multiple of 3 with a probability of two-thirds and to the next highest multiple of 3 with a probability of one-third. The probabilities are reversed for counts that are one less than a multiple of 3. For this reason, numbers presented in this table may differ from the ones on the next page.

Table 27: College/University enrolments and graduations by institutions, 2008-2009*

NAICS Code	2008	
	Enrolments	Graduations
University of Guelph – Parent Institution	858	177
University of British Columbia – Parent Institution	855	174
Ryerson University	453	90
University of Toronto – Parent Institution	237	84
University of Manitoba – Parent Institution	318	84
Laval University	351	81
University of Western Ontario – Parent Institution	342	54
University of Saskatchewan – Parent Institution	183	48
University of Alberta – Parent Institution	354	48
Institut de Technologie Agricole – Parent Institution	129	45
Mount St. Vincent University	243	36
Durham College of Applied Arts and Technology	105	36
Memorial University of Newfoundland – Parent Institution	51	24
University of Prince Edward Island	66	18
Université de Moncton – Parent Institution	108	18
CÉGEP de Maisonneuve	18	18
Southern Alberta Institute of Technology	54	18
McGill University	120	18
CÉGEP régional de Lanaudière (Joliette)	48	9
British Columbia Institute of Technology	51	9
Okanagan College	9	9

Table 27: College/University enrolments and graduations by institutions, 2008-2009* (con't)

NAICS Code	2008	
	Enrolments	Graduations
Dalhousie University	36	6
Loyalist College of Applied Arts and Technology	24	3
University of Ottawa - Parent Institution	90	0
Cégep de la Gaspésie et des Îles-de-la-Madeleine	12	0
Total	5,163	1,098

Source: Statistics Canada, Postsecondary Student Information System (PSIS)..

* Figures for Institut de Technologie Agricole (Parent Institution) are under Agriculture, Agriculture Operations and Related Sciences.

Table 28: Information concerning registrations, certificates and completions for “food service” apprenticeship programs for the period from 2004 to 2008

Food Service Trade & Occupation	Reporting Year 2004			Reporting Year 2005			Reporting Year 2006		
	Reg.	Certif.	Compl.	Reg.	Certif.	Compl.	Reg.	Certif.	Compl.
Chefs	0	0	0	0	0	0	0	0	0
Cooks	9,258	861	474	9,765	822	495	10,575	702	423
Butchers, Meat Cutters And Fishmongers - Retail And Whlsl	219	15	12	228	9	9	270	9	9
Bakers	807	48	36	864	51	45	978	42	33
Food And Beverage Servers	312	3	3	90	12	12	69	6	6
Industrial Butchers and Meat Cutters, Poultry Preparers And Rel. Workers	0	0	0	0	0	0	0	0	0
Total Food Service	10,599	930	531	10,947	894	561	11,892	765	477

Source: Registered Apprenticeship Information System (RAIS)

Abbreviations: Reg. = Registration Count random rounded base 3

Certif. = Certificate Count random rounded base 3

Compl. = Completion Count random rounded base 3

Table 28: Information concerning registrations, certificates and completions for “food service” apprenticeship programs for the period from 2004 to 2008 (con’t)

Food Service Trade & Occupation	Reporting Year 2007			Reporting Year 2008		
	Reg.	Certif.	Compl.	Reg.	Certif.	Compl.
Chefs	3	0	0	9	0	0
Cooks	11,115	927	528	13,029	1,050	582
Butchers, Meat Cutters And Fishmongers - Retail And Whlsl	222	12	12	369	30	30
Bakers	1,092	69	57	1,371	108	81
Food And Beverage Servers	72	0	0	75	15	15
Industrial Butchers and Meat Cutters, Poultry Preparers And Rel. Workers	0	0	0	159	21	6
Total Food Service	12,504	1,005	591	15,015	1,224	717

Source: Registered Apprenticeship Information System (RAIS)

Abbreviations: Reg. = Registration Count random rounded base 3

Certif. = Certificate Count random rounded base 3

Compl. = Completion Count random rounded base 3



Survey Results

Table 29: Distribution of respondents by main sector and by region (weighted)

	Region						
	Total	Atlantic	Quebec	Ontario	Prairies	Alberta	British Columbia
Animal Food Manufacturing	8.2%	0.0%	9.5%	8.3%	19.1%	14.2%	4.3%
	34	0	11	11	5	5	2
Grain and Oilseed Milling	2.5%	0.0%	1.5%	2.5%	11.6%	4.8%	1.2%
	10	0	2	3	3	2	1
Sugar and Confectionery Product Manufacturing	4.1%	1.5%	6.0%	6.4%	1.6%	1.4%	0.0%
	17	1	7	8	0	0	0
Fruit and Vegetable Preserving and Speciality Food Manufacturing	6.8%	3.5%	7.4%	8.8%	4.2%	6.3%	5.6%
	28	2	9	12	1	2	3
Dairy Product Manufacturing	7.8%	5.8%	9.6%	8.1%	6.9%	7.1%	5.6%
	32	3	11	11	2	2	3
Meat Product Manufacturing	15.2%	5.3%	15.5%	15.5%	23.5%	26.1%	12.1%
	62	3	18	21	6	8	7
Seafood Product Preparation and Packaging	11.1%	60.1%	5.4%	1.6%	0.0%	0.0%	13.5%
	46	30	6	2	0	0	8
Bakeries and Tortilla Manufacturing	25.5%	11.4%	28.0%	28.4%	18.9%	22.5%	31.1%
	105	6	32	38	5	7	17
Beverage Manufacturing	8.3%	8.2%	5.6%	8.8%	6.8%	7.0%	14.4%
	34	4	6	12	2	2	8
Other Food Manufacturing	10.4%	4.1%	11.5%	11.6%	7.4%	10.7%	12.3%
	43	2	13	15	2	3	7
Total number of respondents	411	49	114	133	27	32	56

Table 30: Distribution of respondents by main sub-sector and by number of employees per establishment (n=411³)

Number of Employees per Establishment	Sub-Sector										
	Total	Animal Food	Grain & Oilseed	Sugar & Confect.	F&Veg. Preserv. & Specialty Food	Dairy Prod.	Meat Prod.	Seafood Prod. Prep. & Pack.	Baker & Tortilla	Beverage	Other
Less than 19 employees	34.5%	45.0%	25.3%	34.8%	25.8%	27.8%	26.9%	20.3%	44.6%	37.7%	37.7%
20-49 employees	30.5%	38.7%	41.0%	25.9%	27.1%	30.6%	28.5%	25.5%	32.2%	26.7%	32.2%
50-99 employees	15.8%	10.3%	33.7%	16.3%	20.0%	22.4%	14.1%	21.4%	11.0%	16.8%	15.2%
100-199 employees	10.6%	4.4%	0.0%	8.1%	15.1%	9.8%	13.3%	19.2%	6.9%	13.6%	10.2%
200-499 employees	7.0%	1.0%	0.0%	12.6%	7.1%	8.6%	12.4%	12.4%	4.2%	5.1%	4.4%
500 + employees	1.7%	0.5%		2.2%	4.9%	0.8%	4.8%	1.1%	1.2%		0.3%
Average number of employees per establishment	74	39	38	84	130	78	111	106	51	55	50

³ N=411, i-e 140 establishments + 271 head offices with an average of 3.6 establishments per head office.

6

Employment Profile

Table 31: Average number of employees per establishment by region (n=411)

Number of Employees	Region						
	Total	Atlantic	Quebec	Ontario	Prairies	Alberta	British Columbia
Average number of employees per establishment	74	82	78	72	68	63	72

Table 32: Average number of employees per establishment by sub-sector (n=411)

Average Number of Employees per Establishment	Sub-Sector										
	Total	Animal Food	Grain & Oilseed	Sugar & Confect.	F&Veg. Preserv. & Specialty Food	Dairy Prod.	Meat Prod.	Seafood Prod. Prep. & Pack.	Baker & Tortilla	Beverage	Other
Average number of employees per establishment	74	39	38	84	130	78	111	106	51	55	50

Table 33: Average number of employees and type of employment by sector (n=411)

Type of Employment	Sub-Sector										
	Total	Animal Food	Grain & Oilseed	Sugar & Confect.	F&Veg. Preserv. & Speciality Food	Dairy Prod.	Meat Prod.	Seafood Prod. Prep. & Pack.	Bakeries & Tortilla	Beverage	Other
Average number of employees:											
Full-time permanent	53.7	33.7	35.4	72.6	51.5	65.5	105.6	31.1	42.8	39.5	45.5
Full-time seasonal /contractual	11.5	2.4	1.4	6.8	44.7	5.7	2.0	52.3	1.4	8.6	2.9
Part-time permanent	3.7	1.6	0.5	2.4	4.4	3.2	2.2	3.4	6.7	3.3	1.8
Part-time seasonal /contractual	5.2	1.0	0.5	1.8	29.1	4.0	0.7	19.3	0.5	3.8	0.3
Total	74.0	38.7	37.8	83.6	129.7	78.4	110.5	106.0	51.4	55.1	50.4
Type of employment:											
Full-time permanent	72.5%	87.1%	93.7%	86.8%	39.7%	83.6%	95.6%	29.3%	83.4%	71.7%	90.2%
Full-time seasonal /contractual	15.5%	6.3%	3.7%	8.2%	34.4%	7.3%	1.8%	49.3%	2.7%	15.5%	5.7%
Part-time permanent	5.0%	4.2%	1.3%	2.9%	3.4%	4.0%	2.0%	3.2%	13.0%	6.0%	3.6%
Part-time seasonal /contractual	7.0%	2.5%	1.4%	2.1%	22.4%	5.1%	0.6%	18.2%	0.9%	6.8%	0.6%

Table 34: Average number of employees and type of employment by region (n=411)

Type of Employees	Region						
	Total	Atlantic	Quebec	Ontario	Prairies	Alberta	British Columbia
Average number of employees:							
Full-time permanent	53.7	29.2	63.1	52.9	61.7	56.8	52.2
Full-time seasonal / contractual	11.5	39.4	6.7	9.1	3.8	4.2	10.0
Part-time permanent	3.7	2.2	6.0	3.2	1.2	1.7	3.6
Part-time seasonal / contractual	5.2	11.6	1.7	7.3	1.3	0.8	6.1
Total	74.0	82.4	77.5	72.5	68.0	63.5	71.8
Type of employment:							
Full-time permanent	72.5%	35.4%	81.4%	72.9%	90.7%	89.6%	72.7%
Full-time seasonal / contractual	15.5%	47.8%	8.7%	12.6%	5.6%	6.6%	13.9%

Figure 7: Type of employment by establishment (n=411)

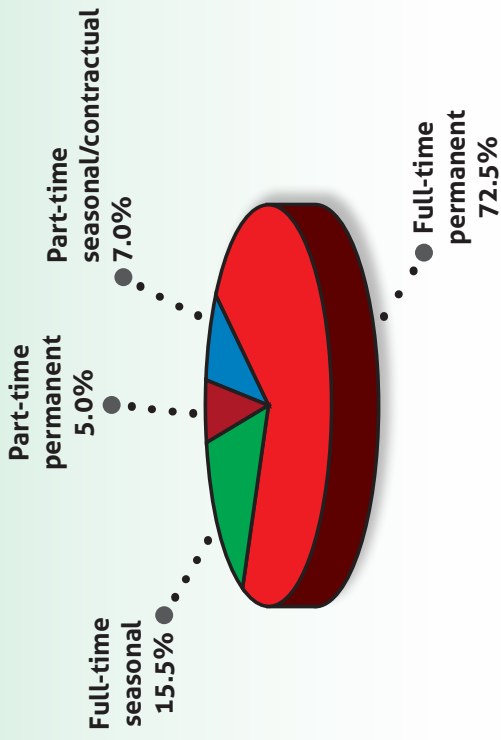


Figure 8: What proportion of your production workers are seasonal foreign workers with a temporary work permit? (n=411)

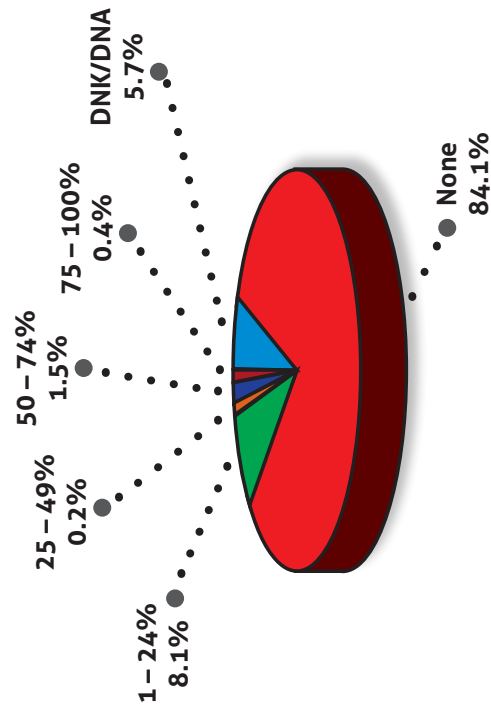


Table 35: What proportion of your production workers are seasonal foreign workers with a temporary work permit? Distribution of answers by sub-sector (n=411)

Proportion of Foreign Seasonal Workers	Sub-Sector										
	Total	Animal Food	Grain & Oilseed	Sugar & Confect.	F&Veg. Preserv. & Specialty Food	Dairy Prod.	Meat Prod.	Seafood Prod. Prep. & Pack.	Bakeries & Tortilla	Beverage	Other
None	84.1%	82.1%	100.0%	75.3%	69.6%	87.1%	83.6%	80.8%	87.8%	78.6%	92.0%
1-24%	8.1%	4.4%	0.0%	24.7%	9.0%	5.4%	8.9%	16.0%	3.7%	15.4%	3.3%
25-49%	0.2%	0.0%	0.0%	0.0%	0.4%	0.0%	0.7%	0.0%	0.0%	1.1%	0.0%
50-74%	1.5%	0.0%	0.0%	0.0%	19.9%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%
75-100%	0.4%	0.0%	0.0%	0.0%	1.0%	0.0%	1.4%	0.6%	0.0%	0.0%	0.0%
DNK/DNA	5.7%	13.5%	0.0%	0.0%	0.0%	7.5%	5.4%	2.6%	8.5%	4.9%	3.1%
Average proportion	1.7%	0.3%	0.0%	1.3%	12.0%	0.2%	2.3%	1.3%	0.4%	0.7%	1.3%

Figure 9: Does your organization have facilities or provide service in Aboriginal communities? (n=411)

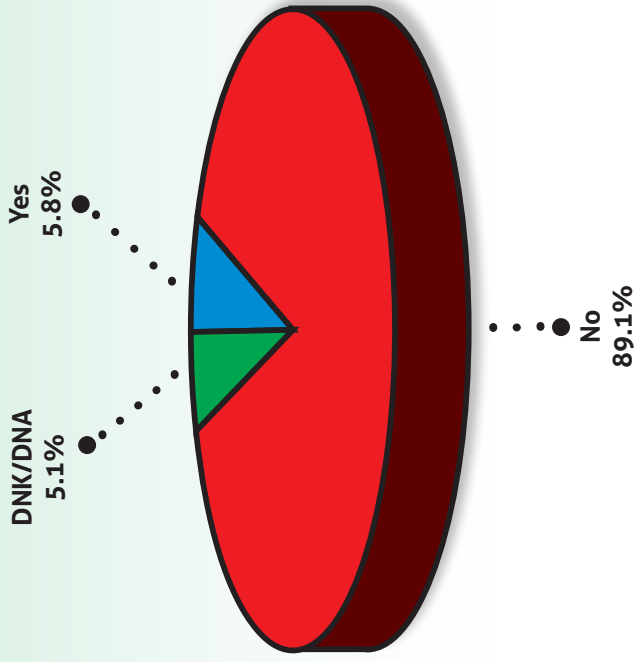


Table 36: Does your organization have facilities or provide service in Aboriginal communities? Distribution of answers by region (n=411)

Presence of Facilities or Services	Region						
	Total	Maritimes	Quebec	Ontario	Prairies	Alberta	British Columbia
Yes	5.8%	5.1%	3.0%	3.1%	10.9%	6.2%	15.8%
No	89.1%	92.1%	94.2%	92.1%	70.6%	85.1%	80.2%
DNK/DNA	5.1%	2.7%	2.8%	4.8%	18.5%	8.8%	4.0%

7

Labour and Human Resource

Figure 10: What proportion of your staff is unionized? (n=411)

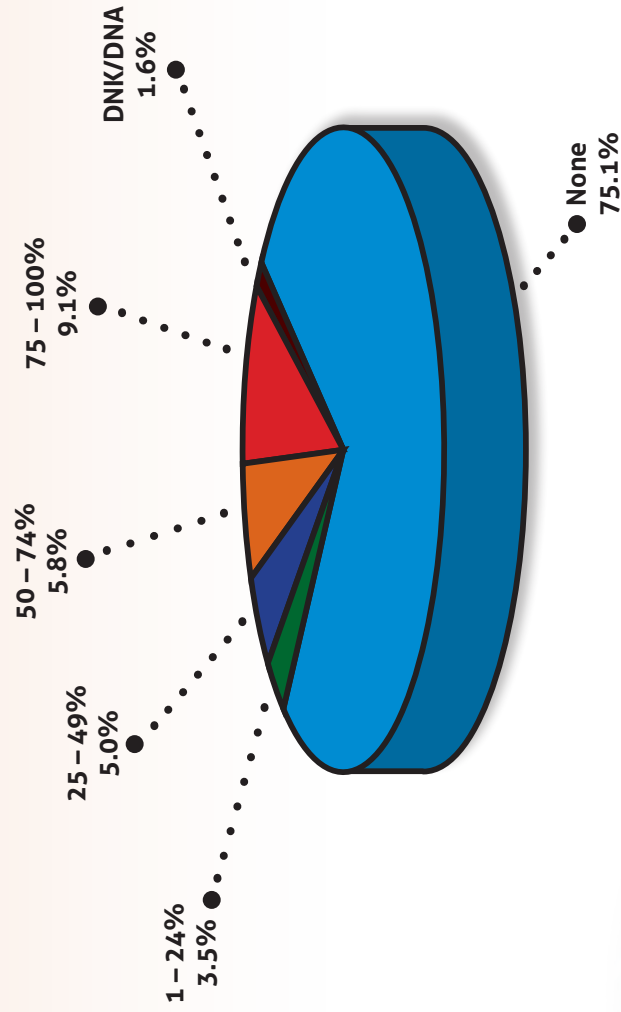


Figure 11: Is each of these a potential human resources challenge that could affect your organization? (n=411)

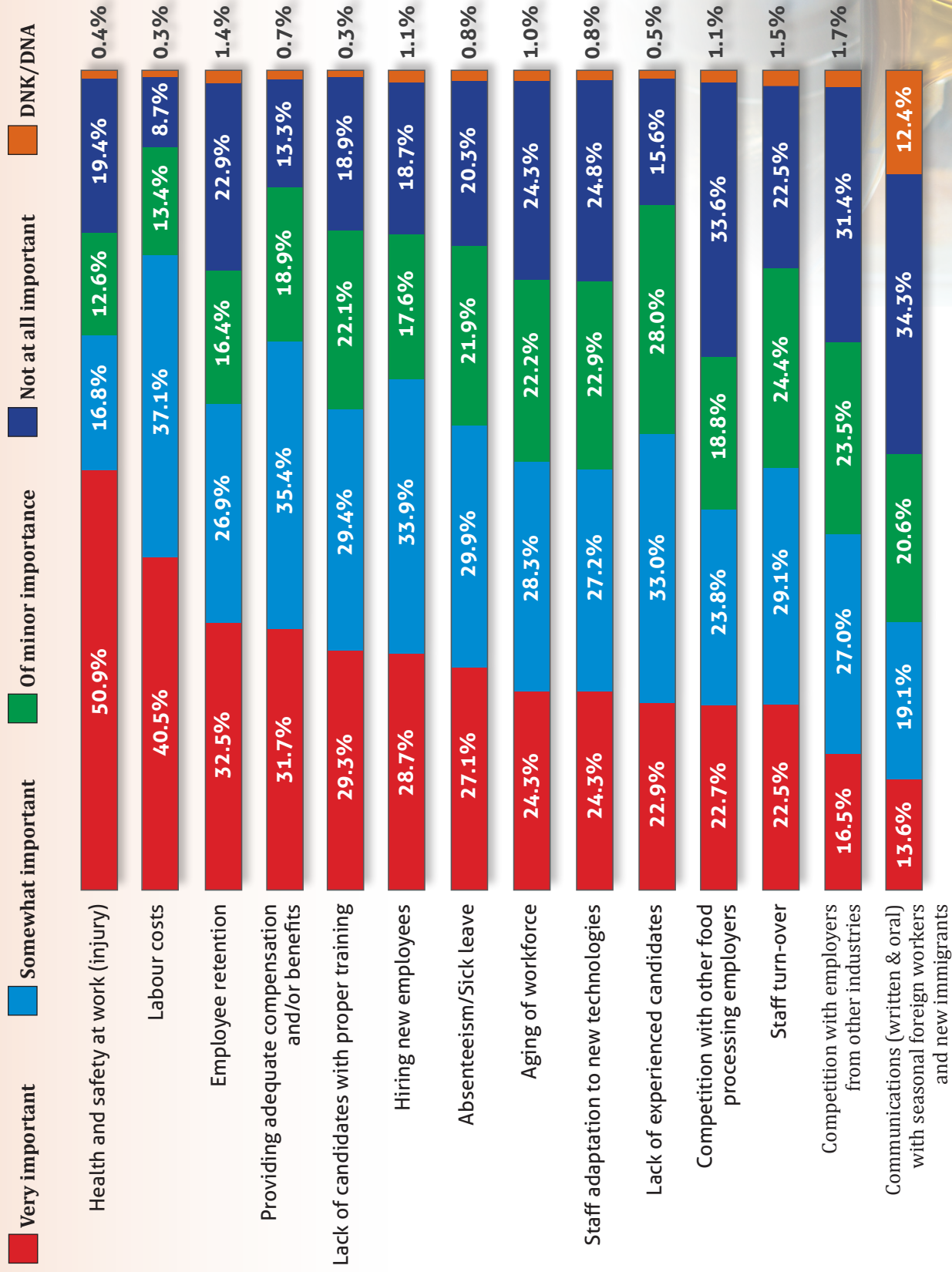


Figure 12: Which of the following human resource management practices do you currently use in your organization? (n=411)

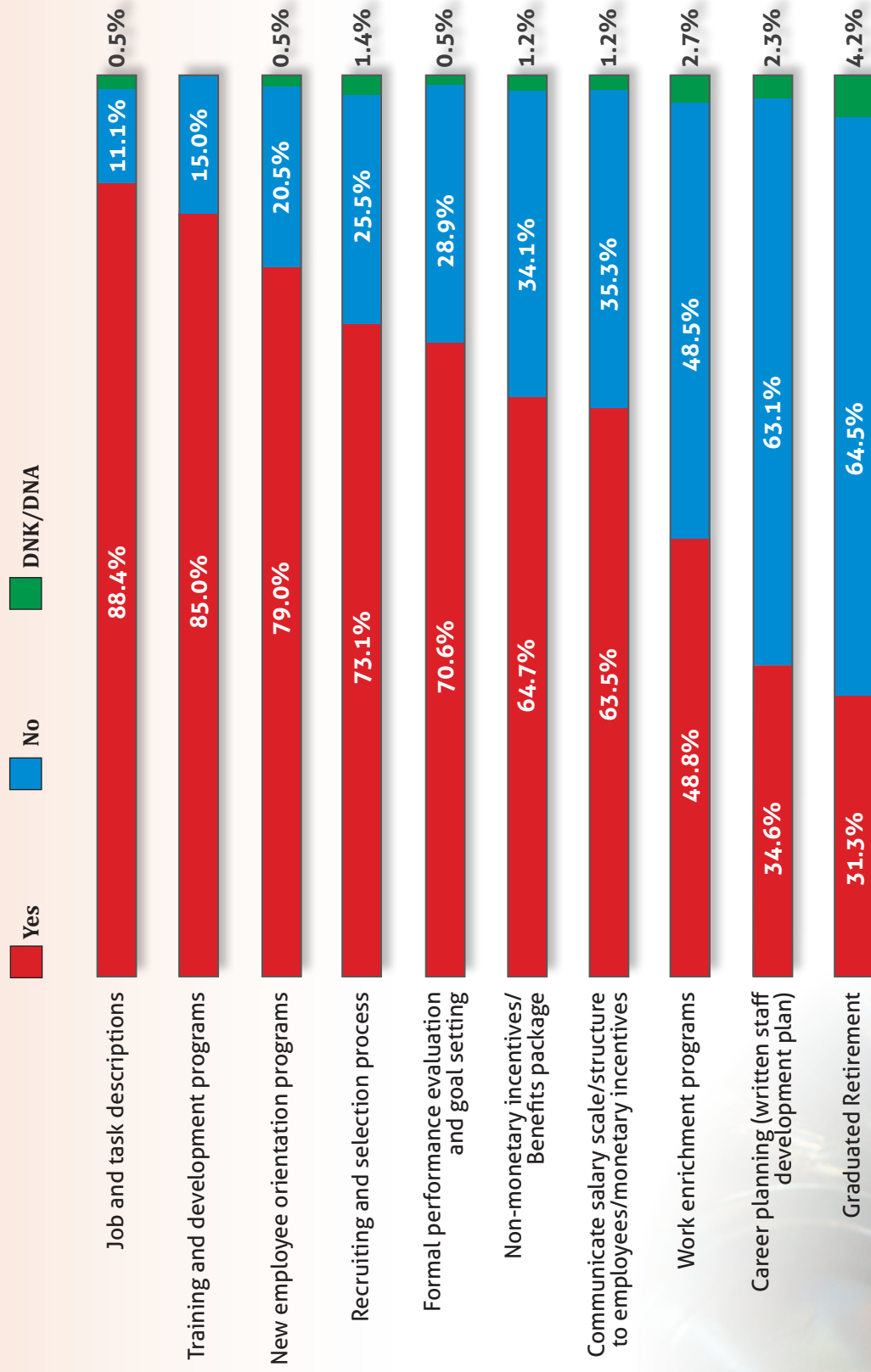
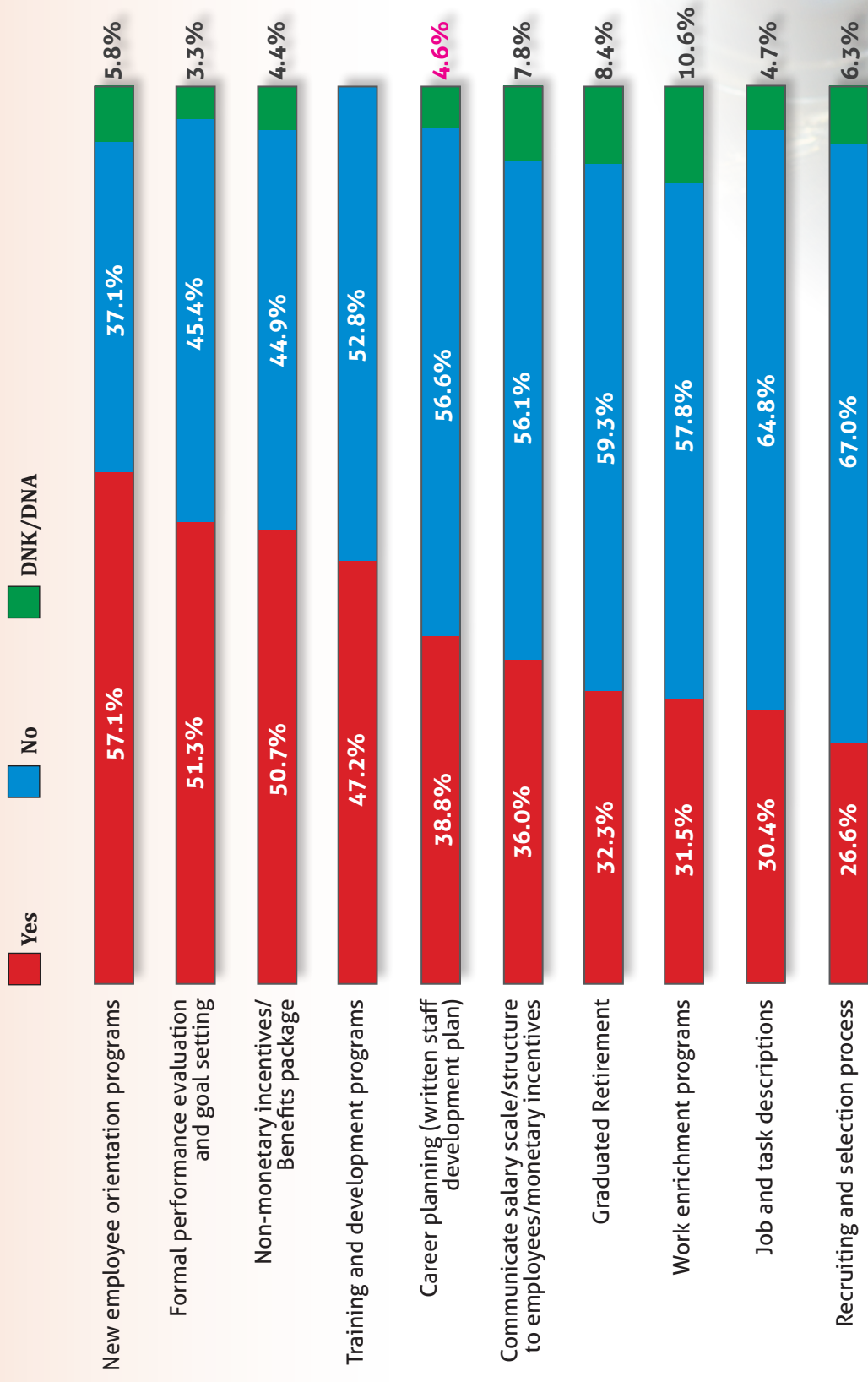


Figure 13: Would you consider this practice to be very important for future HR development in your organization*? (n=411)



* Among respondents who do not currently use this practice in their organization.

Figure 14: What are the main tools that you use to recruit employees? (n=411)

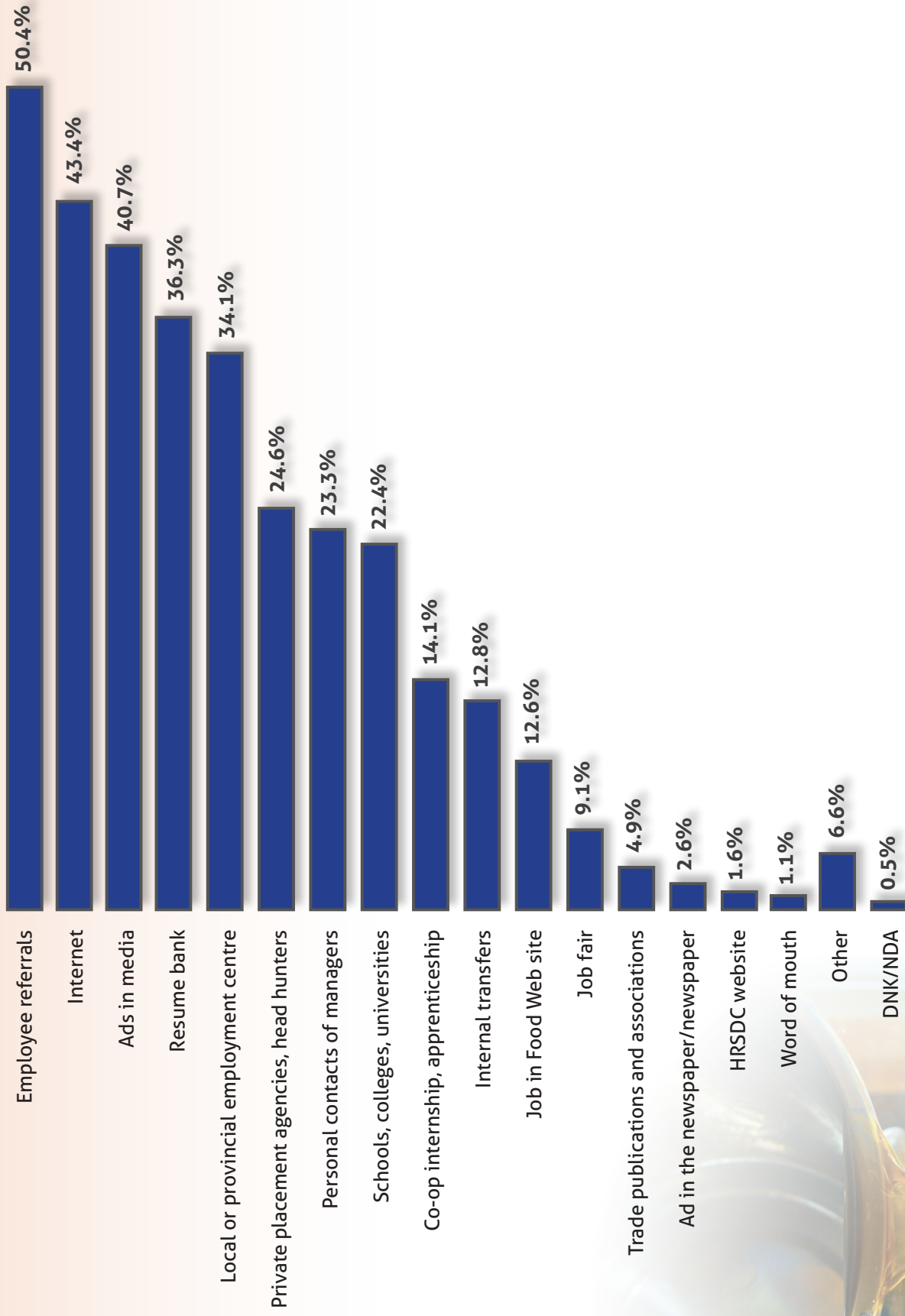


Figure 15: What incentive programs does your organization use to attract and retain staff? (n=411)

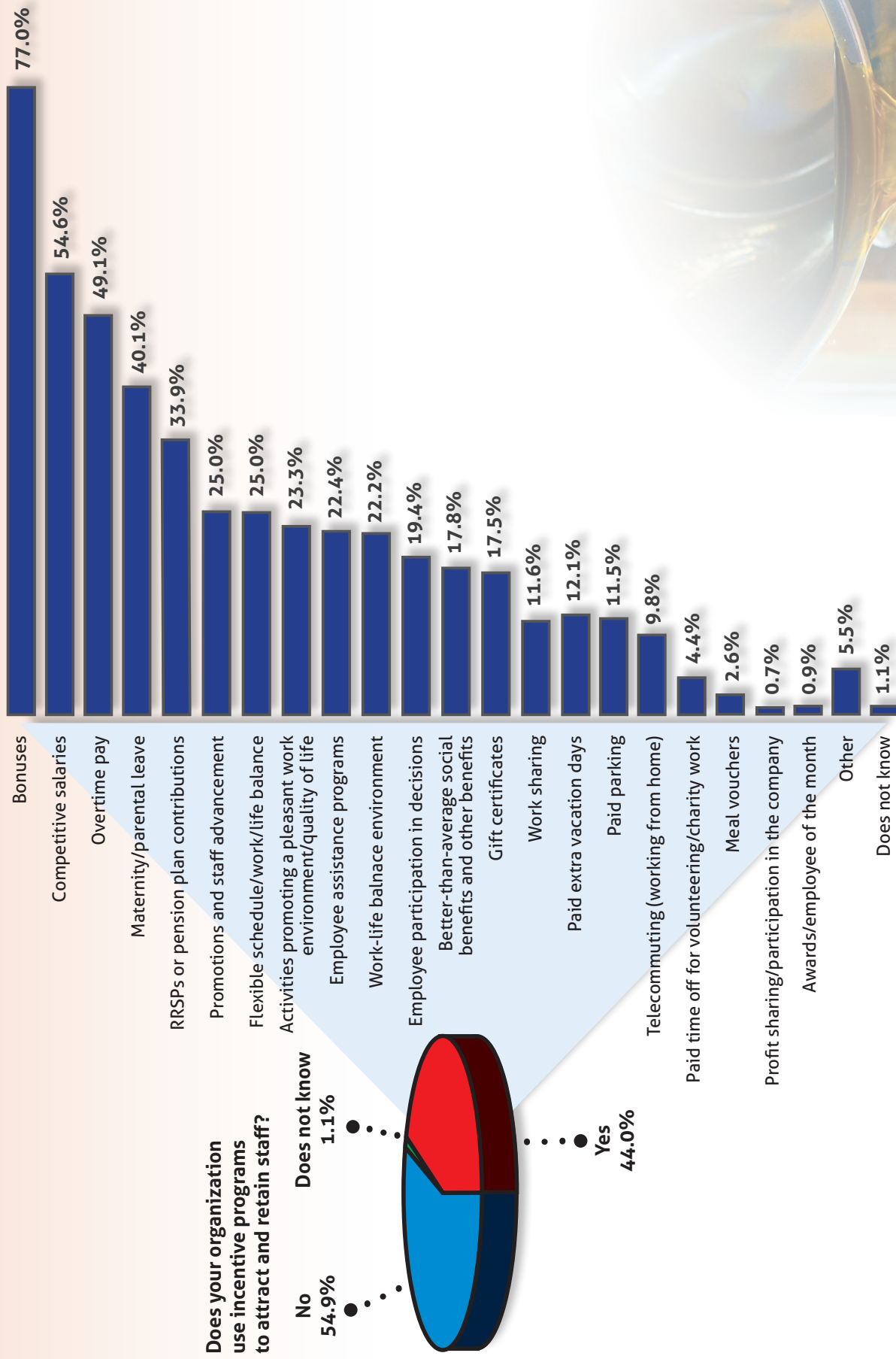


Figure 16: To fulfill your labour needs, have you recruited in the past, or are you currently recruiting? (n=411)

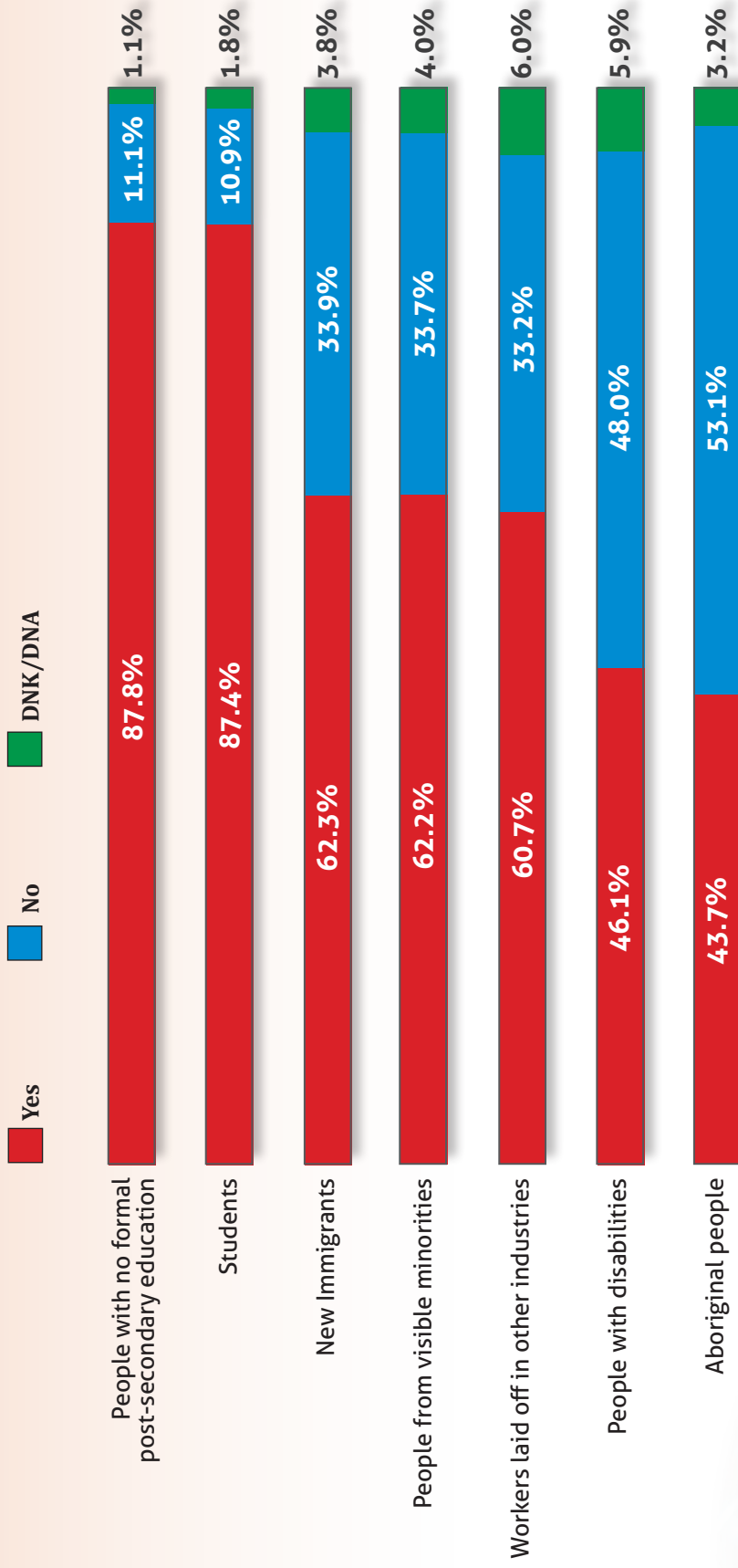


Figure 17: As an employer, which of the following tools do you currently use to meet your employees' development plan? (n=411)

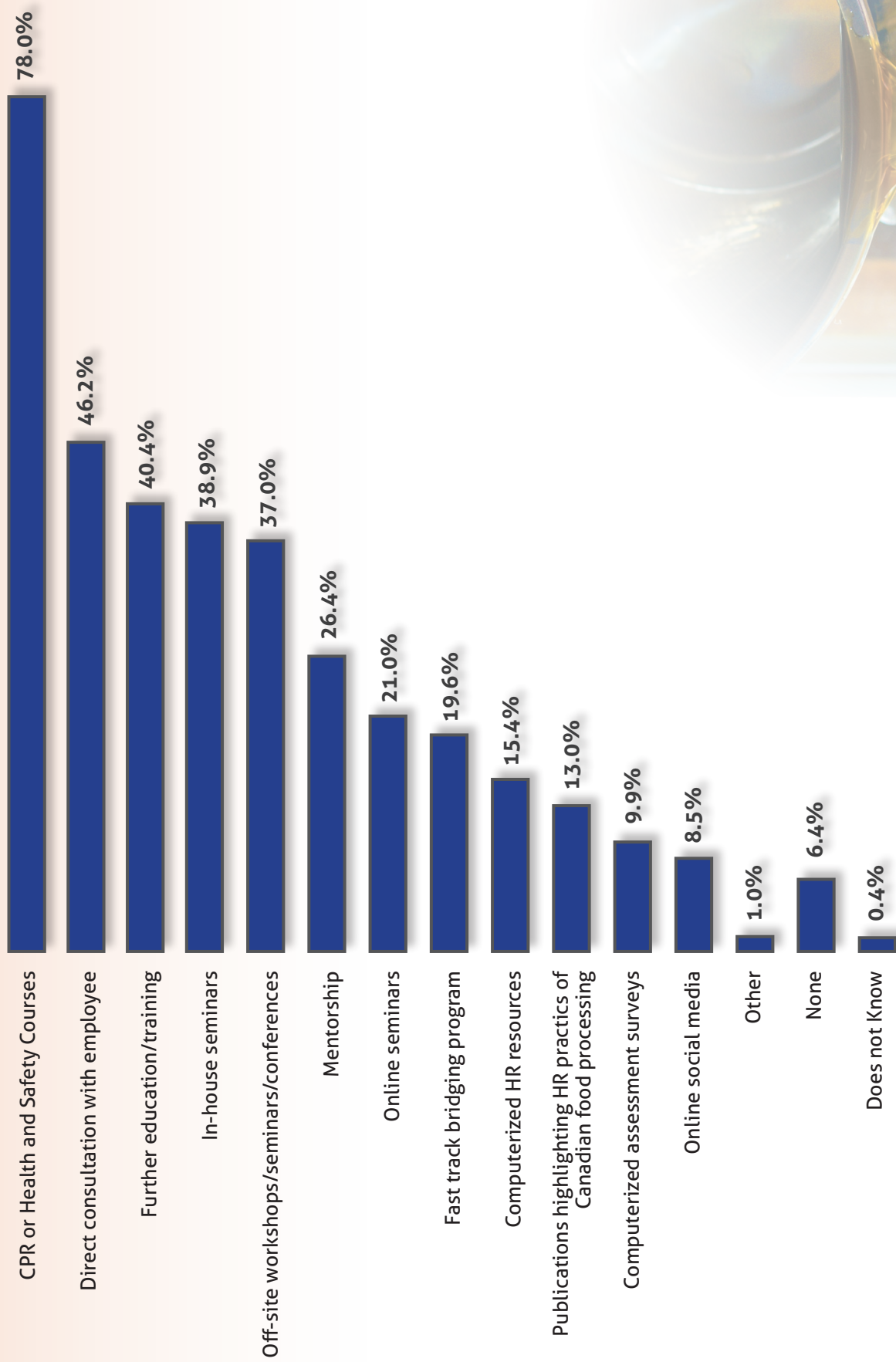


Figure 18: As an employer, which of the following tools would be of most use in the future to meet your employees' development plan? (n=411)

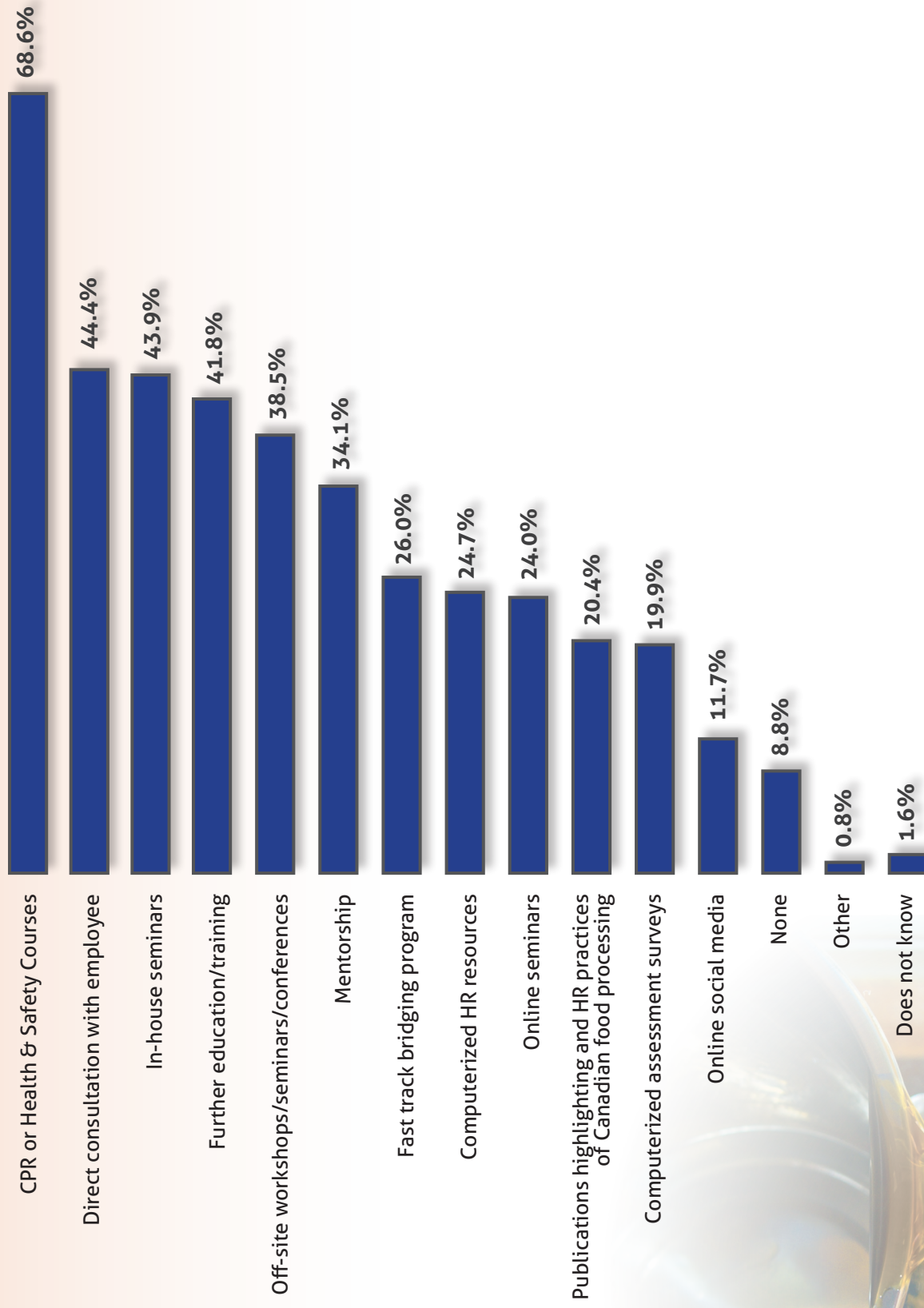


Figure 19: Compared to 2009, is the training budget for 2010 bigger, smaller or the same? (n=411)

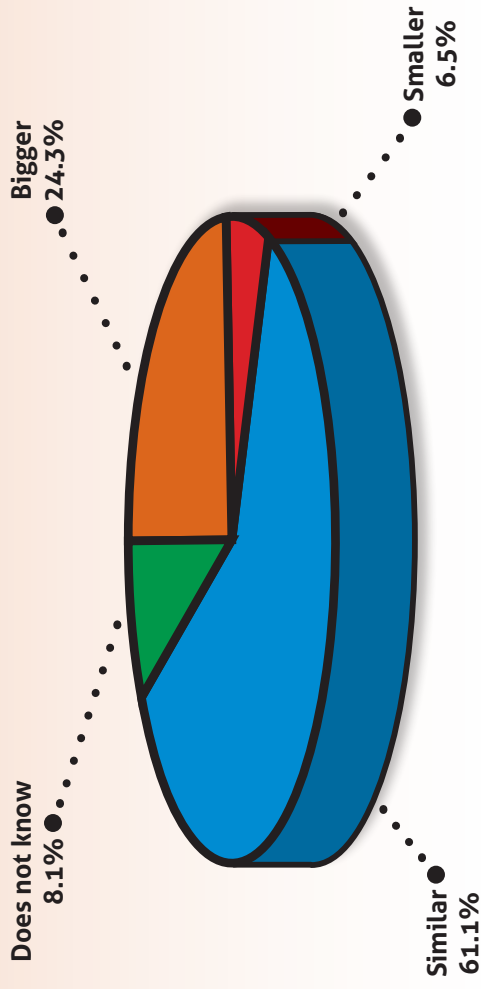


Figure 20: Over the next three years, do you expect the number of employees who will be trained to increase, remain stable or decrease compared to 2010? (n=411)

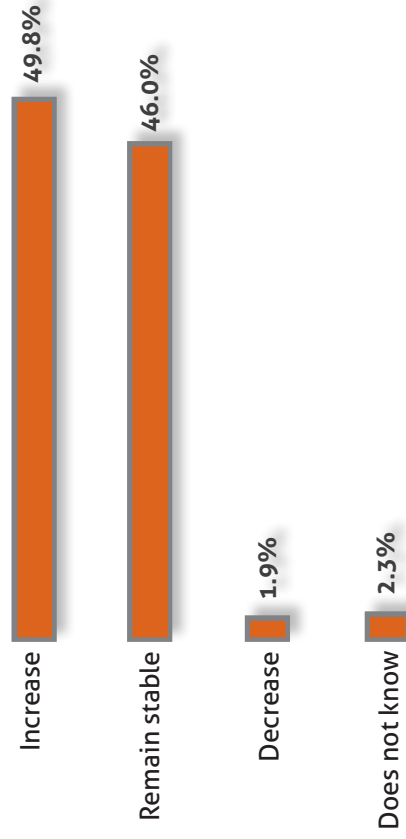


Figure 21: Over the next three years, do you expect the average number of training hours per employee to increase, remain stable or decrease compared to 2010? (n=411)

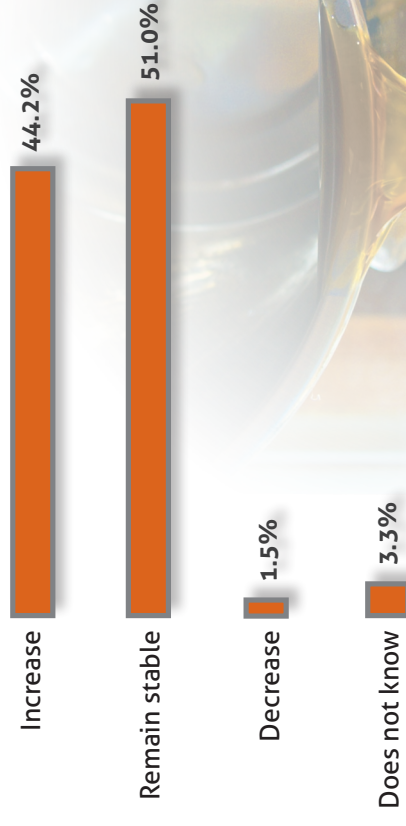


Figure 22: To what extent is your organization faced with each of the following training issues? (n=411)

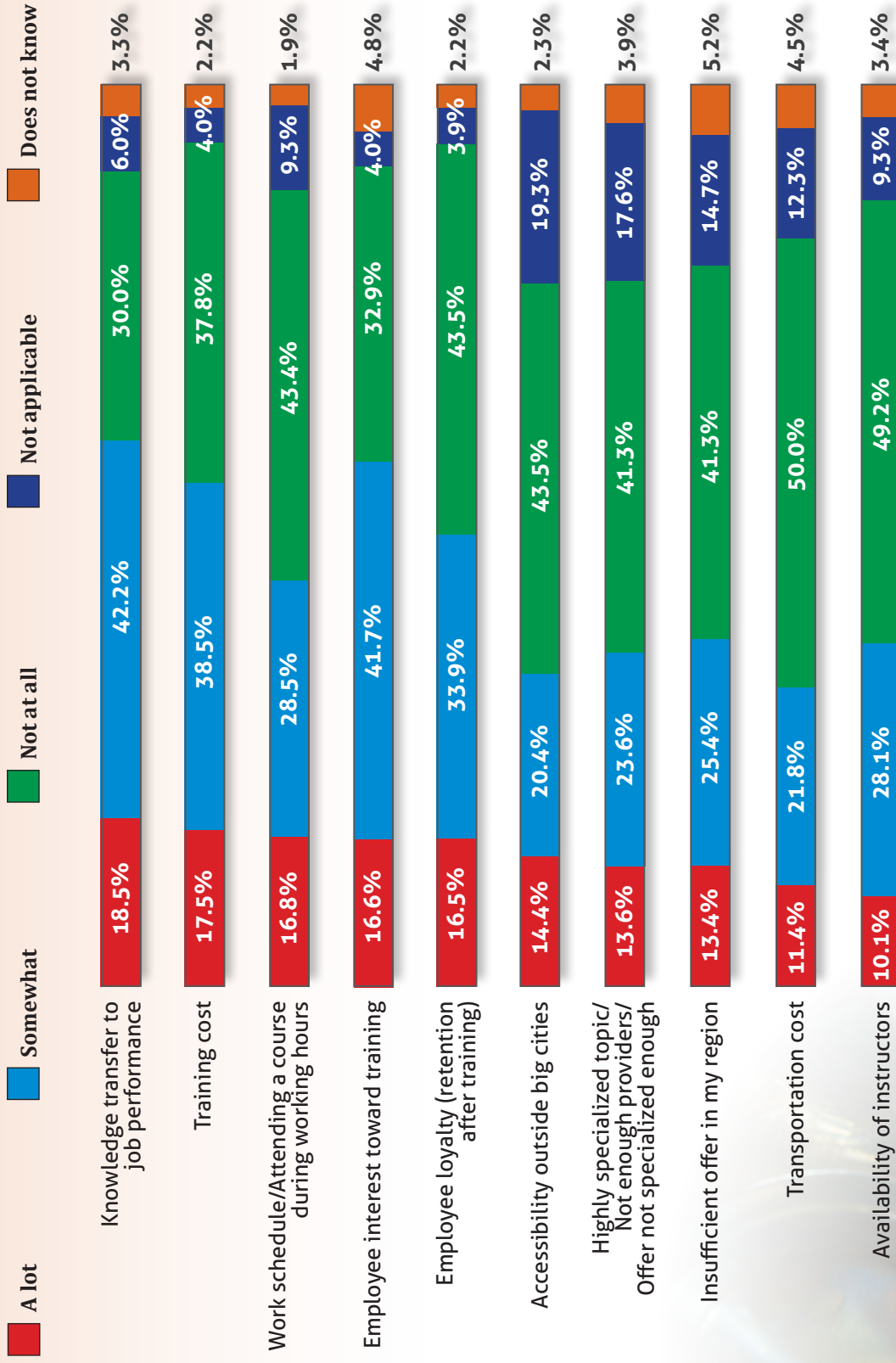


Figure 23: Is each of these a potential training topic in the areas of food and beverage processing industry? (n=411)

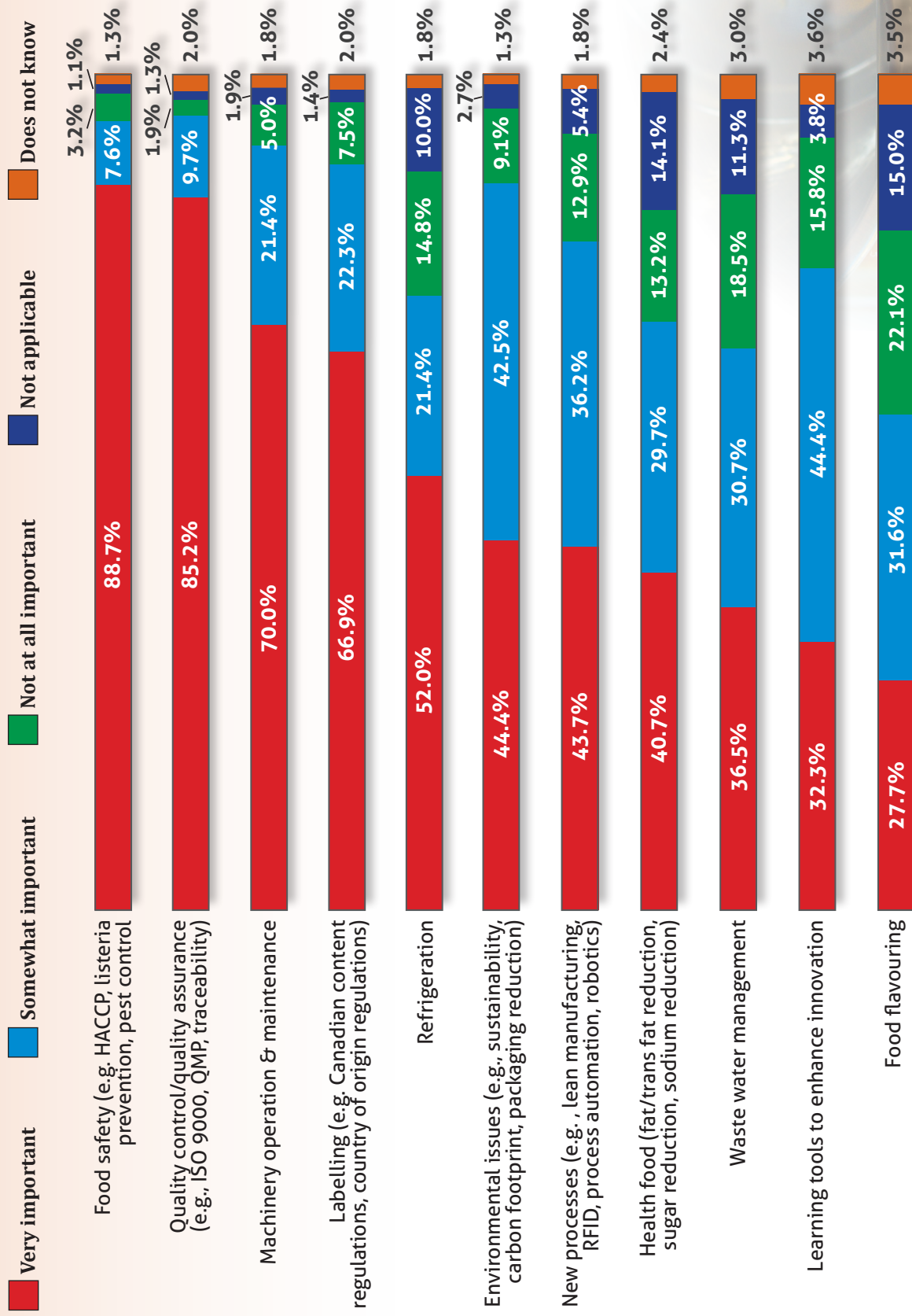


Table 37: Organizations' budget for training last year

	Canada (N=411)	Establishments (N=140)	Head Offices (N=271)
Less than \$5,000	36.9%	41.9%	34.2%
\$5,001 to \$10,000	23.1%	23.1%	23.2%
\$10,001 to \$50,000	17.1%	9.5%	21.0%
\$50,001 to \$100,000	5.0%	3.3%	6.0%
\$100,001 to \$500,000	3.4%	3.2%	3.5%
More than \$500,000	1.0%	0.5%	1.3%
Included in the operation budget (internal)	2.7%	2.5%	2.8%
DNK/DNA	10.8%	16.1%	8.1%

8

Hiring Expectations

Figure 24: For each of the following occupations, do you think the number of employees in your organization/ establishment will increase, remain stable or decrease over the next three years? (n=411)

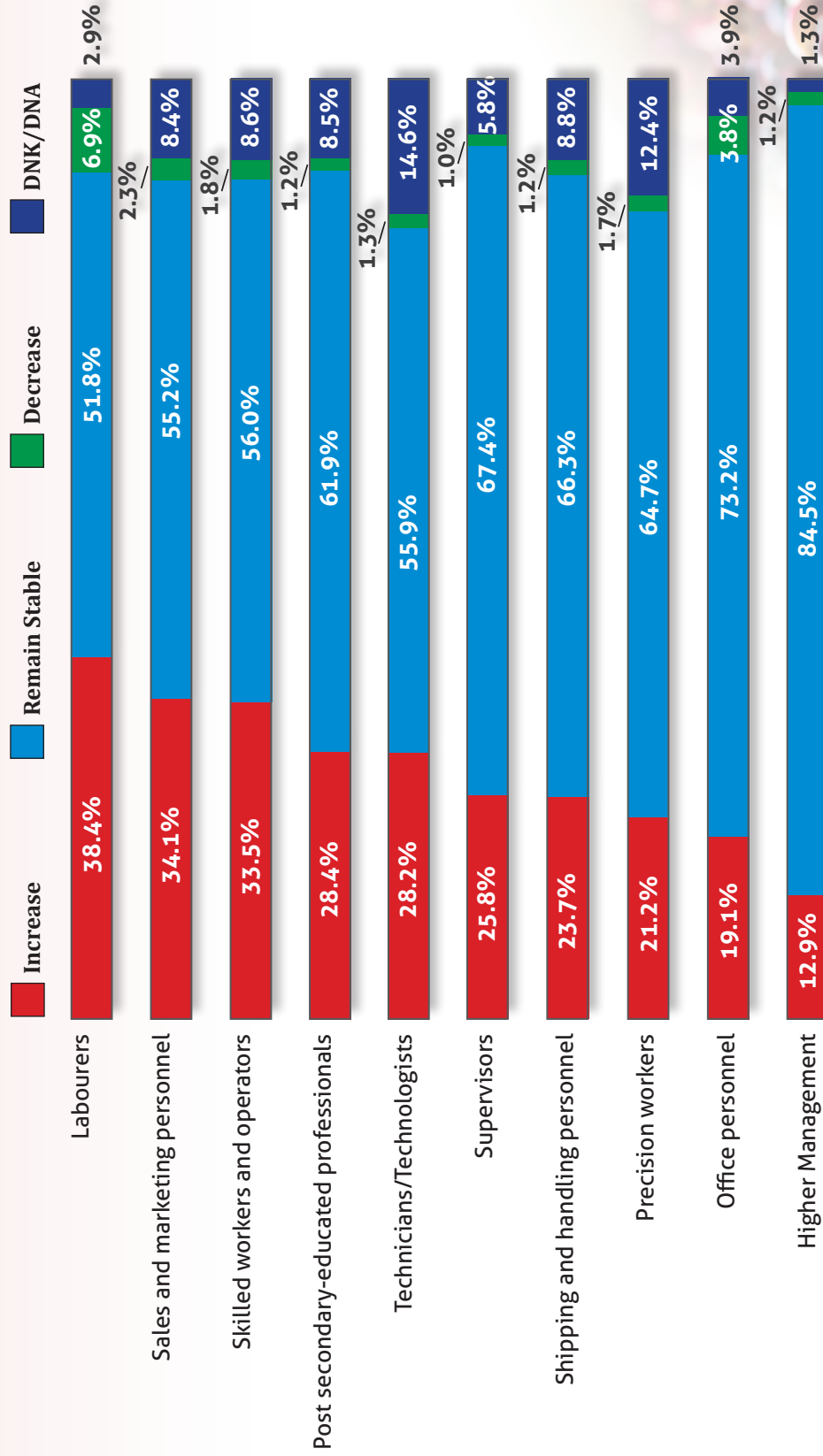


Table 38: How many employees do you expect to hire in the next three years? Distribution of answers by sub-sector (n=411)

Occupation	Sector										
	Total	Animal Food	Grain & Oilseed	Sugar & Confect.	F&Veg. Preserv. & Specialty Food	Dairy Prod.	Meat Prod.	Seafood Prod. Prep. & Pack.	Baker & Tortilla	Beverage	Other
Higher Management (e.g., CEO, President, General Manager, Vice-Presidents, Directors)	380	68	30	20	25	55	27	69	26	38	23
Post secondary-educated professionals (e.g., food scientists, researchers, product developers, engineers, plant managers)	758	96	37	19	86	35	76	72	222	84	30
Technicians/ Technologists (e.g., quality assurance technicians, food safety technicians)	412	88	5	16	52	26	46	24	88	36	32
Food and Beverage Processing Operational Staff											
Supervisors (e.g., foremen, coordinators, schedulers)	301	59	11	19	27	17	48	21	48	28	24
Precision workers (e.g., machinists, electricians, maintenance workers)	409	52	12	13	91	34	80	56	31	19	20

Table 38: How many employees do you expect to hire in the next three years? Distribution of answers by sub-sector (n=411) (con't)

Occupation	Sector										
	Total	Animal Food	Grain & Oilseed	Sugar & Confect.	F&Veg. Preserv. & Specialty Food	Dairy Prod.	Meat Prod.	Seafood Prod. Prep. & Pack.	Baker & Tortilla	Beverage	Other
Skilled workers and operators (e.g., butchers, meat cutters, bakers, blenders)	977	112	18	53	60	61	259	97	203	69	48
Labourers (e.g., production workers, line workers, general labour, helpers, handy men, packaging technicians, sanitation workers)	2,950	204	57	242	323	456	583	439	459	96	91
Other Staff											
Sales and marketing personnel (e.g., sales representatives, technical representatives, merchandisers, sales clerks)	508	139	7	11	12	33	42	29	103	92	42
Shipping and handling personnel (e.g., shippers, receivers, storekeepers, delivery drivers)	340	39	4	11	27	58	96	11	57	23	15

Table 38: How many employees do you expect to hire in the next three years? Distribution of answers by sub-sector (n=411) (con't)

Occupation	Sector										
	Total	Animal Food	Grain & Oilseed	Sugar & Confect.	F&Veg. Preserv. & Specialty Food	Dairy Prod.	Meat Prod.	Seafood Prod. Prep. & Pack.	Baker & Tortilla	Beverage	Other
Office personnel (e.g., administration, accounting, finance, purchasing, IT, Human Resources, etc.)	328	63	3	9	25	48	48	33	54	29	17
Other occupations	33	0	2	0	1	3	4	13	5	1	4
Total hirings (for the 338 organizations that responded (0 or more) for each occupation)⁴	6,147	904	185	241	689	791	1,250	738	728	327	293

⁴ This number differs from the arithmetic sums for each column (total = 7,396). The sums are not related to a definite number of respondents and cannot be used for further extrapolation.

Table 39: How many employees do you expect to hire in the next three years? Distribution of answers by region (n=411)

Type of Employees	Region						
	Total	Atlantic	Quebec	Ontario	Prairies	Alberta	British Columbia
Higher Management (e.g., CEO, President, General Manager, Vice-Presidents, Directors)	380	65	109	145	16	14	30
Post secondary-educated professionals (e.g., food scientists, researchers, product developers, engineers, plant managers)	758	74	154	371	43	39	75
Technicians/Technologists (e.g., quality assurance technicians, food safety technicians)	412	37	137	123	19	16	81
Food and Beverage Processing Operational Staff							
Supervisors (e.g., foremen, coordinators, schedulers)	301	22	83	83	27	25	61
Precision workers (e.g., machinists, electricians, maintenance workers)	409	38	55	206	16	31	62
Skilled workers and operators (e.g., butchers, meat cutters, bakers, blenders)	977	125	292	252	80	42	187
Labourers (e.g., production workers, line workers, general labour, helpers, handy men, packaging technicians, sanitation workers)	2,950	695	727	499	163	310	556

**Table 39: How many employees do you expect to hire in the next three years? Distribution of answers by region (n=411)
(con't)**

Type of Employees	Region						
	Total	Atlantic	Quebec	Ontario	Prairies	Alberta	British Columbia
Other Staff							
Sales and marketing personnel (e.g., sales representatives, technical representatives, merchandisers, sales clerks)	508	46	161	154	33	30	83
Shipping and handling personnel (e.g., shippers, receivers, storekeepers, delivery drivers)	340	21	96	75	183	40	89
Office personnel (e.g., administration, accounting, finance, purchasing, IT, Human Resources, etc.)	328	35	96	108	21	33	35
Other occupations	33	15	4	8	0	3	3
Total hirings (for the 338 organizations that responded (0 or more) for each occupation) ⁵	6,147	1,111	1,677	1,787	251	412	909

⁵ This number differs from the arithmetic sums for each column (total = 7,396). The sums are not related to a definite number of respondents and cannot be used for further extrapolation.

Table 40: Projected hirings by occupation

Occupation	%	Total
Higher Management (<i>e.g., CEO, President, General Manager, Vice-Presidents, Directors</i>)	5.1%	1,101
Post secondary-educated professionals (<i>e.g., food scientists, researchers, product developers, engineers, plant managers</i>)	10.2%	2,197
Technicians/Technologists (<i>e.g., quality assurance technicians, food safety technicians</i>)	5.6%	1,196
Supervisors (<i>e.g., foremen, coordinators, schedulers</i>)	4.1%	872
Precision workers (<i>e.g., machinists, electricians, maintenance workers</i>)	5.5%	1,185
Skilled workers and operators (<i>e.g., butchers, meat cutters, bakers, blenders</i>)	13.2%	2,831
Labourers (<i>e.g., production workers, line workers, general labour, helpers, handy men, packaging technicians, sanitation workers</i>)	39.9%	8,549
Sales and marketing personnel (<i>e.g., sales representatives, technical representatives, merchandisers, sales clerks</i>)	6.9%	1,474
Shipping and handling personnel (<i>e.g., shippers, receivers, storekeepers, delivery drivers</i>)	4.6%	985
Office personnel (<i>e.g., administration, accounting, finance, purchasing, IT, Human Resources, etc.</i>)	4.4%	951
Other occupations	0.4%	96
Total hirings	100%	21,437

Figure 25: For each of these occupations, are you encountering difficulties now in hiring qualified candidates? (n=411)

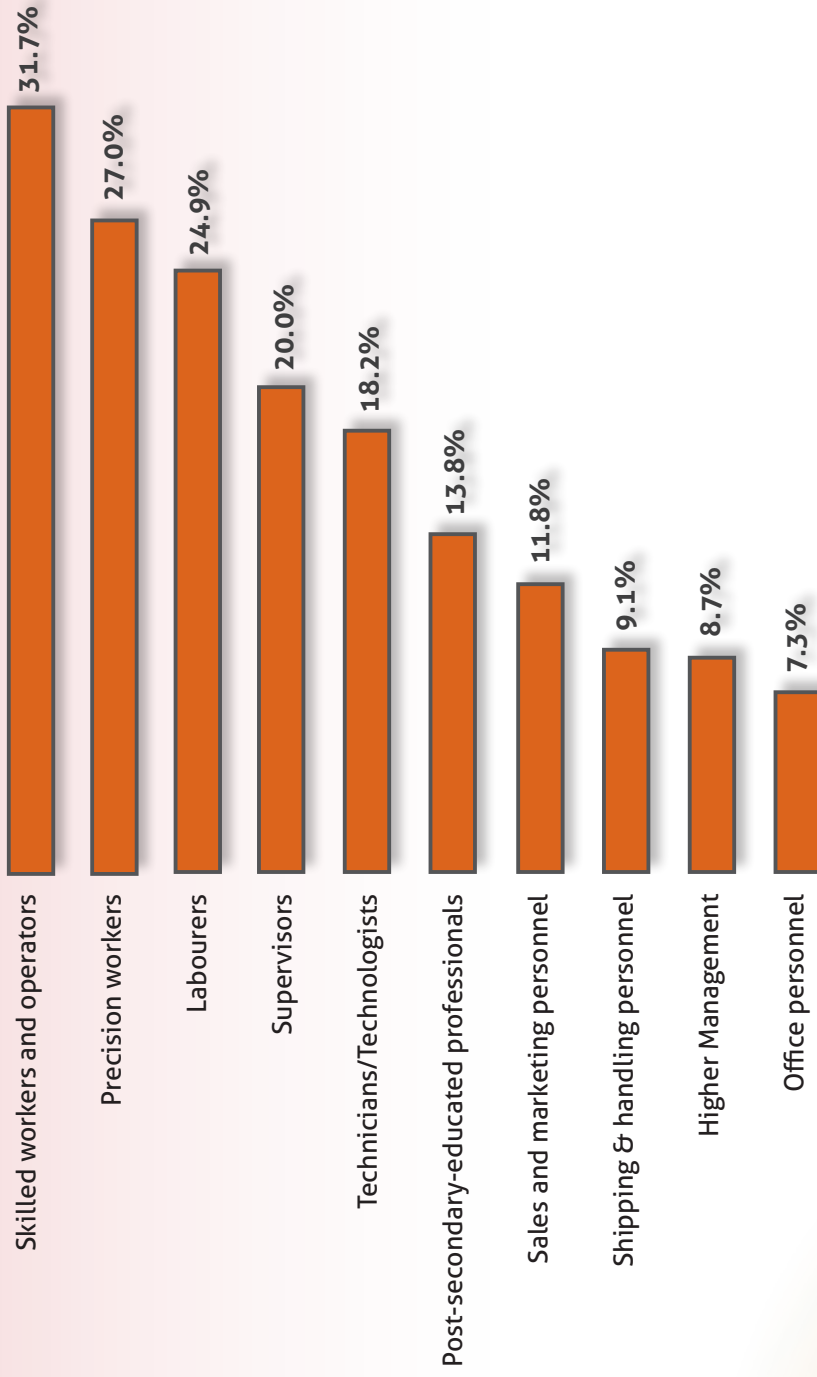


Figure 26: For each of these occupations, do you expect to encounter difficulties in hiring qualified candidates in the next five years? (n=411)

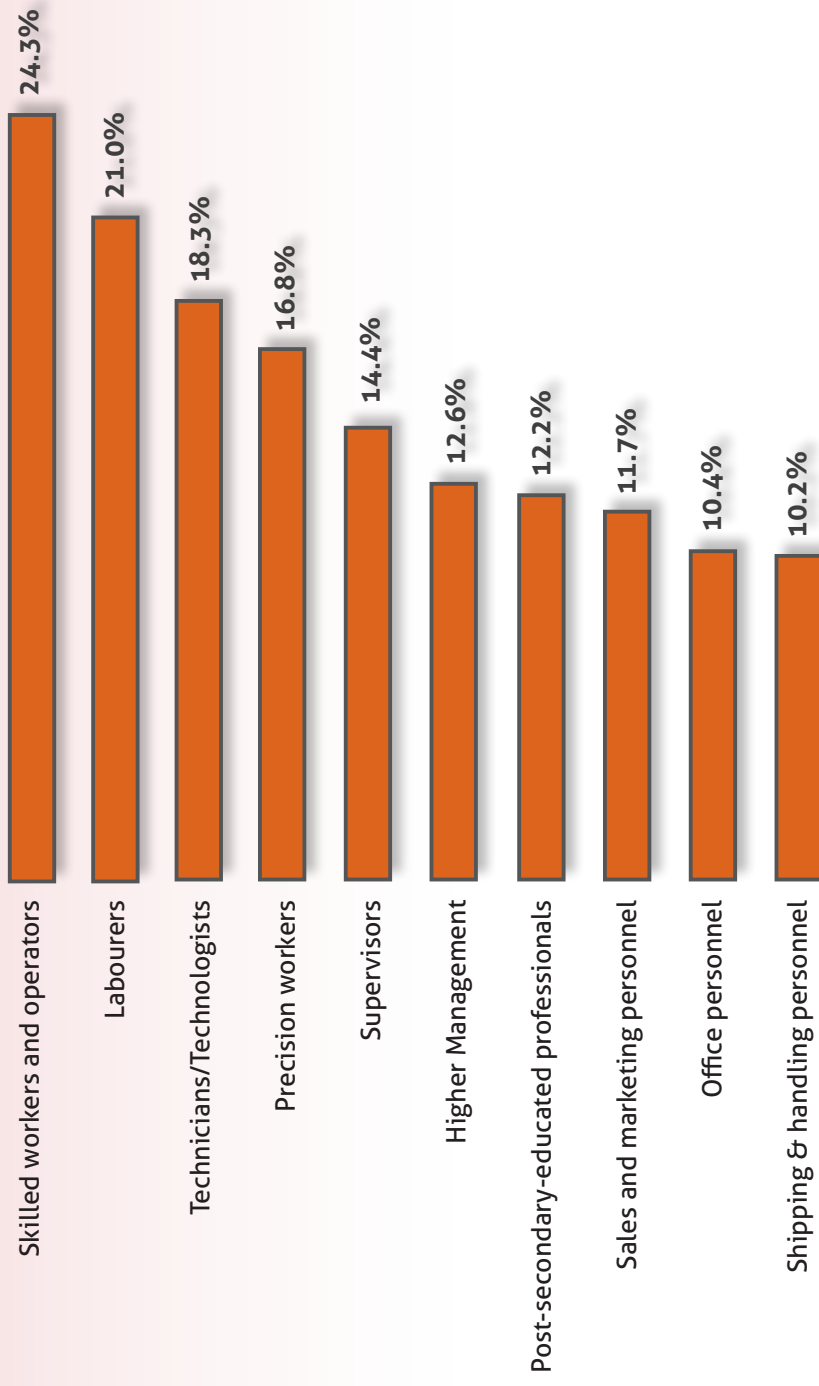


Figure 27: Were you previously aware of the food processing human resource council (FPHRC)? (n=411)

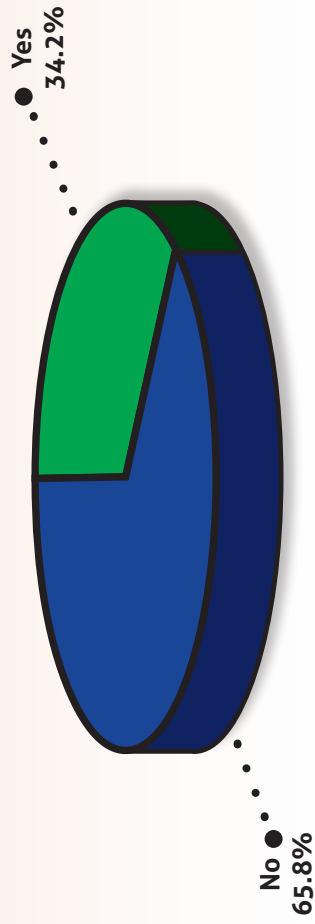


Figure 28: What would your level of interest be in the developments of national occupation standards in the food processing sector? (n=411)

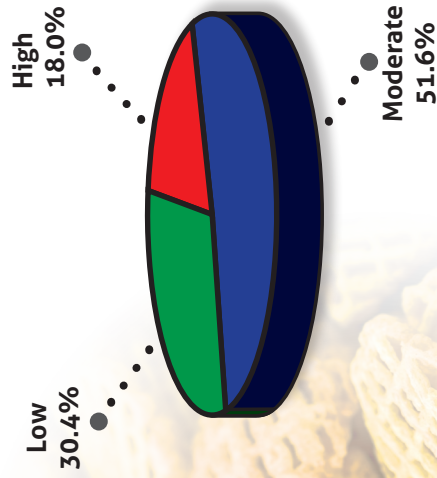
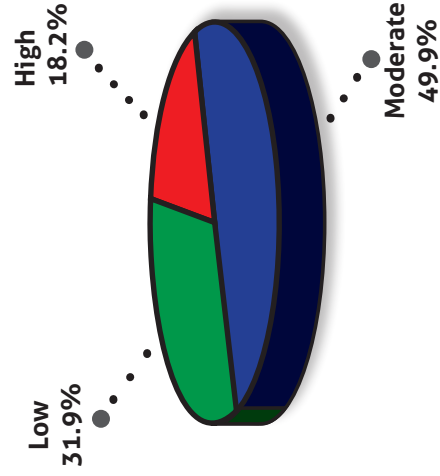


Figure 29: What would your level of interest be in the development of a national certification program by the FPHRC? (n=411)



Notes





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