

FOOD PROCESSING SKILLS CANADA

# OTHER FOODS PROCESSING SURVEY REPORT

2020



## SECURING CANADA'S **OTHER FOOD PROCESSING** WORKFORCE

**Real Challenges. Practical Solutions.  
Fresh Perspectives.**



**Canada**  
This program is funded by the Government of  
Canada's Sectoral Business Program

Available online at [www.fpsc-ctac.com](http://www.fpsc-ctac.com)

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## ABOUT US

**Food Processing Skills Canada (FPSC)** is the food and beverage manufacturing industry's workforce development organization. As a non-profit, located in Ottawa with representatives across Canada, we support food and beverage manufacturing businesses from coast to coast in developing skilled and professional employees and workplace environments.

Our work directly and positively impacts industry talent attraction, workforce retention and employment culture. We care about assisting the industry in finding, training and retaining the very best people for the job. Through our partnerships with industry, associations, educators and all levels of governments in Canada, FPSC has developed valuable resources for the sector including the **Food Skills Library™**, **Canadian Food Processors Institute™**, **FoodCert™** and Labour Market Information Reports.

Survey conducted by Ipsos, analysis conducted by Prism Economics and Analysis

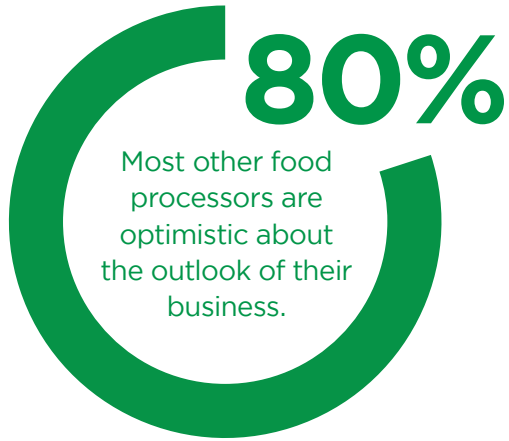
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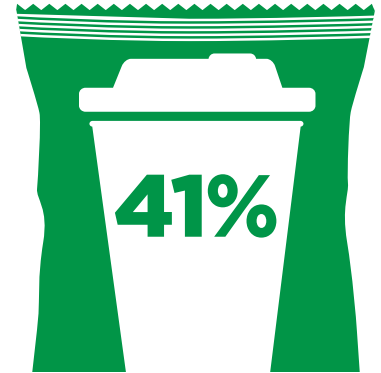


# EXECUTIVE SUMMARY



**34%**

Approximately one-third (34%) of Canada's other food processors reported not being able to fill positions or chronic recruitment challenges.



41% of other food processors reported an increase in recruitment challenges over the past year, with 18% indicating a significant increase.



The most prominent HR challenge identified in the sector is applicants with too high compensation expectations, viewed as at least somewhat of a challenge by 53% of respondents.



The average hourly starting wage for entry level front-line workers is **\$15.96**

**\$18,455\***



Other food processors reported an average training budget of \$18,455 annually, equating to approximately \$410 per paid position

\*per annum

Two-thirds of other food processors cite production related positions as the most difficult to recruit for, while kitchen and administrative roles were identified as the most difficult to recruit for by nearly a quarter (23%) of processors.





**14% of  
processors**

reported they saw no perceived  
threat to their business due  
to COVID-19, the highest  
concentration across food  
and beverage sectors

## How we did it

**126 Other Food processors** responded to this survey and participated either online or by telephone between February and May 2020. The extended time in field was due to COVID -19 pandemic. It wasn't possible to ask as many questions in the phone version of the survey as opposed to the online version. As such the number of respondents is indicated by N for every chart and ranges from 22 to 100 depending on the question.

### Who we surveyed:

N= 126  
Other Food processing employers surveyed

Region	Survey Responses
BC	21
AB	15
SK/MB	9
ON	28
QC	47
Atlantic Canada	5
Not Specified	1
<b>TOTAL</b>	<b>126</b>

The majority of the questions in this report were asked to food and beverage processors across the country, there were 740 responses in total to the survey. The findings of the overall survey are available on the FPSC website (<https://fpsc-ctac.com/reports/>) in the report titled:

2020 Labour Market Information Survey Report – Canadian Food & Beverage Manufacturing Industry Report



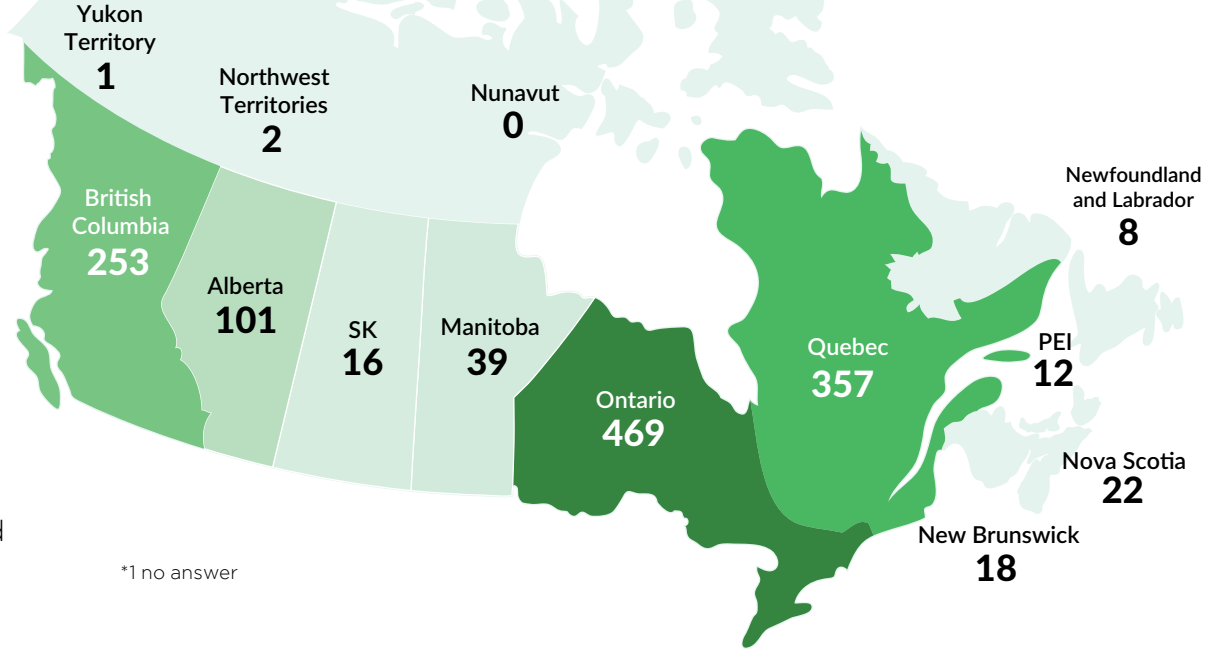




## Overview

- ① Industry Profile
- ① Workforce Profile
- ① Workforce Availability and Recruitment
- ① Wages and Benefits
- ① Training and Skills Development
- ① Impact of Covid-19

## Total Other Food Establishments by Province



### Who we surveyed:



N= 126\*  
Other Food processing employers surveyed



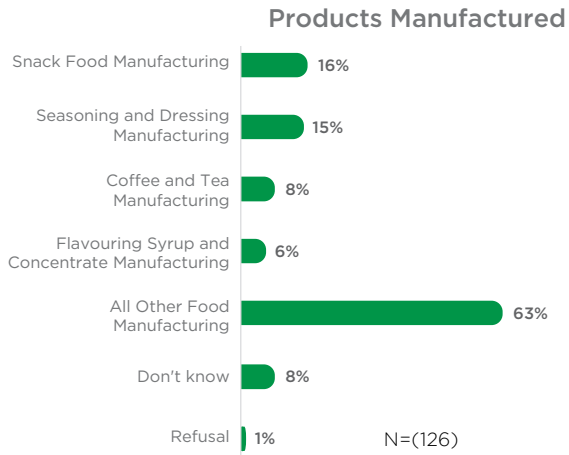
Quebec had the largest concentration of Other Food processors

\*1 no answer

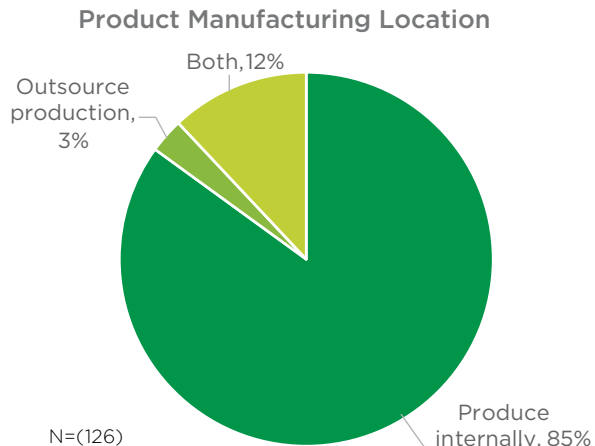
## In a Snapshot



The majority of facilities (63%) manufacture other food products that are not specified, while approximately one in six facilities produce snack food (16%) and seasoning and dressing (15%)



The vast majority of facilities (85%) produce products in Canada, while 12% of facilities produce products both domestically and abroad






# OTHER FOOD PROCESSING INDUSTRY PROFILE



## Employment Size

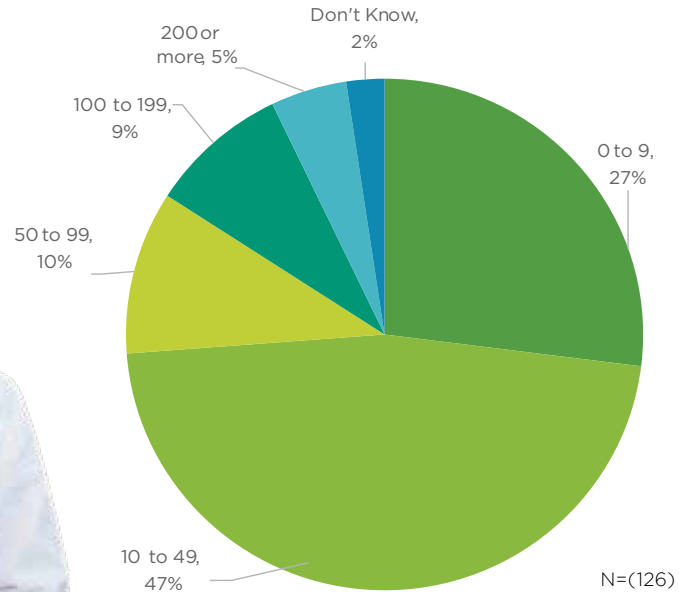
### Other Food processors mainly operate small to medium size facilities:

-  The “average” processor in Canada has 45 paid positions, including both filled and vacant positions
-  74% of processors reported fewer than 50 paid positions at their facility
-  5% of processors reported 200 or more paid positions are their facility

\* Includes both filled and vacant positions



### Size of Processing Facilities, Paid Positions\*



\* Includes both filled and vacant positions



## Employment Size



The “average” Other Food processor has 45 paid positions at their facility



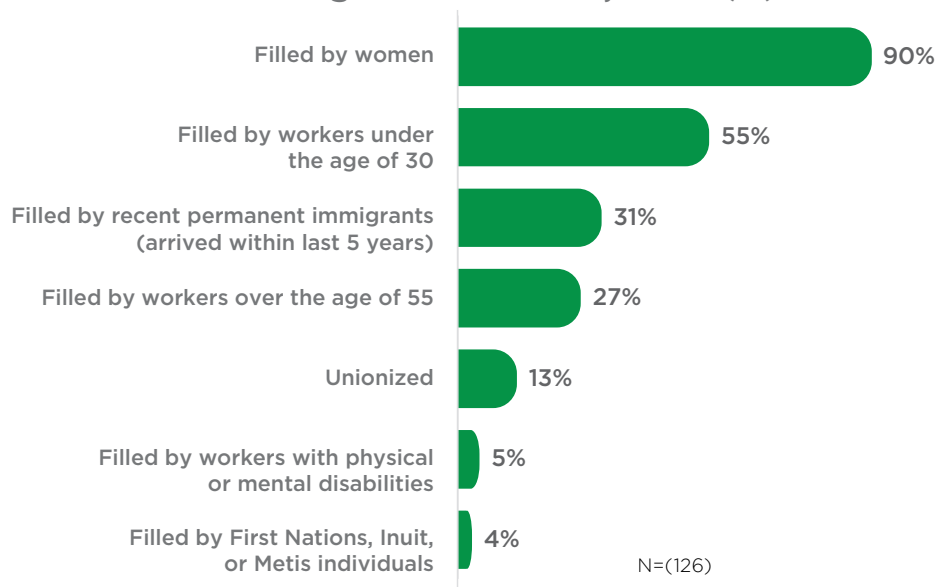
On average, more than 90% of paid positions are filled by women



On average, a significantly lower portion are unionized (13%), filled by workers with disabilities (5%) or Indigenous Peoples (3%)

**Question:** On average, in 2019 how many paid positions were...?

### Average Paid Positions, Share (%)



A woman in a white lab coat and blue hairnet is pointing at a control panel in a food processing facility. Another woman in a white lab coat and blue hairnet is visible in the background, also working at a control panel. The scene is brightly lit, suggesting a clean and professional environment.

**On average, more than  
of paid positions are  
filled by women**

**90%**

## Employment by Occupation



Sanitation and production workers were also reported as common positions in the sector




“ On average, warehouse workers account for the highest number of paid positions. ”


# OTHER FOOD PROCESSING WORKFORCE PROFILE

Occupation	Average # of People Employed
Warehouse worker	150
Sanitation	52
Production	32.7
Shipping/receiving clerk	16.6
Packing clerk	15
Entry Level General laborers	13
Front desk clerk	12
Certified Bakers (With Cert of Qualification)	10
Chefs /Cooks	8.3
Retail Salespersons	8
Maintenance worker	7
Supply chain/logistics	5.8
Supervisor/team leader	5.5
Marketing	5.5
Food science	5
Kitchen helper	5
Skilled/Semiskilled Process control and machine operators	3.8
Cake decorator	3
Pastry chef	3
Quality Control and Assurance	1.9
Delivery drivers	1.5
Management, Finance and Administration	1.3
Production/operations manager	1.2
Other	10.6

N= (Varies)

## Highest level of Education Required

 For many positions, only a high school diploma is required

 For other positions, including quality assurance; supply chain; production manager; food science; management, finance and administration; marketing; recruiter; and retail sales, a university degree is required

**““ Most processors require higher education for quality assurance; supply chain; production manager; food science; management, finance and administration; marketing; recruiter; and retail sales. ””**





# OTHER FOOD PROCESSING WORKFORCE PROFILE

	High School Diploma	College Diploma/ Trade School	University Undergraduate Degree	University Post Degree	Experience/ past training in field	Certificate of Qualification - skilled trades	Other	None	Not Applicable	Don't Know
Warehouse worker	100%	--	--	--	--	--	--	--	--	-
Cake decorator	100%	--	--	--	--	--	--	--	--	-
Kitchen helper	100%	--	--	--	--	--	--	--	--	-
Front desk clerk	100%	--	--	--	--	--	--	--	--	-
Packing clerk	67%	--	--	--	--	--	--	33%	--	--
Shipping/receiving clerk	60%	--	--	--	--	--	--	--	40%	-
Production	56%	11%	6%	--	--	--	--	17%	6%	6%
Skilled/Semi-skilled Process control and machine operators	50%	21%	--	--	-7	%	14%	7%	--	--
Entry Level General laborers	50%	-	17%	--	--	--	--	17%	17%	-
Delivery drivers	50%	--	--	--	--	-	50%	--	--	-
Sanitation	50%	--	--	--	--	--	--	-	50%	-
Chefs / Cooks	40%	40%	--	--	--	--	--	--	-	20%
Certified Bakers (With Cert of Qualification)	33%	67%	--	--	--	--	--	--	--	--
Supervisor/ team leader	29%	29%	29%	-	14%	--	--	--	--	-
Quality Control and Assurance	-	17%	58%	17%	-8	%-	--	--	--	-
Maintenance worker	-	75%	--	--	-	25%	--	--	--	--
Supply chain/ logistics	-	40%	60%	--	--	--	--	--	--	-
Production/ operations manager	-	40%	60%	--	--	--	--	--	--	-
Food science	--	--	100%	--	--	--	--	--	--	-
Apprentice Bakers/ assistant baker	--	--	--	--	--	--	-	100%	--	--
Pastry chef	-	100%	--	--	--	--	--	--	--	--
Butcher/ Meat Cutter	--	--	--	--	--	--	100%	--	--	-
Management, Finance and Administration	-	22%	56%	11%	--	--	11%	--	--	-
Marketing	-	25%	50%	--	--	--	--	-	25%	-
Recruiter	--	--	50%	50%	--	--	--	--	--	--
Retail Salespersons	--	--	60%	-	20%	--	--	20%	--	--
Other	32%	14%	18%	9%	5%	--	--	18%	5%	-
Don't know	50%	--	--	--	--	--	--	--	50%	-

N= (Varies)

## Business Outlook

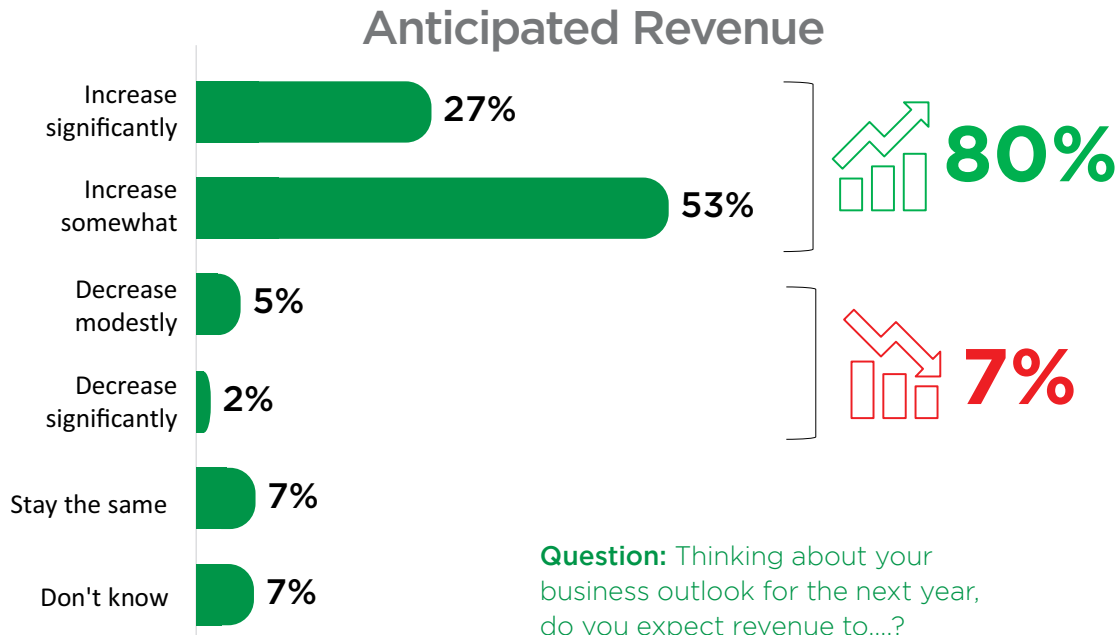


Other Food processors are optimistic about the outlook of their business, as most (80%) anticipate an increase in revenue over the next year



7% anticipate revenue will either decrease or remain unchanged over the next year

N= (60)



**Question:** Thinking about your business outlook for the next year, do you expect revenue to...?

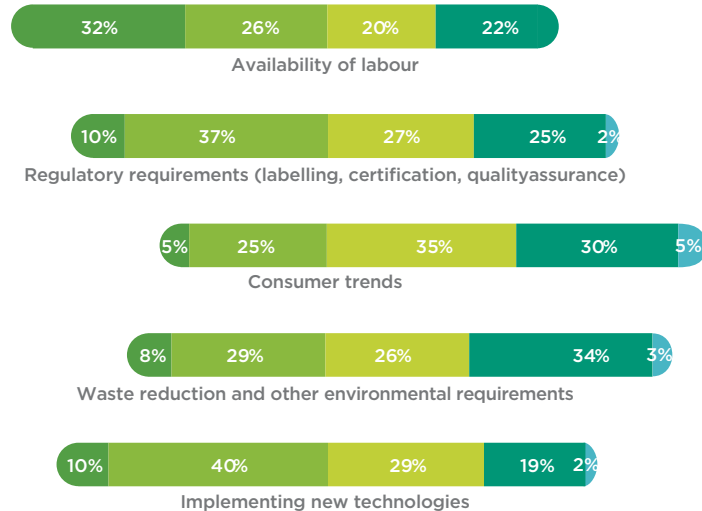
## Business Challenges



The availability of labour is the most significant business challenge within the industry, as approximately six-in-ten (58%) Other Food processors identified this as at least somewhat of a challenge



Implementing new technologies (50%) and regulatory requirements (47%) were also viewed as challenges by a large share of processors



■ Extreme challenge ■ Somewhat of a challenge ■ A little bit of a challenge ■ Not at all a challenge ■ Don't Know

**Question:** How would you rate the following in terms of their impact on your business....?

## Recruitment Challenges



29% reported experiencing occasional or seasonal challenges



All together, 63% report some form of challenges recruiting or retaining qualified workers.



Approximately one-third reported experiencing no challenges recruiting or retaining workers

**“ Approximately one-third (34%) of Canada’s Other Food processors reported not being able to fill positions or chronic recruitment challenges. ”**



## Workforce Availability

17%

Experiencing immediate and persistent challenges throughout the year recruiting and retaining qualified workers and cannot fill vacant positions

17%

Experiencing ongoing challenges recruiting or retaining qualified workers to successfully fill positions

29%

Experiencing occasional or seasonal challenges recruiting or retaining qualified workers. Cannot fill vacancies during peak periods

33%

Experiencing no significant challenges in recruiting or retaining qualified workers

4%

Don't Know

**Question:** How would you describe the general availability of workers you need?

N=(126)



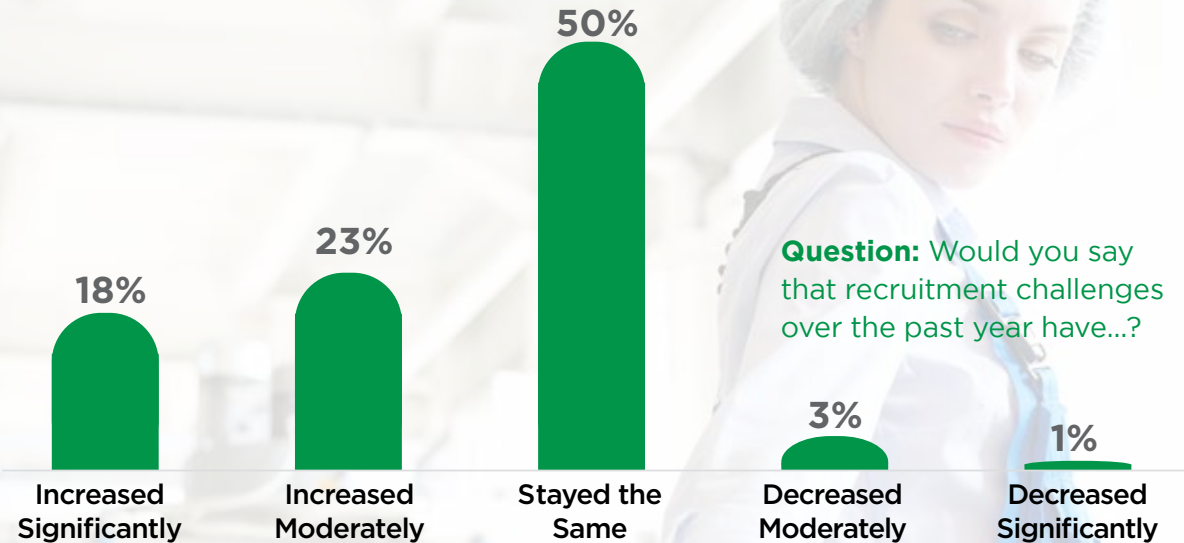
## Recruitment Challenges



The majority of processors (50%) reported these challenges have remained constant over the past year



Only 4% reported recruitment challenges decreased over the past year



**Question:** Would you say that recruitment challenges over the past year have...?

**41% of Other Food processors** reported an increase in recruitment challenges over the past year, with 18% indicating a **significant** increase.

N=(126)

## Other Food Processors Roles Most Difficult to Recruit For



Two-thirds (67%) of Other Food processors cite production-related positions, as the most difficult to recruit for



Around one in four (23%) find kitchen or administrative (23%) positions to be the most difficult to recruit for



38% cited other positions not listed as the most difficult to recruit for

< 3% Responses not shown



N=(115)



## Human Resource Challenges



The most prominent issue, reported as at least somewhat challenging by the majority of processors (53%), was applicants with compensation expectations that were too high



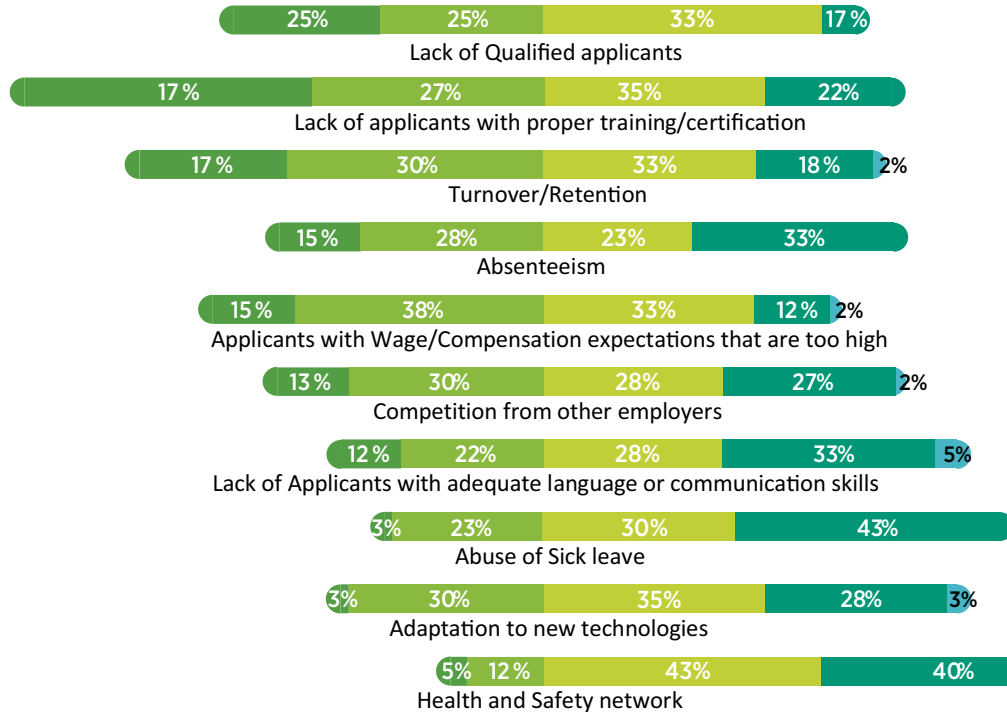
A lack of qualified applicants was also identified as at least somewhat of a challenge by the majority of processors wage expectations (56%).



**Most Other Food processors (60%) report having a dedicated human resources staff or department.**



# WORKFORCE AVAILABILITY AND RECRUITMENT



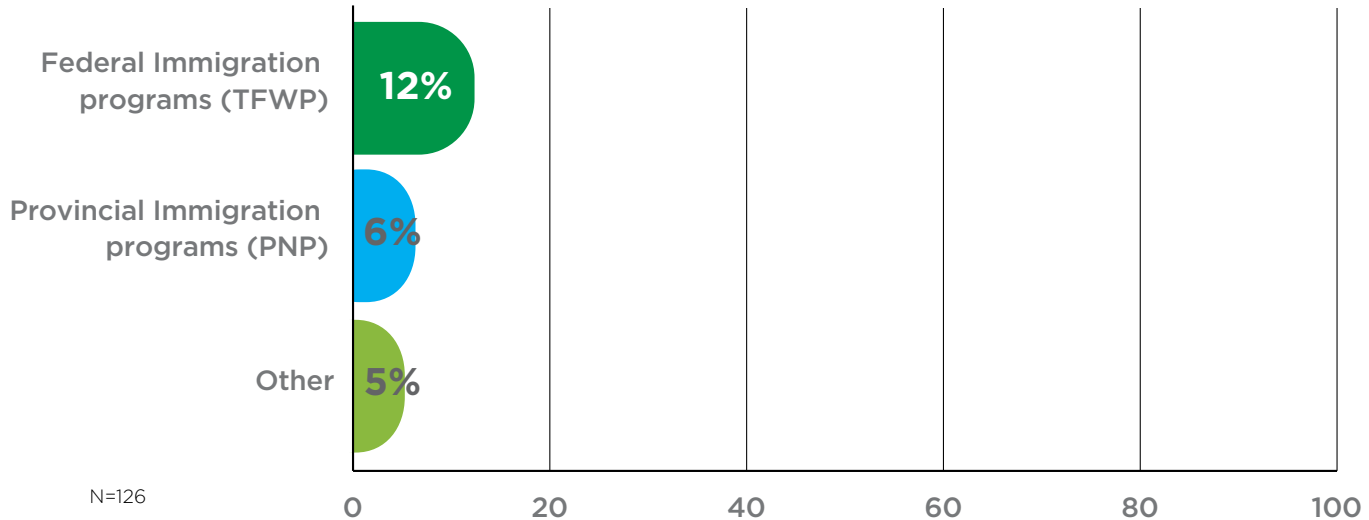
N=60

■ Extreme Challenge
 ■ Somewhat of a Challenge
 ■ A Little Bit of a Challenge
 ■ Not a Challenge at All
 ■ Don't Know

## Immigration Programs

**13%** of Other Food processors reported utilizing the TFWP, while 6% reported utilizing the PNP program.

### Utilization of Government Programs



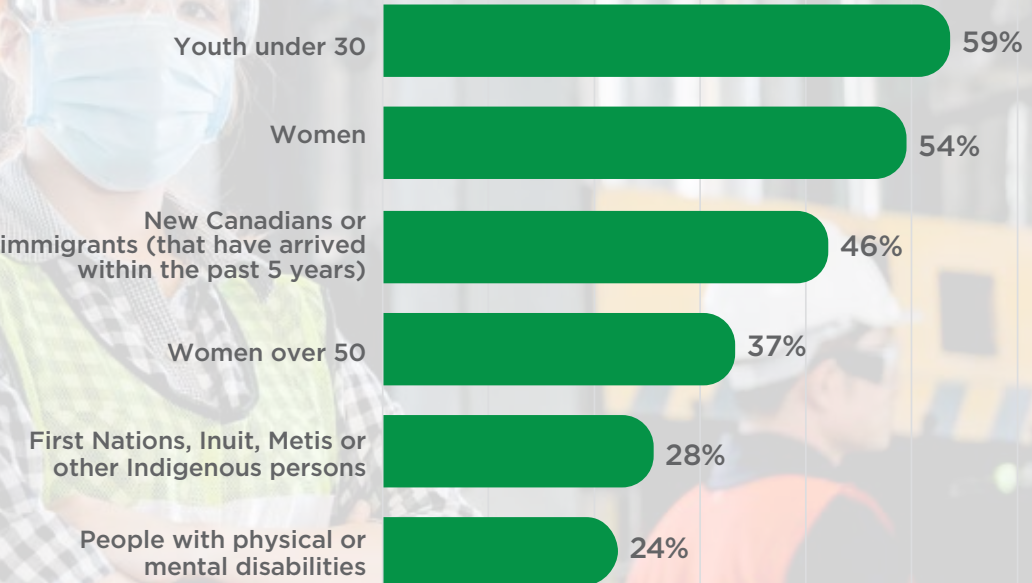
## Underrepresented Groups



The majority of Other Food processors reported making concerted efforts to recruit youth under 30 (59%) and women (54%)



Recruitment efforts lagged behind for Indigenous Peoples (28%) and people with disabilities (24%)



N=126

## In a Snapshot



**\$15.96**

Average hourly  
starting wage for  
an entry level  
front line worker

N=(126)



# WORKFORCE WAGES AND BENEFITS



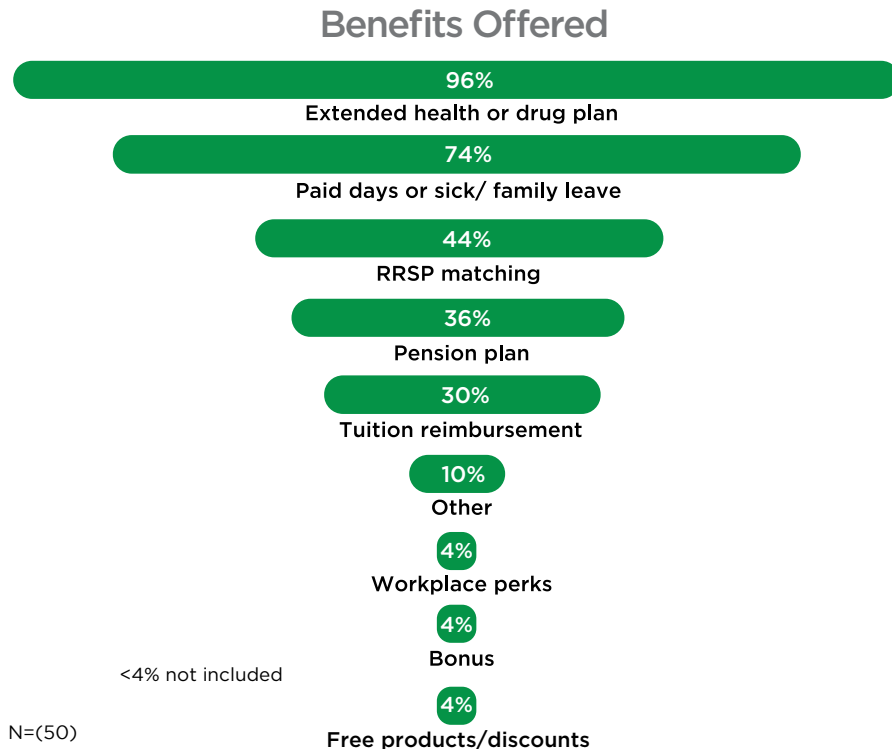
Most Other Food processors (63%) reported offering benefits at their plant or organization, one of the highest proportions across the food and beverage processing industry.



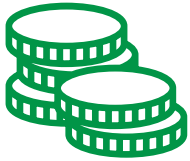
Of those who provide benefits, nearly all processors (96%) provide employees with extended health or drug plans, while paid days and sick leave were also frequently reported by 74% of processors



Fewer than half of processors reported offering RRSP matching (44%), pension plans (36%) and tuition reimbursement (30%)



## In a Snapshot



# \$18,455

Annual Training Budget



Other Food processors reported an average training budget of \$18,455 annually.



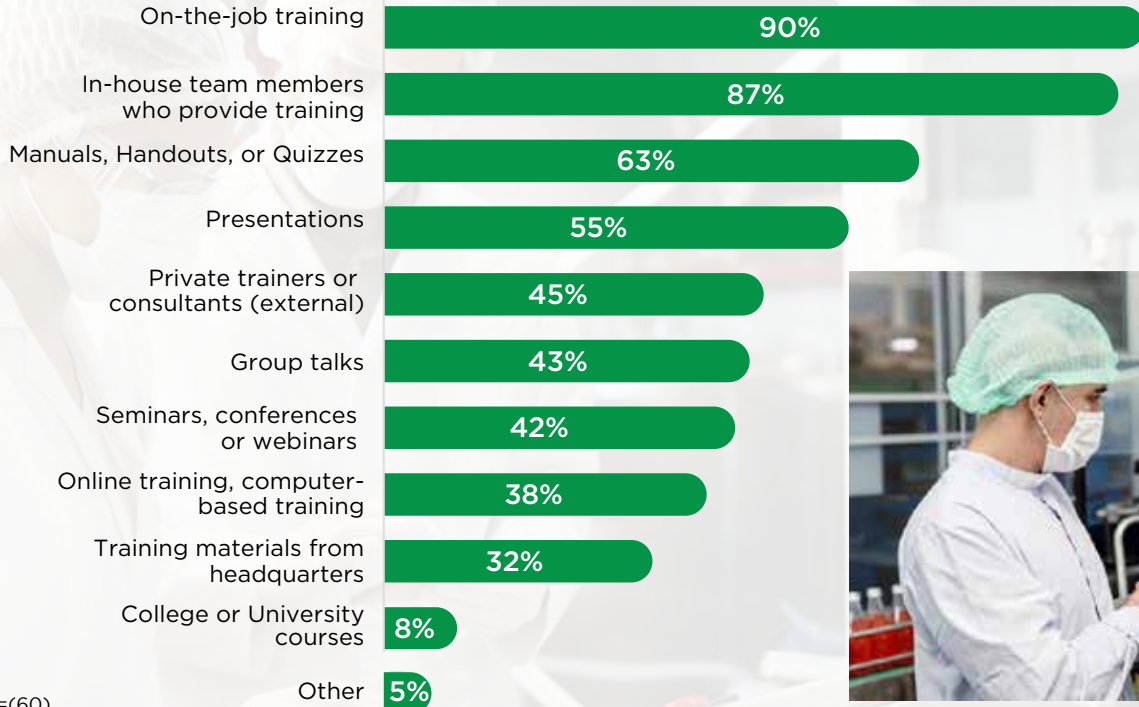
On average, this equates to approximately \$410 per paid position.



The sector utilizes a variety of training tools, while on-the-job training (90%) and in-house training (87%) are the most common tools used.



## Training Tools



N=(60)



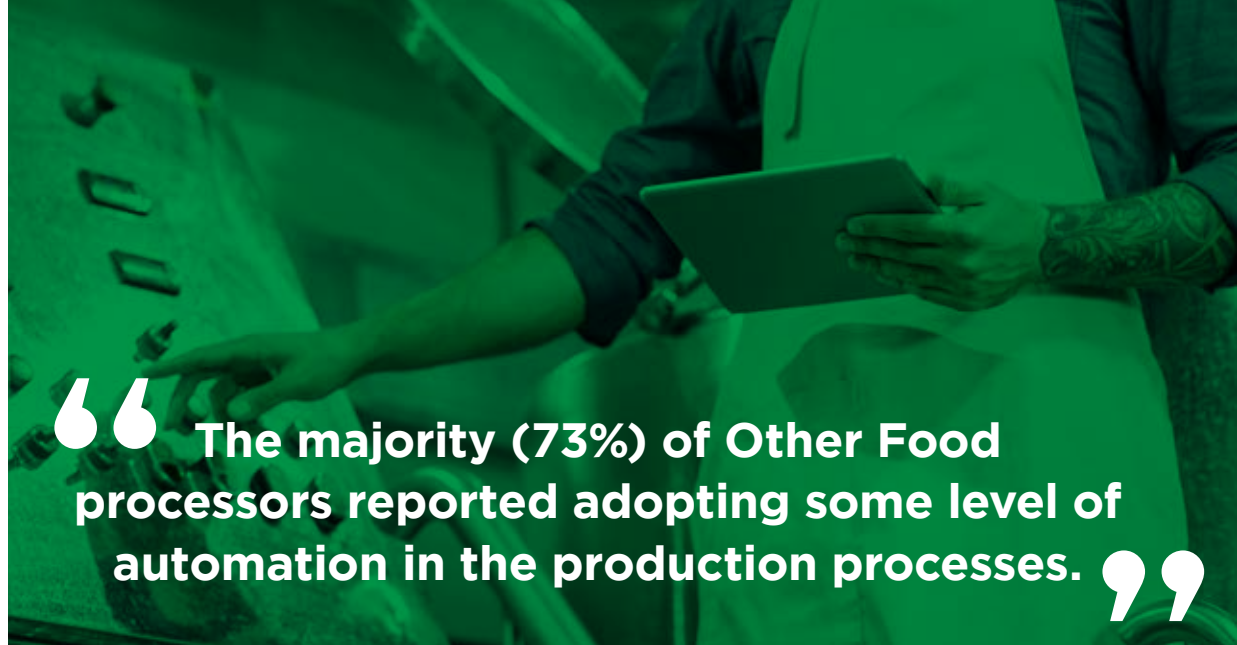
## Automation in the Other Food Sector



22% of Other Food processors reported moderate integration of automated production processes

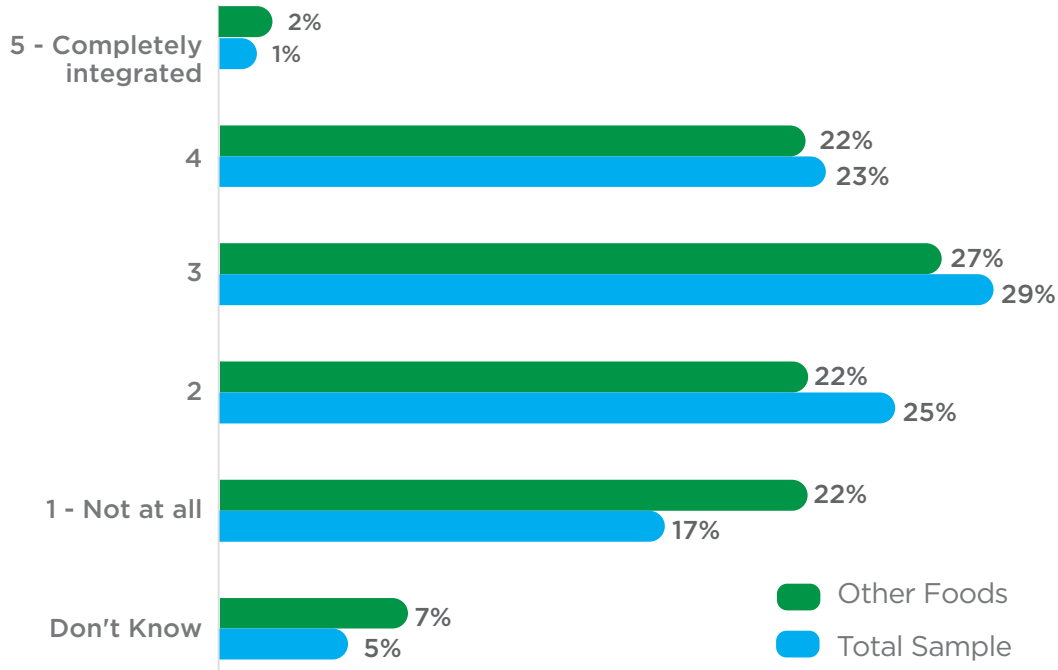


Approximately one in five processors (22%) reported no integration, slightly higher than the total sample



“ The majority (73%) of Other Food processors reported adopting some level of automation in the production processes. ”

## Level of Automation Adopted



**Question:** On a scale of 1 to 5 to what degree has your business made investments in automation and digitization of production processes?

N=(60)

## Educational Programming

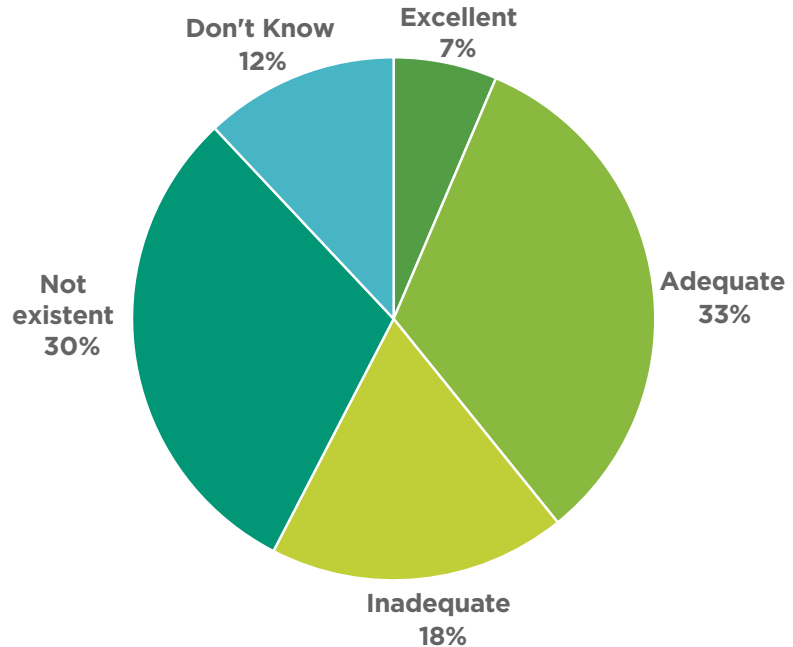


Nearly half (48%) of Other Food processors rate the educational programming designed to produce graduates for their sector as being inadequate or non-existent



Four-in-ten (40%) processors think it is, at a minimum, adequate

**Question:** How would you describe the Educational Programming designed to produce graduates for your sector?



“ Nearly half (48%) of Other Food processors rate the educational programming designed to produce graduates for their sector as being inadequate or non-existent. ”





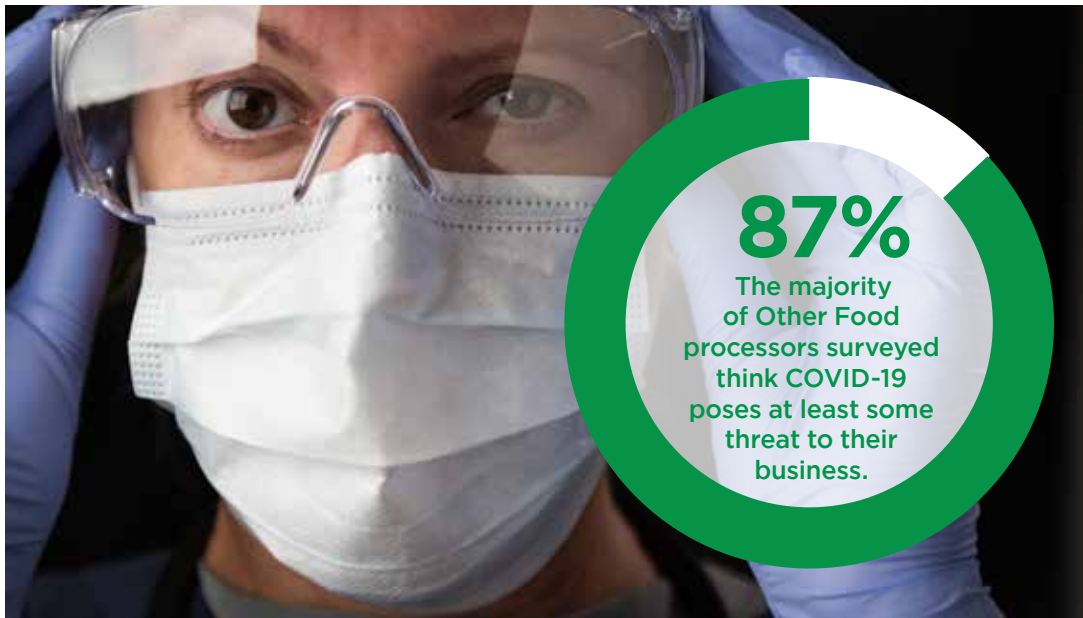
## Perceived Threat



The majority of Other Food processors surveyed (87%) think COVID-19 poses at least some threat to their business, while a significant portion (41%) feel highly threatened by it.



14% of processors reported they saw no perceived threat to their business, the highest concentration across food and beverage sectors.



# IMPACT OF COVID-19

## Threat Level

15%

Very high

26%

High

35%

Somewhat High

11%

A Little

14%

None

41%  
**HIGH**

N=(66)

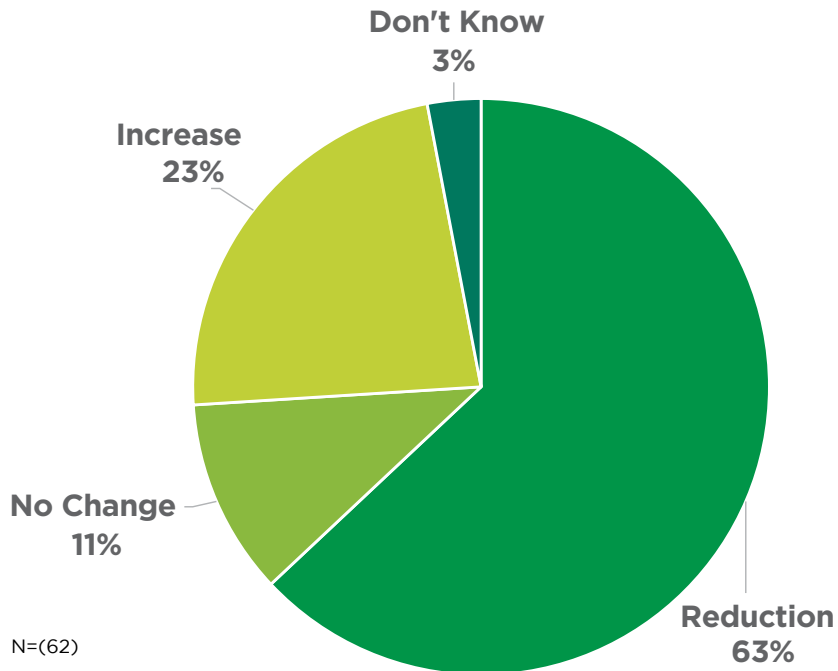
## Production Volumes



Most Other Food processors surveyed (63%) reported a reduction in production due to COVID-19



Approximately a quarter (23%) reported an increase in production volume due to COVID-19





## Other Food processors have been impacted in many ways by COVID-19

- Decline in customer orders has been the most notable impact, as reported by 63% of processors
- Decline in cash flow was also reported by most processors (53%)



## Other Food processors also took different approaches to dealing with COVID's impact

- Approximately four-in-ten processors reported conducting layoffs (42%) and reducing workers hours (39%)
- Fewer processors reported allowing work from home (23%) or increased outsourcing (5%)

# IMPACT OF COVID-19



## Impact of COVID-19

Decline in number of workers available **45%**

Decline in availability of raw materials or supplies **29%**

Decline in orders from customers **63%**

Closure due to health concerns **8%**

Decline in cash flow **53%** N=(62)

## Action Taken

Increased outsourcing **5%**

Allowed employees to work from home **23%**

Reduced workers' hours **39%**

Laid-off workers **42%**

N=(62)





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