

# SECURING CANADA'S MEAT WORKFORCE

Real Challenges. Practical Solutions. Fresh Perspectives.

## EXECUTIVE SUMMARY



**FPSC**



FOOD PROCESSING SKILLS CANADA    COMPÉTENCES TRANSFORMATION ALIMENTAIRE CANADA



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The opinions and interpretations in this publication are those of the author and do not necessarily reflect those of the Government of Canada.

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# EXECUTIVE SUMMARY

## INTRODUCTION

Meat processing is an important part of the Canadian economy, contributing about \$6.5 billion to Canada's GDP and employing nearly 60,000 people across the country – most of them in predictable, full-time jobs in both rural and urban centres, with opportunities to progress to higher skilled, higher paid jobs in the industry.

It's also a significant exporter, sending products worth more than \$7.6 billion a year to the rest of the world. That's a quarter of Canada's total food and beverage exports, with significant growth potential, especially in markets such as Europe and Asia.

That means the sector is going to need a lot more workers to keep up with existing demand and build capacity to handle this growth – current forecasts suggest the sector will need an additional 25,000 workers over the next 12 years.

But that's easier said than done.

Employers in the meat processing sector have been suffering from labour shortages for years. And, as this study concludes, the situation is projected to worsen under status quo conditions. The industry will need to hire a net of nearly 2,275 additional new workers over the next three years to meet expansion and workforce retirements. Replacement demands (deaths and retirements) alone are expected to total 5,500 between 2017 and 2030. Taking account of both replacement and expansion demands, the industry will likely need to hire just over 10,400 new workers, or (77%) of the current workforce over the next 13 years. Unfortunately, this recruitment need will be occurring within the context of very tight regional labour markets that are currently experiencing labour shortages during peak seasons and which are predicted to continue during this period.

Overall, the analysis indicated that eight of the fourteen regions studied in-depth, were facing very tight labour markets where the current or projected demand for workers (total and lower skill level) from the regional industries was higher than the existing local labour market (see table below).

Region	Total Labour Force			Lower Skill-Level Labour Force		
	2018	2020	2025	2018	2020	2025
Brandon, Manitoba	3	3	3	3	3	3
Brooks, Alberta	3	3	3	3	3	3
Rivière-du-Loup, Quebec	3	3	3	3	3	3
Saint-Esprit, Quebec	3	3	3	3	3	3
Wynyard, Saskatchewan	3	3	3	3	3	3
Kings Country, Nova Scotia	2	3	3	3	3	3
Levis, Quebec	3	3	3	3	3	2
Chilliwack, British Columbia	2	2	2	3	3	2
Guelph, Ontario	1	1	1	2	2	2
High River, Alberta	1	1	1	1	1	1
Langley, British Columbia	1	1	1	1	1	1
Toronto, Ontario	1	1	1	1	1	1
Hamilton, Ontario	1	1	1	1	1	1
Winnipeg, Manitoba	1	1	1	1	1	1

1 = Meat processing employment demand is less than 50% of regional labour force at annual average employment levels

2 = Meat processing employment demand is between 50 and 100% of regional labour force at annual average employment levels

3 = Meat processing employment demand is greater than 100% of regional labour force at annual average employment level

Many smaller processors are looking for solutions that are pragmatic and easy to implement, as they don't necessarily have the capacity to adapt complex solutions to their specific situations. Fortunately, there are some

promising practices being tried across the industry that could be investigated and adapted by meat processors big and small to start attracting more people to work in this important and growing sector.

## WHAT IS CANADA'S MEAT PROCESSING SECTOR?

The roughly 1,600 businesses in Canada's meat processing sector employed approximately 58,000 people in 2017. Almost half (45%) of these businesses are small, with 10 or fewer employees, and another 30 percent have between 11 and 60 workers. Just 11 percent have more than 200 employees, and the average "very large" employer has 668 employees.

A significant share of Canadian meat products is shipped internationally, with the largest firms focused extensively on export markets in the United States and internationally. Many meat processors with 60-120 employees are also active exporters.

This existing predisposition to export markets, even among medium-sized businesses, is a good indicator of the sector's potential growth, most of which will come from exports over the next decade. It's also a positive indicator for potential capacity to continue to develop growing export markets, as these businesses already have some export expertise.

Two recent trade agreements – the Canada-European Union Comprehensive Economic and Trade Agreement (CETA) and the Comprehensive and Progressive Agree-

ment for Trans-Pacific Partnership (CPTPP) – are expected to have a significant positive impact on demand for Canadian meat products, with demand particularly strong for beef products. And Canada's meat industry has the capacity to increase the amount of beef, poultry and pork available as it is not limited by quotas or production restrictions.

Therefore, the major limiter on taking advantage of these export opportunities will be in processing the meat, not producing it. And one of the key limiters on processing meat is how many people are employed in the industry.

Much of the value-added for meat products can be in the secondary processing, such as turning the raw product into things like sausages, deli meats, and frozen nuggets, as well as specialty meats, such as specialty pork for the Japanese market, and packaging of products for retail sale, including boneless, skinless chicken breasts in multi-portion styro trays. Halal processed meats are also growing in demand. To address this value-added component of meat processing, the sector will need increased investments in technology and quality assurance processes – and more workers.

## WHAT KIND OF WORKERS WILL IT NEED?

Meat occupations are divided into three main areas: meat and poultry slaughtering/abattoir occupations, meat-cutting occupations and poultry processing occupations. Each of these groupings consists of six main levels, ranging from foundational occupations (such as general packers and live receivers) to intermediate (including industrial butchers and trimmers) to higher skill jobs such as lead butcher and supervisory occupations. There are also management positions and senior executive leadership occupations. (Another closely connected group of occupations deals with quality control and quality assessment, with five main levels.)

The industry places a heavy reliance on on-the-job training, with three of the six occupational levels requir-

ing no specific post-secondary training or education, and two of the six not necessarily requiring high school diplomas. As a result, entry into the sector is easy, and there is room for career progression based on work experience rather than having to undergo formal training or education.

Nevertheless, because the sector can be perceived as a low-skill one with limited career progression opportunities, it can be challenging to recruit and retain workers. In addition, there are significant physical requirements for many of the jobs, and for meat slaughtering, it is important to find workers who can tolerate the slaughter environment.

## HOW MANY WORKERS WILL BE NEEDED?

Despite the sector's strong employment numbers, more than half (55%) of Canada's meat processors say they cannot find enough people for all the available jobs or experience chronic recruitment challenges. It's estimated that that 7,300 positions went unfilled in 2016, affecting one in five (22%) of processors.

These staffing challenges are compounded by a high annual turnover rate (41% overall) that, in effect, means employers must hire approximately 1.4 people for every job opening. Last year, that meant hiring an estimated 24,500 people. And they're doing this in several tight local labour markets while competing with other meat processors for available labour and with employers in other industries who may be able to offer higher wages or better working conditions, or both.

An additional challenge is that almost half (46%) of workers in meat processing are lower-skilled production level workers who don't require specialist qualifications, making them more mobile among various employers, jobs and industries. Despite recent increases in wages, production labourers in the meat processing sector appear to receive lower hourly wages than similar labourers in other sectors. Meanwhile, the supply of workers with lower levels of education is shrinking relative to the overall labour force as youth achieve rising levels of educational training over time.

It is in this difficult labour environment that the meat processing will be trying to hire approximately 32,000 additional workers over the next 12 years to replace workers who retire or die and to take advantage of

the sector's growth opportunities. That means approximately 2,500 workers must be hired every year between 2018 and 2030, not including those who are needed to fill vacant positions or replace those who leave after working for just a brief period.

There may be some limited opportunities for meat processors to increase their hiring of workers available locally by offering substantial wage hikes and improvements to working conditions, but in many regions, there simply aren't enough people to meet local employment requirements in all sectors competing for workers.

Processors also have limited opportunities to try to bring in more workers from other places, either by regional relocation or through the Temporary Foreign Workers Program or to use technology and automation to lower their requirements for labour (although this may not be a cost-effective option for the many small processors employing 10 or fewer workers. A more drastic option could be to try moving processing plants closer to more readily available pools of labour, but processors would still find themselves competing with other sectors for those workers.

Taking all of this into account, meat processors continue to face substantial challenges in their attempts to recruit enough workers to replace retirements, fill ongoing vacancies and work to address turnover rates while also trying to grow, remain competitive and increase productivity.



## WHERE WILL IT FIND THEM?

Canada's meat processing industry is characterized by a large number of small to medium-sized plants, often in rural or remote locations, particularly if the plant is associated with a slaughter or abattoir facility. These plants have small populations from which to draw enough workers to operate, a situation made more difficult by the continued demographic shift away from rural and remote communities to urban centres.

Meat processors in urban or suburban locations have a different challenge in finding enough workers, as they often face considerable competition from other sectors and industries for the available pool for labour.

**Women:** Men still dominate the meat processing industry, making up two-thirds of the workforce in 2017. For the industry to attract more women, it will need to consider such things as child-care provision, school holidays and parental leave factors.

**Older Workers:** Similarly, in order to attract and retain older workers, employers may need to adjust their current working conditions by shortening the length of shifts, providing time off for medical appointments, providing health benefits and helping employees transition into semi-retirement stages.

**Youth:** Recruiting youth to work in meat processing is becoming more difficult, with fewer youth as a proportion of the overall Canadian population, declining youth unemployment rates and the ongoing trend of young people moving out of rural Canada (where many of the larger meat processing plants are located) in favour of larger urban areas. In addition, students often want to match summer employment with their career interests and tend to prefer working conditions that do not require physical labour.

Nevertheless, the sector may be seen by some youth as an employer that can help them make a successful transition into the labour market despite various personal barriers, such as lower levels of education, a lack

of work experience or appearance and attitude issues. Any initiatives to help youth facing these challenges would need to be implemented with proper supports and in coordination with community and training agencies that assist at-risk youth.

Improving retention rates for younger employees could be possible if processors adapt a "gaming environment" at work, with ongoing performance feedback, adapting the production line to allow music to be played, and by providing "phone breaks" during shifts.

**Unemployed:** Most meat processing jobs in Canada (80%) are permanent, full-time positions, so there is no pool of unemployed workers already familiar with the industry waiting to be called back for seasonal work. Furthermore, much of the beef industry is located in the western provinces, where recent lower rates of unemployment reduced the number of people looking for work, while competition for labour is also tight in Southern Ontario, which has a high proportion of meat processors.

**New Canadians:** New immigrants and refugees make up one in 10 workers in the current meat processing workforce, with a further three percent working in the industry as temporary foreign workers. Clearly, new Canadians represent a significant pool of potential employees for meat processors, but this is tempered by the difficulty in finding enough established immigrants willing to live and work in rural and remote communities where many plants are located.

**Indigenous Canadians:** Indigenous Canadians appear to be underrepresented in the meat processing sector, which could be due to a lack of knowledge among processors of the local Indigenous communities as a potential supply of workers. In order to increase the engagement of local Indigenous communities in meat processing, it will be important to understand the various factors that can detract or contribute to that engagement.





## RECOMMENDATIONS

The meat processing industry hasn't been sitting still in the face of its recruitment and retention challenges and has been trying many different things to try to deal with those challenges. There is enough hard evidence and much positive anecdotal results to suggest some "promising practices" that could be further investigated and adapted by employers and other stakeholders.

The following recommendations are drawn from the LMI study results and implications. Several are aimed at further stabilizing the sector's labour market situation. The expectation is that these will provide enough time for the longer-term measures contained in the other recommendations to produce impacts and, ultimately, create labour market equilibrium in the meat processing industry.

## RECOMMENDATIONS THAT ARE EXPECTED TO PRODUCE IMPACTS OVER THE NEAR TERM

### RECOMMENDATION: REGIONAL SOLUTIONS

The current labour market demand versus supply situation is tight and projected to persist until at least 2030. With no single obvious solution to the labour shortage, it is likely that progress can only come through incremental improvements in a range of areas, including within plants (e.g., shorter shifts for older workers), as well as outside of them (e.g., rural economy development). Government policies and programs can have a significant positive impact on the industry's success, and concomitantly, on the success of the communities that the plants call home.

It is recommended that Governments at all levels conduct a coordinated review of all relevant programs and policies, including R&D funding, immigration policies, EI policies, employment-related training and rural development.

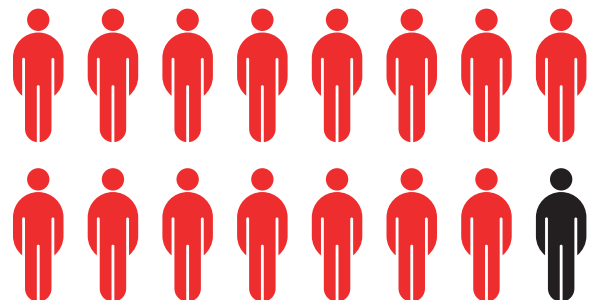
Additionally, that communications between federal, provincial, and municipal governments as well as intra-departmental discussions within government improve, to ensure there is more collaboration and a clearer focus on outcomes.

#### Key Players

- Immigration, Refugees and Citizenship Canada (IRCC)
- Agriculture and Agri-Food Canada (AAFC)
- Employment and Social Development Canada (ESDC)
- Federal and provincial regional economic development agencies
- Industry associations
- Labour unions

#### Initial Step

- Explore potential mechanisms and structures for undertaking a coordinated review of programs and policies.



## RECOMMENDATION: ADDRESSING THE CRITICAL LABOUR SHORTAGE

The research has determined the sector is currently facing, and is expected to continue to face, a significant labour shortage. This situation has negative implications for the competitiveness of the sector and potentially, for its survival. There is a need to implement measures to help balance labour market supply and demand relatively quickly. The following recommendations are aimed at achieving this.

### The federal government should consider:

- Creating a special industrial meat cutter immigration stream to alleviate the shortage in plants large and small across the country.
- Lifting restrictions on the number of times a Temporary Foreign Workers (TFW) can return to work for sector employers.
- Removing the cap on the number of TFW a sector employer can hire per year.
- Lowering the cost of applying to the TFW program.
- Simplifying the LMIA process (e.g., by making local level LMI data available to employers).
- Revive the Career Focus Wage Subsidy Program for meat and poultry processors as it was an effective recruiting tool for recent post secondary graduates, with 90% of hires staying on.

Key Players	Initial Step
<ul style="list-style-type: none"> <li>• Immigration, Refugees and Citizenship Canada (IRCC)</li> <li>• Employment and Social Development Canada (ESDC)</li> <li>• Industry associations</li> <li>• Labour unions</li> </ul>	<ul style="list-style-type: none"> <li>• Discuss the federal government views on the above recommendations.</li> <li>• Assess the impact of the above recommendations on the current meat processing labour force.</li> </ul>

## RECOMMENDATION: FLEXIBLE WORKPLACES

It is recommended that employers should work with unions and industry associations to consider adapting their workplaces to meet the specific needs and preferences of the workforce. Examples include:

- Shifts that correspond to worker needs and preferences (e.g., shorter shifts where the workforce has a lot of older employees, flexibility in scheduling).
- Addressing youth preferences (e.g., phone breaks, music while working, gaming considerations in measuring performance).
- Transportation (e.g., bus transportation for communities to the plant).

Given the diversity in the workforce, the traditional wage and benefit package is less attractive to today's generation of workers than previous generations.

Employers should consider further tailoring compensation packages to include aspects such as forgoing health benefits for higher wages, education bursaries, benefits for part-time workers, and leaves of absence for various reasons (education, travel). Employees could perhaps pick from a menu of benefits. In a similar vein, employers could develop a recruitment and retention rewards programs. Examples include employee referral bonuses, retention bonuses and tenure milestone bonuses.

Key Players	Initial Step
<ul style="list-style-type: none"> <li>• Industry associations</li> <li>• Industry members (including HR professionals)</li> <li>• Food Processing Skills Canada (FPSC)</li> <li>• Labour Unions</li> </ul>	<ul style="list-style-type: none"> <li>• Conduct a needs assessment to identify which areas of HR are most in need of innovation/change.</li> </ul>

## RECOMMENDATIONS THAT ARE EXPECTED TO PRODUCE IMPACTS OVER THE **MEDIUM TERM**

### RECOMMENDATION: SUPPORT MORE SKILLED MEAT CUTTERS TO IMMIGRATE PERMANENTLY TO CANADA THROUGH CHANGES TO THE NOC CODING SYSTEM

The industry is currently using the TFWP to bring in skilled meat cutters needed to fill vacant positions. An emphasis on “temporary” is not useful for the industry or the workers, given that these are permanent, full-time positions for which there currently are not available Canadians to fill them.

The federal government should consider changing the NOC coding system to recognize high levels of skill required for some of the industrial meat cutting occu-

pations. The current occupational coding for industrial meat cutters is at a level “C” (NOC 9462), which makes it challenging for the higher skilled industrial meat cutters to be considered for many of the permanent pathways for immigration. The study suggests that a level “C” underrates the actual level of skill required to succeed as an industrial meat cutter (e.g., retail butchering, classified as skill level B, is now occurring at the plant level in response to increasing demand for case-ready products).

Key Players	Initial Step
<ul style="list-style-type: none"> <li>• Immigration, Refugees and Citizenship Canada (IRCC)</li> <li>• Employment and Social Development Canada (ESDC)</li> <li>• Industry associations</li> <li>• Labour unions</li> </ul>	<ul style="list-style-type: none"> <li>• Discuss the federal government views on the above recommendations.</li> <li>• Assess the impact of the above recommendations on the current meat processing labour force.</li> </ul>

### RECOMMENDATION: FOCUS ON PERMANENT PATHWAYS FOR IMMIGRATION

In many rural communities, there are not enough people to support industry employment requirements (including the meat processing sector).

It is recommended that federal and provincial immigration policies and programming should be reviewed with the following in mind:

- Focus on community development from multiple dimensions in addition to economic considerations.

- Accord additional “points” for families willing to remain in rural/semi-rural communities.
- Strike a better balance between filling skilled and semi-skilled labour needs.
- Develop express entry or other federal paths to permanent residency for positions in the meat processing industry.
- Provide advance standing in the permanent residency program based on a TFW’s past performance.

Key Players	Initial Step
<ul style="list-style-type: none"> <li>• Immigration, Refugees and Citizenship Canada (IRCC)</li> <li>• Employment and Social Development Canada (ESDC)</li> <li>• Industry associations</li> </ul>	<ul style="list-style-type: none"> <li>• Discuss the federal government views on the above recommendations.</li> </ul>

## RECOMMENDATION: ENCOURAGE YOUNG FAMILIES TO REMAIN OR RELOCATE TO RURAL COMMUNITIES

In addition to encouraging immigrants to settle permanently in processing plant communities, employers and governments should develop an “all of community” approach to encourage young families to remain or relocate to rural communities. Potential approaches include:

- A community focus on immigrant retention – joint responsibility with support from all sectors (education/training, faith communities, small business, large industry, housing, banks, health)

- Analyze the fit between current community facilities/priorities and young families’ needs (e.g., affordable housing, child care, transportation, social and recreational amenities).
- Develop employment opportunities taking into account family requirements (two parents employed, benefit packages, day-care requirements, flexible scheduling).
- Emphasize the benefits of rural community lifestyle (e.g., enjoying the outdoors, quiet, safe, great place to raise a family (and retire)).

Key Players	Initial Step
<ul style="list-style-type: none"> <li>• Immigration, Refugees and Citizenship Canada (IRCC)</li> <li>• Industry associations</li> <li>• Local immigrant settlement agencies</li> <li>• Municipal governments</li> <li>• Federal and provincial regional economic development agencies</li> </ul>	<ul style="list-style-type: none"> <li>• Discuss the merits of the recommendation with local immigrant settlement agencies, including their capacity to become involved, potential sources of funding, potential up-take from immigrants.</li> </ul>

## RECOMMENDATION: ENGAGING EFFECTIVELY WITH GROUPS EXPERIENCING LOW LABOUR MARKET PARTICIPATION

The industry has a prevalence of positions that require neither a high school diploma nor previous training. Despite decreasing levels of unemployment in many of the regions studied, there remain groups of individuals who for various reasons have challenges finding and/or keeping a job.

It is recommended that the sector work with community and training agencies, as well as provincial social assistance programs, to provide essential skills and employment readiness training to at-risk youth and other groups with historically tenuous attachments to the labour force. Potential approaches include:

- Adapting the working conditions and environment to meet the needs and priorities of the new entrant (iterative onboarding, tailored training to address learning challenges, shorter shifts, combined essential skills training with on-the-job training approaches).
- Developing and communicating multiple clear milestones for the development and achievement of new entrants, along with clear feedback mechanisms.
- Making allowances for new entrants to maintain some of their government benefits (EI, Social Assistance) while integrating into the work environment.

Key Players	Initial Step
<ul style="list-style-type: none"> <li>• Industry associations</li> <li>• Provincial ministries with responsibility for social assistance</li> <li>• ESDC</li> <li>• Service Canada</li> <li>• Labour unions</li> <li>• Community organizations working with social assistance recipients and other segments facing employment challenges</li> <li>• Food Processing Skills Canada (FPSC)</li> </ul>	<ul style="list-style-type: none"> <li>• Explore the feasibility of this recommendation under current social assistance rules, regulations and legislation, and estimate potential uptake by SA and EI recipients.</li> </ul>

## RECOMMENDATION: FIRST NATIONS PARTNERSHIPS

There were limited examples found during the study of effective engagement of Indigenous workers by the industry, even though there is a significant number of Indigenous communities (e.g., First Nations reserve lands; Indigenous urban populations) located within commuting distance of meat processing plants.

It is recommended that consideration be given to the following ways that plants could engage with this underrepresented group:

- Investing in partnerships with Indigenous communities (e.g., training, transportation projects, work placements)
- Gaining increased knowledge of the needs and priorities of Indigenous communities regarding employment, economic development, cultural considerations, etc.
- Investing in an “Indigenous Partnerships Advisor” in a similar way that many plants are now investing in immigration advisors and expertise concerning immigration issues

- Working directly in partnership with Indigenous community employment and training centres and umbrella organizations (e.g., ASETS-holders) to ensure that the meat processing industry is considered in career planning, training support, etc.
- Drawing connections between aspects of meat processing and traditional Indigenous practices and beliefs (e.g., minimizing waste and total use of animal, feeding families, humane treatment of animals).

As part of these efforts, local economic development agencies and Service Canada offices should work with local First Nations communities to better understand how various factors can help or hinder First Nations and Métis community members becoming part of the industry’s labour force. These agencies and offices could also serve as conduits or go-betweens for First Nations and Métis communities and employers who have had little or no contact with these communities in the past.

Key Players	Initial Step
<ul style="list-style-type: none"><li>• Industry associations</li><li>• First Nations/Métis community leaders</li><li>• Local/regional economic development agencies</li><li>• Service Canada</li></ul>	<ul style="list-style-type: none"><li>• Explore the receptivity of Indigenous communities to implementing this recommendation.</li></ul>



## RECOMMENDATION: SECTOR EMPLOYMENT OPPORTUNITIES AWARENESS CAMPAIGNS

The image of the industry ranges from neutral to positive for a large portion of the public, including youth, Indigenous Canadians and immigrants. It is recommended that the industry capitalize on this relative openness by providing labour market participants with opportunities to enhance their awareness and knowledge of jobs in the industry. Methods could include open houses, organized tours, virtual tours (that youth, employment counsellors, etc. could easily access on-line) and video testimonials/profiles. Also:

- In more suburban-urban centres, temporary workers recruited through temporary agencies can be recruited for permanent positions after payment to agencies (in essence, temporary agencies are working as recruitment agencies for the plants).
- The implementation of more in-depth onboarding (e.g., assignment of “coaches”) after someone is hired has reduced the number of “fast quits” in some companies.
- For newcomers to Canada, on-line pre-arrival training is recommended (e.g., Pre-Arrival Food Safety Management Training Program).
- The research also provides guidance for tailoring outreach and awareness campaigns to various segments. These include promoting the sector

within the spectrum of “farm to fork” and building on the current attention being paid to “foodie culture” and the increased desire by some groups to learn more about their food.

Conveying the wide variety of skill requirements and types of positions available could also help improve the industry’s attractiveness, along with the idea that working in the sector is more than just a job. Presenting the demanding/physical nature of some jobs as “working-class heroic” (e.g., the way oil and gas, military and construction jobs can be portrayed) could attract a segment of the labour market.

It is also recommended that the sector develop closer ties with secondary and post-secondary schools to help build awareness of employment possibilities among students and to develop/expand experiential learning programs and opportunities for the sector. Participation in experiential learning programs (e.g., co-op, apprenticeship, pre-apprenticeship, work readiness, summer jobs) could provide sector employers with several benefits, including conversion into permanent employees, increased awareness of the industry among youth and programs that more effectively respond to employer needs.

Key Players	Initial Step
<ul style="list-style-type: none"> <li>• Service Canada offices</li> <li>• Post-secondary institutions</li> <li>• High schools</li> <li>• Community organizations that work with youth</li> <li>• Industry associations</li> <li>• Industry members</li> <li>• Labour unions</li> <li>• Food Processing Skills Canada (FPSC)</li> </ul>	<ul style="list-style-type: none"> <li>• Explore the receptivity of schools to increase awareness of career opportunities in the sector.</li> </ul>



## RECOMMENDATION: EXAMINE REASONS FOR THE LOW LEVELS OF ENROLLMENT IN EXISTING TRAINING FOR MEAT CUTTING AND BUTCHER PROGRAMS

Given the current acute shortage of highly skilled meat cutters in many regions, there would need to be considerable investment by governments and training institutions to develop additional programs to meet industry needs through education-facility-based training pro-

gram(s), even though current programs are undersubscribed. Before any further investment in programming is made in this area. However, it is recommended that governments, schools and industry should gain a better understanding of current barriers to enrollment.

Key Players	Initial Step
<ul style="list-style-type: none"><li>• Industry associations</li><li>• Provincial ministries with responsibility for training and education</li><li>• Community colleges</li><li>• Food Processing Skills Canada (FPSC)</li><li>• Labour unions</li></ul>	<ul style="list-style-type: none"><li>• Explore the merits of developing a research project aimed at better understanding the drivers of low enrollment in current and programs.</li></ul>

## RECOMMENDATION: SUPPORT MORE SYSTEMATIC DEVELOPMENT OF TRAINING MATERIALS, TOOLS AND PROGRAMS WITHIN THE INDUSTRY TO ENHANCE ON-THE-JOB TRAINING

Currently, most of the training of industrial meat cutters is provided by employers and is largely on-the-job training, with the possibility of considerable duplication within industry with respect to curricula and training materials. Part of this duplication of effort may be due to concerns about intellectual property, market in-

telligence and the need to customize training to plant specifics. Notwithstanding these concerns, it is recommended that industry associations, training groups and employers should explore ways of coordinating training initiatives (e.g., common training materials, joint programs).

Key Players	Initial Step
<ul style="list-style-type: none"><li>• Industry associations</li><li>• Food Processing Skills Canada (FPSC)</li><li>• Labour unions</li></ul>	<ul style="list-style-type: none"><li>• Explore the merits and feasibility of coordinating some training activities.</li></ul>





## RECOMMENDATION: INDUSTRY LEARNING/DEVELOPMENT PROGRAMS (INCLUDING SOME LEADING TO A CERTIFICATE)

The sector lacks clear pathways for employee advancement and, relatedly, suffers from high turnover rates. It is recommended that training/professional development reflect the following:

- employment in the sector is more than “just a job”;
- there are a variety of positions available; and
- there are pathways to high skilled, supervisory and management positions.

Ways of achieving this could include cross-training and lateral movement, promoting supervisors and identi-

fying trainers from the production line, engaging with the education sector to develop training programs, and developing a national certification system for the meat processing industry. Supporting the acquisition of language skills could also be part of training and professional development (e.g., offering ESL classes).

It is also recommended that the sector work with FPSC to develop online and other training programs that lead to a certificate. Certificates could help employees advance their careers, as well as count towards requirements for certification.

Key Players	Initial Step
<ul style="list-style-type: none"><li>• Industry associations</li><li>• Food Processing Skills Canada (FPSC)</li><li>• Labour unions</li></ul>	<ul style="list-style-type: none"><li>• Convene to discuss best practices and the merits and process for developing learning programs that would provide graduates with a certificate.</li></ul>



# RECOMMENDATIONS THAT ARE EXPECTED TO PRODUCE IMPACTS OVER THE LONG TERM

## RECOMMENDATION: INNOVATION PARTNERSHIPS

Advanced processing technologies and automation are needed in order to compete in global markets. To improve automation and productivity, it is recommended that a partnership be developed between government, the meat processing sector, technology development and manufacturing firms and universities to: 1) Identify options to assist small and medium-sized plants to adapt and take advantage of available automation/technology that might currently be cost-prohibitive for them, and 2) Reduce labour requirements across the sector by helping processors to adapt existing technology/automation to take into account increased tailoring for value-added products. Increased automation (e.g., packaging, box folding) could also help retain workers by lessening the physicality of some positions.

The core strategic priorities for the Protein Industries Supercluster are to formulate a shared innovation map to guide technology leadership projects and to

undertake a program of cluster building to enhance the quality of collaborations while also extending their benefits widely. The Innovation Partnership should work with the Supercluster to ensure the needs of meat processing companies are considered and addressed by their strategy. It is also recommended that the Innovation Partnerships:

- help address the funding gap in prototype commercialization;
- include an industry education component to raise awareness of available technology that could be adopted/adapted by processors; and
- include an avenue to communicate the most significant technology gaps to governments.

Key Players	Initial Step
<ul style="list-style-type: none"><li>• Universities</li><li>• Innovation, Sciences and Economic Development Canada</li><li>• Protein Industries Supercluster</li><li>• AAFC</li><li>• Relevant provincial agencies</li><li>• Industry associations</li><li>• Labour unions</li></ul>	<ul style="list-style-type: none"><li>• Form an industry committee to enter into partnership discussions with key players.</li></ul>







# SECURING CANADA'S **MEAT** WORKFORCE

Real Challenges. Practical Solutions.  
Fresh Perspectives.