



SECURING CANADA'S **MEAT** WORKFORCE

Real Challenges. Practical Solutions.
Fresh Perspectives.



June 2018

Meat + Poultry Processing Workforce Survey Report

LABOUR MARKET INFORMATION
REPORT SERIES

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Meat Processors Survey

Executive Summary



SECURING CANADA'S **MEAT** WORKFORCE

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- Over half (55%) of Canada's meat processors report not being able to fill positions or experience chronic recruitment challenges. A further 21% occasional or seasonal challenges recruiting qualified workers. Greatest challenges reported in Quebec and BC among mid to large sized processors.
- Meat processors cited: Meat cutters, plant management & supervisors, slaughterers, butchers and production labourers as the top key occupations. Recruitment challenges for Meat cutters and butchers were cited most often across most regions of Canada
- Canada's Meat processors hired an estimated 24,500 workers over the past year. This represents a 41% turnover rate in the industry for key occupations.
- Meat processors also reported an average vacancy rate of 12.4% - the equivalent 7,300 vacant positions across Canada.
- 8% of employers, representing 35% of the workforce, reported utilizing the Temporary Foreign Worker Program over the past year.
- The "average" processor in Canada employs 102 workers, but 45% employ less than and 10% employ 200+. Over one-third, 35% of positions, are filled by Women and 10% filled by recent immigrants.
- In total, n=417 meat processing employers participated in the survey administered by Ipsos. Data collection was conducted via a telephone (n=299) and online (n=118) surveys between December 30th, 2017 and April 23rd, 2018. Meat processors surveyed employed a total of 45,300 workers, representing an estimated 75% of the total industry workforce.

Meat Processors Survey

Overview

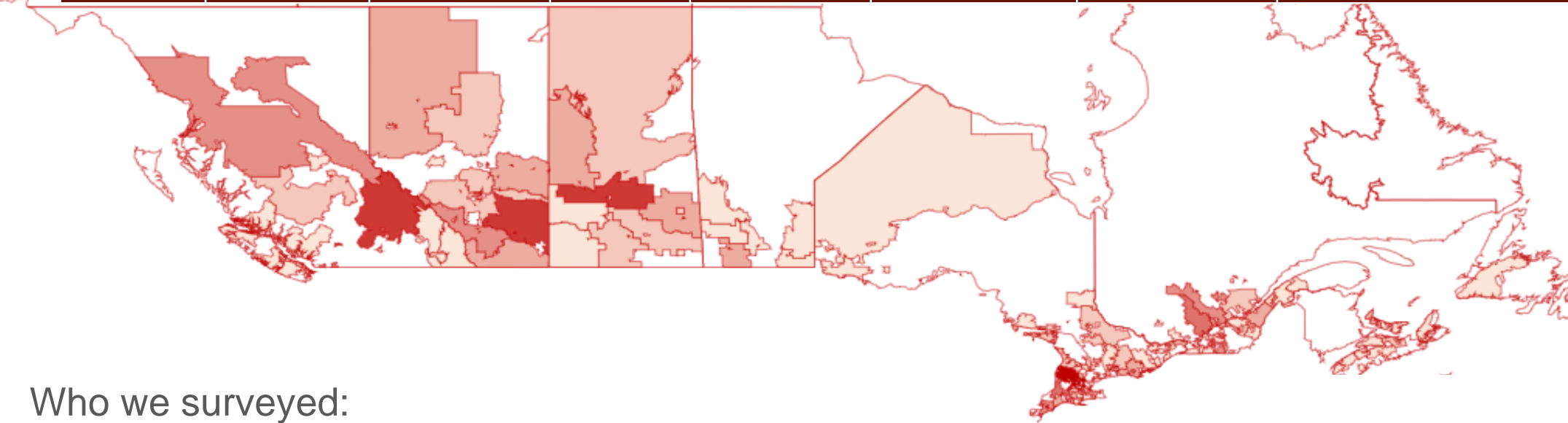


SECURING CANADA'S
MEAT WORKFORCE

Real Challenges. Practical Solutions.
Fresh Perspectives.

- Industry profile
 - Activity
 - Export markets
- Workforce profile
 - Employment
 - Vacancies
 - Workforce availability and Recruitment
 - Wages and Benefits
 - Workforce recruitment
- Methodology

Total	BC	AB	SK	MB	ON	QC	Atlantic Canada
417	48 (11%)	55 (13%)	29 (7%)	12 (3%)	175 (42%)	75 (18%)	19 (5%)



Who we surveyed:

- n=417 meat processing employers surveyed.
- Meat processors surveyed employed 45,300 workers, or 75% of the total industry workforce*.
- Representative distribution across regions and segments.



* According to the 2016 Census Canada's Meat product manufacturing industry (NAICS 3116) employed 59,290 workers in 2016

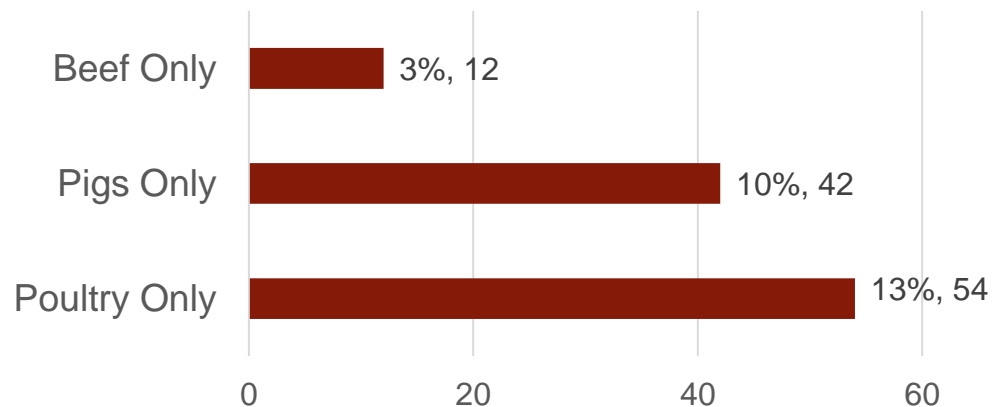
Meat Processing Industry Profile

There is significant overlap in activities and animal types

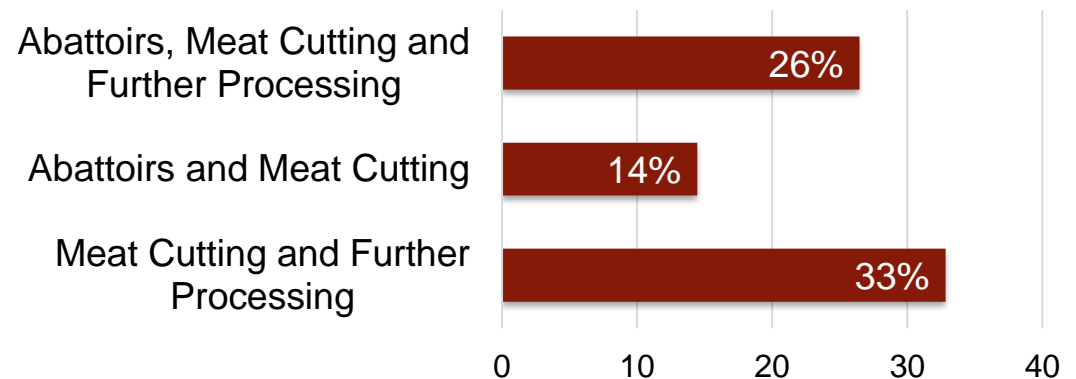
- Overwhelming majority (75%) of processors are involved in multiple processing activities and animal types
 - 8-in-10 are involved in Meat cutting
 - Three-quarters involved in Further processing
 - Almost half (47%) in Abattoirs/Slaughter

Activity Type	Number of respondents (%)
Abattoirs/Slaughter	195 (47%)
Meat cutting	335 (80%)
Further processing	304 (74%)
Total	417

Facilities Processing Single Animal



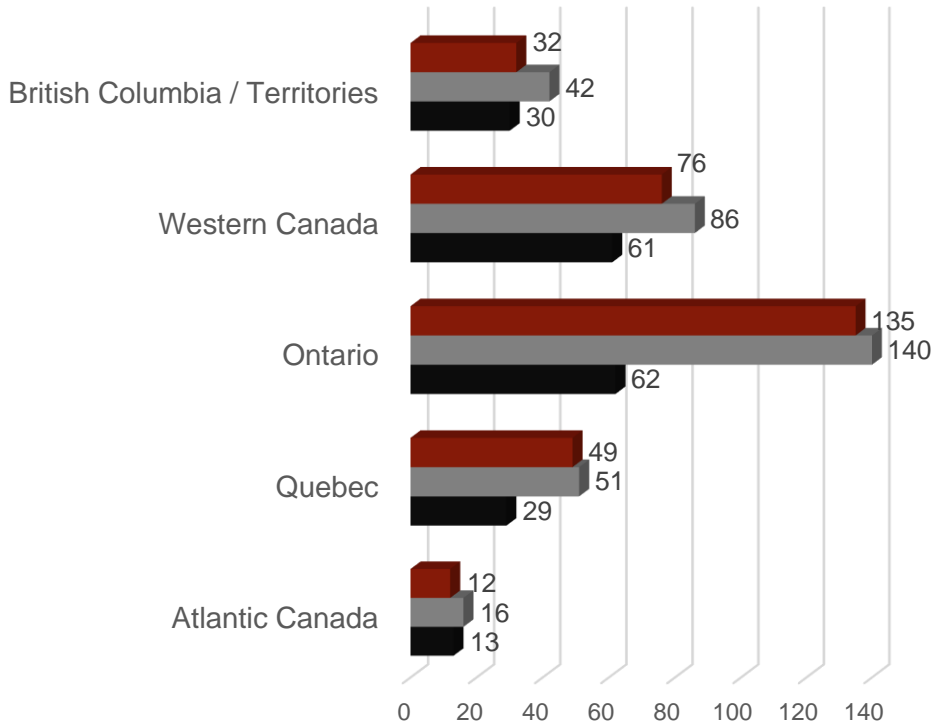
Facilities performing multiple activities, share of total



Meat Processing Industry Profile

Processing Activity

Activity by Province



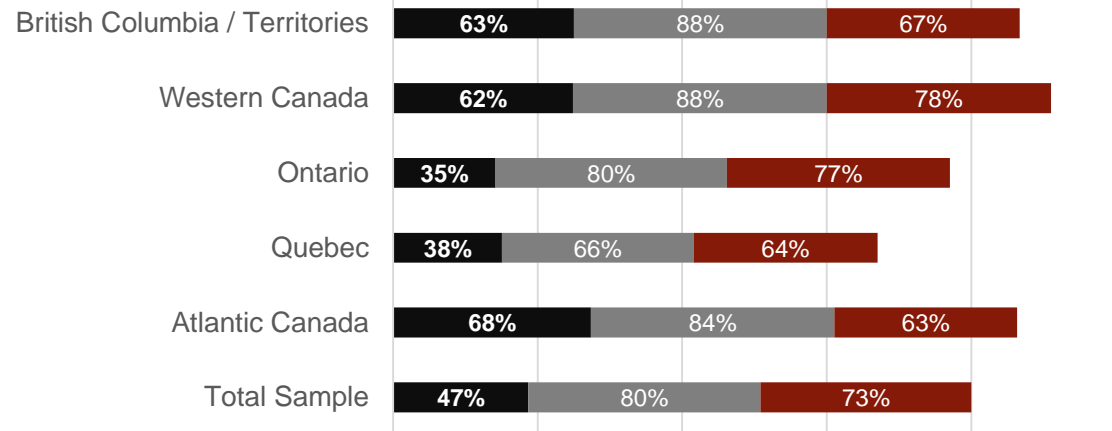
- Further processing (e.g. products such as sausage)
- Meat cutting (quartering, initial cuts of meat, and retail cuts)
- Abattoirs / Slaughter

Regional differences in processing activity:

- Western Canada (62%), British Columbia(63%) and Atlantic Canada(68%) have the largest concentration of Abattoirs
- Ontario and Quebec concentrated in Meat cutting and Further processing

Activity by Province

Note: includes plants with multiple processing activities



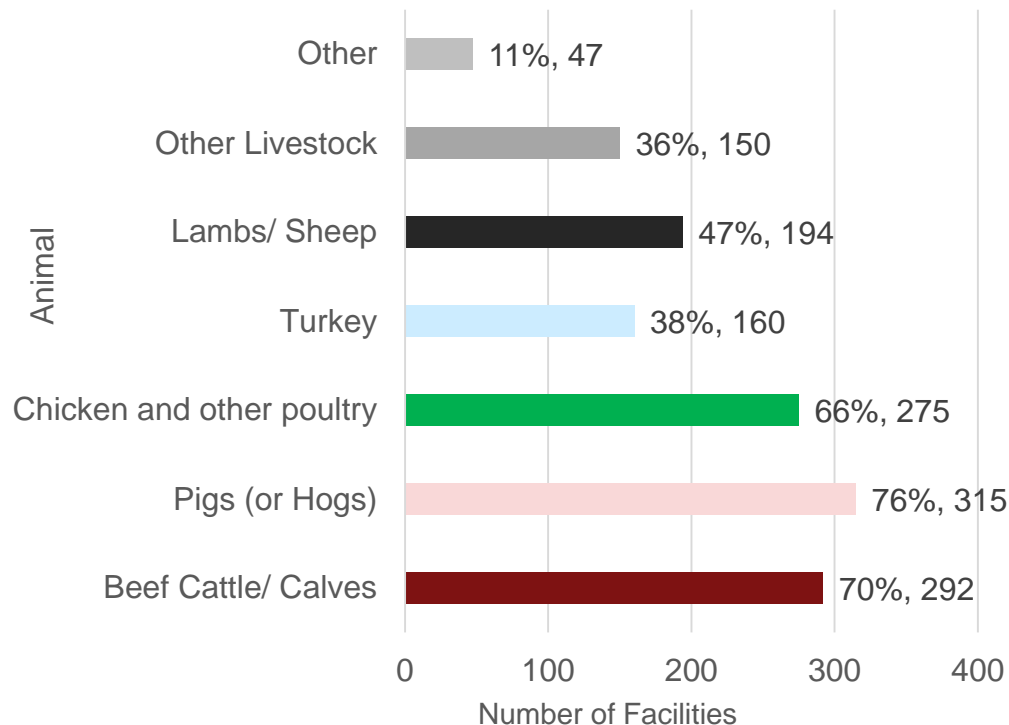
- Abattoirs / Slaughter
- Meat cutting (quartering, initial cuts of meat, and retail cuts)
- Further processing (e.g. products such as sausage)

Meat Processing Industry Profile

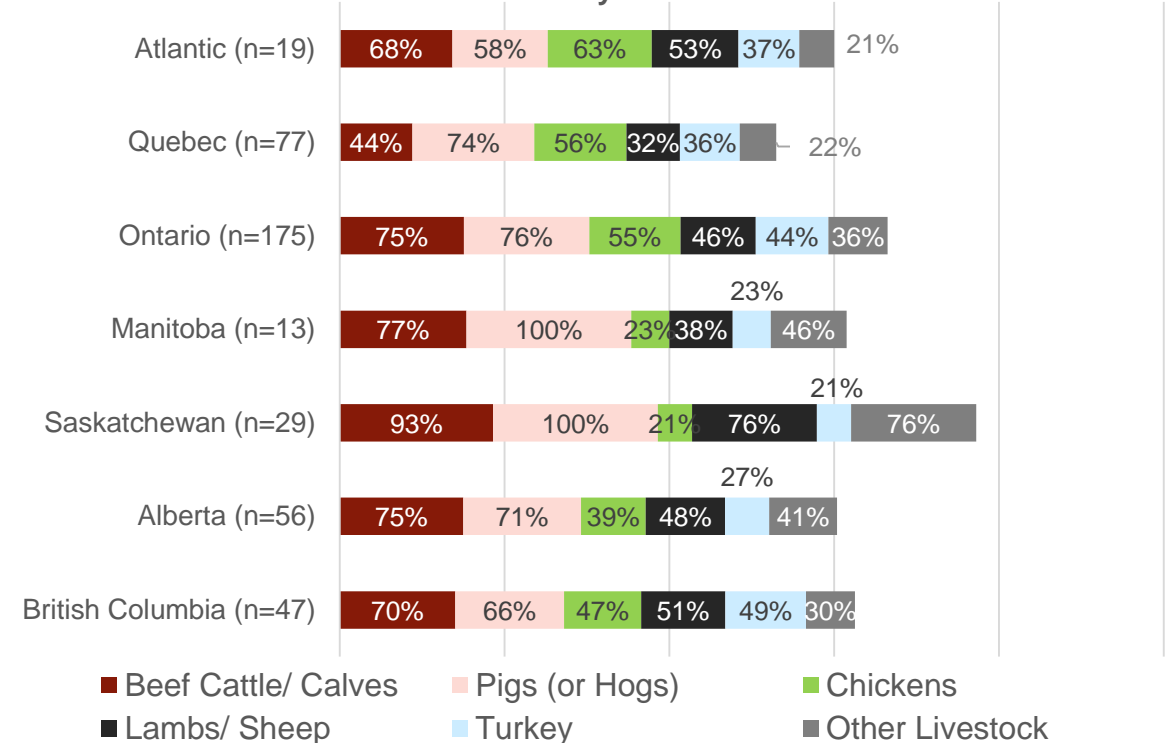
Animal Type

- 76% of facilities process Pigs (hogs), 70% Beef Cattle, and 66% Chickens or Poultry
- Saskatchewan is among the most diverse processors pigs, beef, lambs/sheep and other live stock
- Higher concentration of Chicken and other poultry processors Quebec and Atlantic Canada

Number and Share of Facilities by Type of Animal Processed



Share of Facilities by Animal Processed

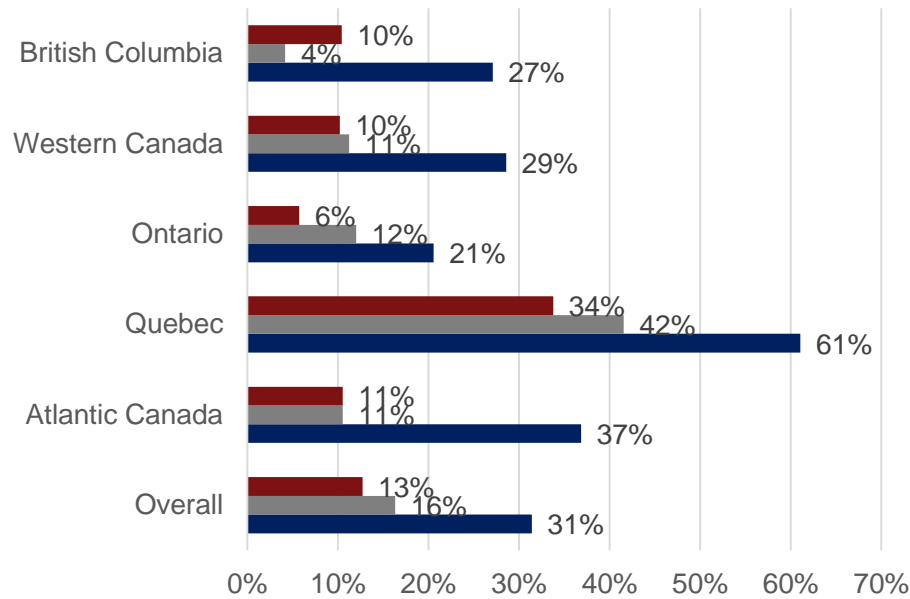


Meat Processing Industry Profile

Processor Export Markets

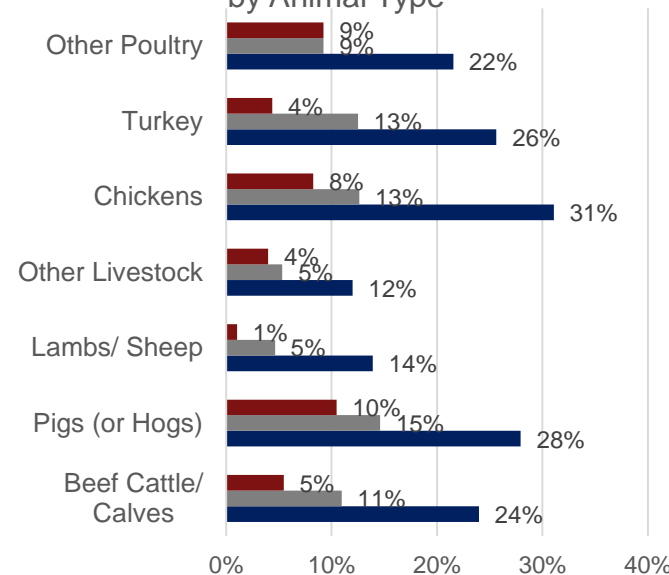
- Overall, 16% of processors export to the US and 13% export internationally, while 31% export to other provinces
- 42% of Quebec's processors export to the US, compared to only 4% in BC
- Pig (hog) processors are most likely to export to the US and internationally
- 58% of large processors with 200+ employees export to the US, 69% to other international markets

Share (%) of Processors that Export, by Province

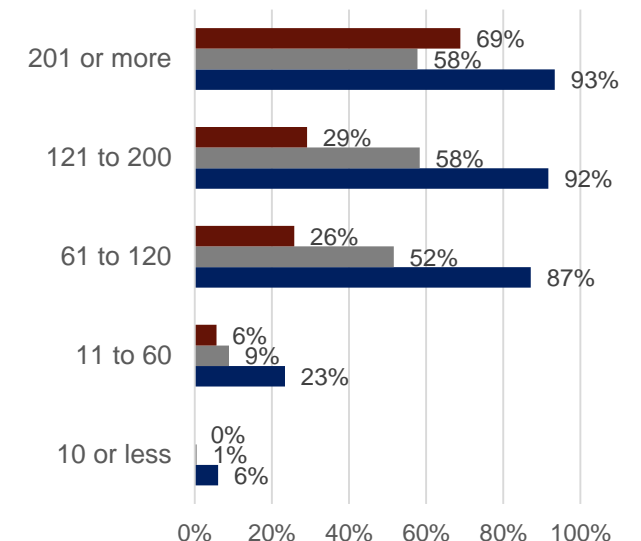


	Overall	Atlantic Canada	Quebec	Ontario	Western Canada	British Columbia
Exported internationally to other countries	13%	11%	34%	6%	10%	10%
Exported to the USA	16%	11%	42%	12%	11%	4%
Exports to other provinces	31%	37%	61%	21%	29%	27%

Share (%) of Processors that Export, by Animal Type



Share (%) of Processors that Export, by Employment Size



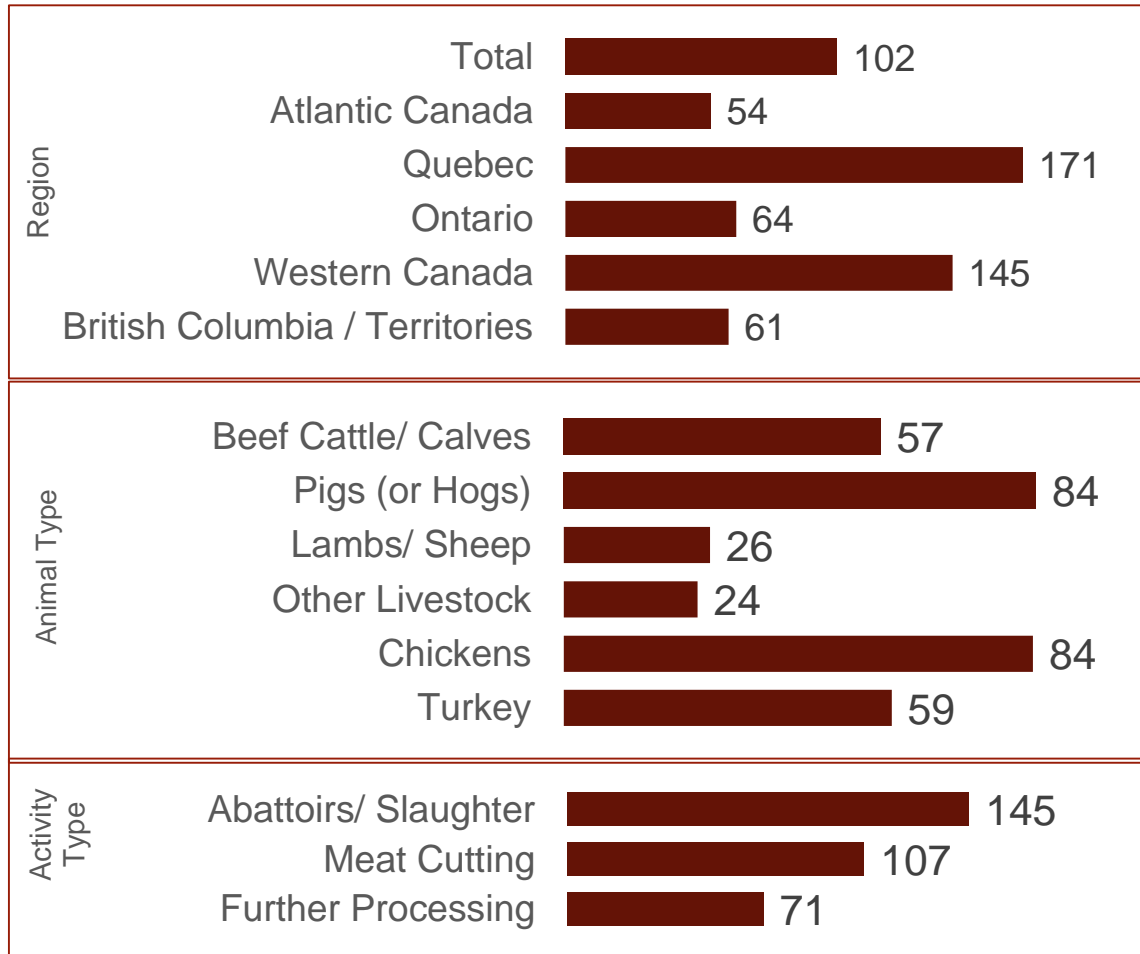
Meat Processing Industry Profile



Processors are stratified across small, medium and large facilities:

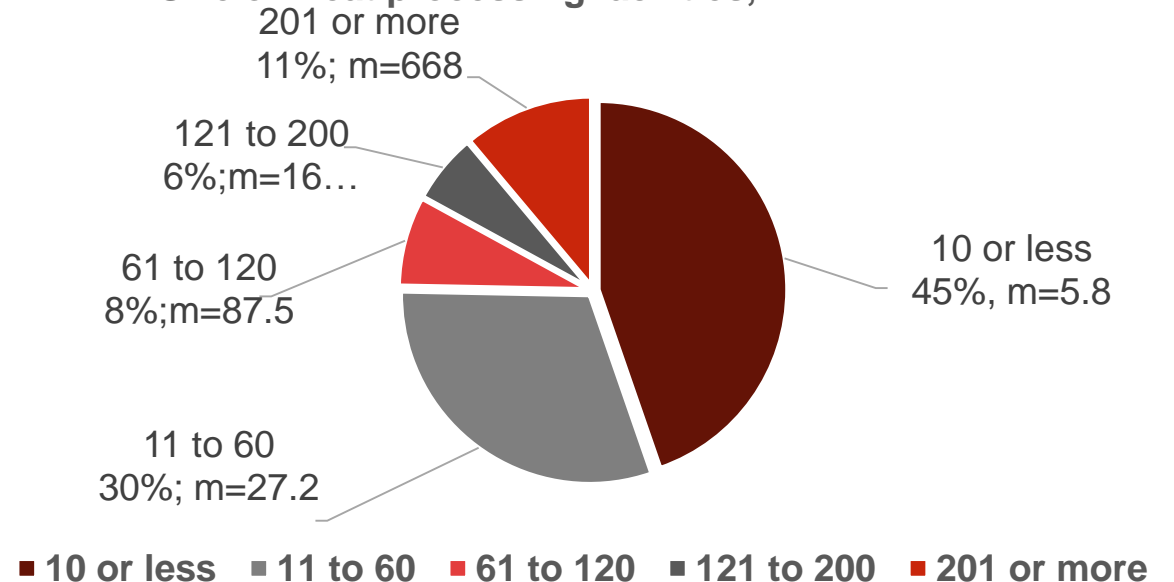
Workforce – Employment Size

Average Processor Employment Size



- The “average” processor in Canada employs 102 workers, but average is uncommon.
- 45% employ less than 10 (averaging 5.8 workers) , while 10% employ 200+ (employing an average of 670 workers)
- On average, largest processors are Poultry and Hog plants, abattoirs/slaughter facilities and those in Quebec and Western Canada

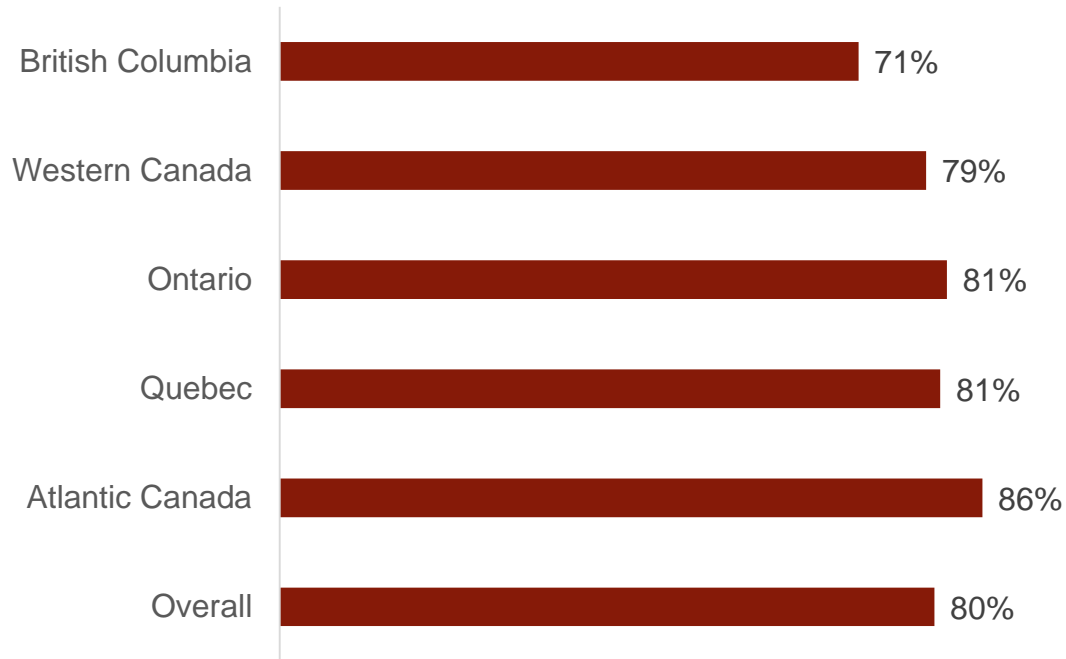
Size of meat processing facilities, N = 417



Meat Processing Industry Profile

Permanent Full-time Employment Share

By Region



80% of meat processor workforce is made up of permanent full-time positions:

- Chicken processors report the highest share of permanent workers at 86%, while hog and pig processors reported a full-time employment share of 73%.

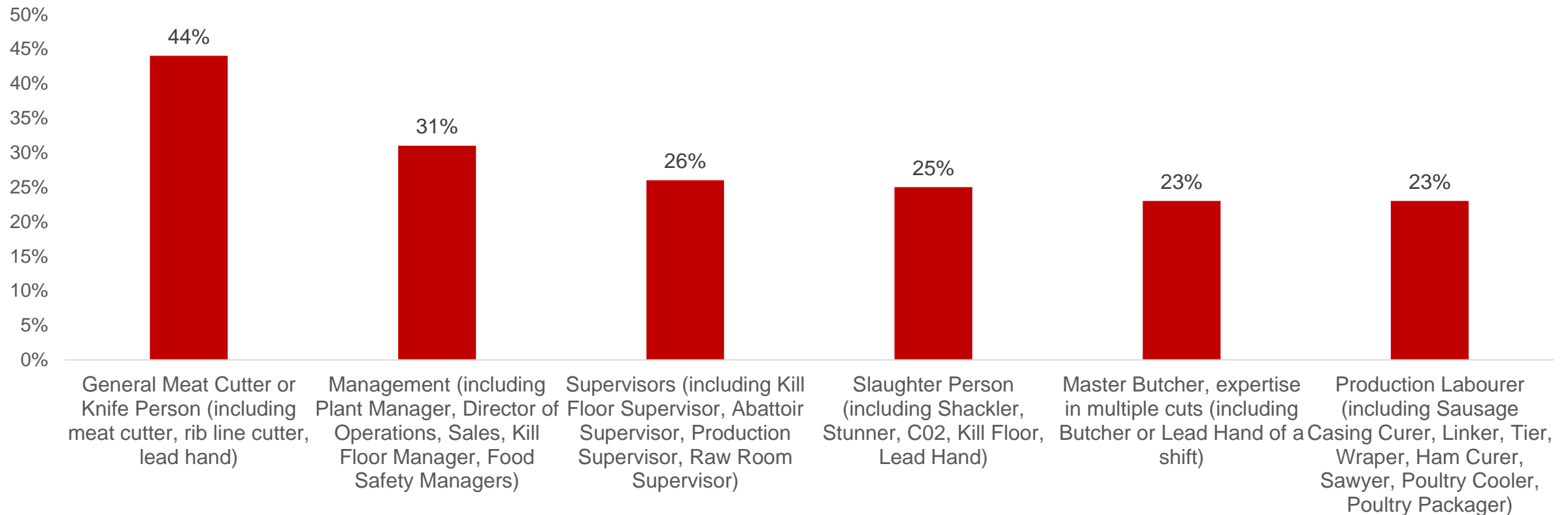
Question: Over the past year, on average, how many paid positions were permanent full-time?

Meat Processing Industry Profile

Meat cutters, plant management & supervisors, slaughterers, butchers and production labourers are the top key occupations for meat processors.

Question: What are the top key occupations, or specific job titles for workers, at your plant? By key occupations we mean either occupations employed in the largest numbers, those with the most specialized skills or those generally most critical to production..

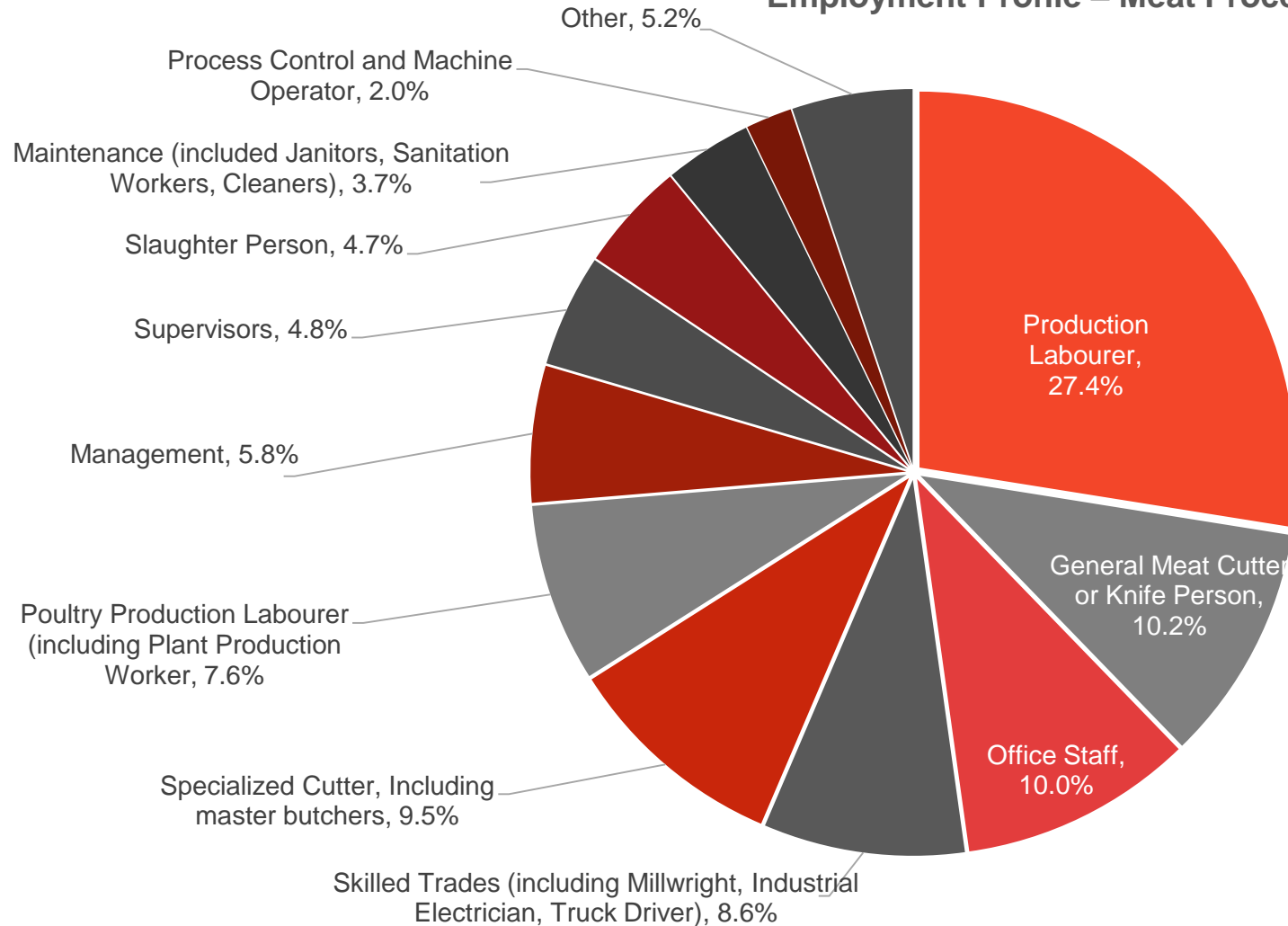
Top key occupations, % of respondents



Meat Processing Industry Profile

Occupation Profile

Employment Profile – Meat Processors, Canada



Occupational Profile:

- Production labourers* account for one-third (35%) of industry employment,
- General (10%) and specialized (10%) meat cutters are another one-fifth (20%)

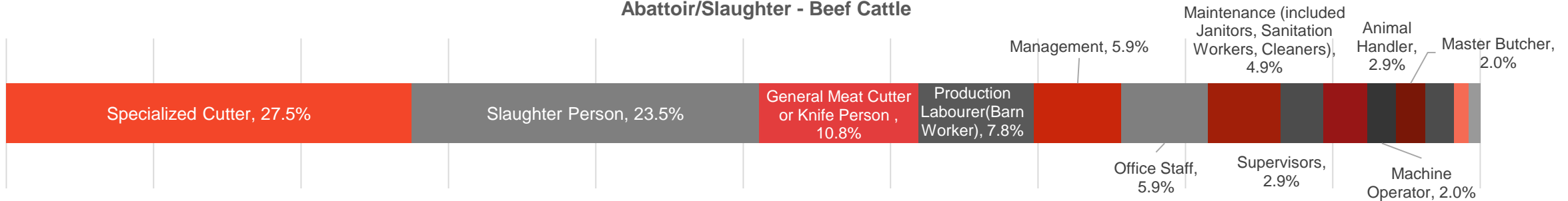
*included poultry and other production labour

Meat Processing Workforce Profile

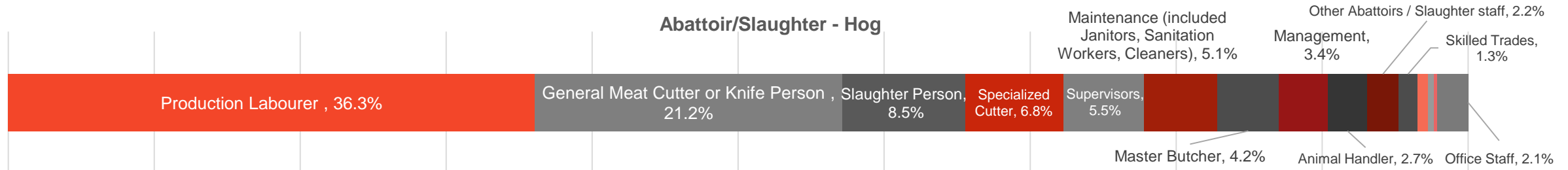
Occupation Profiles

Abattoirs/Slaughter

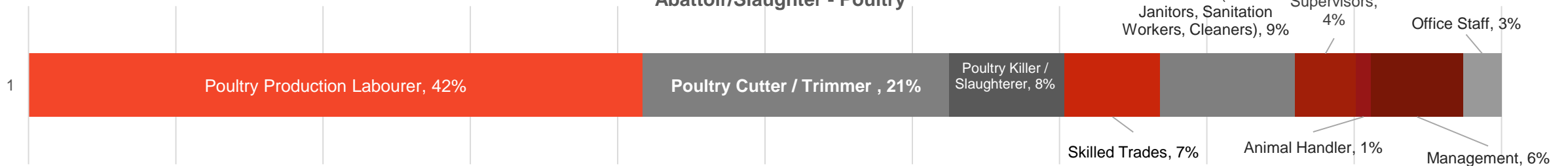
Abattoir/Slaughter - Beef Cattle



Abattoir/Slaughter - Hog



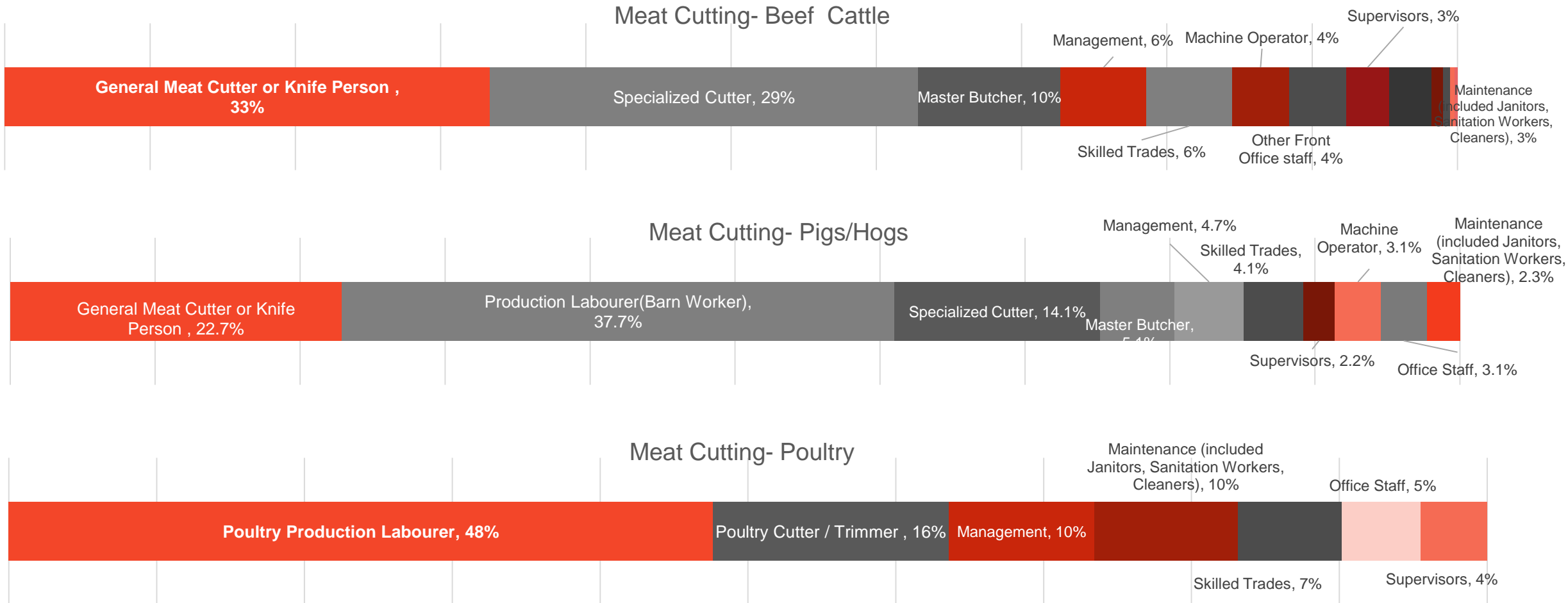
Abattoir/Slaughter - Poultry



Meat Processing Workforce Profile

Occupation Profiles

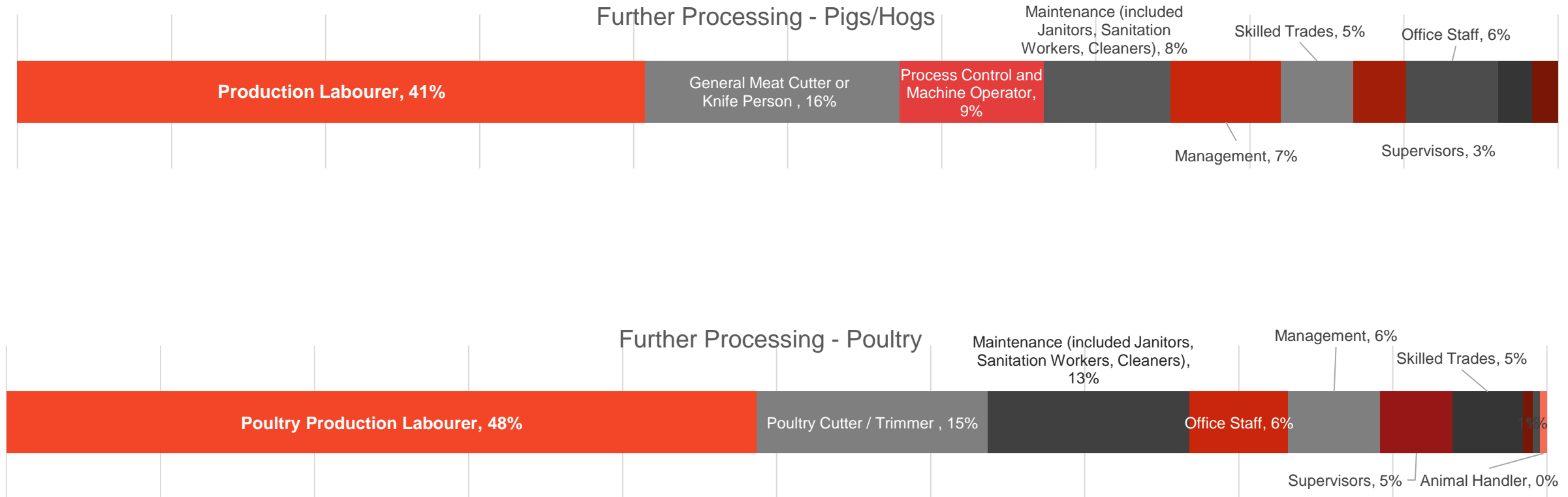
Meat Cutters



Meat Processing Workforce Profile

Occupation Profiles

Further Processors

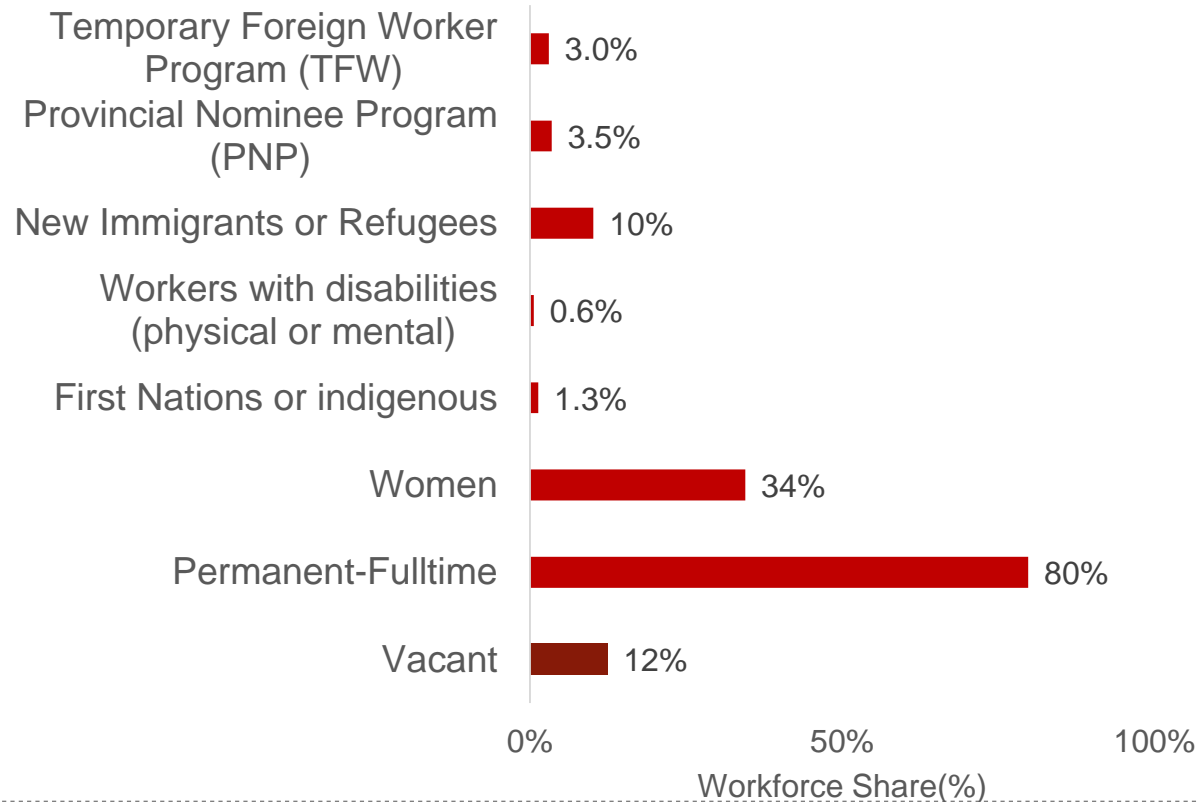


Meat Processing Workforce Profile

Workforce Profile

- On average, 12% of meat processing positions were vacant over the past year, the equivalent of 7,300 positions across Canada.

Workforce profile as a share (%) of average paid positions



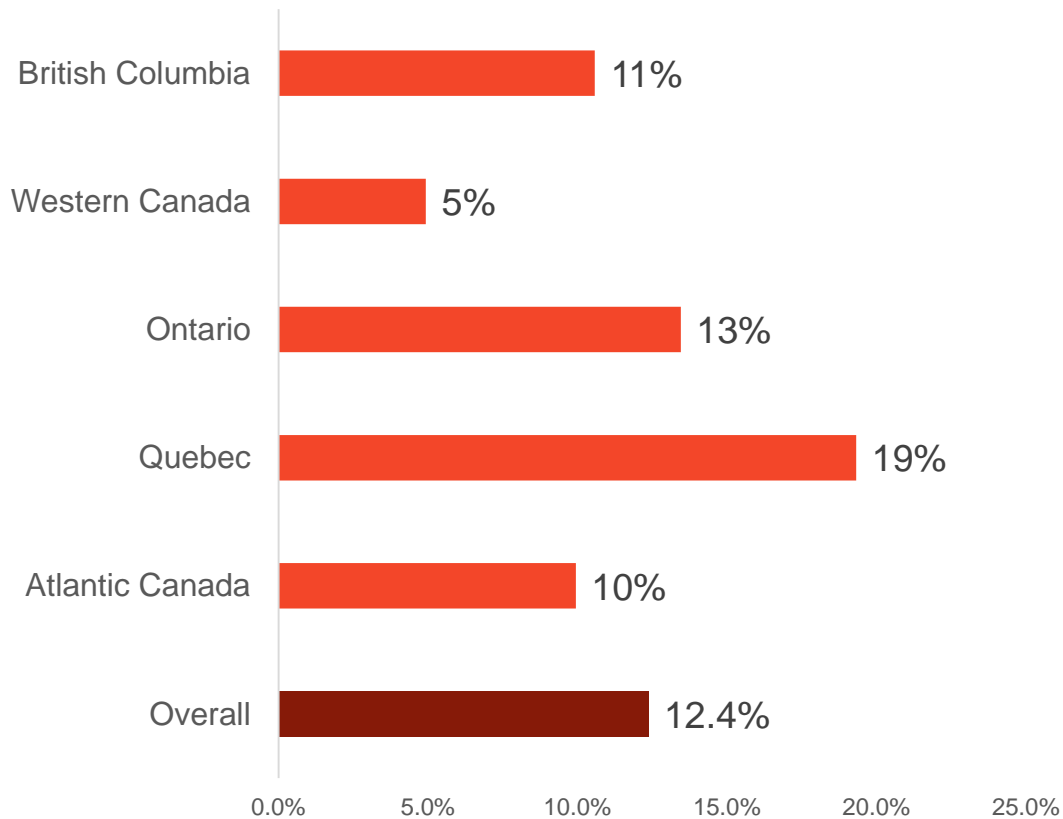
On average, meat processors reported:

- 34% filled by Women
- 10% filled by recent immigrants
- 3% filled by TFWs

Meat Processing Workforce Profile

Workforce Profile - Vacancies

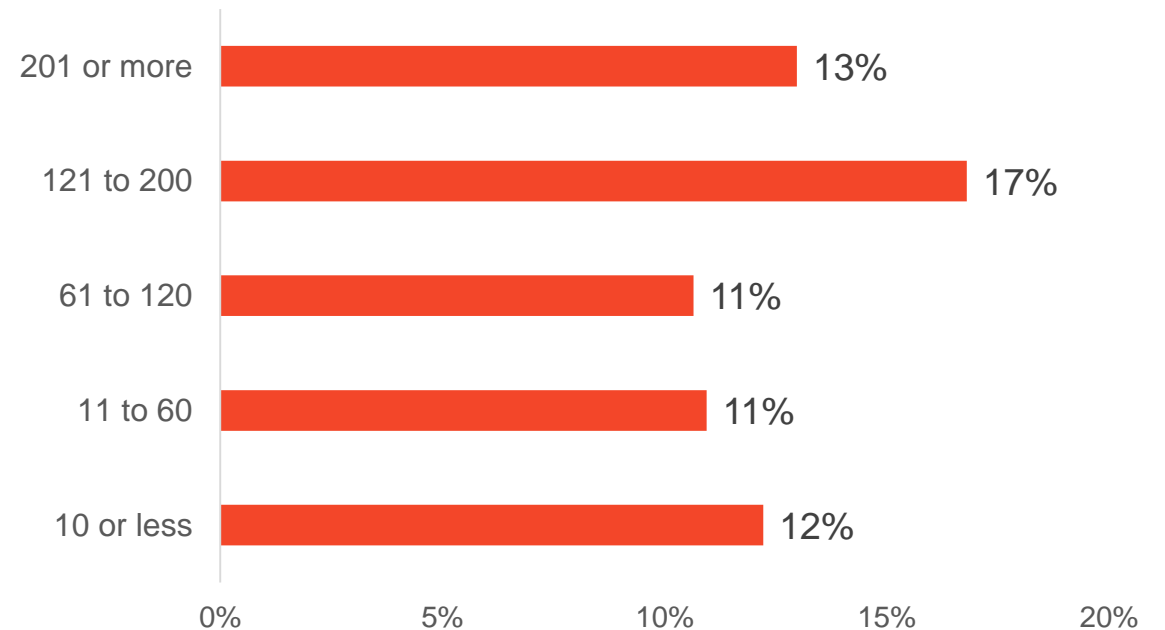
Vacancies as a share of average positions



Vacancies are most acute in Quebec, least likely in Alberta :

- Quebec processors reported that highest vacancy rates at 19%; Western Canada the lowest (5%)
- Highest among processors employing 120 to 200 workers

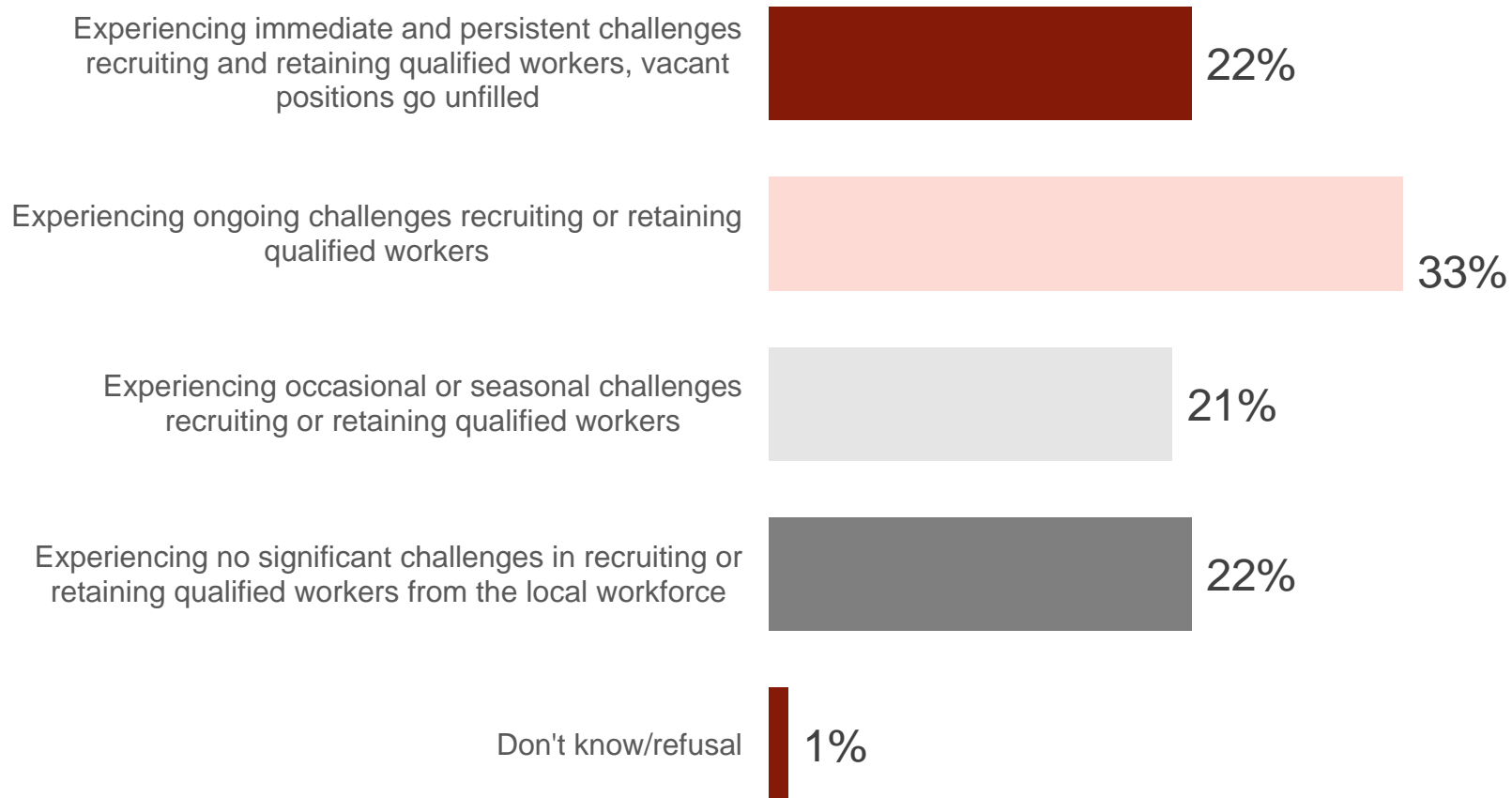
Vacancies as a share of average paid positions



Workforce availability and Recruitment

- Over half (55%) of Canada’s meat processors report not being able to fill positions or experience chronic recruitment challenges.

Workforce Availability



Recruitment Challenges:

- A further 21% occasional or seasonal challenges recruiting qualified workers
- In total, 78% report some form of challenges recruiting or retaining qualified workers.

Question: How would you describe the general availability of workers you need? Would you say that you are...?

Workforce availability and Recruitment

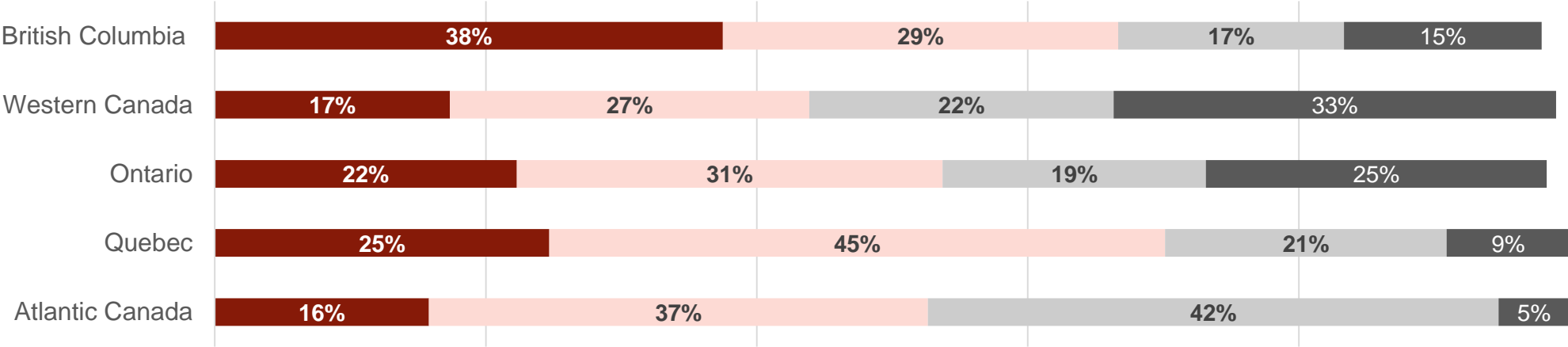


Recruitment challenges most severe in BC and Quebec:

- Almost 4-in-10 processors in BC report not being able to fill positions.
- 70% of meat processors in Quebec report not being able to fill positions(25%) or experience chronic recruitment challenges(45%).

Question: How would you describe the general availability of workers you need? Would you say that you are...?

Workforce Availability

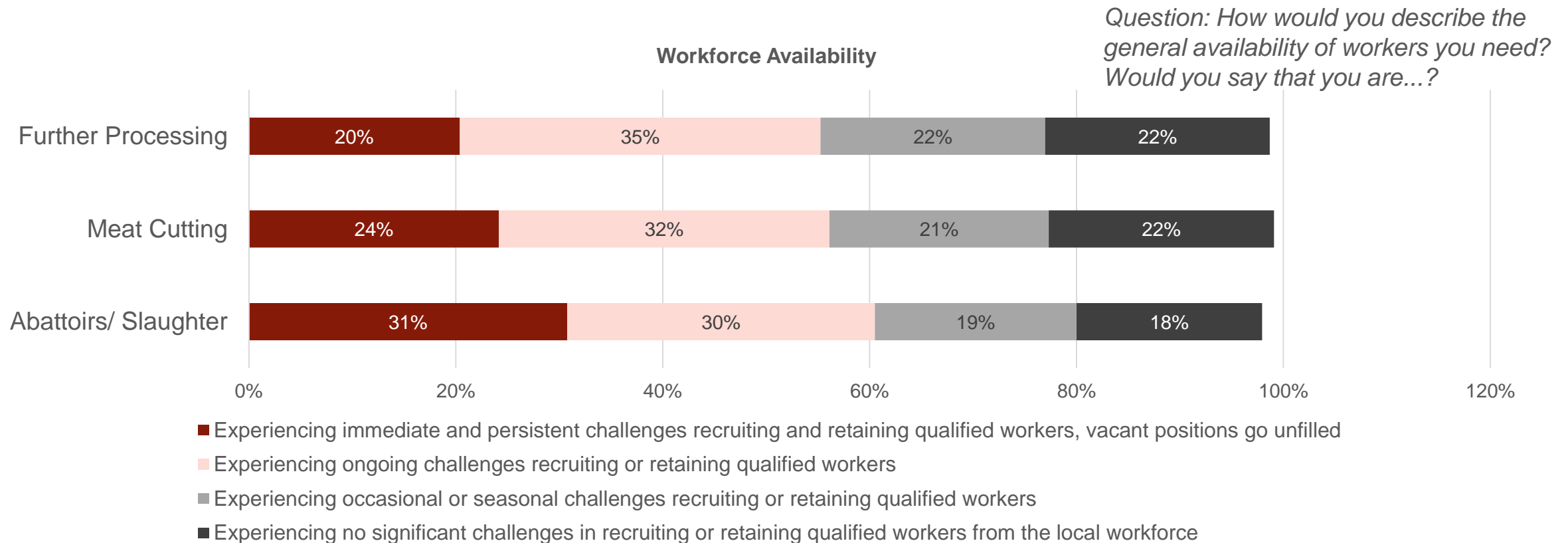


- Experiencing immediate and persistent challenges recruiting and retaining qualified workers, vacant positions go unfilled
- Experiencing ongoing challenges recruiting or retaining qualified workers
- Experiencing occasional or seasonal challenges recruiting or retaining qualified workers
- Experiencing no significant challenges in recruiting or retaining qualified workers from the local workforce

Workforce availability and Recruitment

Abattoirs/Slaughter processors report the greatest recruitment challenges:

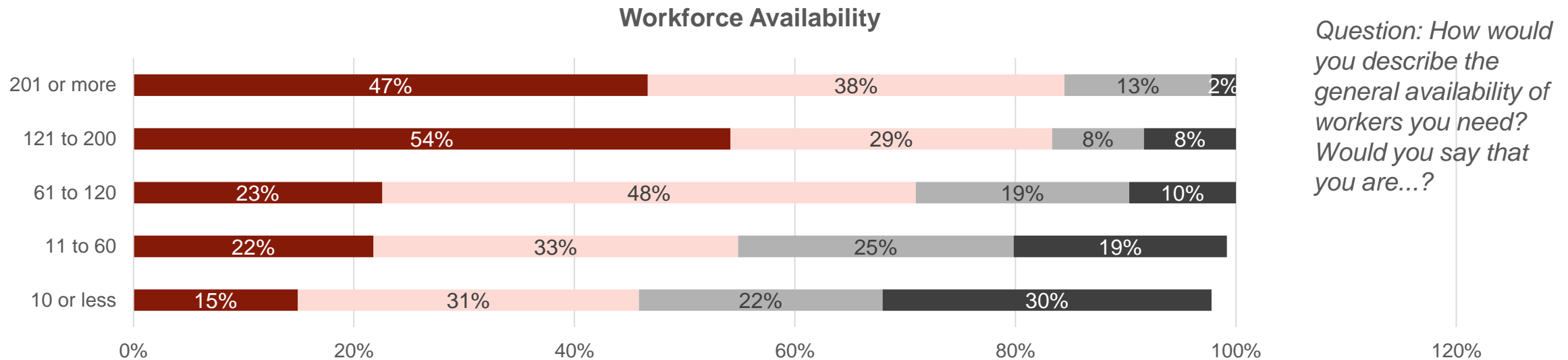
- Almost one-third (31%) of Canada’s Abattoirs/Slaughter processors cannot fill positions or experience chronic recruitment challenges. A further 30% occasional or seasonal challenges recruiting qualified workers



Workforce availability and Recruitment

The largest facilities report more pressing hiring challenges than the smaller ones:

- Over half (54%) of Canada’s meat processors with between 121 and 200 workers cannot fill positions or experience chronic recruitment challenges.
- Three-quarters (75%) of Canada’s largest meat processors report not being able to fill positions or experience chronic recruitment challenges



- Experiencing immediate and persistent challenges recruiting and retaining qualified workers, vacant positions go unfilled
- Experiencing ongoing challenges recruiting or retaining qualified workers
- Experiencing occasional or seasonal challenges recruiting or retaining qualified workers
- Experiencing no significant challenges in recruiting or retaining qualified workers from the local workforce

Workforce availability and Recruitment

Meat processors have difficulties recruiting Meat cutters and butchers across most regions of Canada:

- 4-in-10 processors cited Meat cutters/ butchers as the most difficult to recruit, 6-in-10 in BC and over half in Western Canada.

Rank	Occupation	Overall	Atlantic Canada	Quebec	Ontario	Western Canada	British Columbia
1	Meat cutter/ butcher	42%	53%	14%	43%	52%	60%
2	General labour/ Day labourer	11%	5%	8%	14%	9%	8%
3	Electromechanic/ electrotechnician	6%	5%	26%	-	2%	-
4	Production worker	5%	-	5%	7%	3%	6%
5	Sanitation/ Maintenance	5%	11%	10%	4%	3%	2%
6	Supervisor/ manager	5%	-	10%	2%	5%	4%
7	Meat wrapper/ packaging	4%	-	5%	5%	2%	4%
8	Food processing operator	3%	5%	12%	1%	1%	-
9	Deboner	2%	-	4%	2%	2%	-
10	Sausage maker	2%	-	-	2%	4%	2%
11	Driver/ shipper	2%	5%	3%	2%	1%	-

Question: What are the top three positions that are most difficult to recruit?

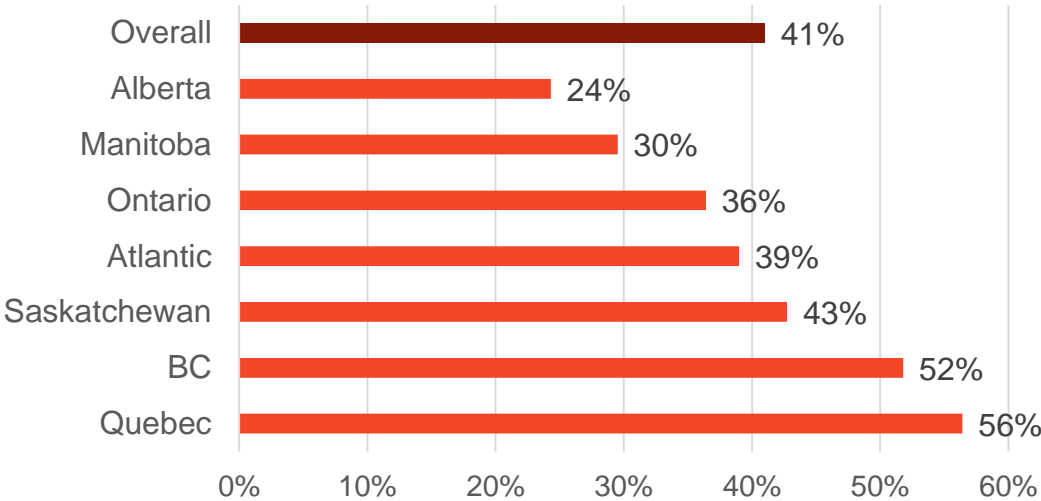
Workforce availability and Recruitment



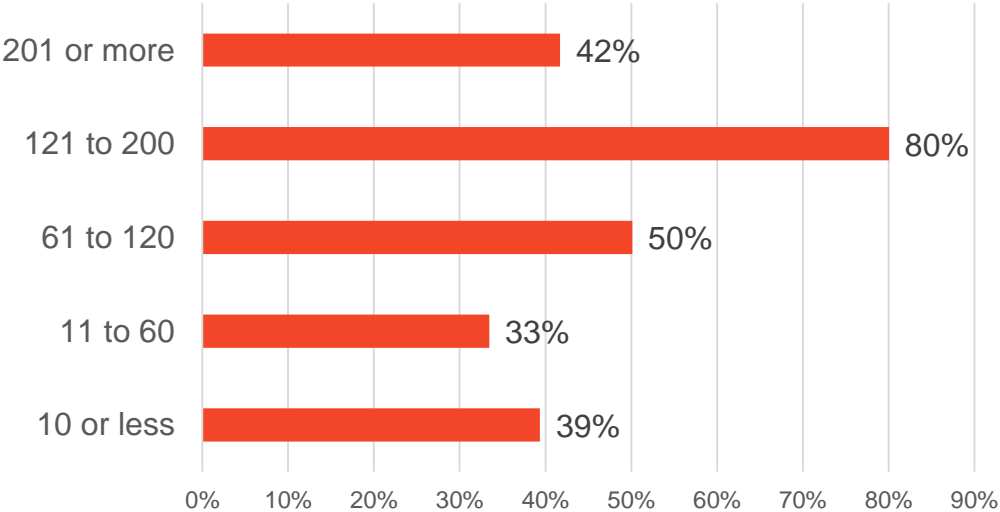
Evidence of significant recruitment challenges supported by high turnover.

- Canada’s Meat processors hired an estimated 24,500 workers over the past year. This represents a 41% turnover rate in the industry for key occupations.
- New hires in Quebec totaled 56% of total reported plant positions.
- Employers with between 120 to 200 workers, reported hiring 80% of their workforce over the past year.

Turnover rate, by Province



Turnover rate, by employer size

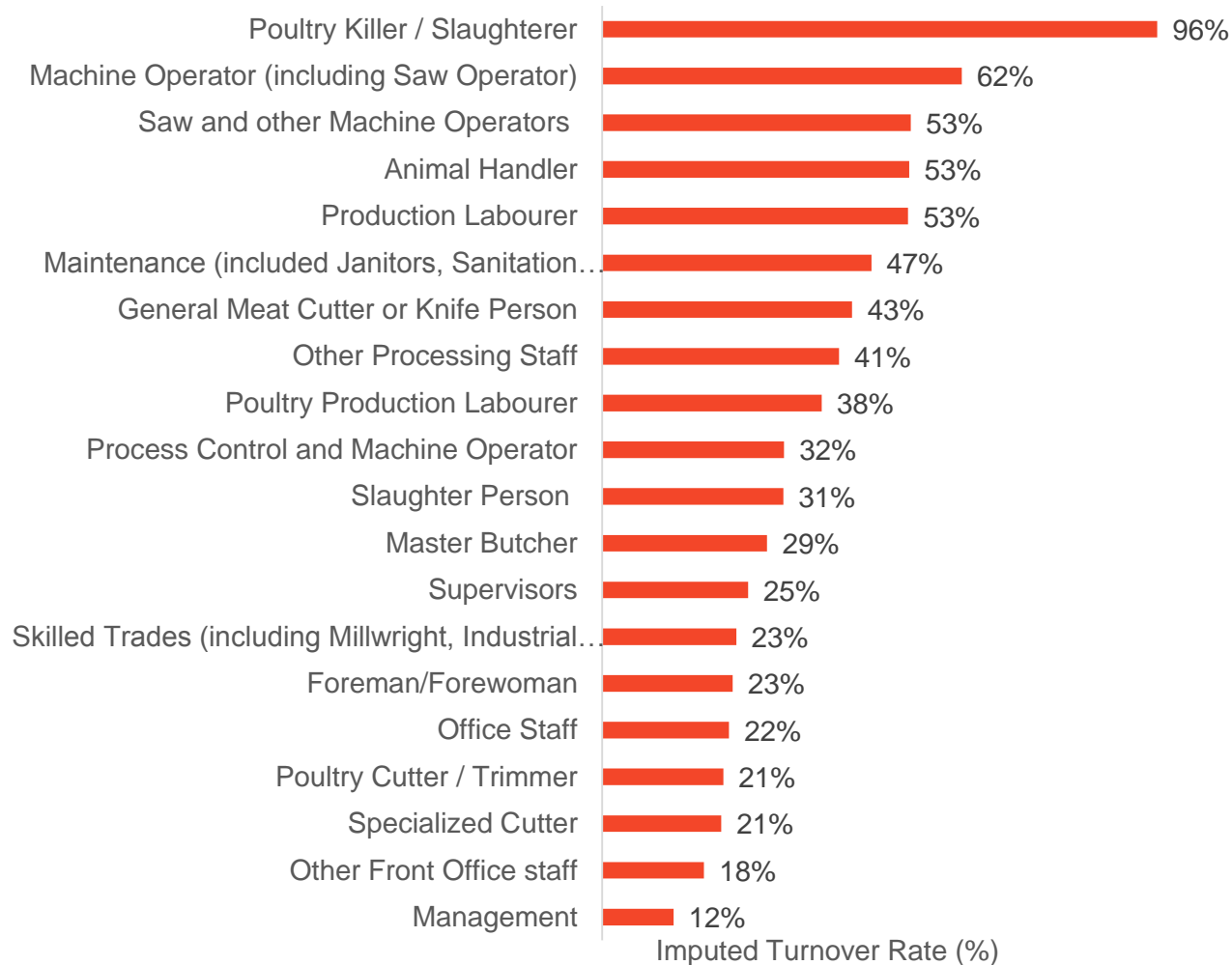


Note: Turnover rate = (total number of people hired in an occupation)/(average number of people employed in an occupation)

Question: Excluding seasonal re-hire, how many workers were hired for this position over the last year?

Workforce availability and Recruitment

Top occupations by turnover rate, meat processing

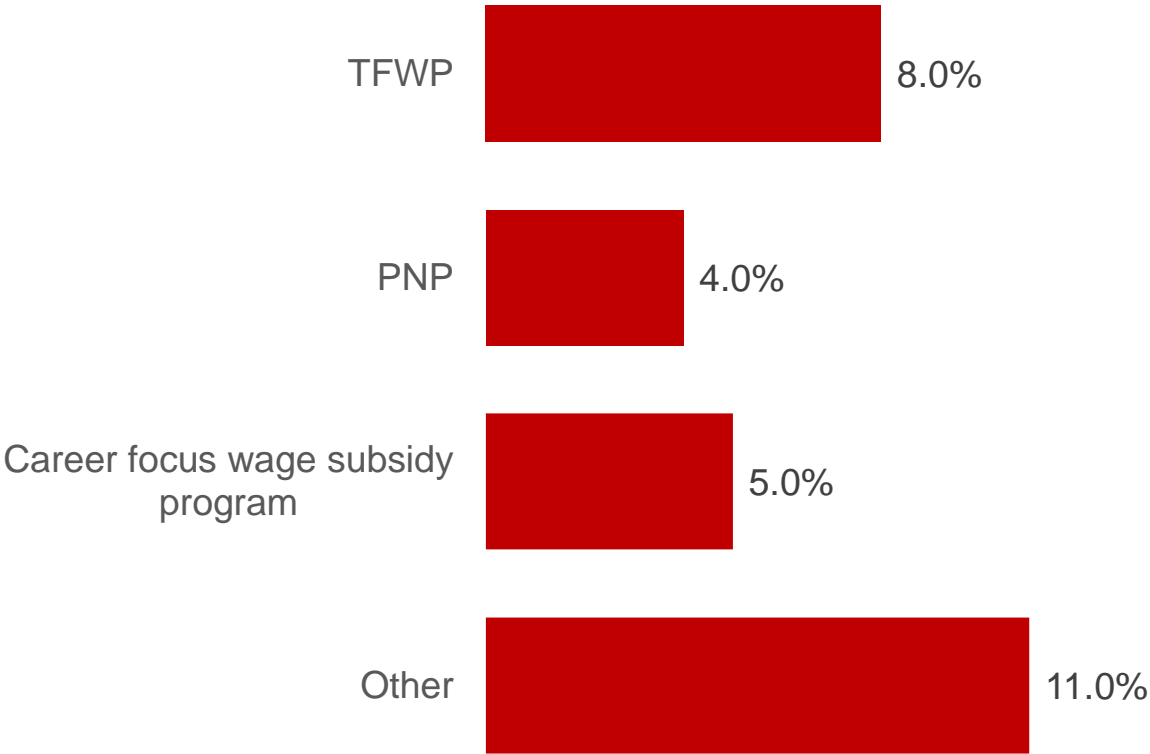


Note: Turnover rate = (total number of people hired in an occupation)/(average number of people employed in an occupation)

- The number of total hires of Poultry killers and slaughters is almost equal to total average employment over a single year.
- Foreman/women and other meat cutting staff have the lowest turnover rates while saw machine operators and other poultry staff have the highest.

Workforce availability and Recruitment

Utilization of programs :



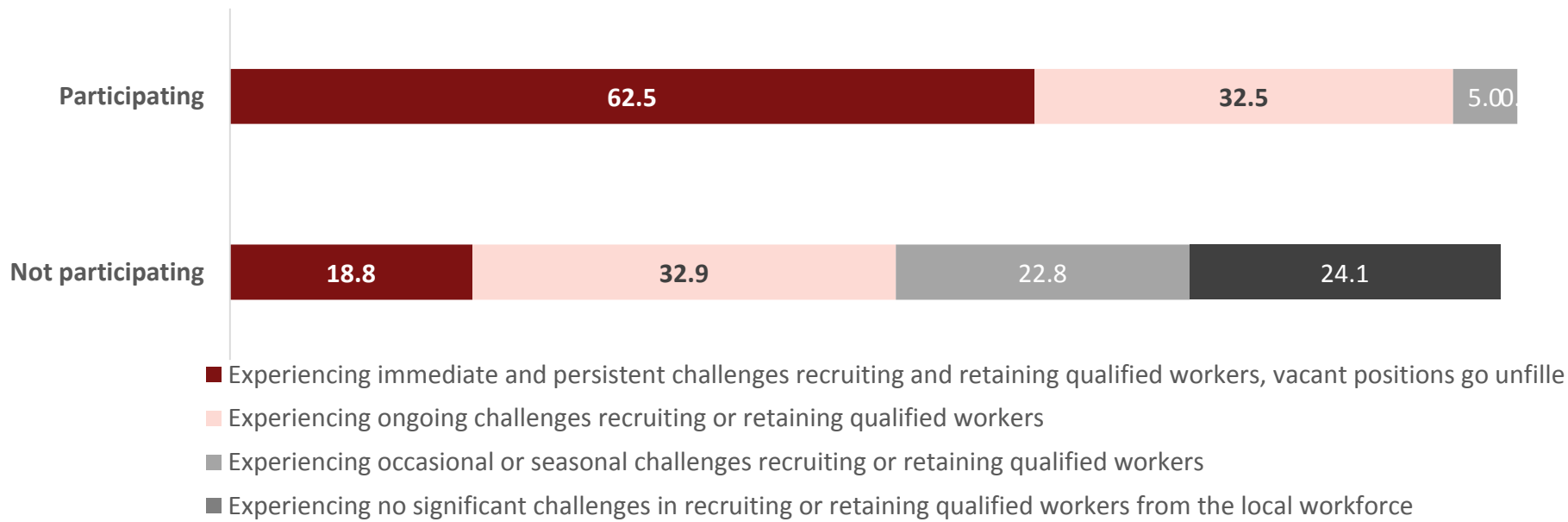
Survey highlights:

- 8% of employers utilized the Temporary Foreign Worker Program over the past year.
- 4% hired through the Provincial Nominee Program.

Workforce availability and Recruitment

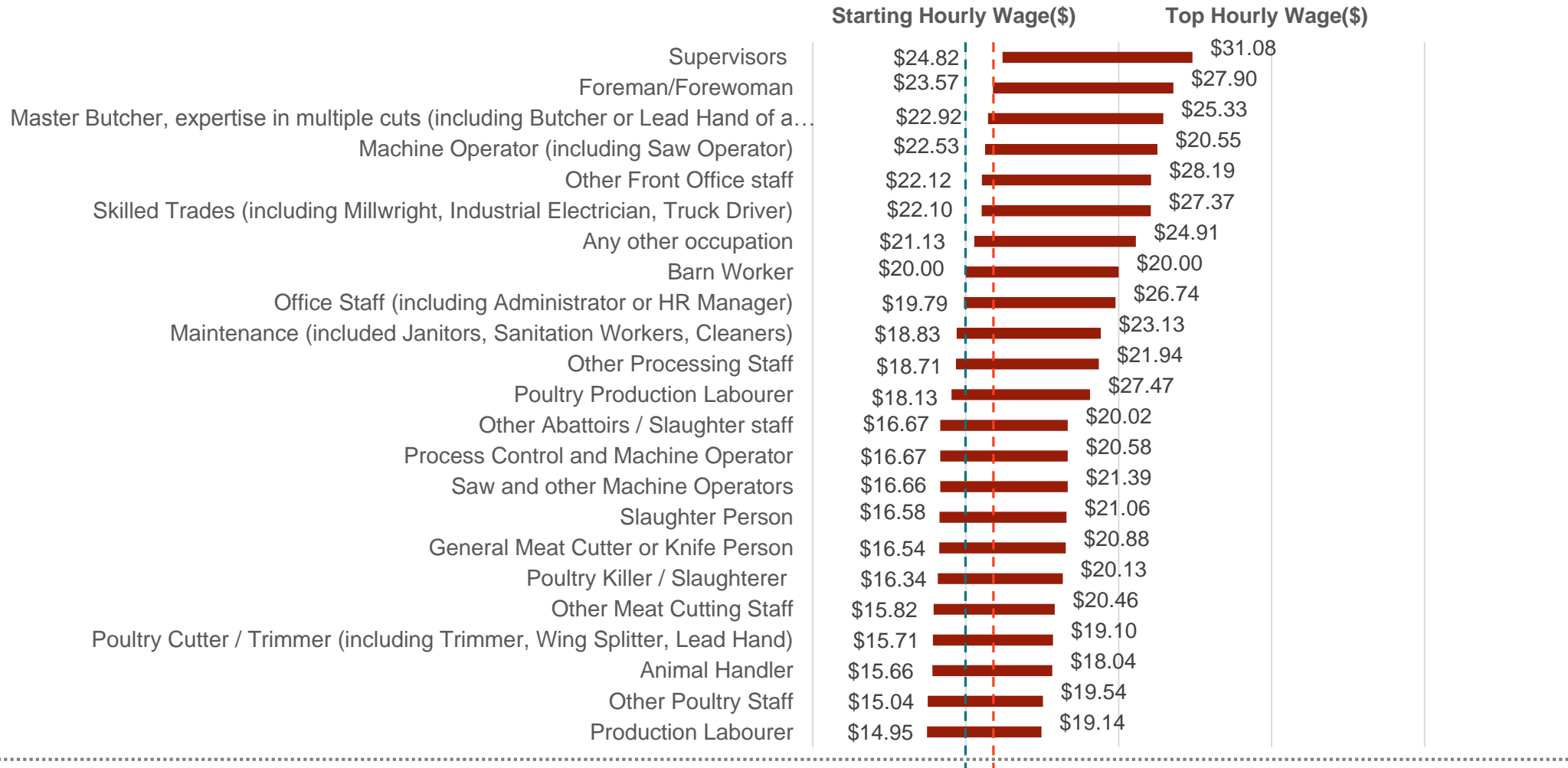
- Employers participating in TFW or PNP programs are much more likely to report inability to fill vacant position.

Recruitment challenges based on participation in PNP/TFW program



Workforce Wages and Benefits

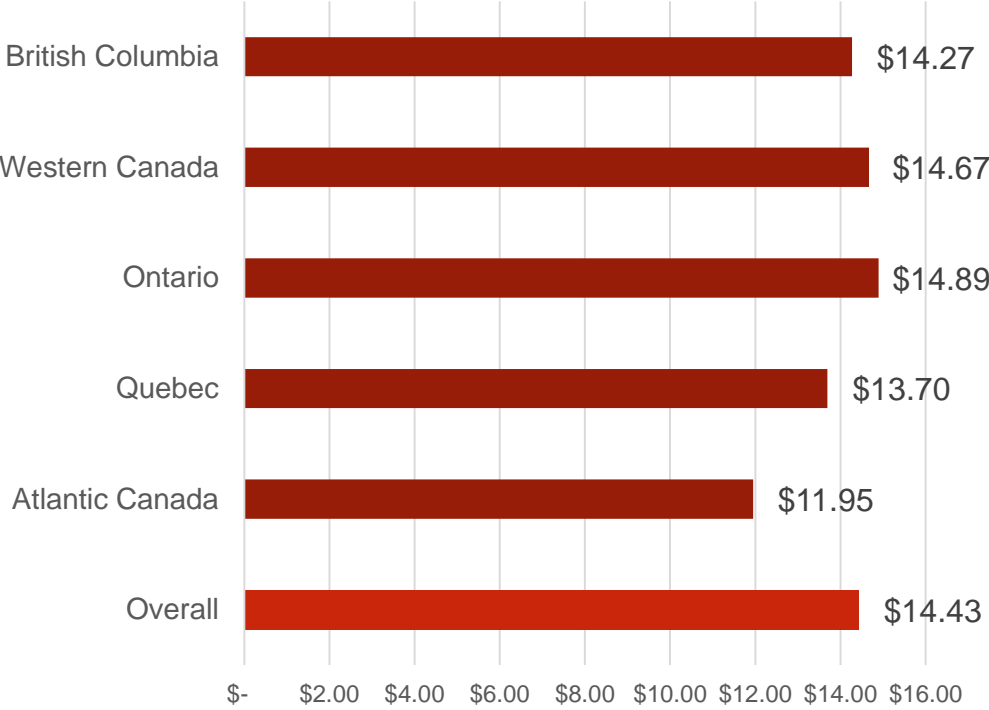
Hourly wage ranges (\$), by Occupation



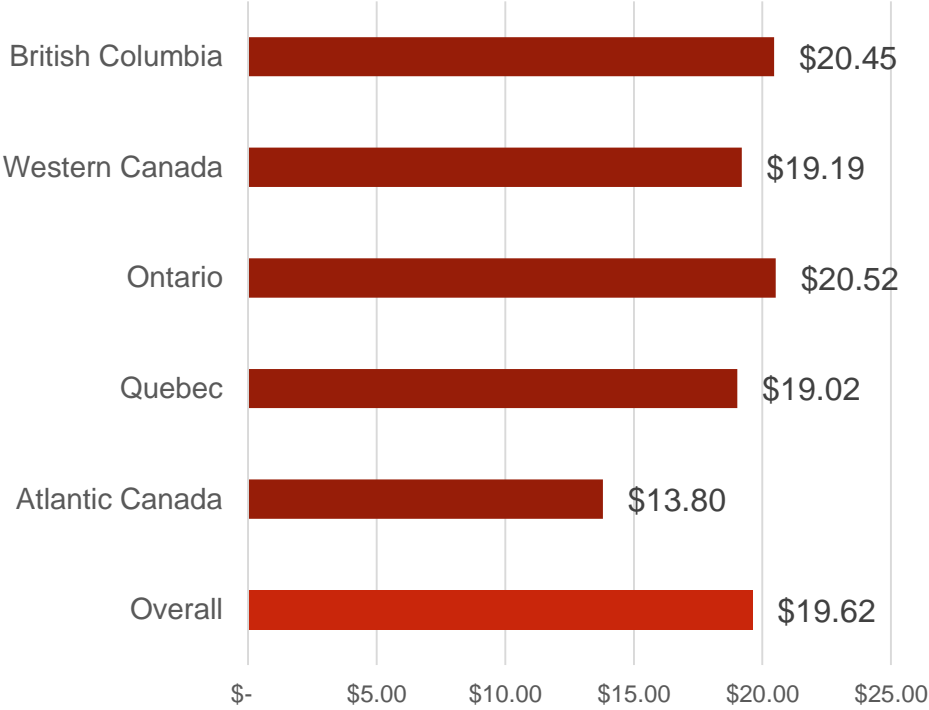
Workforce Wages and Benefits

- Comparison of average starting hourly wages for Production labourers and Master butchers across provinces shows lower wages in Atlantic Canada and higher wages in Ontario and Western Canada.

Starting Hourly Wage (\$) - Production Labourer



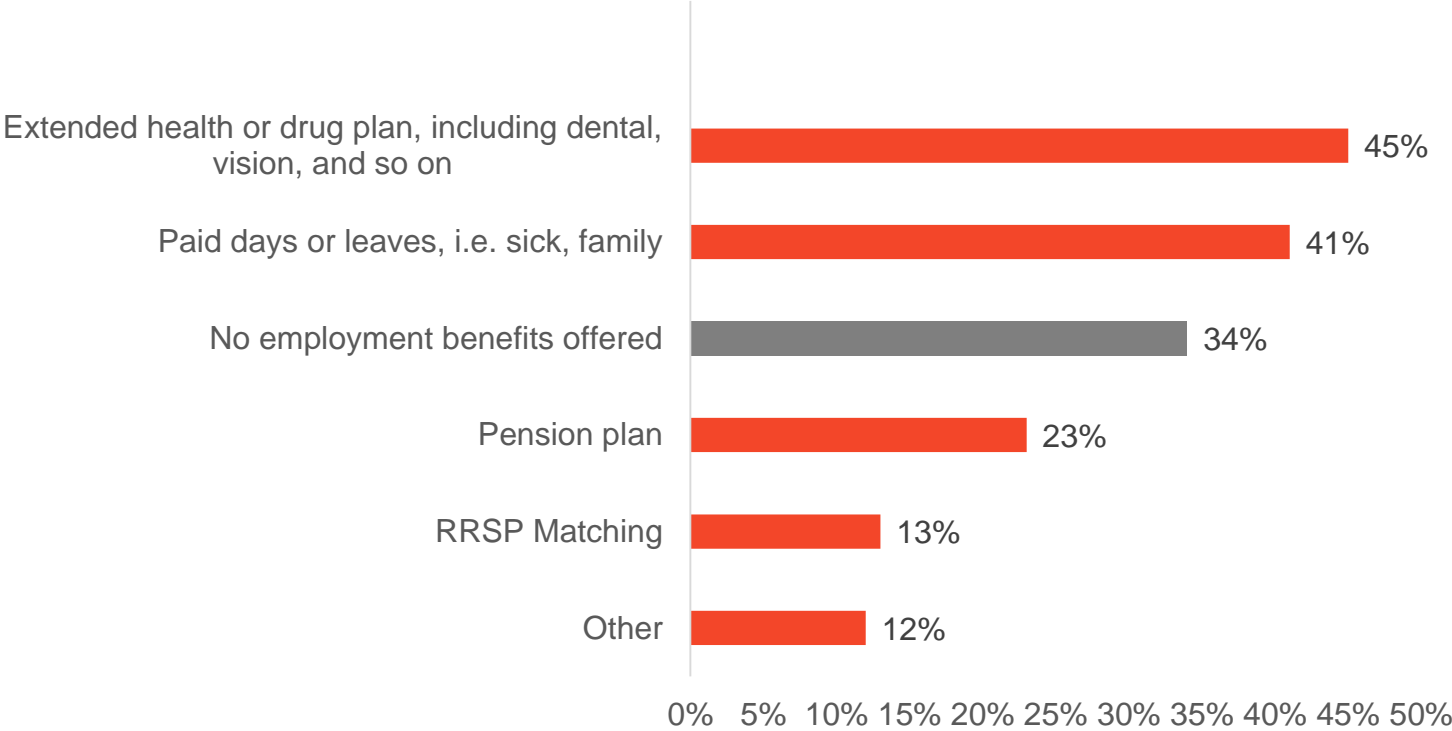
Starting Hourly Wage(\$) - Master Butcher



Workforce Wages and Benefits



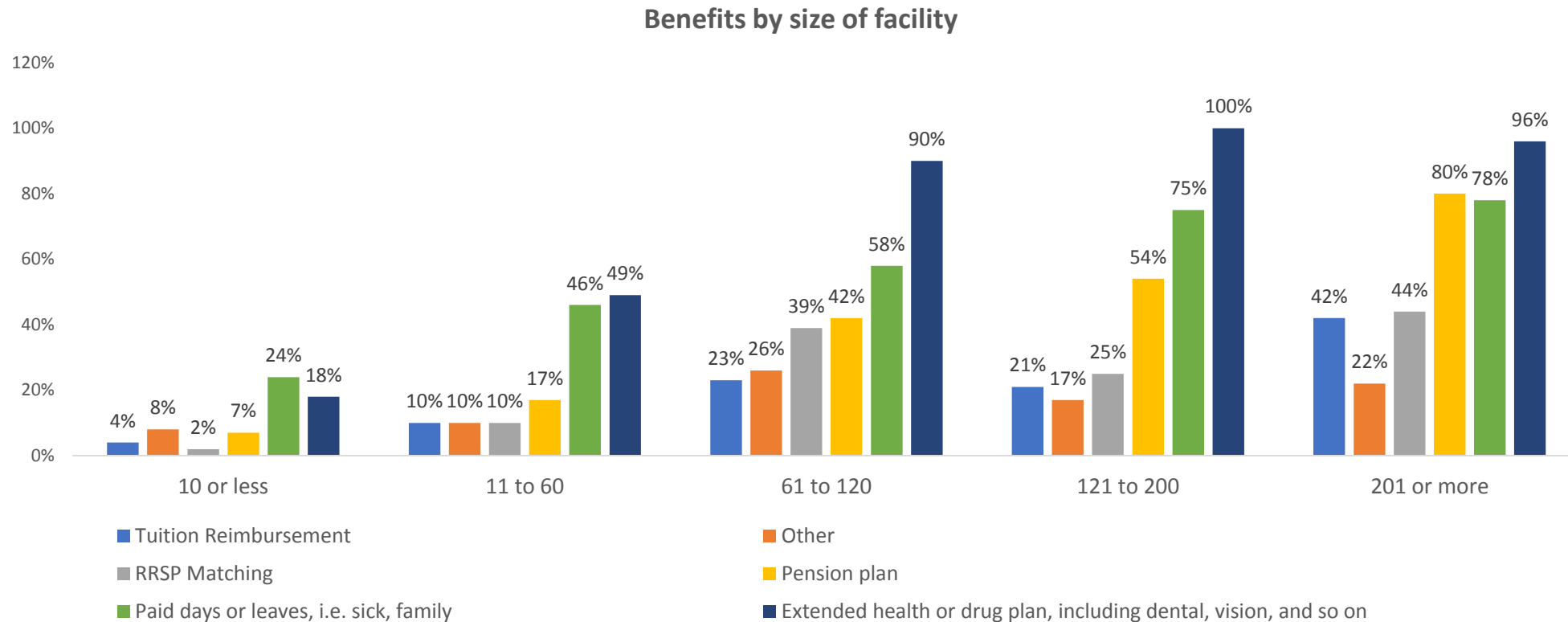
Benefits



45% of the meat processing plants offered extended health and drug plans, while 1/3rd offered none.

Workforce Recruitment

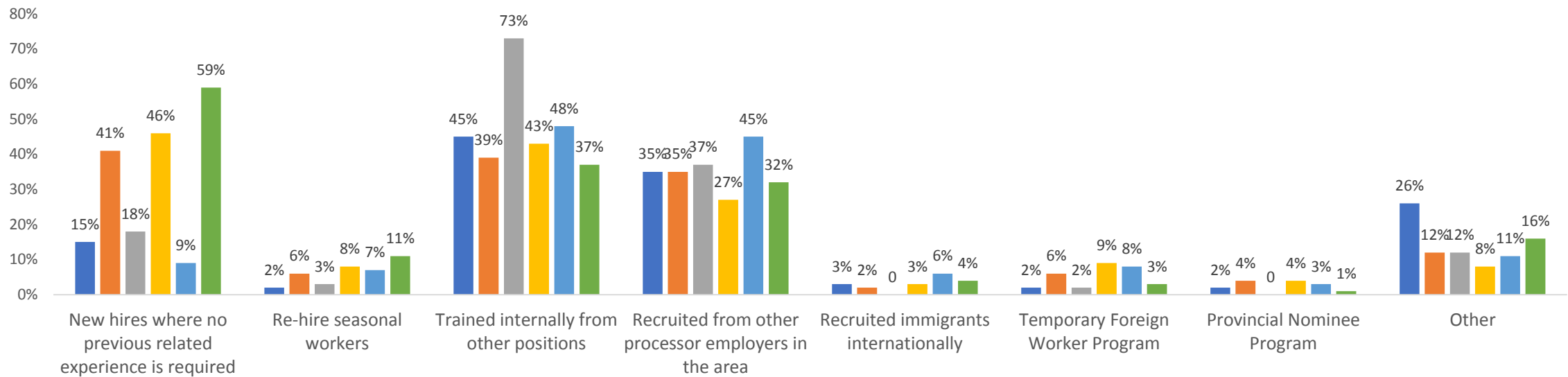
The largest facilities seem to have almost universal coverage*



Workforce Recruitment

How are vacancies most often filled?

Top occupations by hiring program



■ Management (including Plant Manager, Director of Operations, Sales, Kill Floor Manager, Food Safety Managers) Occupations (N=130)

■ General Meat Cutter or Knife Person (including meat cutter, rib line cutter, lead hand) Occupations (N=181)

■ Supervisors (including Kill Floor Supervisor, Abattoir Supervisor, Production Supervisor, Raw Room Supervisor) Occupations (N= 109)

■ Slaughter Person (including Shackler, Stunner, CO2, Kill Floor, Lead Hand) Occupations (N=103)

■ Master Butcher, expertise in multiple cuts (including Butcher or Lead Hand of a shift) Occupations (N=96)

■ Production Labourer (including Sausage Casing Curer, Linker, Tier, Wrapper, Ham Curer, Sawyer, Poultry Cooler, Poultry Packager) Occupations (N=95)

Meat Processors Survey

Methodology

- In total, n=417 meat processing employers participated in the survey administered by Ipsos.
- Data collection was conducted via a telephone (n=299) and online (n=118) surveys.
- The survey was fielded between December 30th, 2017 and April 23rd, 2018.
- The margin of error for a sample of n=417 is +/- 4.7%, nineteen times out of twenty. The margin of error will be greater for sub-groups depending on sample sizes.
- The average length of the survey was 21 minutes via telephone and 33 minutes via online.
- Respondents were screened to ensure that only those individuals who had detailed information about the people employed within the organization and the types of skills and qualifications required by the organization participated in the survey.
- The survey was conducted in both English and French, depending upon the preference of the respondent.
- Respondent contact information for the survey was provided by FPHRC.



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