



SECURING CANADA'S
FISH + SEAFOOD
WORKFORCE

Real Challenges. Practical Solutions.
Fresh Perspectives.



June 2018

Atlantic Fish + Seafood Processing Workforce Survey Report

LABOUR MARKET INFORMATION
REPORT SERIES

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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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Seafood Processors Survey

Executive Summary



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- Survey findings suggest the overwhelming majority of seafood processors in Canada are experiencing labour shortages and recruitment challenges. 83% of seafood processors report some form of recruitment challenges, with nearly one-fifth of seafood processors report not being able to fill positions.
- Recruitment challenges result in more than 1-in-10 jobs left unfilled. On average, employers reported 11% of paid positions vacant over the year – This translates to 1,800 unfilled positions.
- Management, shellfish plant workers and supervisors were the top key occupations cited by seafood processors while vacancies for general production workers were hardest to fill.
- Atlantic seafood processors hired an estimated 6,300 new workers over the past year. This represents a 40% turnover rate for key occupations in the industry.
- The results suggest the industry is highly dependent on older workers with 37% filled by workers aged 55+. This is well above the all industry average of 21% and suggest rising retirements will increase recruitment challenges in coming years.
- Survey suggests about 1-in-5 (22%) seafood processors, representing 40% of the workforce, employed workers through the Temporary Foreign Worker Program (TFWP), which translates to approximately 7% of industry positions filled by temporary foreign workers over the past year. Over 40% of lobster processors used the TFWP, accounting for 14% positions.
- On “average” seafood processors employed 108 workers, with one-quarter (24%) employing less than 10, and 14% employing 200+. Nearly two-thirds (65%) of Atlantic Canada’s seafood processing workforce was reported as part-time or seasonal, a factor which can exacerbate hiring challenges.
- The industry is heavily dependent on exports. Overall, 84% of participants reported exporting to the US and 68% export internationally
- In total n=100 Atlantic seafood processing employers participated in the survey conducted by Ipsos SA between December 30th, 2017 and April 23rd, 2018 using telephone and on-line methodologies. It is estimated that the Seafood processor survey participants represent two-thirds (69%) of the total industry employment.

Seafood Processors Survey

Overview

- Seafood processor profile
 - Activity and product
 - Export markets
- Workforce profile
 - Employment
 - Vacancies
 - Workforce availability and Recruitment
 - Wages and Benefits
 - Workforce recruitment
- Methodology



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Atlantic Canada	NB	NS	NL	PE
N=100	23 (23%)	39 (39%)	18 (18%)	20(20%)



Who we heard from:

- n=100 seafood processing employers surveyed.
- Seafood processors surveyed employed 10,816 workers, or just over two-thirds (69%) of the total industry workforce*.
- Representative distribution across regions and segments.



* According to the 2016 Census Canada's Seafood product manufacturing industry (NAICS 3117) employed 15,670 workers in 2016

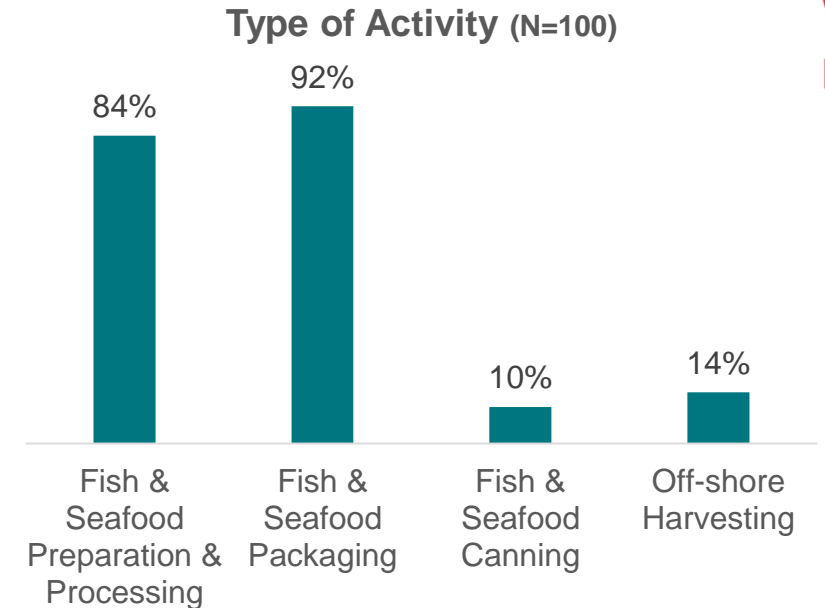


Seafood Processor Profile

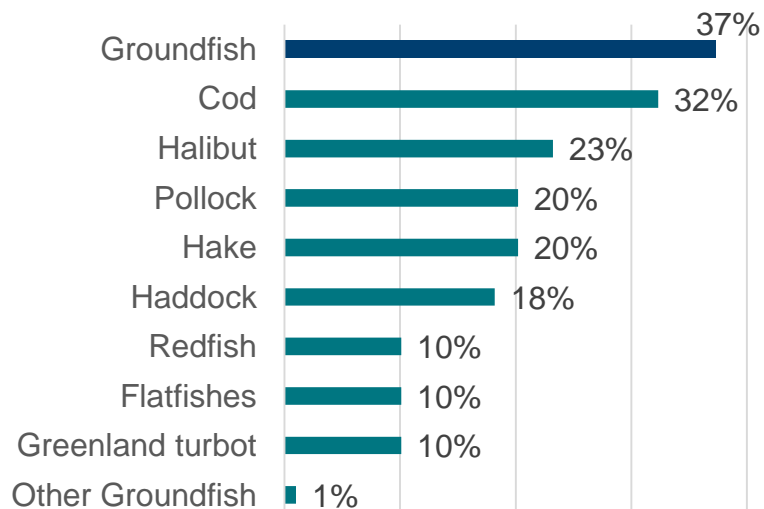
Seafood Activity and Product

The majority of processors are engaged in preparation and packaging. Most (75%) process shellfish, as well as some type of Fin or Groundfish.

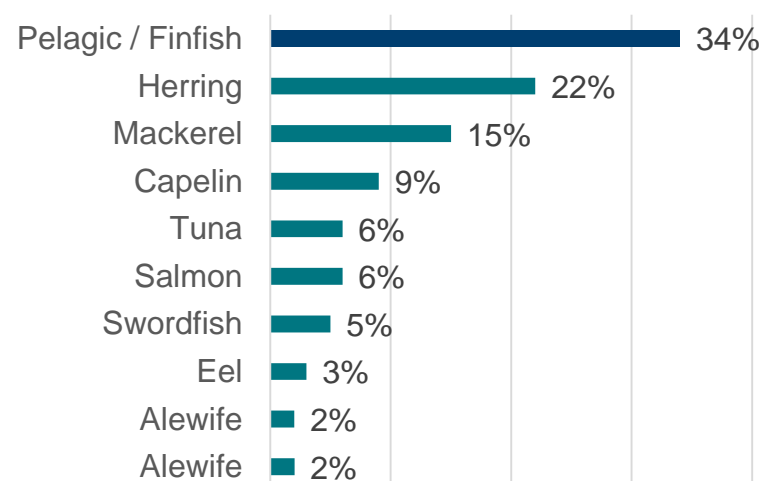
- Lobster is processed by nearly 4-in-10 (39%) processors.
- Cod by close to one-third (32%).



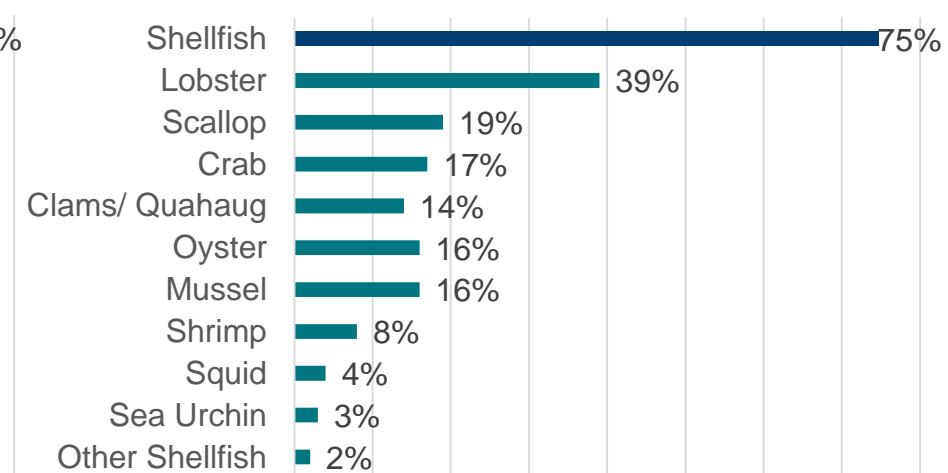
Ground Fish



Pelagic / Finfish



Shellfish



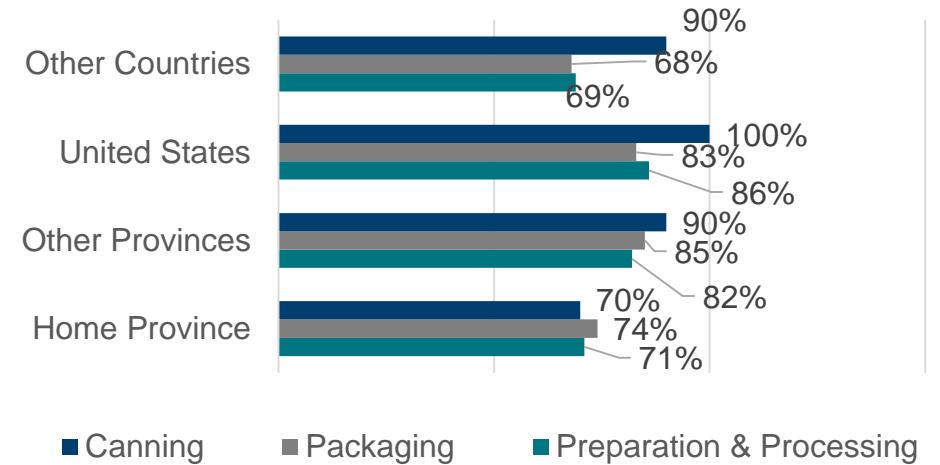
Seafood Processing Industry Profile

Export Markets

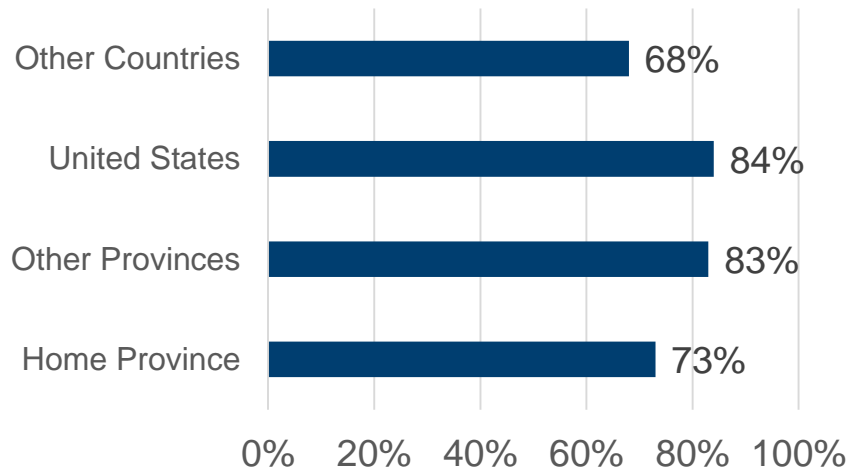
Exports are the dominant market for seafood processors.

- Overall, 84% of processors export to the US and 68% to other countries, while 73% export to other provinces.
- Lobster processors are most dependent on international markets.

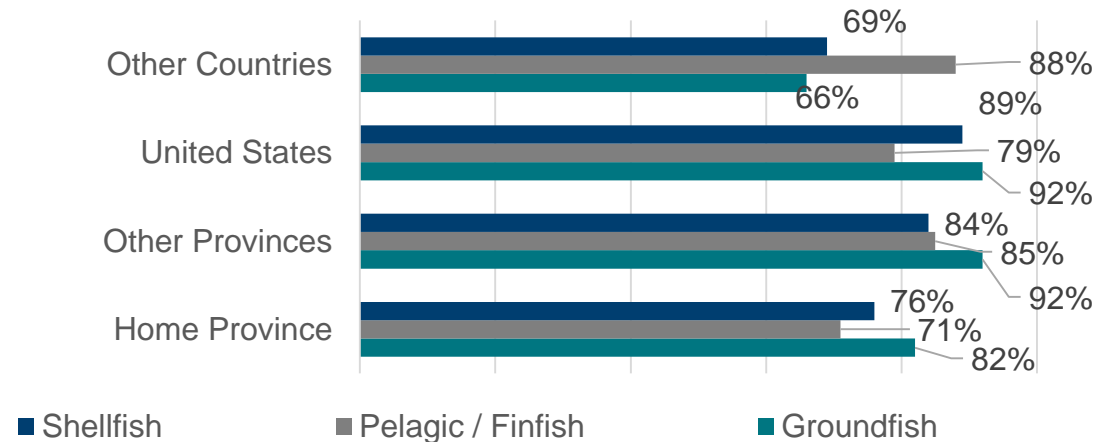
Share (%) of Processors that Export, by Activity



Share (%) of Processors that Export, by Destination



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





Seafood Processing Industry Profile



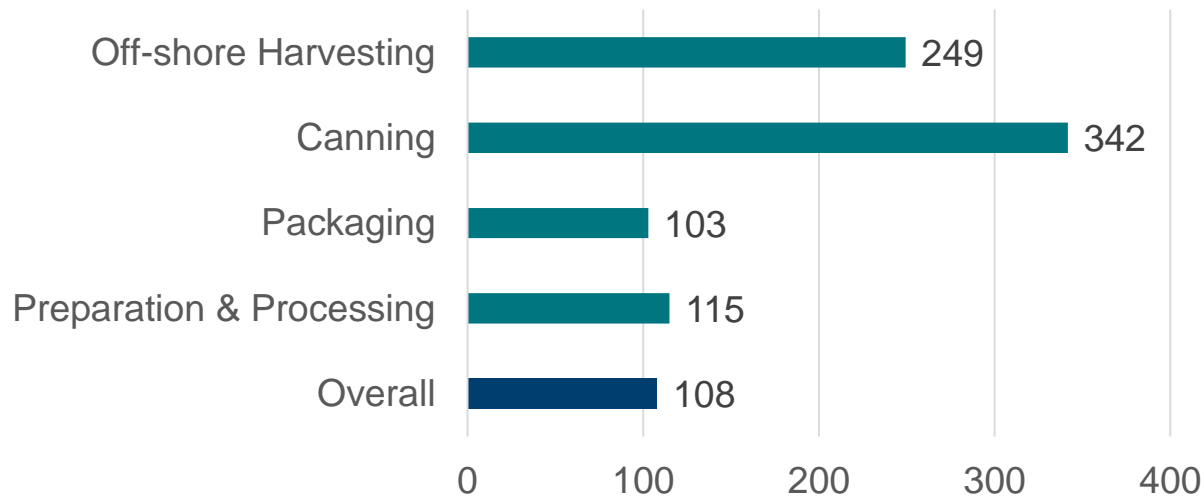
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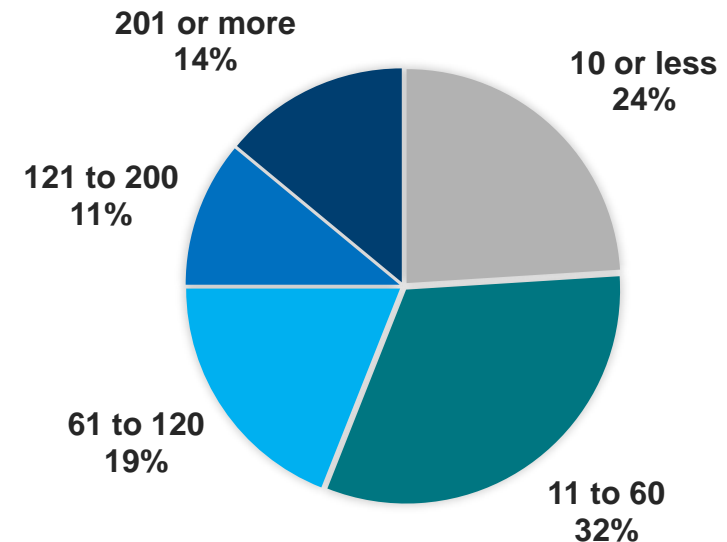
- The “average” Seafood processor in Atlantic Canada employs 108 workers.
- One-quarter (24%) employ less than 10, while 14% employ 200+.
- The majority (32%) employ between 11 and 60 workers.
- Canning facilities, though small in number, employ an average of 340.
- Lobster processors employ 130 workers on average; other seafood processors employ 90.

Workforce – Employment Size

Average Seafood Processor Employment Size (mean number of employees) by Activity



Size of Seafood Processing Facilities, Share (%) of Total





Seafood Processing Industry Profile



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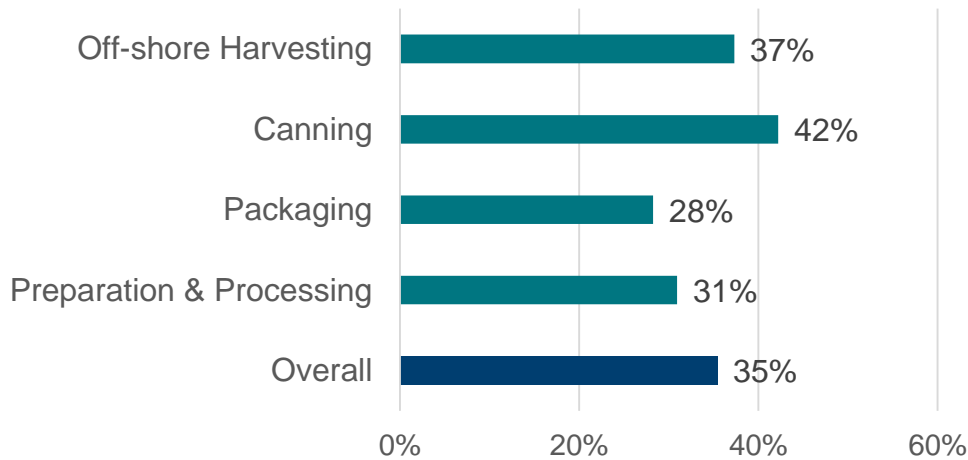
Workforce – Employment Size

65% of Seafood processing workforce works part-time or seasonally.

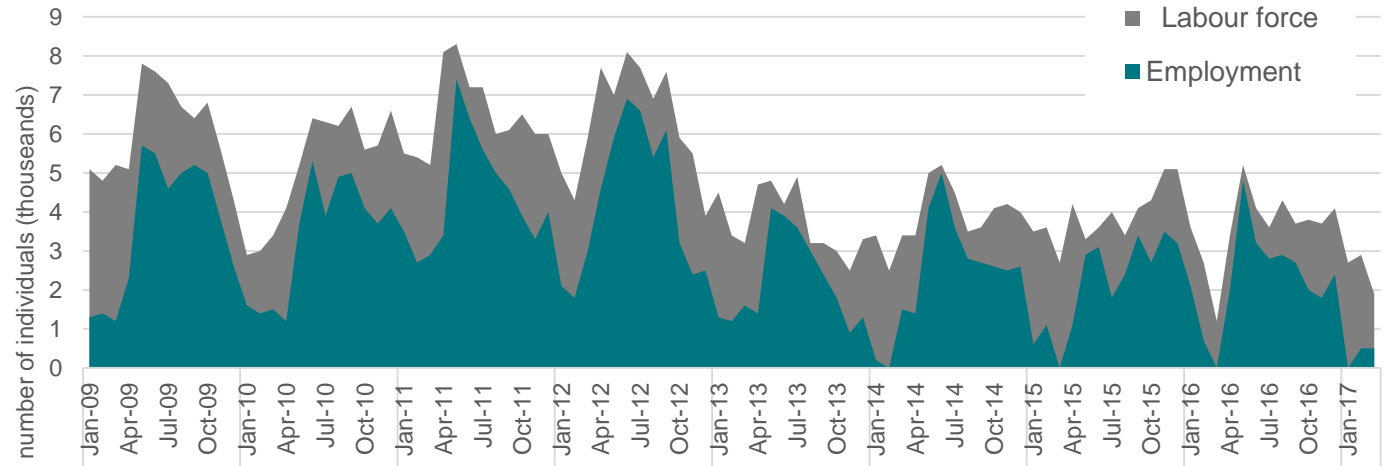
- Fish and seafood canning processors have the highest share of permanent full-time workers.
- Labour Force Survey data illustrates the fluctuation in employment demands for plant works over the year. Sustaining the workforce force during off-season is a key challenge for processors.

Question: Over the past year, on average, what proportion of paid positions were permanent full-time?

Permanent Full-time Employment Share(%)



Employment and Labour force, Fish and seafood plant workers, Monthly, 2009 to 2017



Source: Labour Force Survey (LFS), Statistics Canada



Seafood Processing Industry Profile



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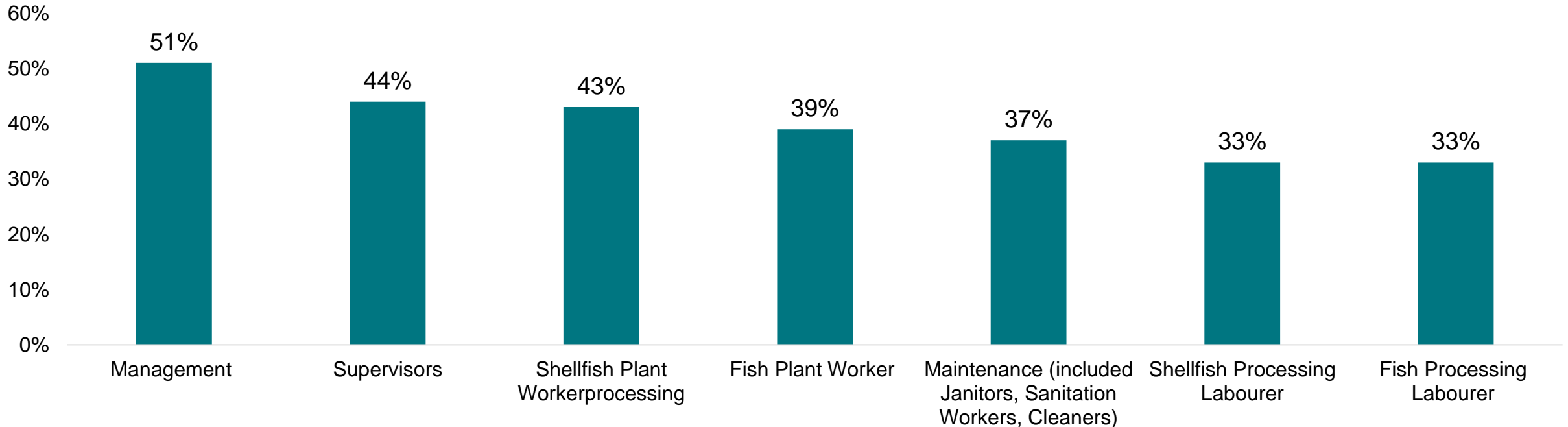
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- Management, shellfish plant workers and supervisors are the top key occupations for seafood processors.

*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..*

Workforce – Key Occupation

Top key occupations cited by employers

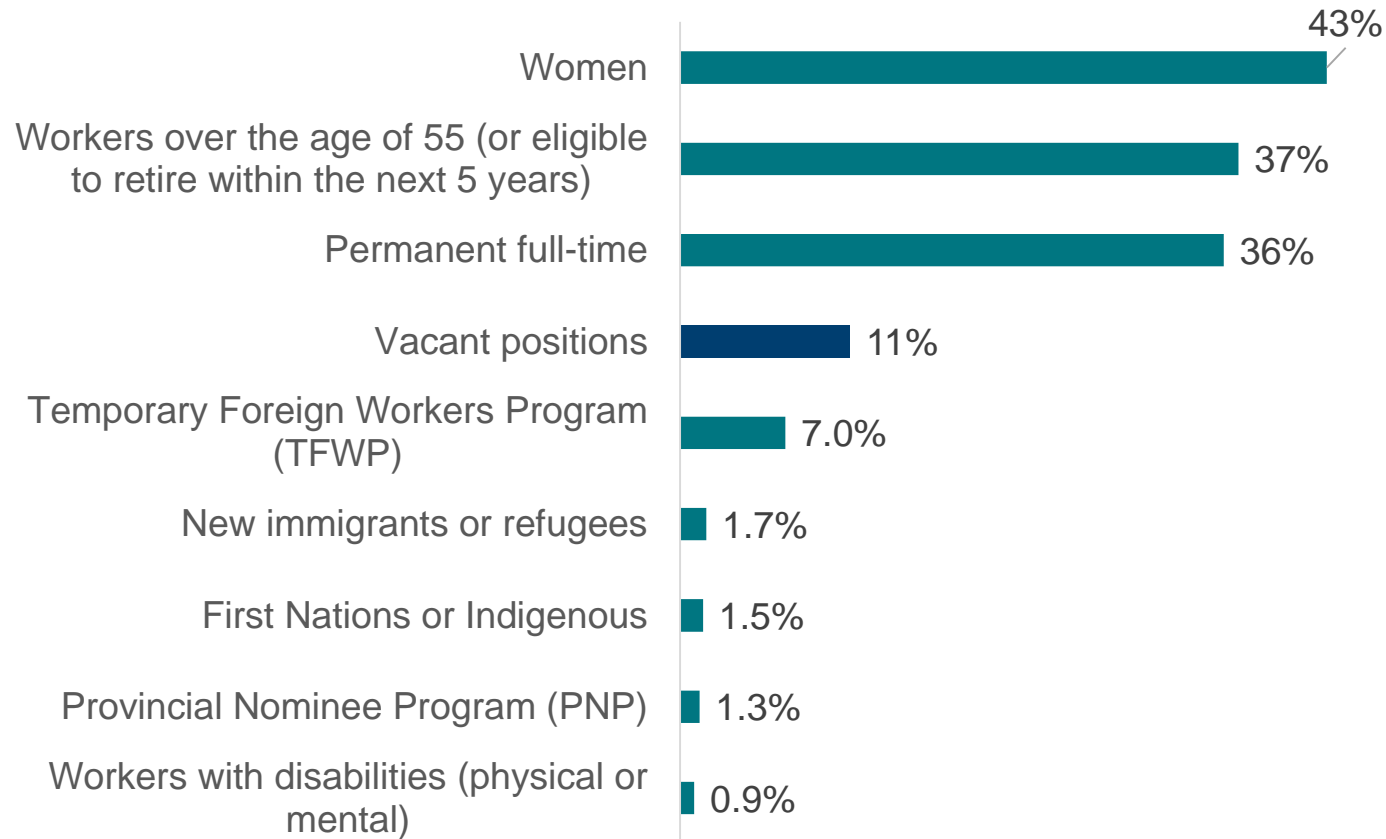


Seafood Processing Workforce Profile

Workforce Profile

The industry is highly dependent on women and older workers, but hundreds of positions go unfilled.

Workforce profile as a share of average paid positions



On average Seafood processors reported:

- 43% of positions filled by women.
- 37% filled by workers aged 55+.
- 7% of positions filled by new temporary foreign workers.
 - 14% among lobster processors.
- 1.7% of positions filled by new immigrants.
- 45% of seafood processors reported vacant positions over the past year.
 - 11.5% of paid positions were vacant over the year – or an average of 1,800 unfilled positions.
 - 16% of paid positions were vacant among lobster processors.

Workforce availability and Recruitment

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

Share of Employer (%)



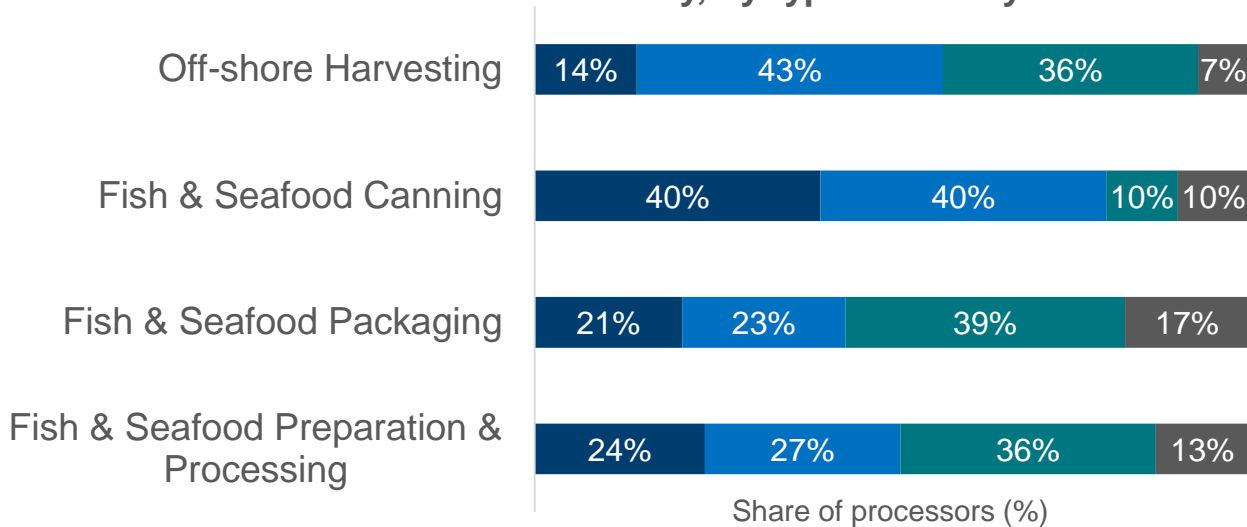
83% of seafood processors report some form of recruitment challenges:

- One-in-five seafood processors report not being able to fill positions.
- A further 24% experience chronic recruitment challenges.
- An additional 38% experience seasonal challenges recruiting or retaining qualified workers

Workforce availability and Recruitment

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

Worker availability, by type of facility



- 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

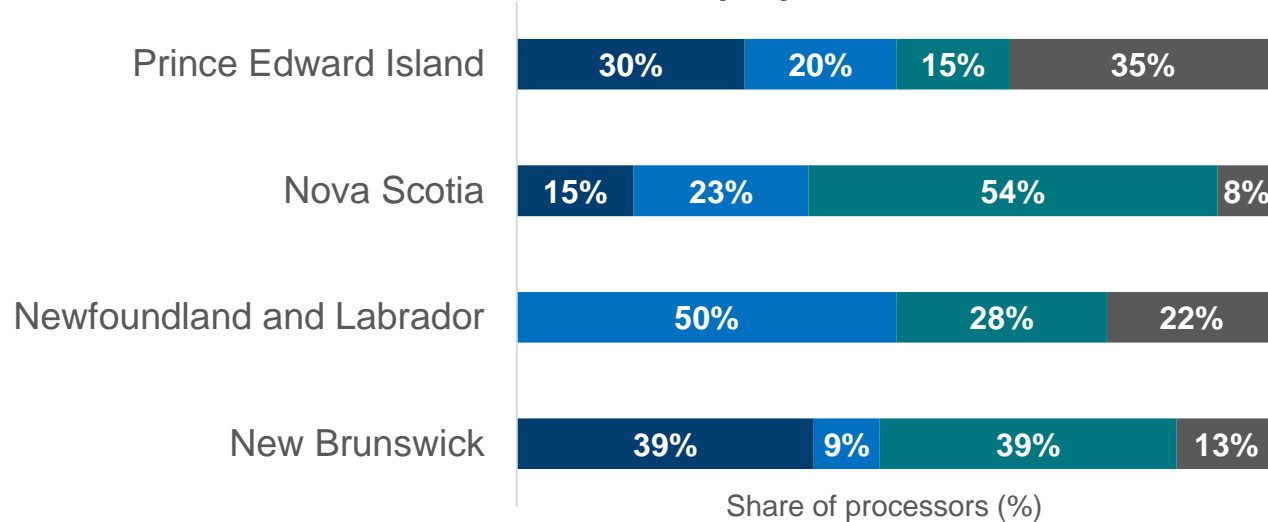
Recruitment challenges most significant for large seafood canning facilities:

- Seafood canning facilities are most likely to not fill positions due to recruitment challenge.
- Processors involved in packaging are most likely to experience seasonal recruitment challenges.

Workforce availability and Recruitment

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

Worker availability, by Province



- 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

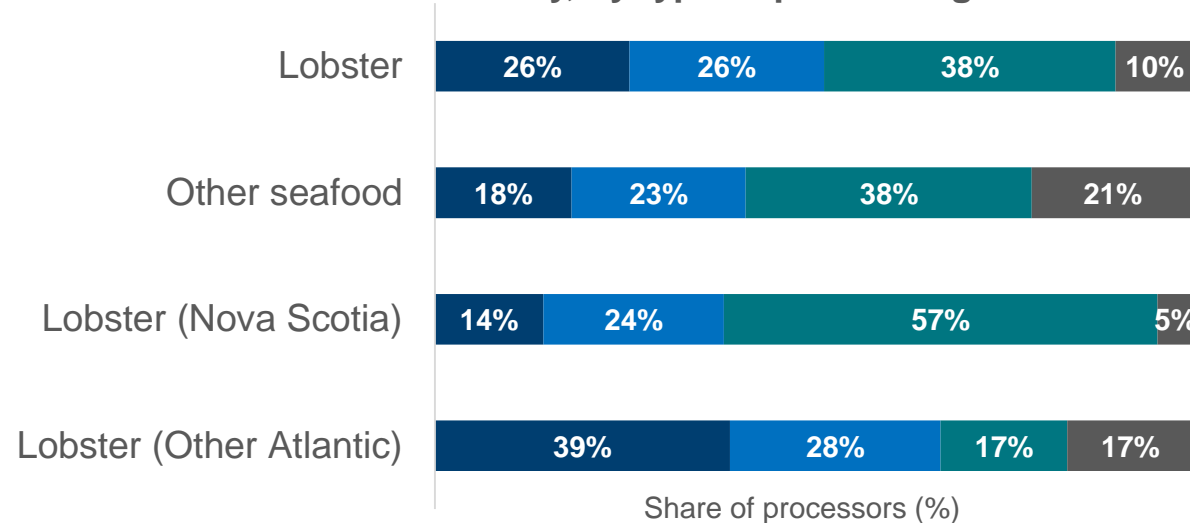
Recruitment challenges most significant for processors in New Brunswick and PEI:

- Over half (54%) of seafood processors in Nova Scotia report seasonal recruitment challenges.
- 39% of New Brunswick and 30% of PEI processors report inability to fill vacant positions.

Workforce availability and Recruitment

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

Worker availability, by type of processing



- 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

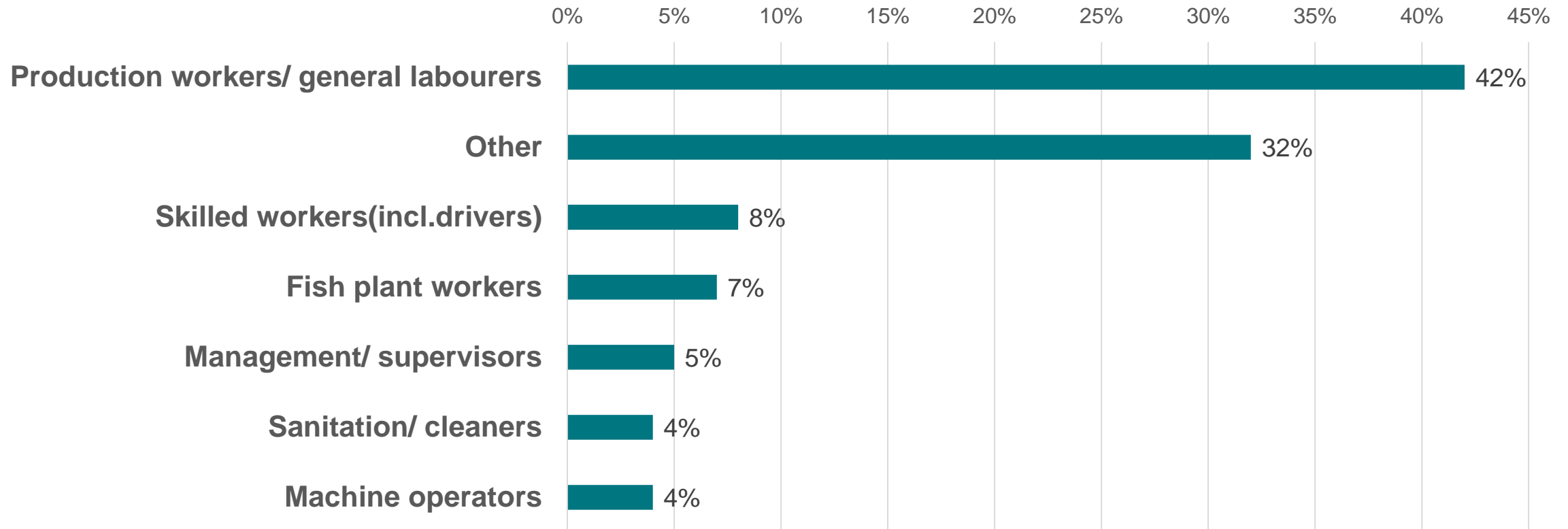
Recruitment challenges most significant for lobster processors, especially those outside Nova Scotia:

- 26% of lobster processors report not being able to fill positions and a further 26% experience chronic recruitment challenges.
- These figures are 18% and 23% respectively among other seafood processors.
- 15% of Nova Scotia lobster processors and 39% of other Atlantic lobster processors report inability to fill vacant positions.

Workforce availability and Recruitment

4-in-10 (42%) processors cited Production workers and general labourers as the most difficult to recruit

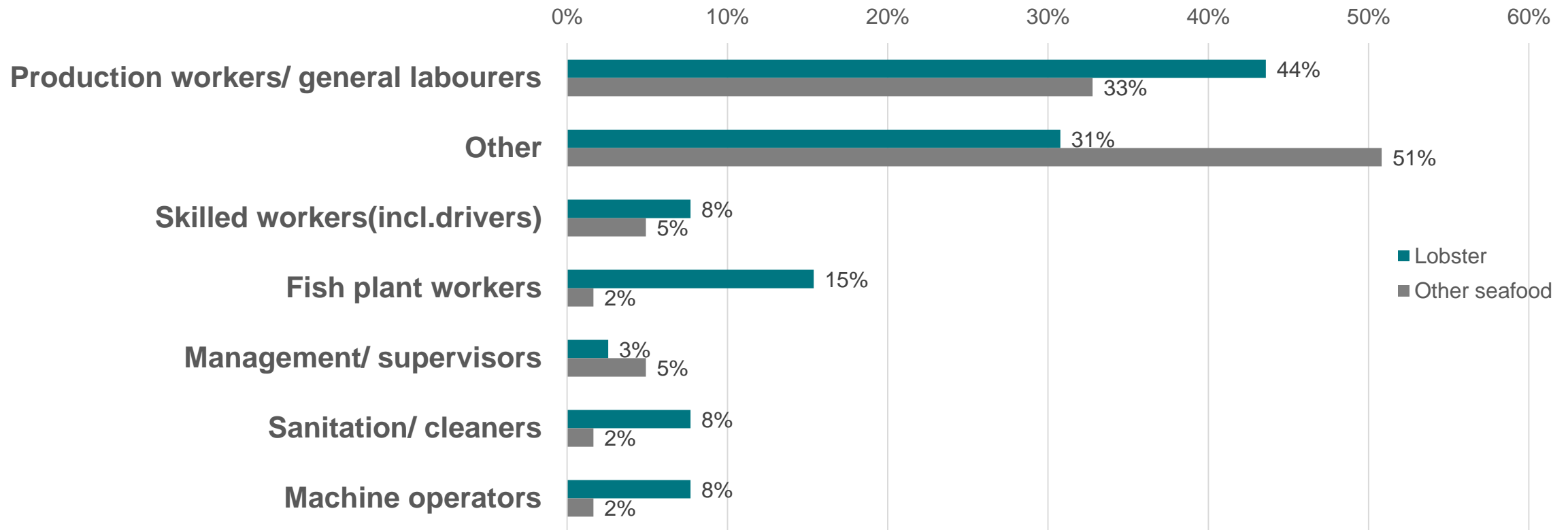
What are the top three positions that are most difficult to recruit?



Workforce availability and Recruitment

Lobster processors reported greater recruitment challenges for most core processing occupations

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

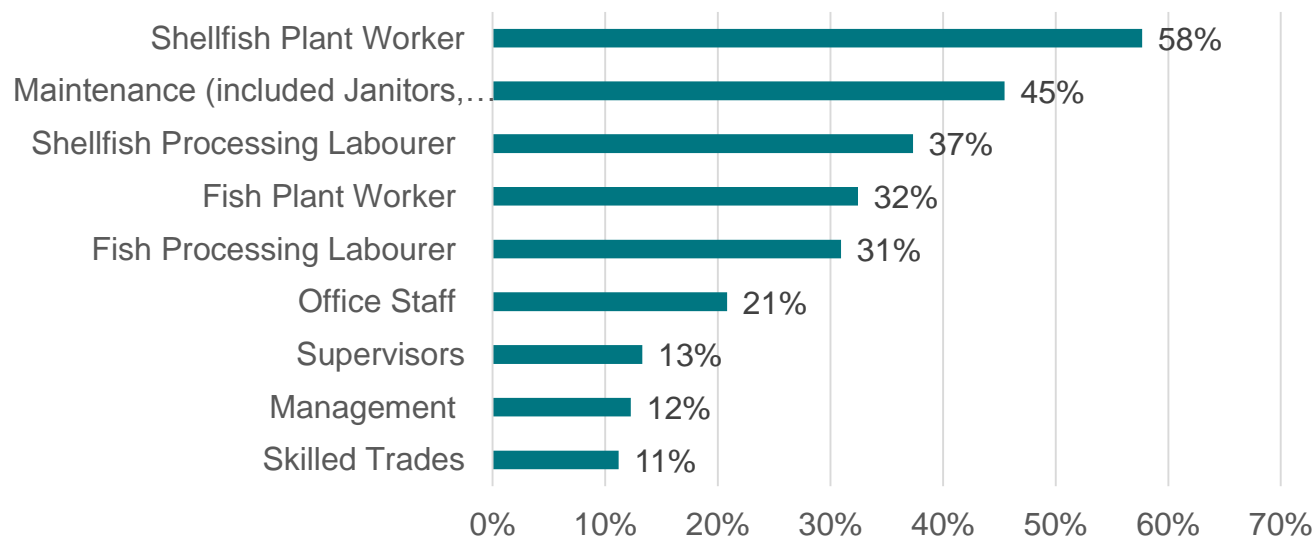


Workforce Availability and Recruitment

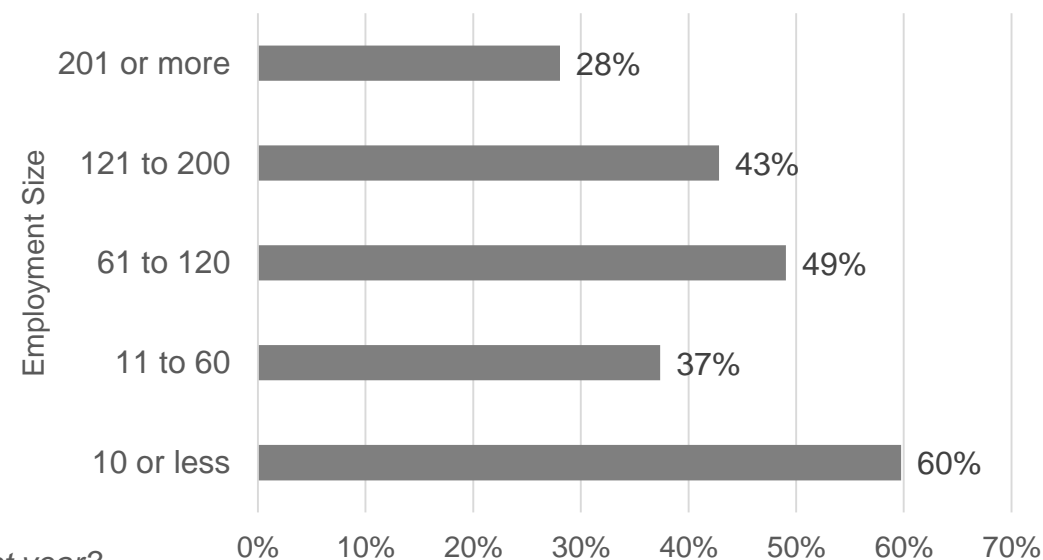
Evidence of significant recruitment challenges supported by high turnover.

- Atlantic seafood processors hired an estimated 6,300 workers over the past year. This represents a 40% turnover rate in the industry.
- Shellfish plant operators, maintenance and sanitation workers have among the highest turnover rates in the industry.
- Small employers with less than 10 employees report turnover rates of 60%, while large employers with 200+ workers reported turnover rates of 28%.

Imputed Turnover Rate (%), by Occupation



Imputed Turnover Rate (%), by Employer Size

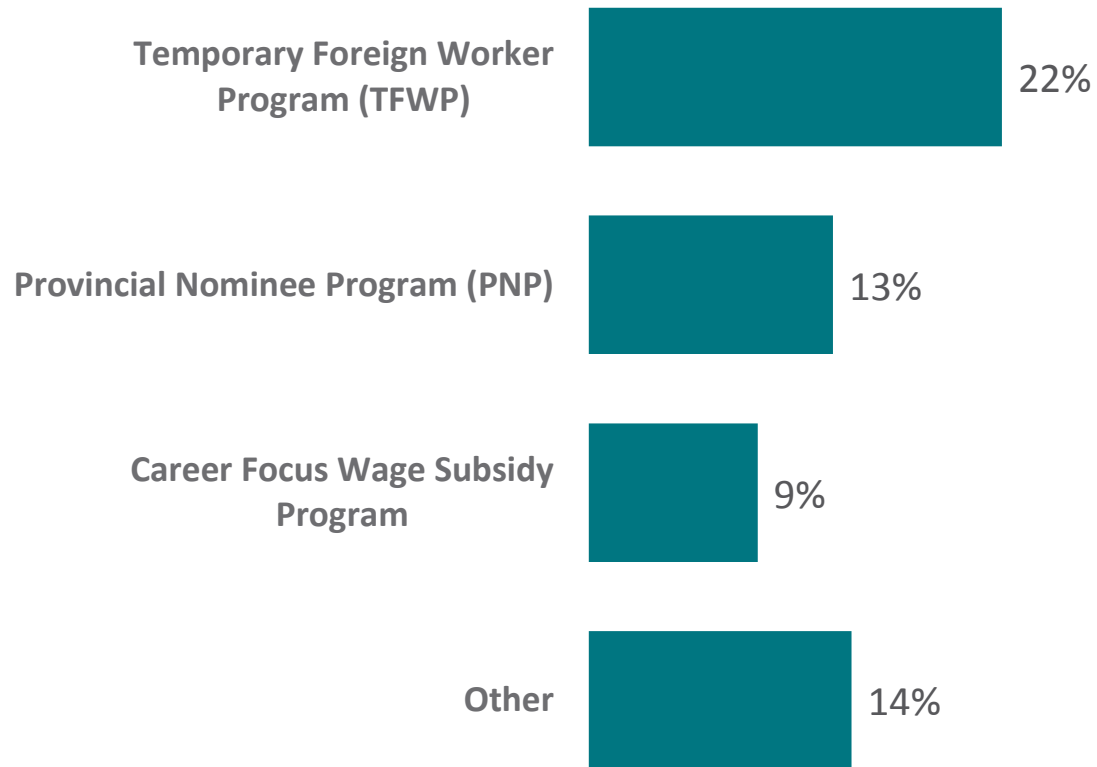


Question: Excluding seasonal re-hire, how many workers were hired for this position over the last year?

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

Workforce Availability and Recruitment

Utilization of programs :



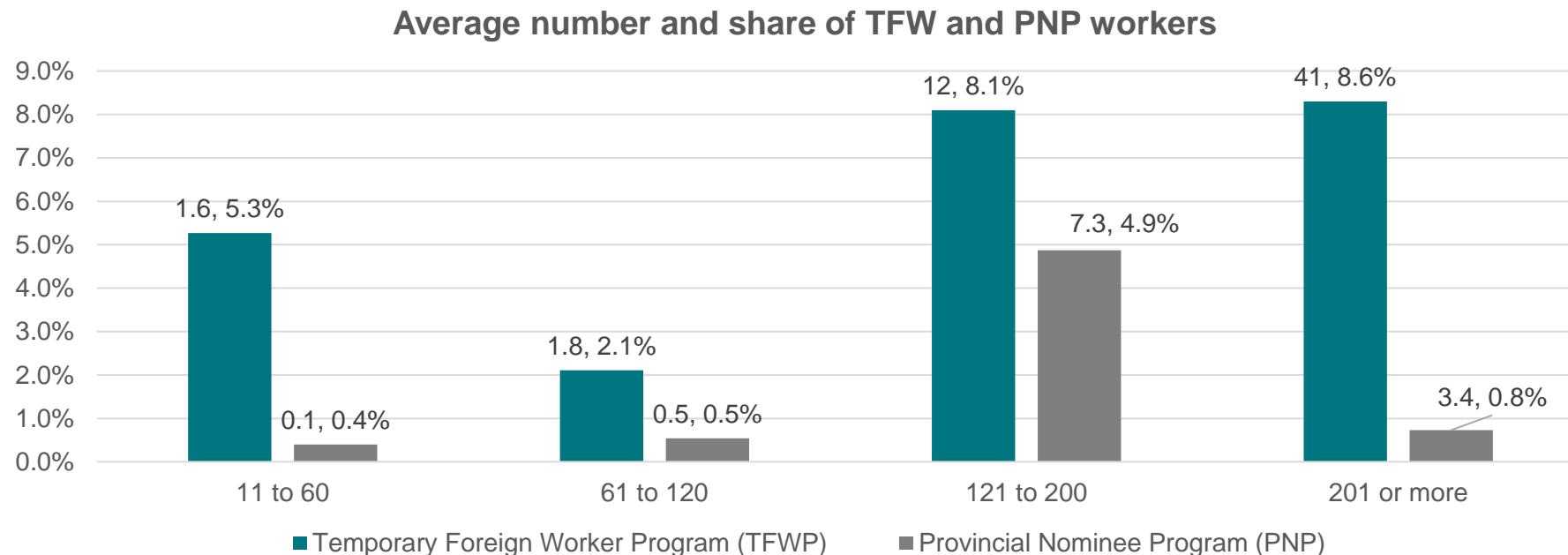
Survey highlights:

- 22% of processors employed workers through the TFWP over the past year.
- On average employing 7.5 TFWs per plant.

Workforce Availability and Recruitment

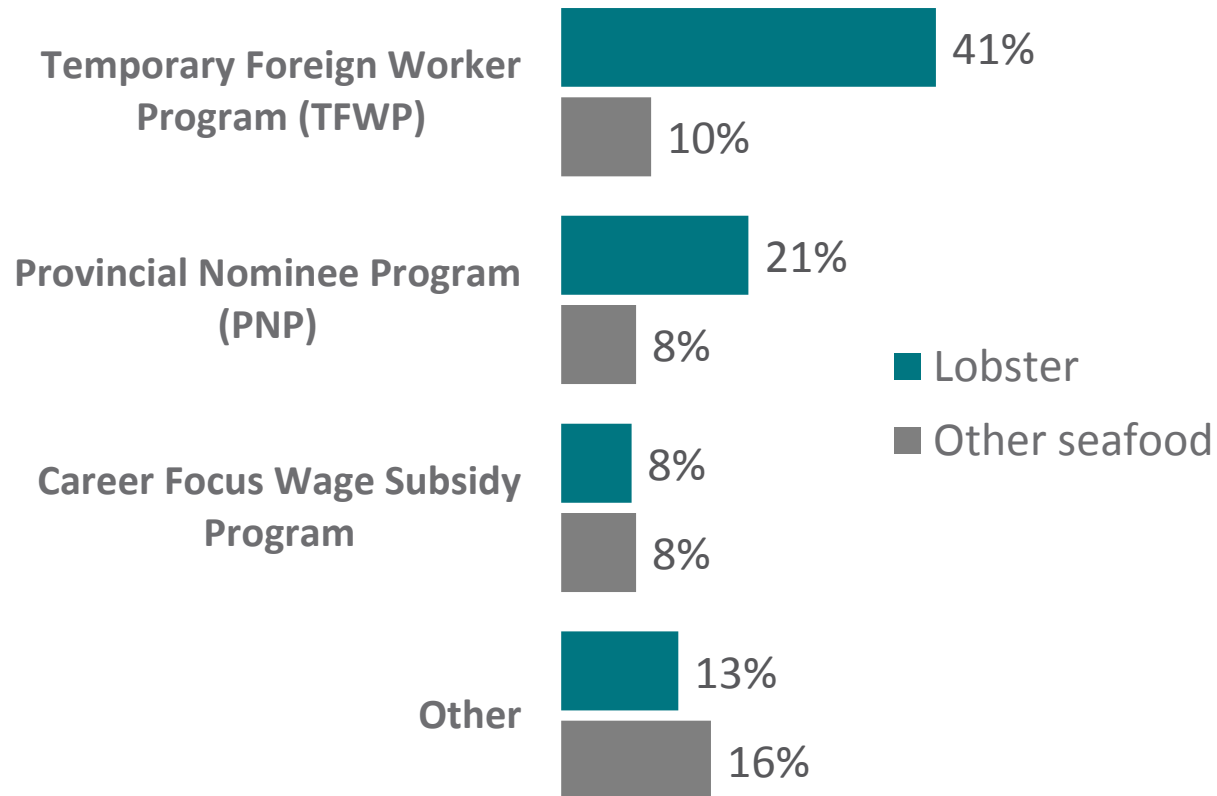
International recruitment:

- Plants with 200 or more workers employ, on average, 41 temporary foreign workers, or 8.6% of total plant employment.
- Plants between 120 and 200 report the largest utilization of provincial nominees (1 out of 20 workers).



Workforce Availability and Recruitment

Utilization of programs :



Survey highlights:

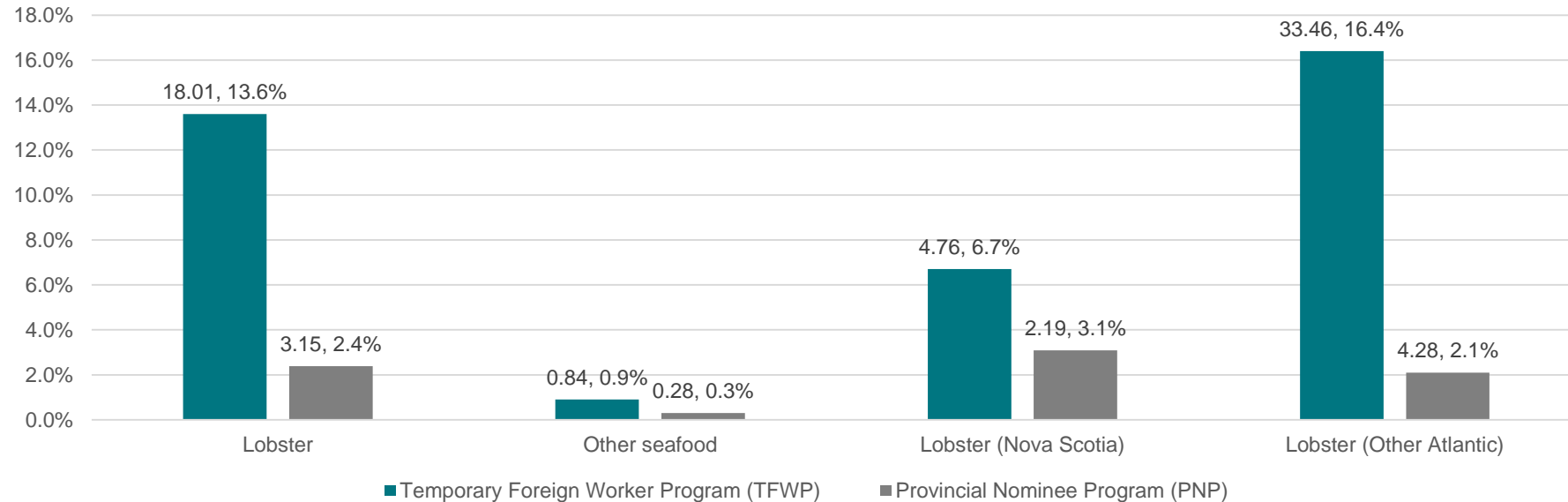
- 41% of lobster processors employed workers through the TFWP over the past year.
- 10% of other seafood processors employed workers through the TFWP over the past year.

Workforce Availability and Recruitment

International recruitment:

- Lobster processors employ, on average, 18 temporary foreign workers (TFWs), or 13.6% of total employment. Other seafood processors employ 1 TFW on average, or 0.9% of total employment.
- Lobster processors also report greater utilization of provincial nominees.

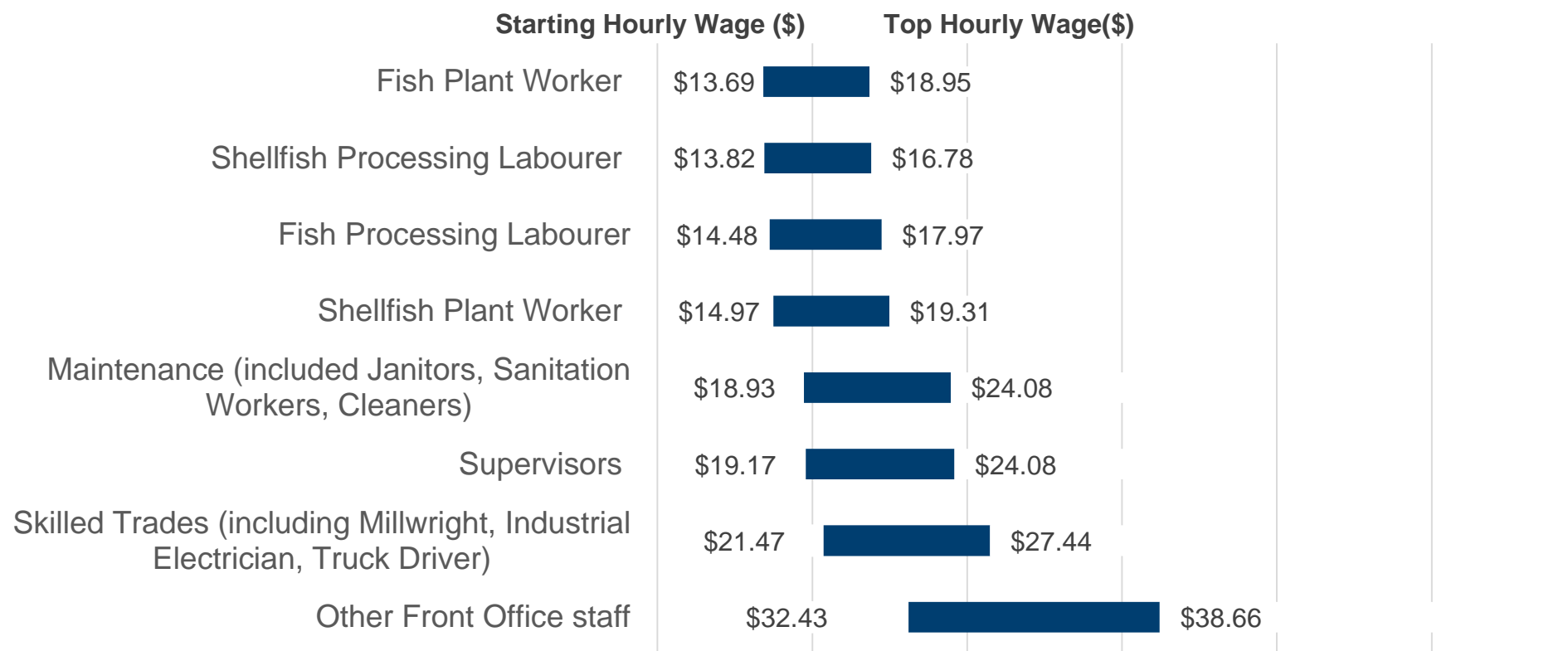
Average number and share of TFW and PNP workers



Workforce Wages and Benefits

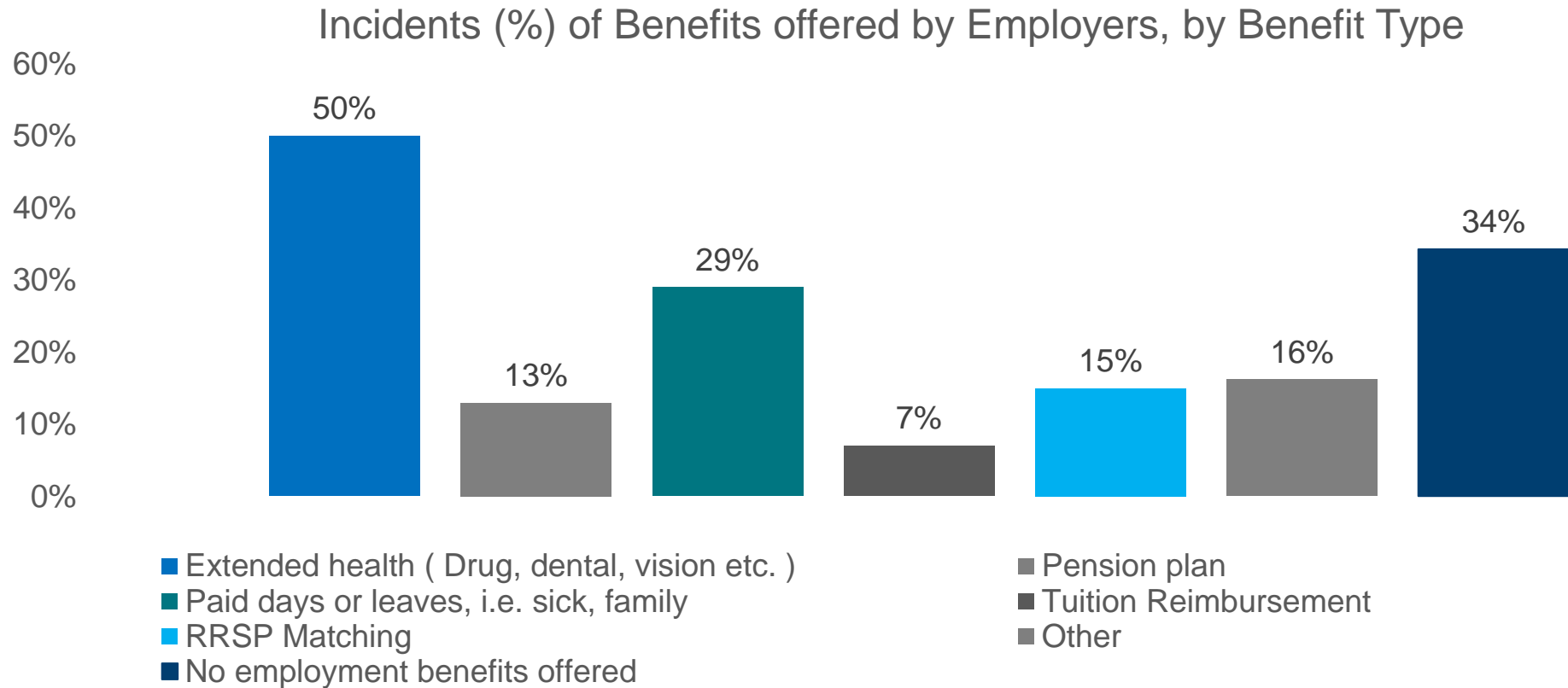
Average starting hourly wages start from \$13.69 from fish plant workers to \$21.47 for skilled trades

Average Hourly wage ranges (\$), by Occupation



Workforce Wages and Benefits

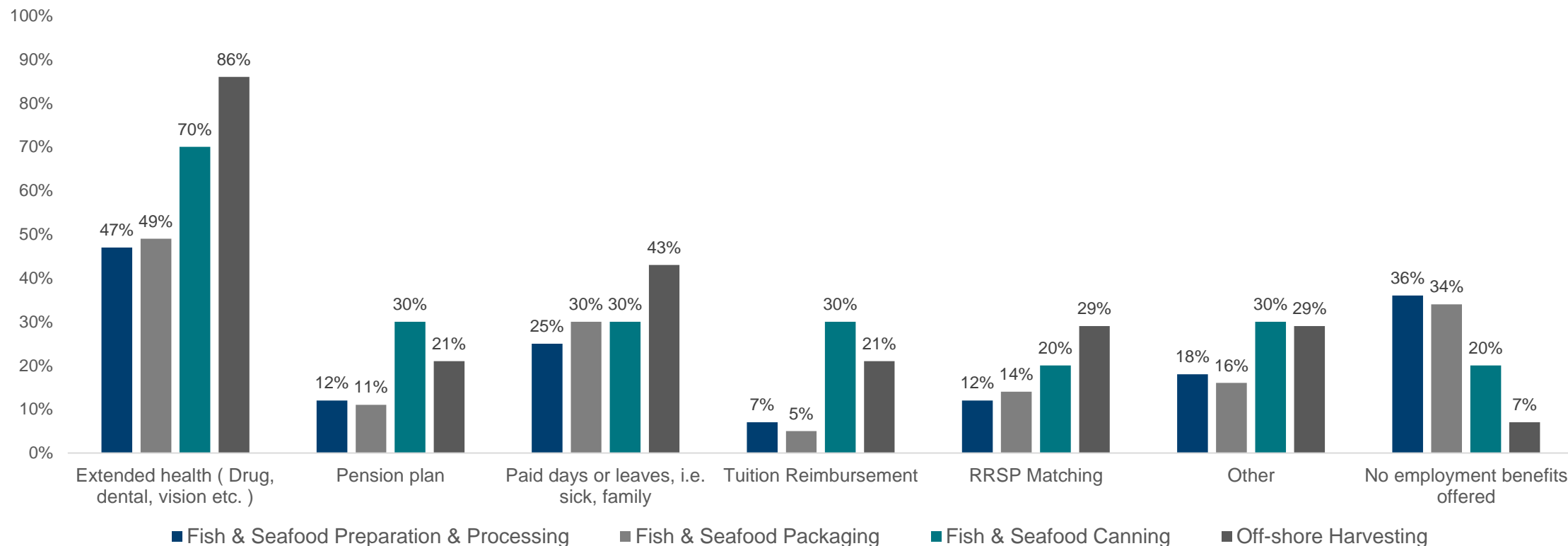
Survey highlights: Half the seafood plants surveyed provide extended health or drug care plans, while one-third offer no benefits.



Workforce Wages and Benefits

Looking at benefits by the type of plant, larger processors involved in off-shore harvesting or canning, are more likely to offer benefits in comparison to other types of facilities.

Incidents (%) of Benefits offered by Employers, by Benefit Type and by Seafood Processing Activity



Seafood Processors Survey

Methodology

- In total, n=100 Seafood processing employers participated in the survey administered by Ipsos.
- Data collection was conducted via a telephone (n=64) and online (n=36) surveys.
- The survey was fielded between December 30th, 2017 and April 23rd, 2018.
- The margin of error for a sample of n=100 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 FPSC.



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