

FOOD PROCESSING SKILLS CANADA

## Labour Market Information



### SECURING CANADA'S **DAIRY** WORKFORCE

Real Challenges. Practical Solutions.  
Fresh Perspectives.

# Belleville, ON



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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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**Canada**

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# Food Processing Skills Canada

**FPSC** is your labour, skills and workforce development non-profit organization. Our job is to provide leadership in professionalizing the food and beverage manufacturing industry so that the most important resource - people - are the best in the world. We have developed a national skills strategy which is a proven long-term approach successfully utilized by other Canadian professional sectors. This strategy builds collaborations with industry, government, academia, unions, associations, community organizations and other stakeholders.

# table of contents

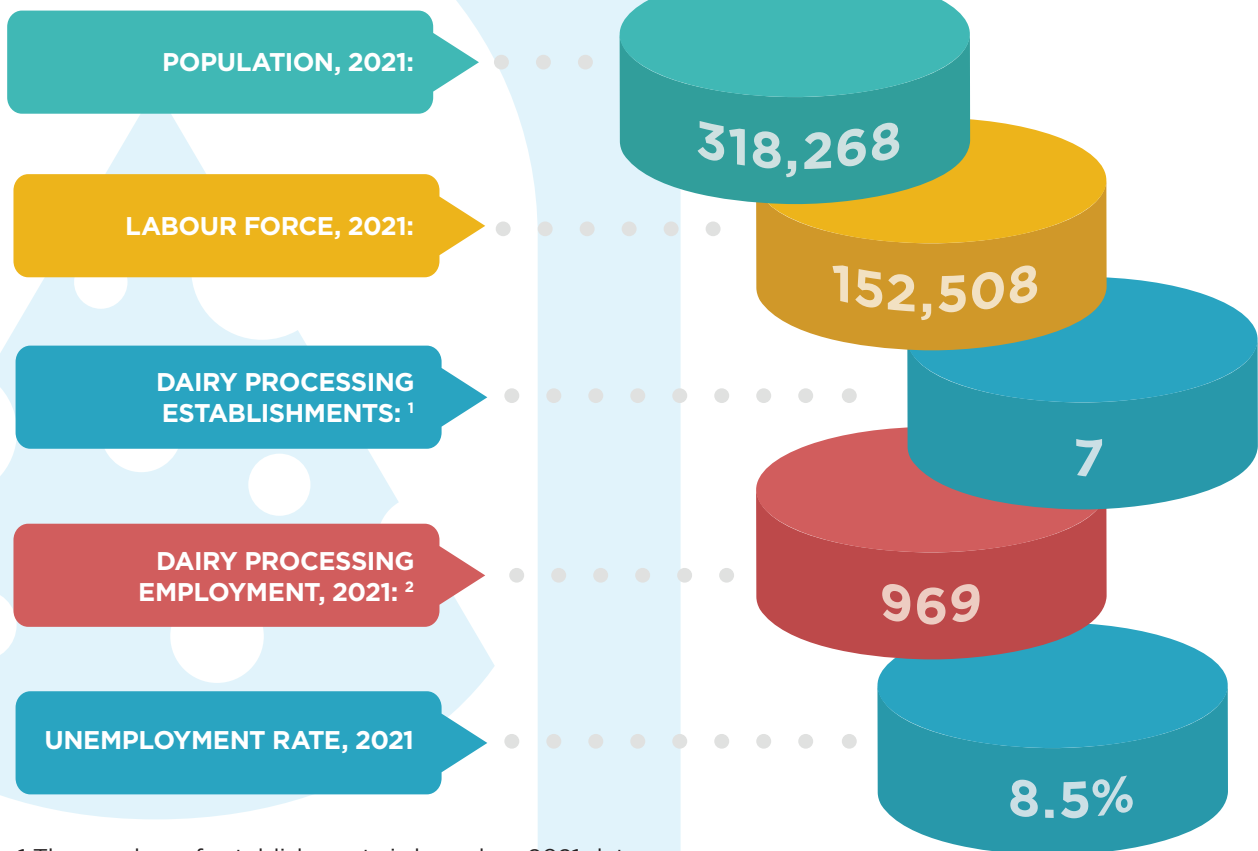
SUMMARY .....	4
KEY STATS .....	4
LABOUR MARKET TIGHTNESS RATINGS.....	5
LMI REPORT SERIES.....	5
OBJECTIVES.....	6
METHODS .....	7
DEMOGRAPHIC CHARACTERISTICS.....	8
SOCIO-ECONOMIC CHARACTERISTICS.....	11
REGIONAL LABOUR FORCE .....	13
DAIRY SECTOR PROFILE .....	15
DAIRY PROCESSING WORKFORCE OUTLOOK .....	16
LABOUR MARKET TIGHTNESS .....	18

## Key Summary

- Belleville is located in Southern Ontario and is a hub for a region with a population of approximately 318,000.
- Recruitment and retention challenges within this time period are expected to increase as a result of increased labour market tightness.
- The region accounts for approximately 5% of dairy processing facilities in Ontario, with an emphasis on cheese and butter production.

- Dairy processing employment in the region is estimated at approximately 969 in 2021 which is actually about 0.7% of the total employment in the area. Manufacturing overall accounts for approximately 11% of employment.
- By the end of this decade (2030), it is estimated that 531 new hires will be required for the regional dairy processing industry, with 89% of this requirement due to replacement of current workers (e.g., retirements).

## key stats

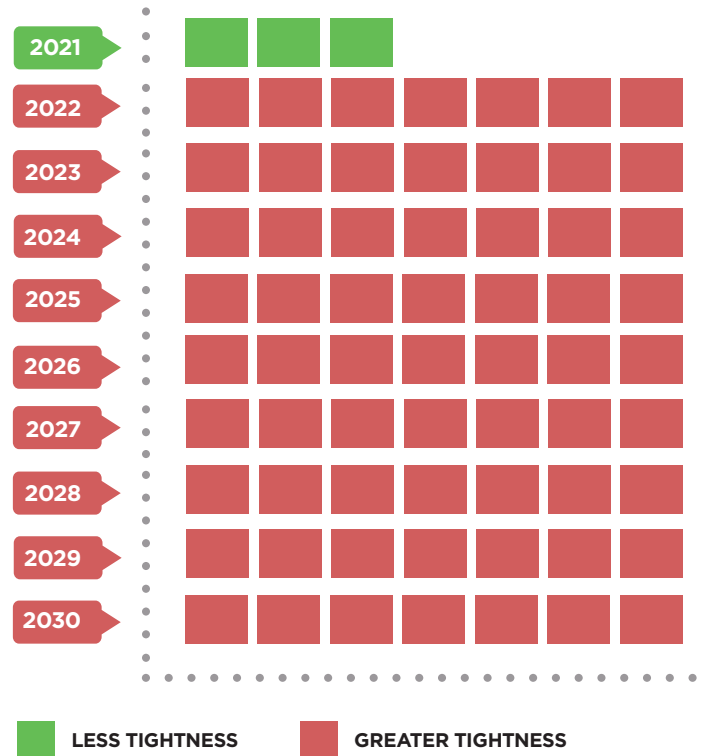


<sup>1</sup> The number of establishments is based on 2021 data from Statistics Canada's Business Register

<sup>2</sup> Prism Economics and Analysis, 2021



# labour market tightness ratings



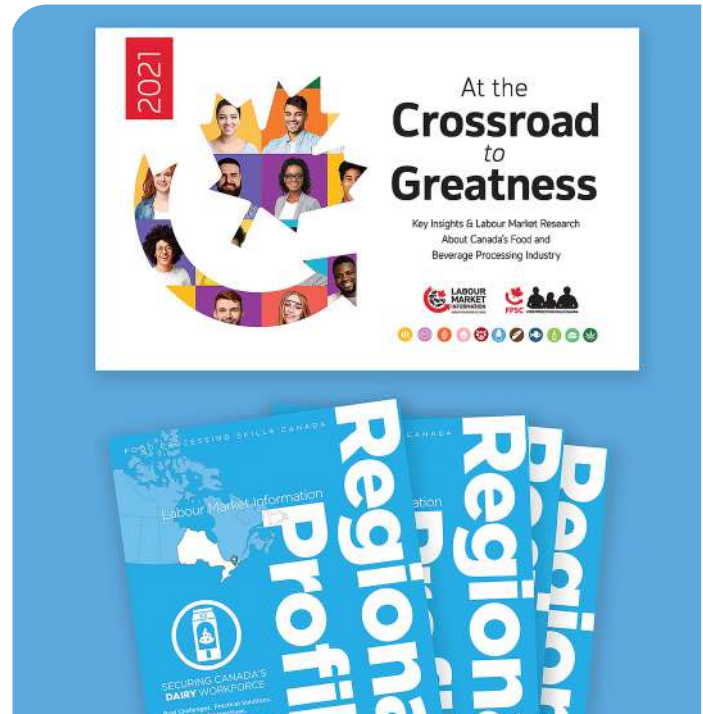


# LMI report series

## Food Processing Skills Canada (FPSC)

has developed this regional profile of the Belleville, Ontario dairy processing as one within a series of 11 regional reports for the Canadian dairy processing industry. The regional report series is one component of a larger labour market information study of dairy processing within the context of an overall study of the Canadian food and beverage processing sector. Visit the link below to access the Crossroads to Greatness and other LMI reports:

<https://fpsc-ctac.com/lmi-reports/>



## objectives

Labour markets are often best understood at a local or regional level where various contributing factors are well understood, sources of labour supply can be characterized, and detailed knowledge of individual facilities exist. The purpose of this regional report is to provide information on the dairy processing industry in the greater Belleville, Ontario area so that readers have detailed information and a better understanding of the local dairy processing industry. The profile outlines the demographic and socio-economic characteristics of the region, the regional labour force, the regional dairy processing industry, and an outlook for the specific dairy processing workforce in the Belleville region.

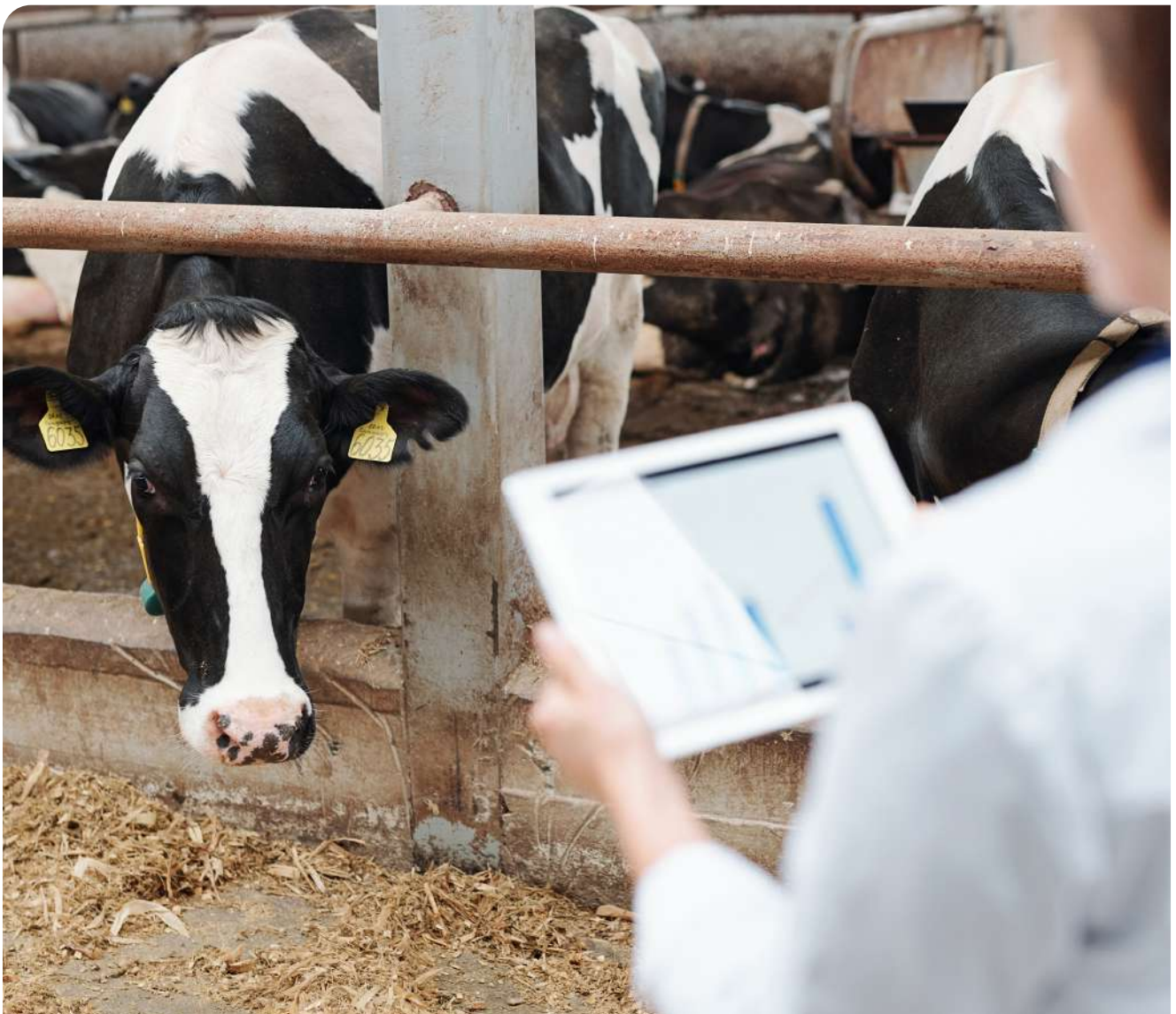


# methods

The methods used to develop the regional profiles included an extensive review of Statistics Canada reports and data that contributed to profile the industry, and project growth in production and employment at the regional level.

In addition, the regional profiles benefitted from a review of other primary and secondary data that enabled the research team to estimate potential labour demand for specific regions, and to identify key industry trends.

The “region” of Belleville, Ontario focuses on a catchment radius of approximately XXkm from the city centre to estimate the approximate distance of maximum commuting distance for potential labour force.





# + REGIONAL PROFILE



## demographic characteristics

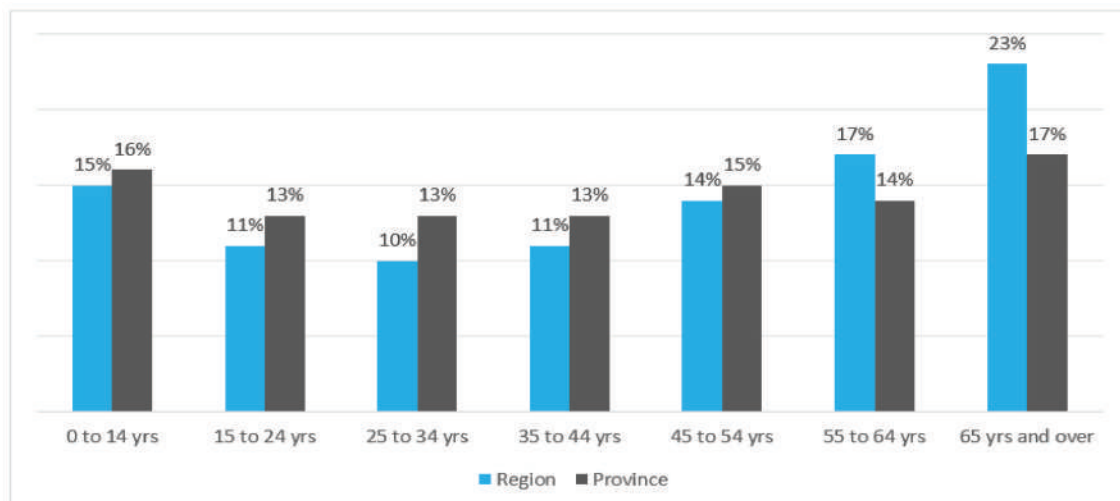
Belleville, Ontario is a hub for a regional population of approximately 320,000 with a labour force of approximately 150,000 and accounts for approximately 2% of the Ontario population.

### Population Summary

	Belleville	Ontario
<b>Total Population</b>	318,268	14,826,000
<b>Total Labour Force</b>	152,508	7,990,300
<b>Total Employment</b>	139,528	7,317,200

Source: Ontario Population Projections, Ontario Ministry of Finance; Prism Economics and Analysis, 2021

### Population by Age Group



Source: Census 2016



Compared with the overall Ontario population, the Belleville region’s population is aging with nearly one-quarter (23%) in the traditional retirement age category of 65 years or older compared with 17% of the Ontario population. Similarly, there is a slightly higher proportion of the Belleville population in the pre-retirement age category of 55 to 64 years of age (17% compared to 14% for Ontario). The proportion of the classic core working age population (25-54) is 35% in the Bellville region compared with 41% in Ontario overall.

### Population Diversity

	Belleville	Ontario
<b>Immigrants</b> <i>Share of Population</i>	17,350 8%	3,852,145 29%
<b>Not Canadian Citizens</b> <i>Share of Population</i>	3,545 2%	1,019,095 8%
<b>Visible Minority</b> <i>Share of Population</i>	7,020 3%	3,885,585 29%
<b>Aboriginal Identity</b> <i>Share of Population</i>	3,545 4%	374,395 3%

Source: Census 2016

The diversity of population according to immigrant status and visible minorities is significantly lower for the Belleville region compared with Ontario overall. The share of population who were immigrants in 2016 was 8% compared with 29% in Ontario, and self-identified visible minorities made up 3% of the Belleville population compared with 29% of Ontario. Similarly, there were smaller proportions of the region’s population who were not Canadian citizens (2%) compared to Ontario overall (8%).

### Population Mobility (5 years)

	Belleville	Ontario
<b>Non-migrants</b> <i>Share of Population</i>	<b>32,300</b> 44%	<b>2,545,875</b> 55%
<b>Migrants</b> <i>Share of Population</i>	<b>41,010</b> 56%	<b>2,112,340</b> 45%
Internal migrants <i>Share of Population</i>	39,445 96%	1,562,375 74%
Intraprovincial <i>Share of Population</i>	35,215 89%	1,380,900 88%
Interprovincial <i>Share of Population</i>	4,250 11%	181,480 12%
External Migrants <i>Share of Population</i>	1,555 4%	549,965 26%

Source: Census 2016

According to the 2016 Census, there was greater mobility within the population of Belleville region (56%) compared with Ontario overall (45%) meaning that proportionally more people had moved into the region within the previous 5 years. The vast majority of mobility was due to Ontario residents moving to the region (89%). External migrants from outside of Canada was significantly lower (4%) compared with Ontario (26%).

## Indigenous Communities

First Nation	Reserve(s)	Location	Population
Mohawks of the Bay of Quinte	Tyendinaga Mohawk Territory	10 Km E/E of/ De Belleville Adjacent to & West of Deseronto	2,525
Alderville First Nation	Alderville First Nation	21 Km SW of Peterborough	495
Hiawatha First Nation	Hiawatha First Nation	6 Km SE of Peterborough	365
Total:			3,385

Source: Census 2021

In the surrounding areas, there are three First Nations with five communities with a total population of approximately 3,418 community members. Overall, approximately 4% of the region's population self-identify as Aboriginal according to the 2016 Census which is similar to the overall rate of 3% for the province.

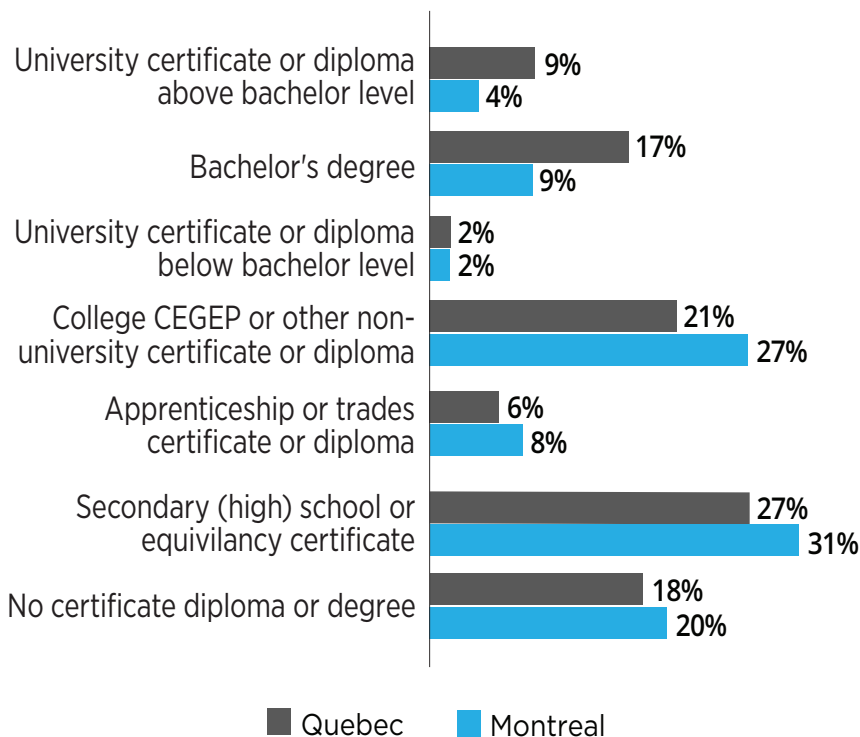
Overall,  
approximately  
4% of the  
region's  
population  
self-identify  
as Aboriginal.\*



\*According to the 2016 Census which is similar to the overall rate of 3% for the province.

# socio-economic characteristics

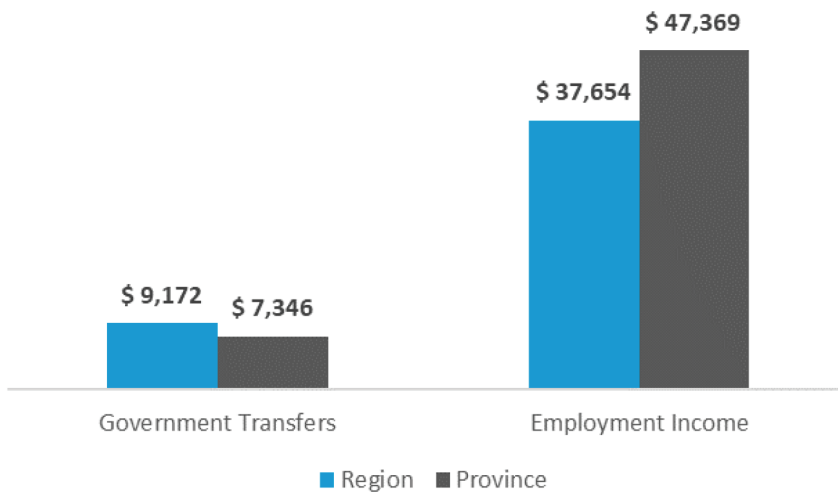
## Educational Attainment



Source: Census 2016

The Belleville regional population has slightly lower rates of post-secondary participation compared with Ontario overall. Approximately one-half (49%) report having some form of post-secondary diploma, certificate or degree compared with 55% of Ontario overall. There is a heavier concentration of college and apprenticeship training (35%) compared with Ontario (27%), and proportionally less university-level degrees or diplomas (15% vs. 28% in Ontario).

## Average Employment Income

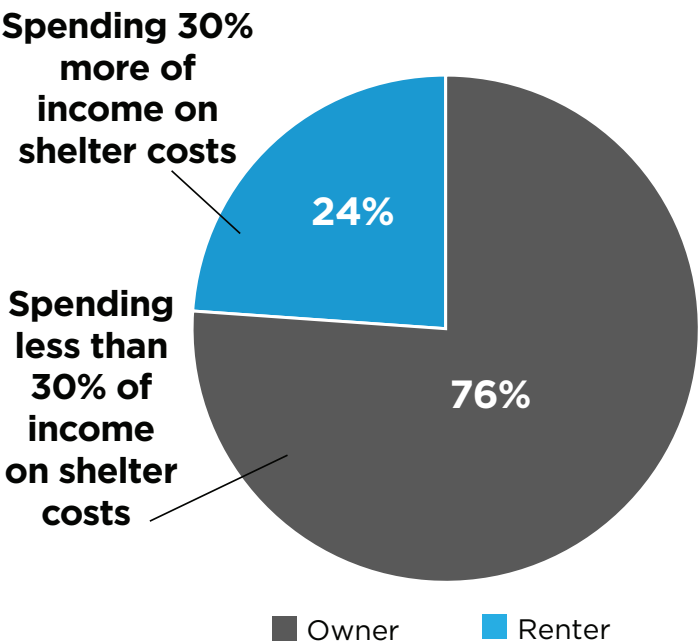


Average employment income among Belleville regional residents was approximately 21% lower in 2015 compared with Ontario overall according to Census 2016. The average employment income for Belleville regional residents was approximately \$38,000 compared with \$47,000 for Ontario overall. The average government transfers was approximately 25% higher for Belleville region residents at \$9,200 compared with \$7,300 for Ontario overall in 2015.



Approximately three-quarters of Belleville region population (76%) are home owners, with a similar proportion (76%) reporting spending less than 30% of their income on shelter costs in 2016. The average monthly housing costs for renters was lower at approximately \$930 compared for home owners at approximately \$1,500.

## Housing Costs

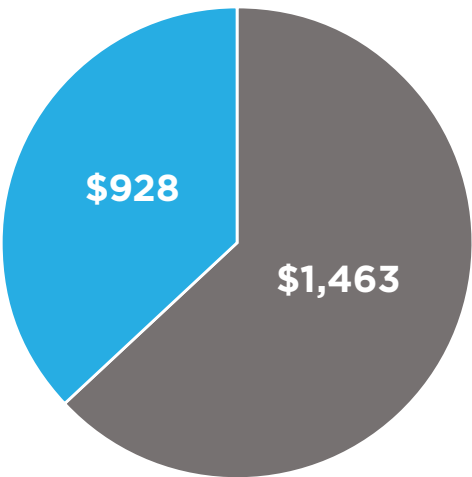


Source: Census 2016



**76% of the  
Belleville  
region  
population  
are home  
owners.**

## Housing Composition



■ Owner households - Average Monthly Cost of Housing for Owners \$1,463  
■ Renter households - Average Monthly Cost of Housing for Renters \$928

Source: Census 2016

# regional labour force

The size of the regional labour force in 2021 was just over 150,000 which was just under 2% of Ontario's overall labour force. The participation rate in the region is somewhat lower (55.1%) compared to Ontario (63.7%) which may be in part due to the older population and higher rates of retirement. Among those in the labour force, the unemployment rates were similar (8.5% vs. 8.4% in Ontario overall).

## Labour Force Characteristics

	Belleville	Ontario
<b>In labour force</b>	152,508	7,990,300
<b>Employed</b>	139,528	7,317,200
<b>Unemployed</b>	12,980	673,200
<b>Participation Rate</b>	55.1%	63.7%
<b>Employment Rate</b>	50.4%	58.3%
<b>Unemployment Rate</b>	8.5%	8.4%

Source: Statistics Canada, Labour Force Survey;  
Prism Economics and Analysis, 2021

Labour force projections indicate an approximate 3% overall growth in the next decade rising from approximately 153,000 in 2021 to 158,000 by 2030. The anticipated age composition will see a slight decline in older workers (55 years and older) with the largest increases occurring in the core group of workers aged 25 to 54 years old. The younger cohort (under 25 years old) is expected to proportionally grow as well during this period.

## Labour Force Characteristics



Source: Prism Economics and Analysis, 2021

## Labour Force by Industry

Industry	Regional Labour Force	% of Labour Force
Retail trade	22,991	15%
Construction	21,803	14%
Health care and social assistance	18,805	12%
Manufacturing	17,307	11%
Educational services	9,898	6%
Professional, scientific and technical services	8,229	5%
Accommodation and food services	7,353	5%

Source: Statistics Canada, Labour Force Survey; Prism Economics and Analysis, 2021

The largest proportions of the Belleville regional labour force are working in retail trade (15%) and construction (14%), with a similar proportion working in health care and social assistance (12%). The manufacturing industry accounts for 11% of the regional labour force and is the sector within which the dairy processing sector would be categorized.

## Job Characteristics by Industry (Nova Scotia overall)

Nova Scotia	Job Vacancy Rate	Average Hourly Wage
All Industries	3.4%	\$20.08
Food manufacturing	5.5%	\$15.55
Accommodation and food services	5.8%	\$14.03
Administrative and support, waste management and remediation services	3.4%	\$15.68
Professional, scientific, and technical services	4.3%	\$31.07
Health care and social assistance	4.0%	\$23.78
Arts, entertainment, and recreation	7.1%	\$15.60
Transportation and warehousing	4.6%	\$18.37

Source: Job Vacancy and Wage Survey Q3 2020 – Q2 2021, Nova Scotia

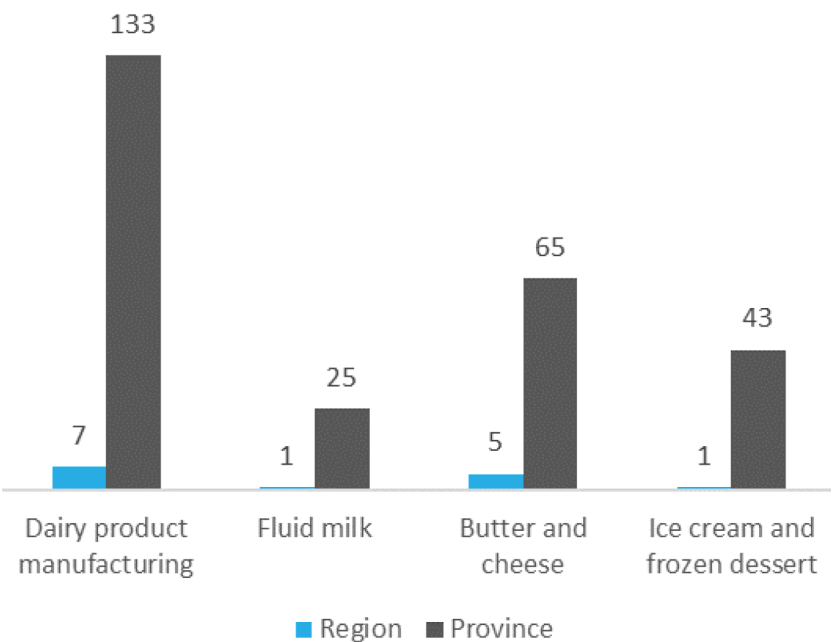
Although not available at the regional level, an examination of the Ontario vacancy rate and average hourly wage data by industry gives some indication for the region as to the potential opportunities and challenges in recruiting and retaining sufficient labour for the dairy processing industry. The job vacancy rate for food manufacturing is similar at 3.9% when compared to all industries at 3.9%. The average hourly wage (\$20.32) is notably lower than that for all industries (\$23.90), but significantly higher than the minimum wage in Ontario of \$15.00 (as of January 1st, 2022).



# dairy processing sector regional profile

Within the greater Belleville region, there are seven dairy processing establishments with a large emphasis on butter and cheese production. The region accounts for approximately 5% of the dairy processing facilities in Ontario. Regional employment in the dairy processing sector is estimated in 2021 at 969, with the largest proportions of the workforce in management, finance, sales or administrative positions (345; 36%), and skilled or semi-skilled occupations (308; 32%). Other sizeable proportions

## Dairy Processing Establishments (2021)



Source: Source: Canadian Business Counts, establishment and location counts, June 2021

**The Belleville region accounts for approximately 5% of the dairy processing facilities in Ontario.**

## Dairy Processing Employment (2021)

Occupation Group	# Employed
Management, Finance, Sales, Admin	345
Skilled/Semi-Skilled	308
Trades	144
Entry-level Labourers	103
Product Development and QC	48
Other	21
Total	969

Source: Prism Economics and Analysis, 2021

# dairy processing workforce outlook

Dairy processing employment in the Belleville region is expected to grow by approximately 6.3% over the upcoming decade rising from 969 in 2021 to 1,030 by 2030 a change of approximately 61. However, the overall hiring requirements will be substantially larger due to the need to replace workers as they retire or leave the industry for various reasons. The actual hiring requirement is expected to be in the range of 531 workers. Anticipated growth will account for 61 new hires (11.5%) while the remaining 470 new hires (88.5%) will be needed due to replacement requirements. The largest hiring requirements will occur in the second half of the decade in 2026-2030. From the demographic analysis, the number of youth new entrants into the industry likely available to fill these new hire positions are under 10 per year or approximately 10-12% of the full requirement. This suggests that hiring requirements will need to consider other labour supply sources in order to meet the demand, largely attributable to labour replacement requirements (retirements).

## Total Dairy Processing Workforce Outlook

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
<b>Labour Force</b>	1, 012	1, 043	1, 061	1, 071	1, 081	1, 087	1, 092	1, 090	1, 086	1, 085
<b>Employment</b>	969	970	982	994	1, 002	1, 010	1, 017	1, 024	1, 028	1, 030
<b>Net Hiring Requirement</b>	31	29	38	47	43	65	65	73	72	68
<b><i>Employment Growth</i></b>	0	1	12	12	8	8	8	6	4	2
<b><i>Replacement</i></b>	31	28	26	35	35	58	57	67	68	66
<b>Youth New Entrants</b>	39	9	8	7	7	7	8	8	9	9

Source: Census 2016

Dairy processing employment in the Belleville region is expected to grow by approximately 6.3% over the upcoming decade.



# dairy processing workforce outlook

## Dairy Processing Employment Outlook

	2021	2022	2023	2024	205	2026	2027	2028	2029	2030
<b>Management, Finance, Sales, and Administration</b>	345	323	327	331	334	336	339	341	342	343
<b>Entry-level Labourers</b>	103	127	128	130	131	132	133	134	134	135
<b>Other</b>	21	20	20	20	20	20	20	20	20	20
<b>Product Development and Quality Control</b>	48	43	44	44	44	45	45	45	45	45
<b>Skilled/Semi-Skilled</b>	308	315	319	322	325	328	330	332	334	335
<b>Trades</b>	144	143	145	147	148	149	150	151	151	151
<b>Total</b>	<b>969</b>	<b>970</b>	<b>982</b>	<b>994</b>	<b>1,002</b>	<b>1,010</b>	<b>1,017</b>	<b>1,024</b>	<b>1,028</b>	<b>1,030</b>

## Dairy Processing Hiring Requirement Outlook

	2021	2022	2023	2024	205	2026	2027	2028	2029	2030
<b>Management, Finance, Sales, and Administration</b>	15	-9	17	21	20	30	30	34	34	33
<b>Entry-level Labourers</b>	2	25	3	3	3	4	4	5	4	4
<b>Other</b>	2	1	2	3	3	5	5	5	5	5
<b>Product Development and Quality Control</b>	5	-1	5	6	6	9	9	11	11	11
<b>Skilled/Semi-Skilled</b>	2	8	6	6	5	6	6	6	5	5
<b>Trades</b>	5	4	6	8	7	11	11	12	12	11
<b>Total</b>	<b>31</b>	<b>29</b>	<b>38</b>	<b>47</b>	<b>43</b>	<b>65</b>	<b>65</b>	<b>73</b>	<b>72</b>	<b>68</b>

The types of workers that will be needed for the Belleville region dairy processing industry vary slightly year to year according to estimates, yet across the decade, the largest proportion of new hires will be within the occupations aligned with management, finance, sales and administration with a total of 225 new workers needed accounting for approximately 42% of the total hiring requirements between 2021 and 2030. Similar numbers of trades (87; 16%) and product development and quality control (72; 14%) workers will be needed. This is of particular concern given the more extensive training requirements for these combined with the increasing competition for these occupations from other industries.



# labour market tightness

Labour market tightness is a measure of the share of the annual supply change that occurs after accounting for available new entrants. Recruitment challenges increase as the proportion of workers need to be recruited from other industries, occupations and geographic regions rises. Recruitment challenges are exacerbated when tightness in other industries exceeds that of the dairy sector.

## Reading the Rankings

Labour markets have tightened significantly in recent years and what were previously periodic recruitment challenges have now become permanent challenges faced by employers in all sectors of the economy. Given this reality, the ranks are intended to be interpreted in relation to recruitment and retention conditions experienced over the previous five years. The analysis of labour market tightness uses a relative ranking system:

- Rank of 1 - recruitment/retention less challenging than previous years
- Rank of 2 - recruitment/retention present comparable challenges to previous years
- Rank of 3 - recruitment/retention more challenging than previous years

For the Belleville region’s dairy processing sector, the labour market tightness rating increase as of 2022 which will likely result in the industry experiencing more challenges in recruitment and retention than previous years.

## Labour Market Tightness Ratings 2021-2030: Belleville Region

2021	1 - Less Tightness
2022	3- Greater Tightness
2023	3- Greater Tightness
2024	3- Greater Tightness
2025	3- Greater Tightness
2026	3- Greater Tightness
2027	3- Greater Tightness
2028	3- Greater Tightness
2029	3- Greater Tightness
2030	3- Greater Tightness





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Real Challenges. Practical Solutions.  
Fresh Perspectives.



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