

FOOD PROCESSING SKILLS CANADA

## Labour Market Information



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

Real Challenges. Practical Solutions.  
Fresh Perspectives.

# Granby, QC



This project was funded by the Government of Canada's Sectoral Initiatives Program.

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

ISBN 978-1-998766-05-5

Copyright © 2024 Food Processing Skills Canada

All rights reserved. The use of any part of this publication, whether it is reproduced, stored in a retrieval system or transmitted in any form or by any means (including electronic, mechanical, photographic, photocopying or recording), without the prior written permission of the Food Processing Skills Canada is an infringement of copyright law.

Food Processing Skills Canada  
201 – 3030 Conroy Road  
Ottawa, Ontario K1G 6C2  
Tel. (613) 237-7988  
Toll free: 1-877-963-7472  
Fax: 613-237-9939

[Imi@fpssc-ctac.com](mailto:Imi@fpssc-ctac.com)  
[fpssc-ctac.com](http://fpssc-ctac.com)



**Canada**

This project is funded by the Government of Canada's Sector Initiative Program.



# 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

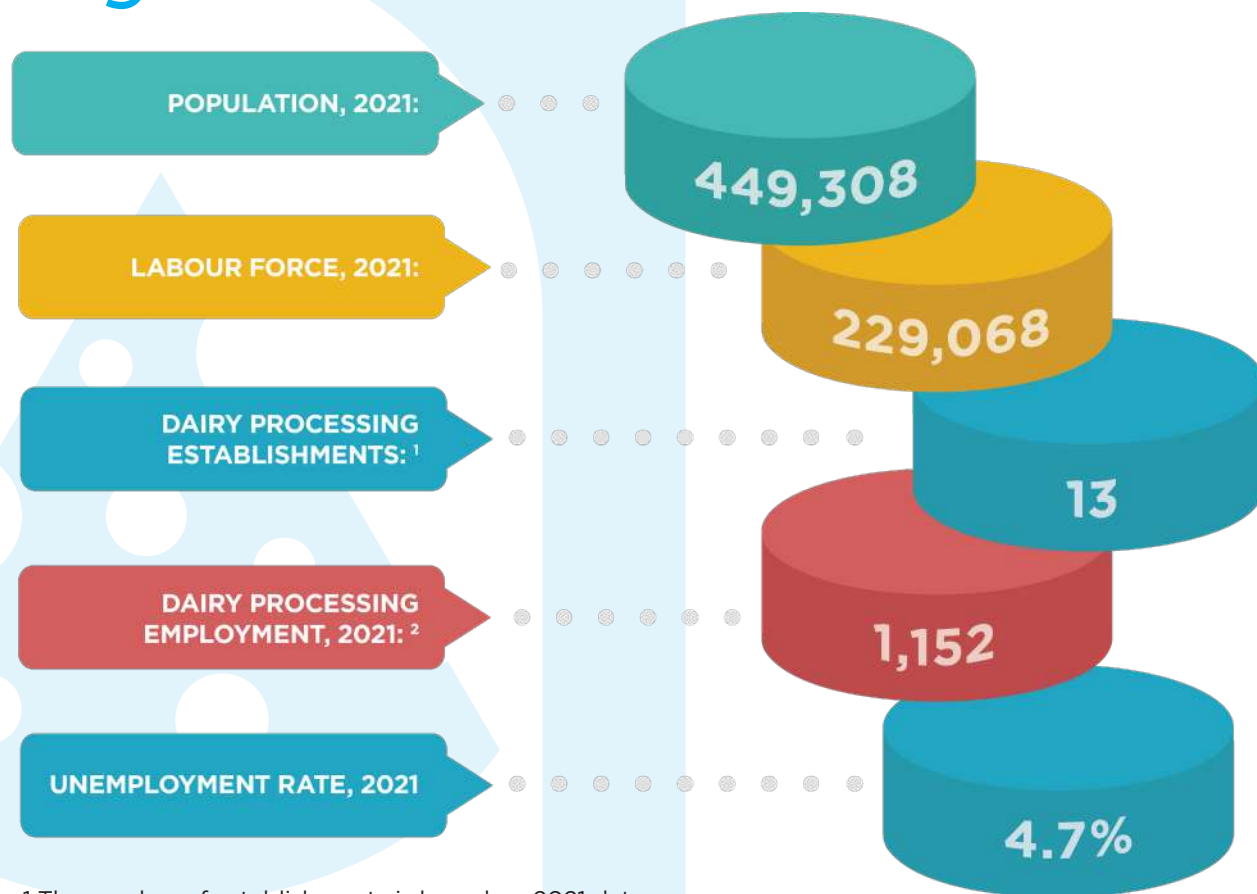
# Key Summary

- Granby is located in Southern Quebec and is a hub for a region with a population of approximately 450,000.
- The region accounts for approximately 10% of dairy processing facilities in Quebec, with an emphasis on cheese and butter production.
- Dairy processing employment in the region is estimated at approximately 1,152 in 2021 which is actually about

0.5% of the total employment in the area. Manufacturing overall accounts for approximately 17% of employment.

- By the end of this decade (2030), it is estimated that 644 new hires will be required for the regional dairy processing industry, with 80% of this requirement due to replacement of current workers (e.g., retirements).
- Recruitment and retention challenges within this time period are expected to increase as a result of increased labour market tightness.

## key stats



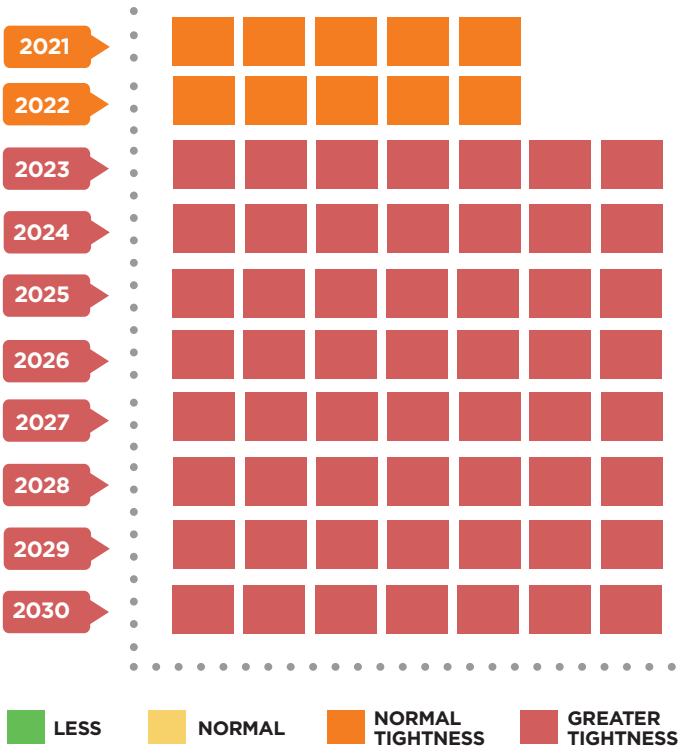
<sup>1</sup> The number of establishments is based on 2021 data from Statistics Canada's Business Register

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





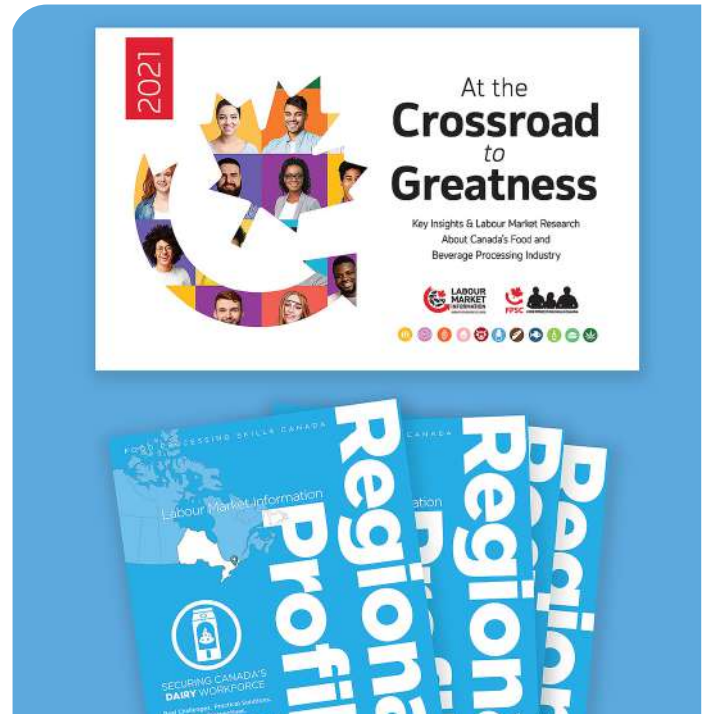
# labour market tightness ratings



# LMI report series

## Food Processing Skills Canada (FPSC)

has developed this regional profile of the Granby, Quebec 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:  
<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 Granby, Quebec 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 Granby region.



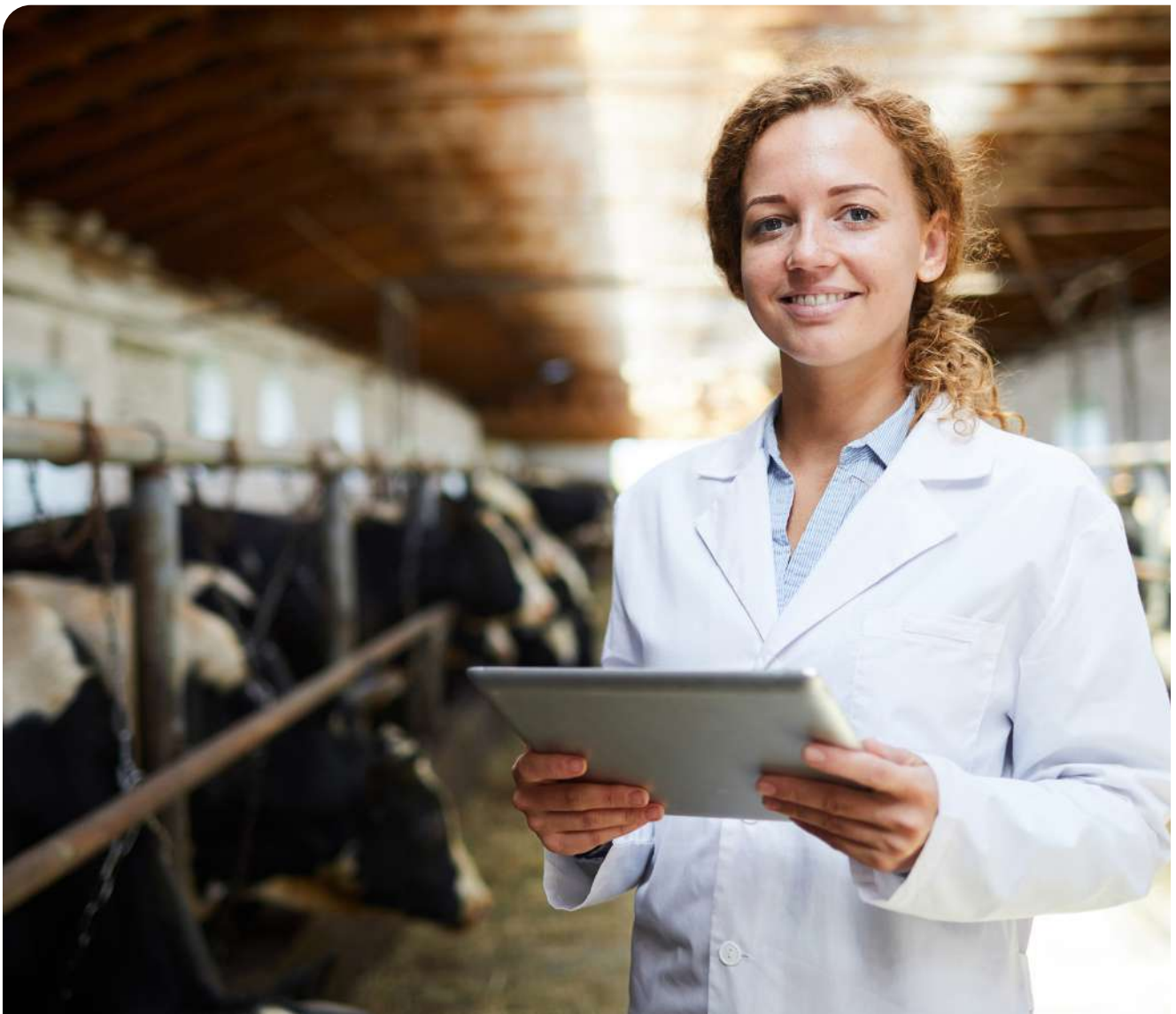


# methods

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 Granby, Quebec focuses on a catchment radius of a one-hour commute to dairy processing establishments to estimate the approximate distance of maximum commuting distance for potential labour force.



# + REGIONAL PROFILE



## demographic characteristics

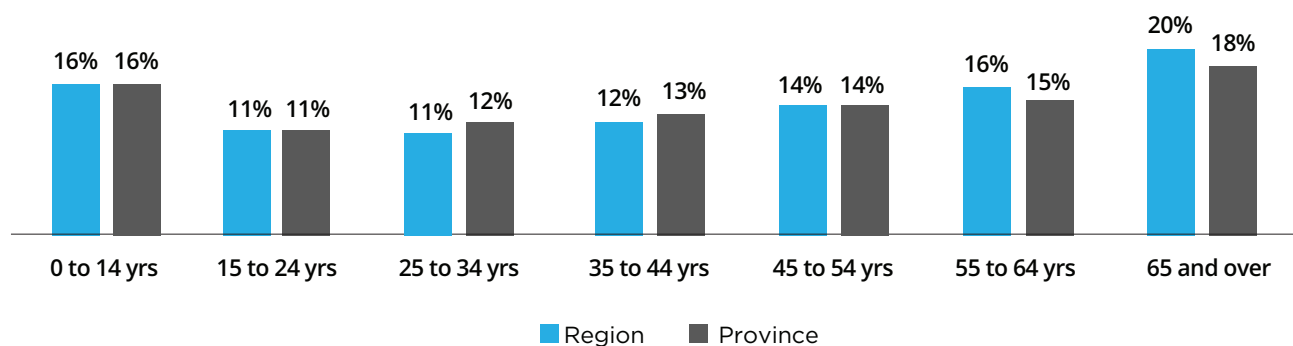
Granby, Quebec is a hub for a regional population of approximately 449,000 with a labour force of approximately 229,000 and accounts for approximately 5% of the Quebec population.

### Population Summary

	Granby	Quebec
<b>Total Population</b>	449,308	8,604,000
<b>Total Labour Force</b>	229,068	4,569,600
<b>Total Employment</b>	218,413	4,286,400

Source: Québec (reference scenario), Institut de la statistique du Québec; Prism Economics and Analysis, 2021

### Population by Age Group



Source: Census 2016



Compared with the overall Quebec population, the Granby region's population is aging with over one-fifth (23%) in the traditional retirement age category of 65 years or older compared with 18% of the Quebec population. The proportion of the classic core working age population (25-54) is 37% in the Granby region compared with 39% in Quebec overall.

### Population Diversity

	Granby	Quebec
<b>Immigrants</b> <i>Share of Population</i>	16,480 4%	1,091,310 14%
<b>Not Canadian Citizens</b> <i>Share of Population</i>	5,910 2%	379,910 5%
<b>Visible Minority</b> <i>Share of Population</i>	11,000 3%	1,032,365 13%
<b>Aboriginal Identity</b> <i>Share of Population</i>	4,875 1%	182,885 2%

Source: Census 2016

The diversity of population according to immigrant status and visible minorities is significantly lower for the Granby region compared with Quebec overall. The share of population who were immigrants in 2016 was 4% compared with 14% in Quebec, and self-identified visible minorities made up 3% of the Granby population compared with 13% of Quebec. There were similar proportions of the region's population who were not Canadian citizens (2%) compared to Quebec overall (5%).

### Population Mobility (5 years)

	Granby	Quebec
<b>Non-migrants</b> <i>Share of Population</i>	<b>73,210</b> 53%	<b>1,507,665</b> 56%
<b>Migrants</b> <i>Share of Population</i>	<b>65,525</b> 47%	<b>1,187,425</b> 44%
Internal migrants <i>Share of Population</i>	62,040 95%	949,170 80%
Intraprovincial <i>Share of Population</i>	60,705 98%	893,800 94%
Interprovincial <i>Share of Population</i>	1,360 2%	55,370 6%
External migrants <i>Share of Population</i>	3,425 5%	238,250 20%

Source: Census 2016

According to the 2016 Census, there was similar mobility within the population of Granby region (47%) compared with Quebec overall (44%) meaning that similar proportions of people had moved into the region within the previous 5 years. The vast majority of mobility was due to internal migration (95%). External migrants from outside of Canada was significantly lower in Granby (5%) compared with Quebec (20%).

# Indigenous Communities

First Nation	Reserve(s)	Location	Population
Mohawks of Kanesatake	Doncaster 17	10 MI North east of Ste. Agathe	2,607
	Kanesatake Lands	53 KM West of Montreal	
Mohawks of Kahnawá:ke	Doncaster 17	10 MI North east of Ste. Agathe	11,104
	Kahnawake No. 14	8 KM Southwest of Montreal	
Total			13,711

Source: Census 2016

In the surrounding areas, there is one First Nation with two communities with a total population of approximately 13,711 community members. Overall, approximately 1% of the region’s population self-identify as Aboriginal according to the 2016 Census which is similar to the overall rate of 2% for the province.

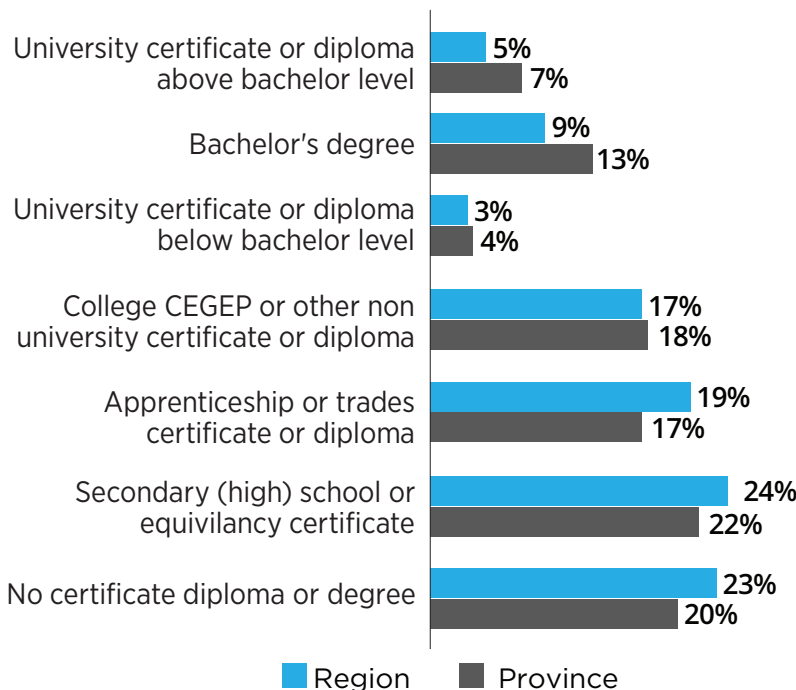
There is one First Nation with two communities with a total population of approximately 11,104 members.\*



\* According to the 2016 Census which is similar to the overall rate of 2% for the province.

# socio-economic characteristics

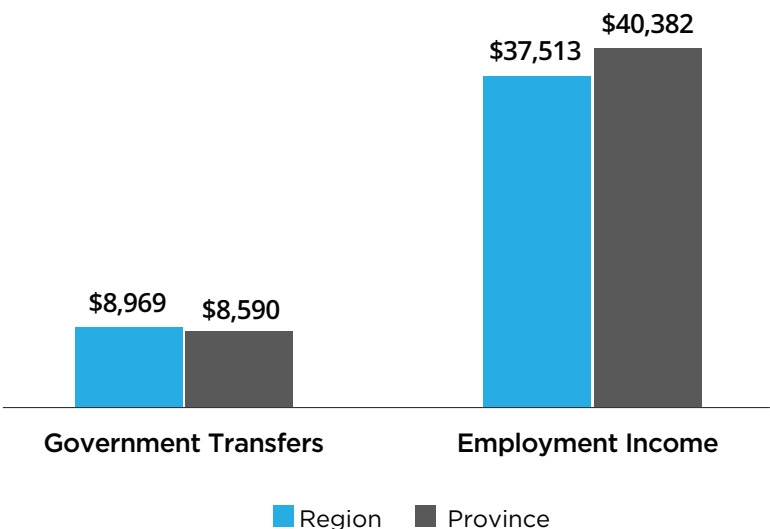
## Educational Attainment



Source: Census 2016

The Granby regional population has slightly lower rates of post-secondary participation compared with Quebec overall. Approximately one-half (53%) report having some form of post-secondary diploma, certificate or degree compared with 58% of Quebec overall.

## Average Employment Income

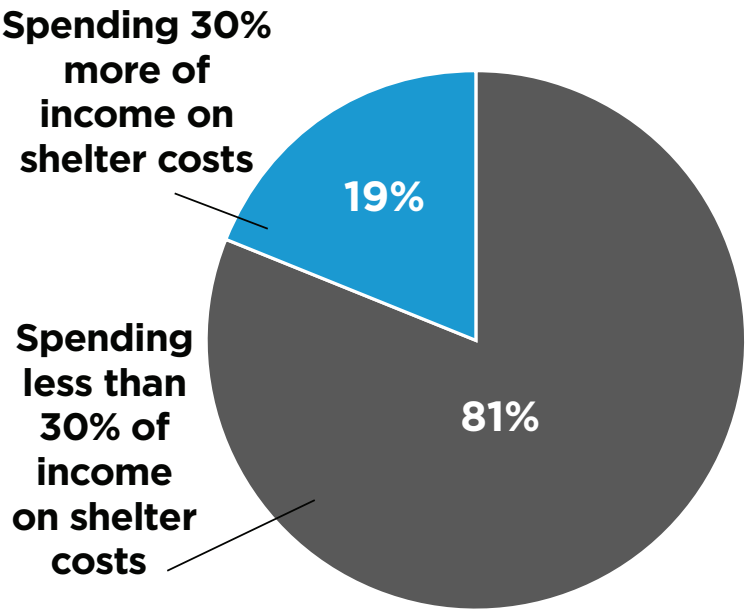


Source: Census 2016

Average employment income among Granby regional residents was approximately 8% lower in 2015 compared with Quebec overall according to Census 2016. The average employment income for Granby regional residents was approximately \$37,513 compared with \$40,382 for Quebec overall. The average government transfers was approximately 4% higher for Granby region residents at \$8,969 compared with \$8,590 for Quebec overall in 2015.

Approximately two-thirds of Granby region population (65%) are home owners, with a higher proportion (81%) reporting spending less than 30% of their income on shelter costs in 2016. The average monthly housing costs for renters was lower at approximately \$698 compared for home owners at approximately \$1,085.

## Housing Costs

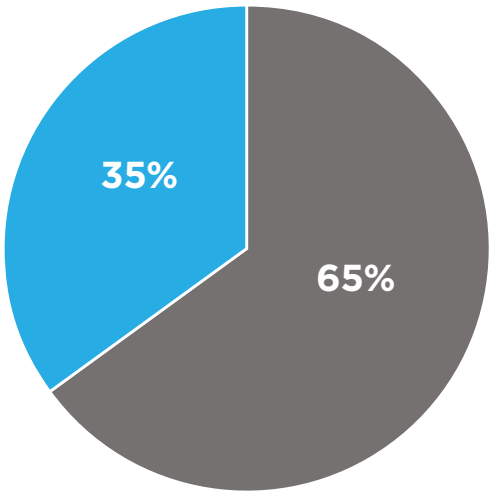


Source: Census 2016



**The average monthly housing costs for renters is approximately \$698.**

## Housing Composition



■ Owner households - Average Monthly Cost of Housing for Owners \$1,085  
■ Renter households - Average Monthly Cost of Housing for Renters \$698

Source: Census 2016



# regional labour force

The size of the regional labour force in 2021 was just over 229,000 which was approximately 5% of Quebec's overall labour force. The participation rate in the region is somewhat similar (60.6%) compared to Quebec (63.1%). Among those in the labour force, the unemployment rates were lower (4.7% vs. 6.2% in Quebec overall).

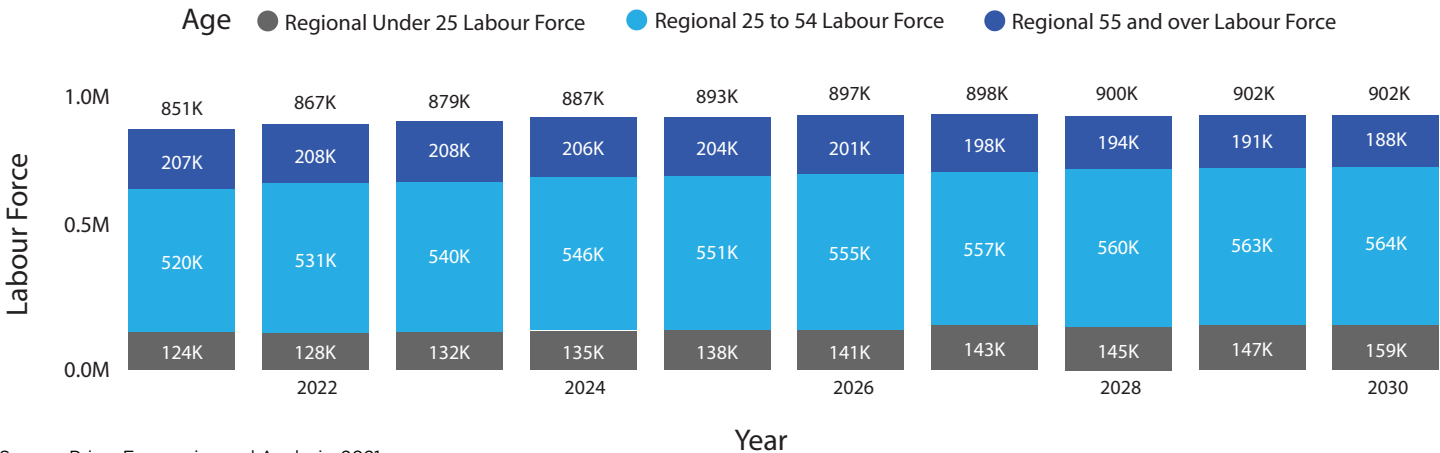
## Labour Force Characteristics

	Granby	Quebec
<b>In Labour Force</b>	229,068	4,569,600
<b>Employed</b>	218,413	4,286,400
<b>Unemployed</b>	10,655	283,500
<b>Participation Rate</b>	60.6%	63.1%
<b>Employment Rate</b>	57.7%	59.1%
<b>Unemployment Rate</b>	4.7%	6.2%

Source: Census 2016

Labour force projections indicate an approximate 6% overall growth in the next decade rising from approximately 851,000 in 2021 to 902,000 by 2030. The anticipated age composition will see a 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
Manufacturing	38,080	17%
Retail trade	26,760	12%
Healthcare and Social Assistance	25,810	12%
Construction	13,220	7%
Educational services	14,830	6%
Accommodation and food services	13,220	6%
Professional, scientific and technical services	10,895	5%

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

The largest proportions of the Granby regional labour force are working in manufacturing (17%), with a similar proportions working in retail (12%) and health care and social assistance (12%). The manufacturing industry is the sector within which the dairy processing sector would be categorized.

## Job Characteristics by Industry (Quebec overall)

Quebec	Job Vacancy Rate	Average Hourly Wage
All industries	4.5%	\$21.83
Food manufacturing	5.7%	\$17.95
Accommodation and food services	7.7%	\$14.33
Administrative and support, waste management and remediation services	5.7%	\$20.12
Professional, scientific, and technical services	5.7%	\$31.37
Health care and social assistance	5.5%	\$22.05
Arts, entertainment, and recreation	5.4%	\$17.78
Transportation and warehousing	4.1%	\$20.98

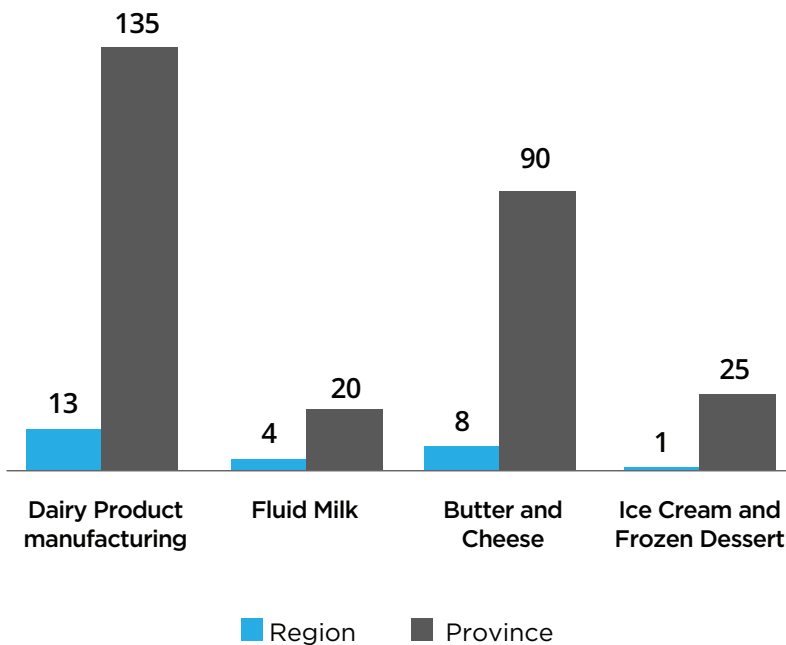
Source: Job Vacancy and Wage Survey Q3 2020 – Q2 2021, Quebec

Although not available at the regional level, an examination of the Quebec 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 higher at 5.7% when compared to all industries at 4.5%. The average hourly wage (\$17.95) is notably lower than that for all industries (\$21.83), but higher than the minimum wage in Quebec of \$13.50 (as of January 1st, 2022).

# dairy processing sector regional profile

Within the greater Granby region, there are 13 dairy processing establishments with a large emphasis on butter and cheese production. The region accounts for approximately 10% of the dairy processing facilities in Quebec. Regional employment in the dairy processing sector is estimated in 2021 at 1,152, with the largest proportions of the workforce in entry-level labourers (392; 34%), and skilled or semi-skilled occupations (388; 34%). Other sizeable proportions of the regional dairy workforce are found in the trades (161; 14%) , and management, finance, sales and administration (118; 10%).

## Dairy Processing Establishments (2021)



**The Granby region accounts for approximately 10% of the dairy processing facilities in Quebec.**

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

## Dairy Processing Employment (2021)

Occupation Group	# Employed
Management, Finance, Sales, and Administration	118
Entry-level Labourers	392
Other	20
Product Development and Quality Control	73
Skilled/Semi-Skilled	388
Trades	161
<b>Total</b>	<b>1,152</b>

Source: Prism Economics and Analysis, 2021

# dairy processing workforce outlook

Dairy processing employment in the Granby region is expected to grow by approximately 11.4% over the upcoming decade rising from 1,152 in 2021 to 1,284 by 2030 a change of approximately 132. 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 644 workers. Anticipated growth will account for 131 new hires (20.3%) while the remaining 513 new hires (79.7%) 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 15 per year or approximately 12-15% 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
Labour Force	1,220	1,214	1,234	1,253	1,268	1,279	1,293	1,305	1,316	1,331
Employment	1,152	1,150	1,178	1,199	1,212	1,225	1,240	1,256	1,270	1,284
Net Hiring Requirement	33	32	65	64	50	70	73	83	85	89
Employment Growth	0	-2	28	20	13	13	15	16	14	14
Replacement	33	34	37	44	36	57	58	68	71	75
Youth New Entrants	36	13	12	11	11	11	12	12	13	13

Source: Census 2016

The largest hiring requirements will occur in the second half of the decade in 2026-2030.





# dairy processing workforce outlook

## Dairy Processing Employment Outlook

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
<b>Management, Finance, Sales, and Administration</b>	392	422	433	440	445	450	455	461	466	471
<b>Entry-level Labourers</b>	118	132	135	137	139	140	142	144	146	147
<b>Product Development and Quality Control</b>	20	22	22	22	23	23	23	23	24	24
<b>Other</b>	73	81	83	84	85	86	87	88	88	89
<b>Skilled/Semi-Skilled</b>	388	327	335	341	345	349	353	358	362	366
<b>Trades</b>	161	167	171	174	176	178	180	182	184	186
<b>Total</b>	<b>1,152</b>	<b>1,150</b>	<b>1,178</b>	<b>1,199</b>	<b>1,212</b>	<b>1,225</b>	<b>1,240</b>	<b>1,256</b>	<b>1,270</b>	<b>1,284</b>

## Dairy Processing Hiring Requirement Outlook

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
<b>Management, Finance, Sales, and Administration</b>	2	15	5	4	3	4	5	5	5	5
<b>Entry-level Labourers</b>	16	47	28	29	23	33	34	39	40	41
<b>Other</b>	3	4	4	4	3	5	5	6	6	7
<b>Product Development and Quality Control</b>	5	14	8	8	7	10	10	12	12	13
<b>Skilled/Semi-Skilled</b>	2	-59	11	9	6	8	8	9	9	9
<b>Trades</b>	5	11	10	10	8	11	11	13	13	13
<b>Total</b>	<b>33</b>	<b>32</b>	<b>65</b>	<b>64</b>	<b>50</b>	<b>70</b>	<b>73</b>	<b>83</b>	<b>85</b>	<b>89</b>

The types of workers that will be needed for the Granby 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 entry-level labourer occupations with a total of 330 new workers needed accounting for approximately 51% of the total hiring requirements between 2021 and 2030. Similar numbers of trades (105; 16%) and product development and quality control (99; 15%) 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 Granby 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: Granby Region

<b>2021</b>	<b>2 - Normal Tightness</b>
<b>2022</b>	<b>2 - Normal Tightness</b>
<b>2023</b>	<b>3 - Greater Tightness</b>
<b>2024</b>	<b>3 - Greater Tightness</b>
<b>2025</b>	<b>3 - Greater Tightness</b>
<b>2026</b>	<b>3 - Greater Tightness</b>
<b>2027</b>	<b>3 - Greater Tightness</b>
<b>2028</b>	<b>3 - Greater Tightness</b>
<b>2029</b>	<b>3 - Greater Tightness</b>
<b>2030</b>	<b>3 - Greater Tightness</b>





# SECURING CANADA'S **DAIRY** WORKFORCE

Real Challenges. Practical Solutions.  
Fresh Perspectives.



**Food Processing Skills Canada (FPSC)**

3030 Conroy Road, Suite 201, Ottawa, Ontario K1G 6C2 Phone: 613.237.7988 Toll Free: 1.877.963.7472

**[fpsc-ctac.com](http://fpsc-ctac.com)**