

FOOD PROCESSING SKILLS CANADA

## Labour Market Information



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

Real Challenges. Practical Solutions.  
Fresh Perspectives.

# Montreal, QC



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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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# 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.

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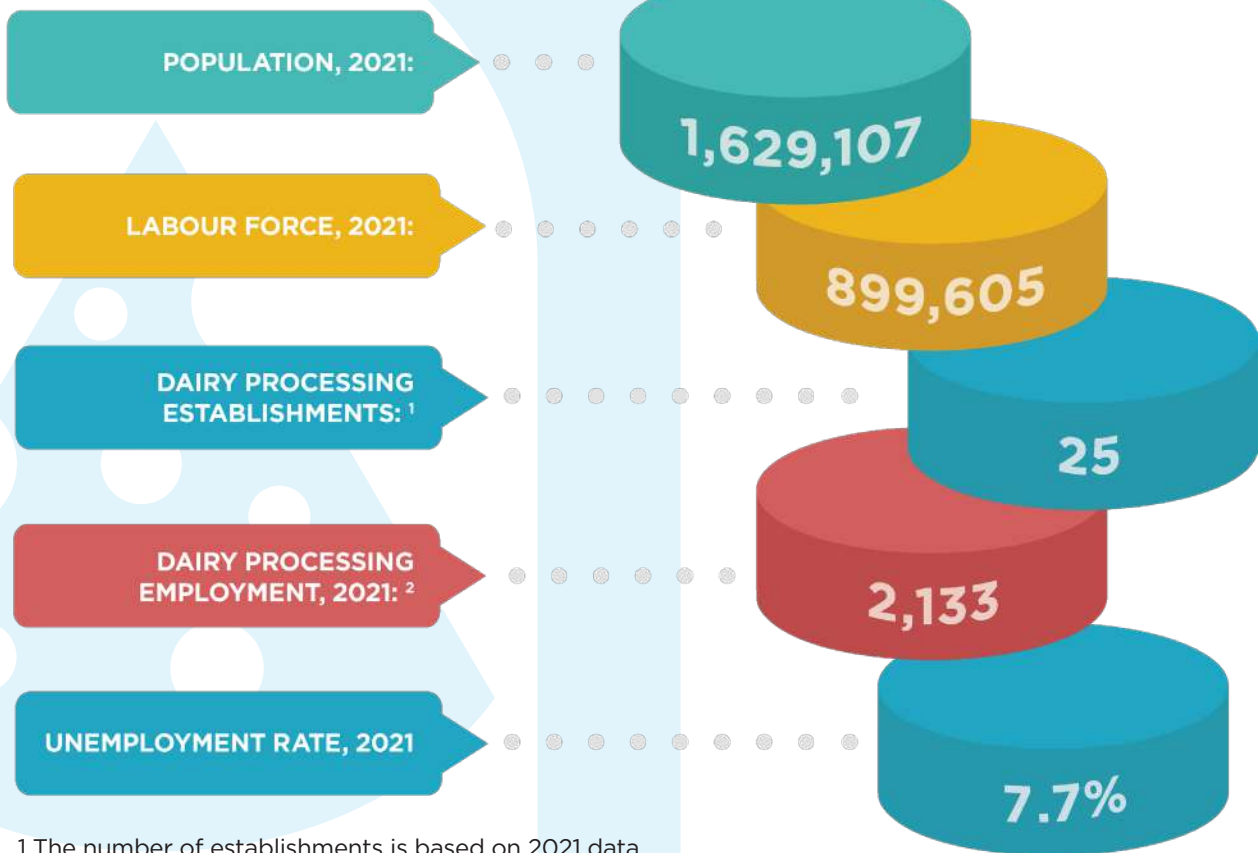
# Key Summary

- Montreal is located in Southern Quebec and is an urban hub for a region with a population of approximately 1.6M.
- The region accounts for approximately 19% of dairy processing facilities in Quebec, with an emphasis on ice cream and frozen dessert production.
- Dairy processing employment in the region is estimated at approximately 2,133 in 2021 which is actually about

0.3% of the total employment in the area. Manufacturing overall accounts for approximately 10% of employment.

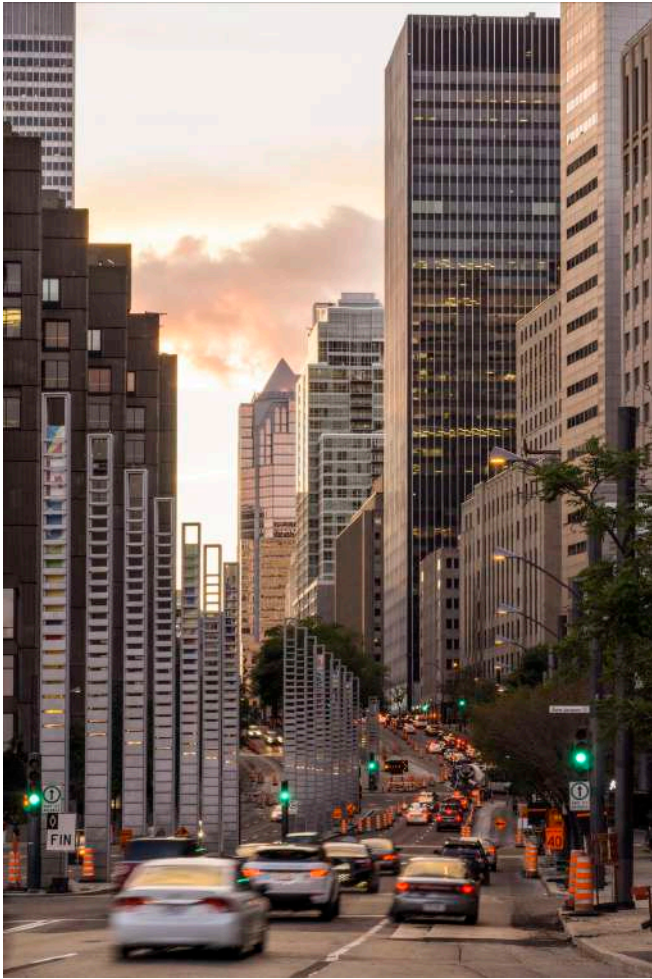
- By the end of this decade (2030), it is estimated that 733 new hires will be required for the regional dairy processing industry, with 75% of this requirement due to replacement of current workers (e.g., retirements).
- Recruitment and retention challenges within this time period are expected to be similar to the current level of tightness.

## key stats

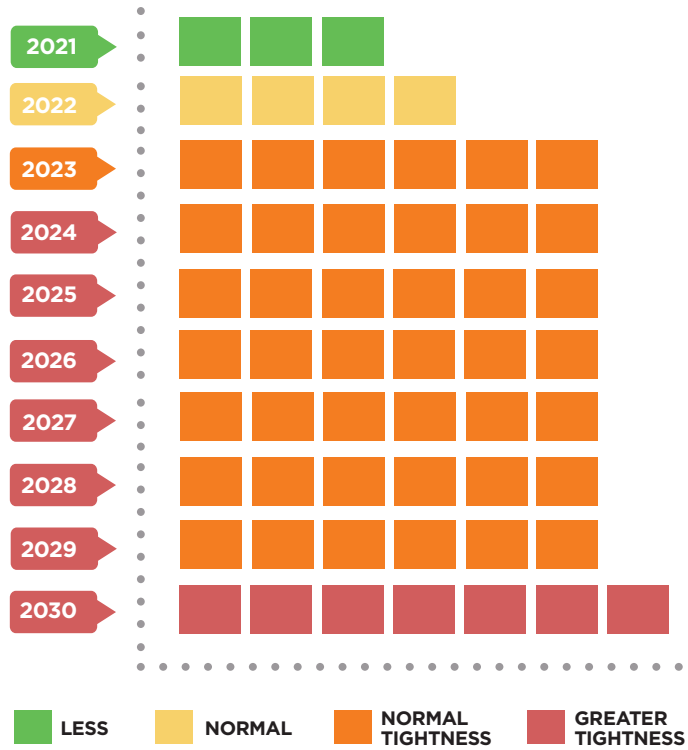


<sup>1</sup> The number of establishments is based on 2021 data from Statistics Canada's Business Register

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

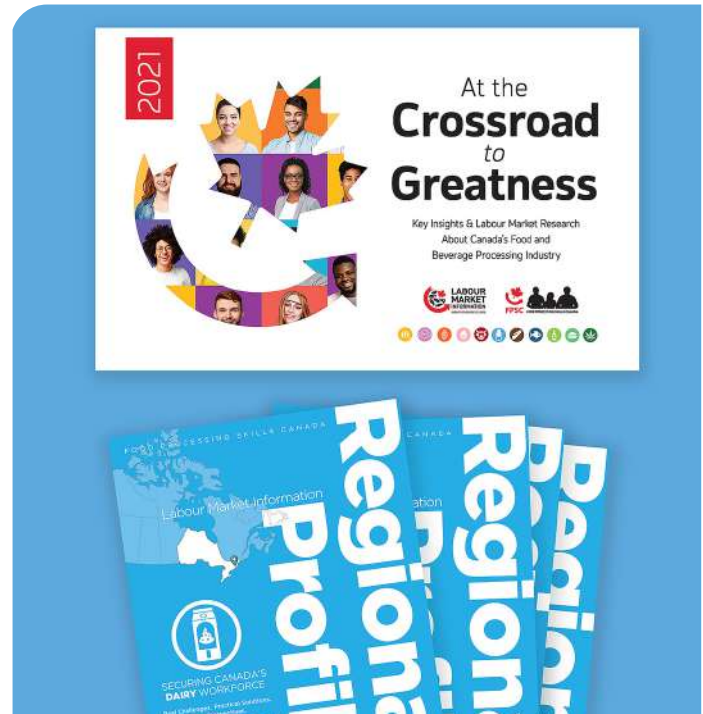


# labour market tightness ratings



# LMI report series

**Food Processing Skills Canada (FPSC)** has developed this regional profile of the Montreal, 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. 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 Montreal, 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 Montreal region.

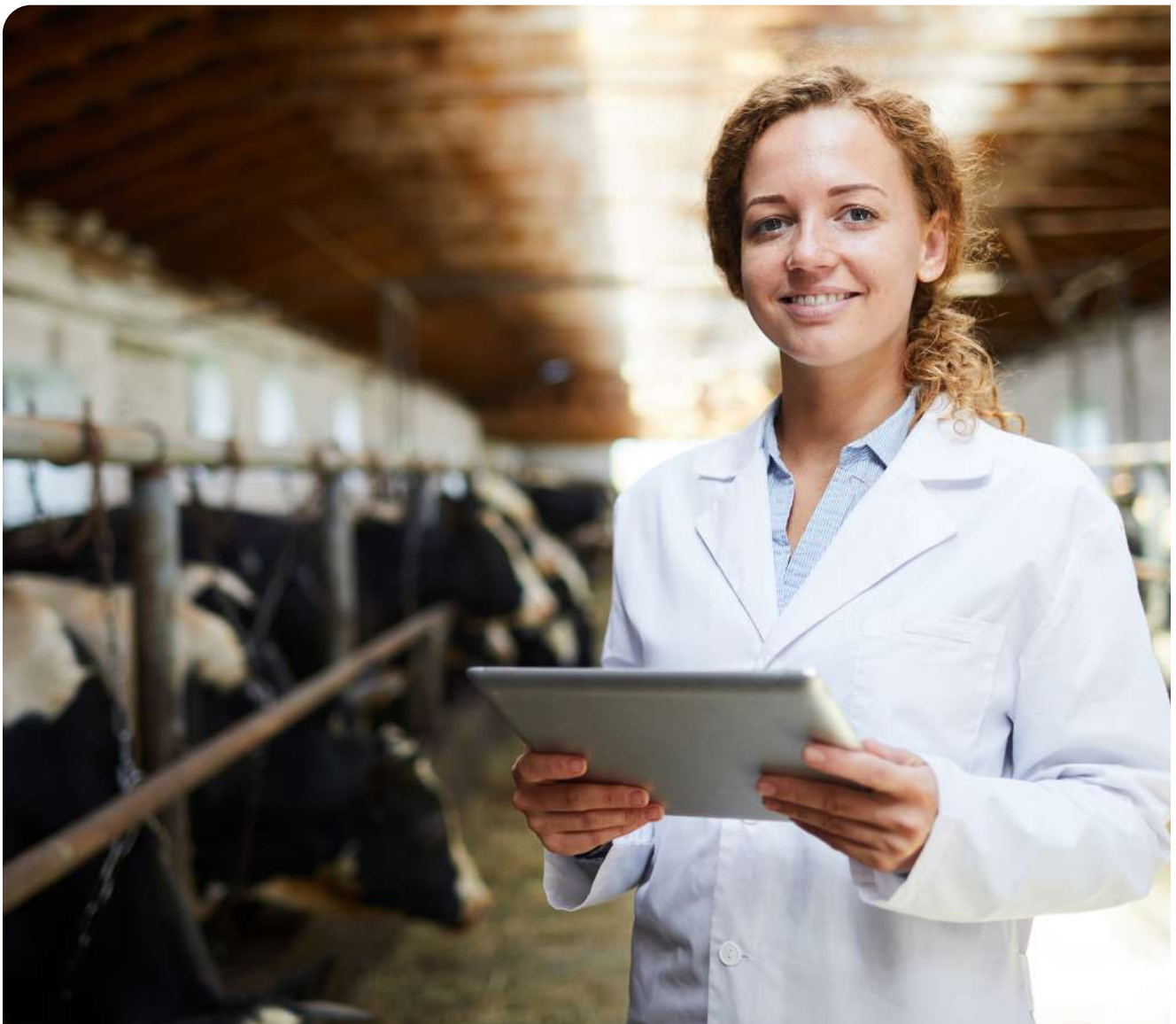


# methods

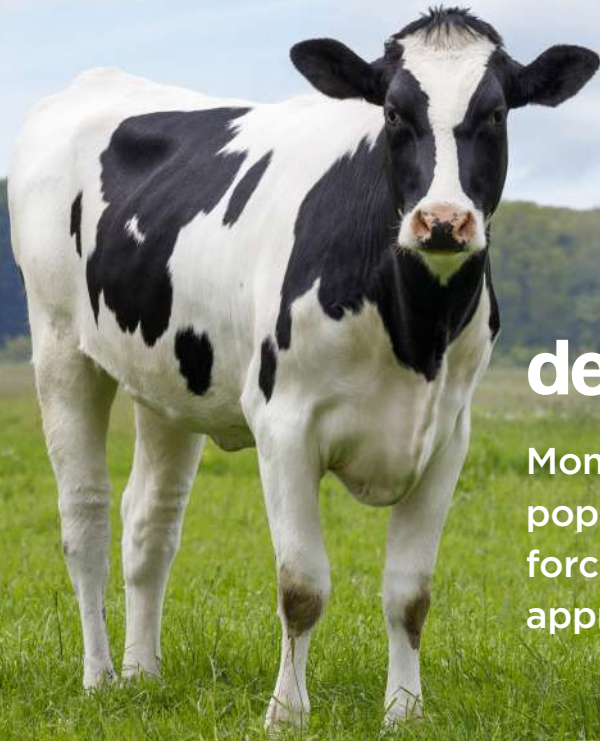
The methods used to develop the regional profiles included an extensive review of Statistics Canada reports and data that contributed to profile the industry, and project growth in production and employment at the regional level.

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 Montreal, 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

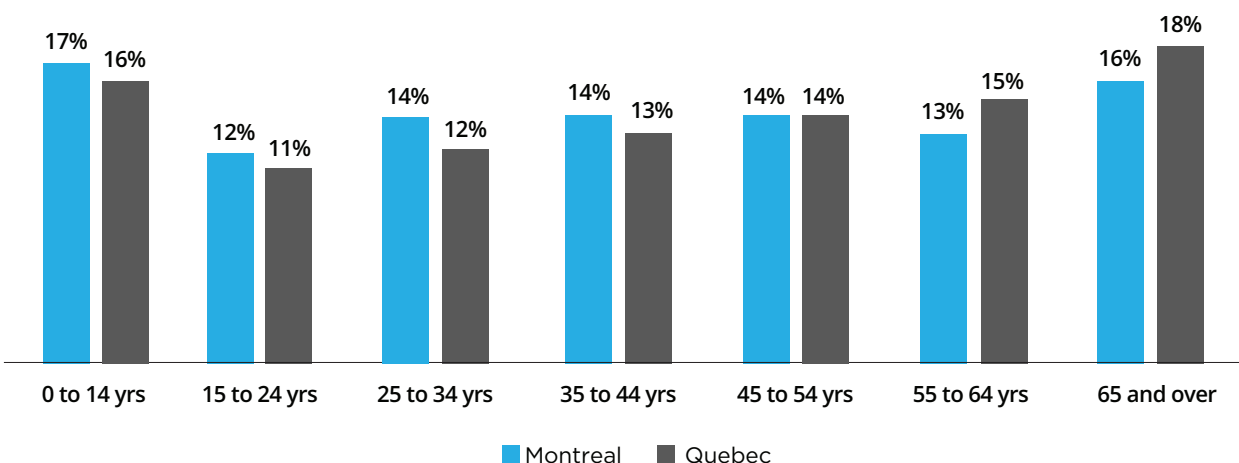
Montreal, Quebec is a hub for a regional population of approximately 1.6M with a labour force of approximately 900,000 and accounts for approximately 19% of the Quebec population.

### Population Summary

	Montreal	Quebec
<b>Total Population</b>	1,629,107	8,604,000
<b>Total Labour Force</b>	899,605	4,569,600
<b>Total Employment</b>	830,630	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 Montreal region’s population is slightly younger with 16% 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 42% in the Granby region compared with 39% in Quebec overall.

### Population Diversity

	Montreal	Quebec
<b>Immigrants</b> <i>Share of Population</i>	827,320 26%	1,091,310 14%
<b>Not Canadian Citizens</b> <i>Share of Population</i>	287,490 9%	379,910 5%
<b>Visible Minority</b> <i>Share of Population</i>	819,145 25%	1,032,365 13%
<b>Aboriginal Identity</b> <i>Share of Population</i>	26,550 1%	182,885 2%

Source: Census 2016

The diversity of population according to immigrant status and visible minorities is significantly higher for the Montreal region compared with Quebec overall. The share of population who were immigrants in 2016 was 26% compared with 14% in Quebec, and self-identified visible minorities made up 25% of the Montreal population compared with 13% of Quebec. Similarly, there were higher proportions of the region’s population who were not Canadian citizens (9%) compared to Quebec overall (5%).

### Population Mobility (5 years)

	Montreal	Quebec
<b>Non-migrants</b> <i>Share of Population</i>	694,425 58%	1,507,665 56%
<b>Migrants</b> <i>Share of Population</i>	502,550 42%	1,187,425 44%
Internal migrants <i>Share of Population</i>	323,605 64%	949,170 80%
Intraprovincial <i>Share of Population</i>	299,045 92%	893,800 94%
Interprovincial <i>Share of Population</i>	24,600 8%	55,370 6%
External migrants <i>Share of Population</i>	178,920 36%	238,250 20%

Source: Census 2016

According to the 2016 Census, there was similar mobility within the population of Montreal region (42%) compared with Quebec overall (44%) meaning that similar proportions of people had moved into the region within the previous 5 years. Much of the migration was due to internal migration (64%). External migrants from outside of Canada was significantly higher in Montreal (36%) 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 are two First Nation with four communities with a total population of approximately 11,104 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.

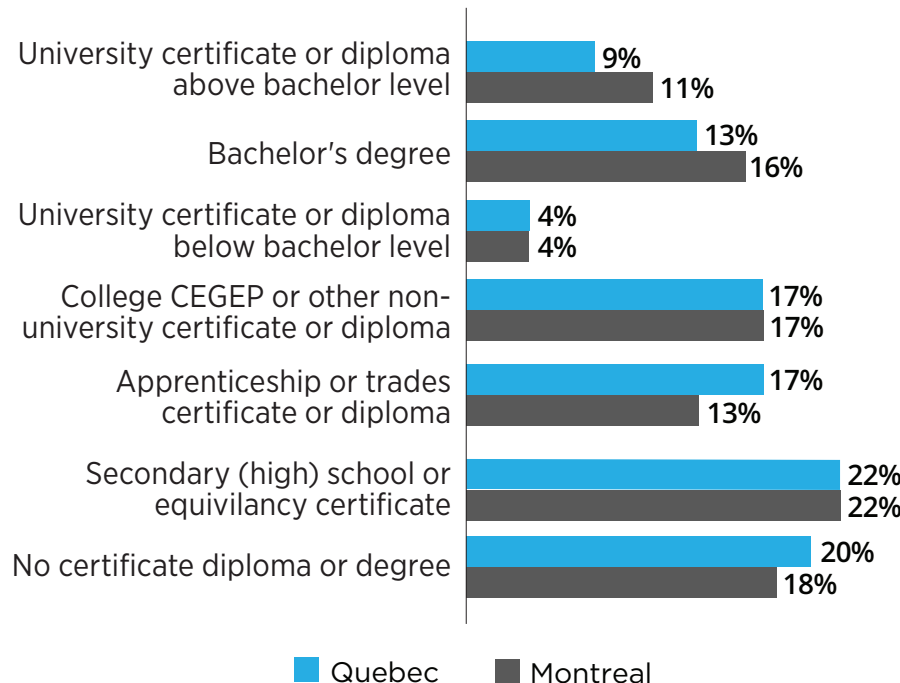
There are two First Nation with four communities with a total population of approximately 13,711 members.



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

# socio-economic characteristics

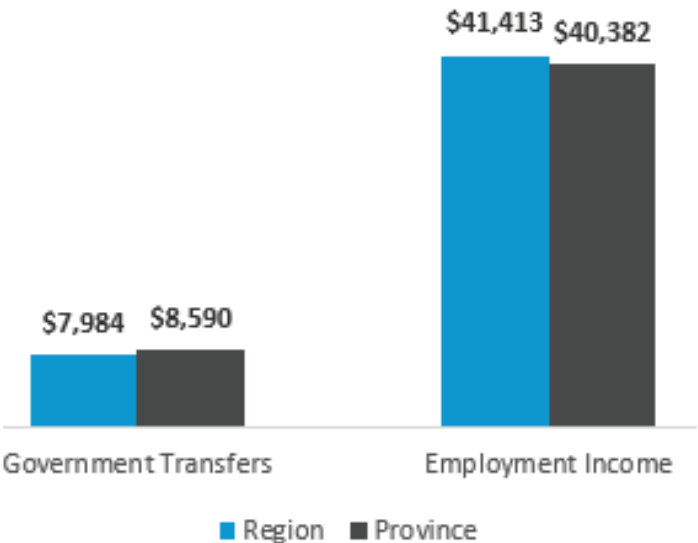
## Educational Attainment



The Montreal regional population has similar rates of post-secondary participation compared with Quebec overall. Over one-half (60%) report having some form of post-secondary diploma, certificate or degree compared with 58% of Quebec overall.

Source: Census 2016

## Average Employment Income

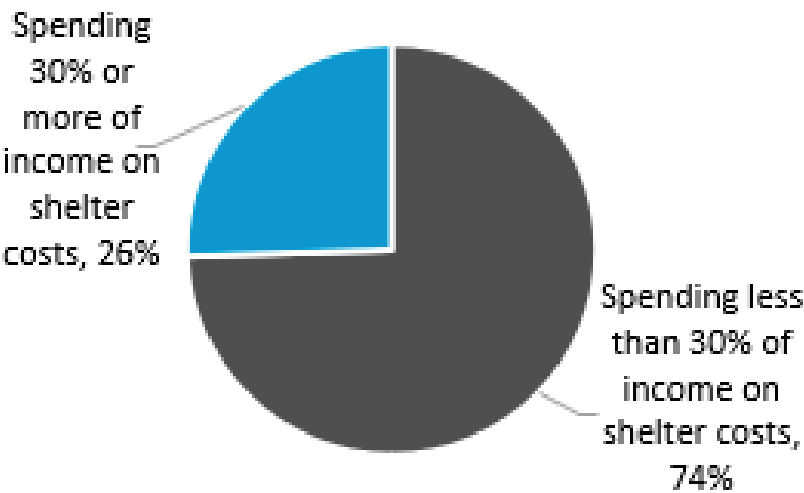


Average employment income among Montreal regional residents was approximately 2% higher in 2015 compared with Quebec overall according to Census 2016. The average employment income for Montreal regional residents was approximately \$41,400 compared with \$40,400 for Quebec overall. The average government transfers was approximately 8% lower for Montreal region residents at \$8,000 compared with \$8,600 for Quebec overall in 2015.

Source: Census 2016

Approximately one-half of Montreal region population (52%) are home owners, with a higher proportion (74%) reporting spending less than 30% of their income on shelter costs in 2016. The average monthly housing costs for renters was lower at approximately \$833 compared for home owners at approximately \$1,085.

### Housing Costs

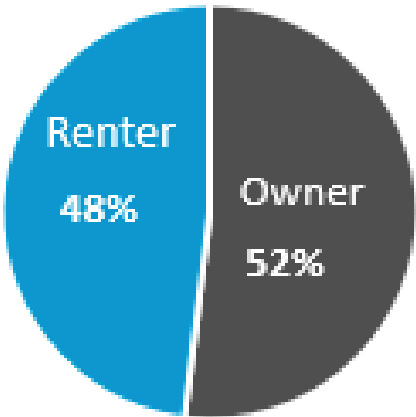


Source: Census 2016



**The average monthly housing costs for renters is approximately \$833.**

### Housing Composition



Source: Census 2016

- Average Monthly Cost of House \$ 1,085
- Average Monthly Cost of Renting \$ 833

# regional labour force

The size of the regional labour force in 2021 was nearly 900,000 which was approximately 20% of Quebec's overall labour force. The participation rate in the region is similar (65.3%) compared to Quebec (63.1%). Among those in the labour force, the unemployment rates were higher (7.7% vs. 6.2% in Quebec overall).

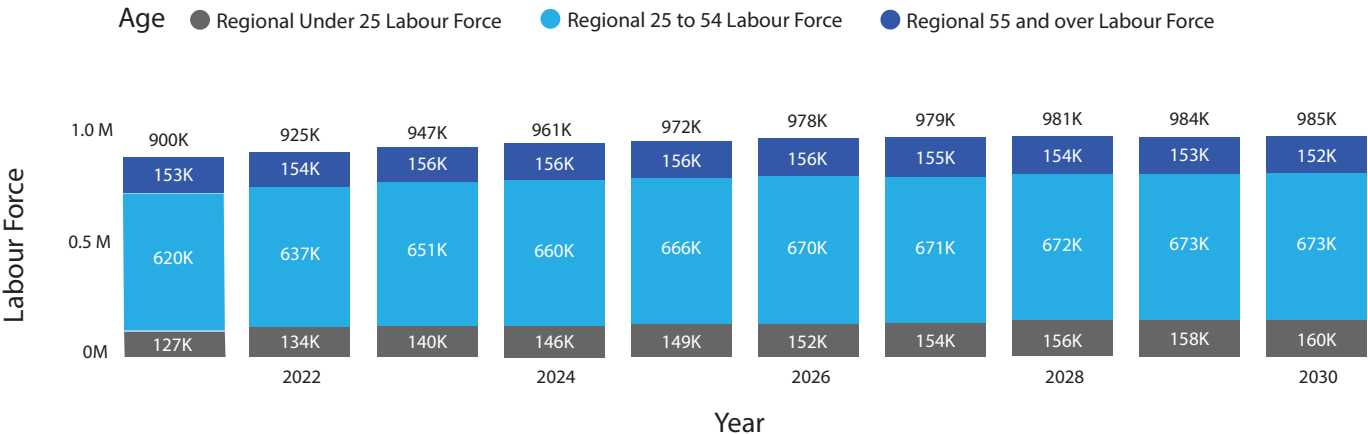
## Labour Force Characteristics

	Montreal	Quebec
<b>In Labour Force</b>	899,605	4,569,600
<b>Employed</b>	830,630	4,286,400
<b>Unemployed</b>	68,975	283,500
<b>Participation Rate</b>	65.3%	63.1%
<b>Employment Rate</b>	60.3%	59.1%
<b>Unemployment Rate</b>	7.7%	6.2%

Source: Census 2016

Labour force projections indicate an approximate 9% overall growth in the next decade rising from approximately 900,000 in 2021 to 985,000 by 2030. The anticipated age composition will see similar numbers of 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
Health care and social assistance	112,981	13%
Retail trade	102,822	11%
Professional, scientific and technical services	90,726	10%
Manufacturing	90,300	10%
Educational services	74,047	8%
Construction	47,994	5%
Accommodation and food services	44,265	5%

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

The largest proportions of the Montreal regional labour force are working in health care and social assistance (13%), with a similar proportions working in retail (11%) and professional, scientific, and technical services (10%). The manufacturing industry, the sector within which the dairy processing sector would be categorized, makes up 10% of the labour force.

## 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

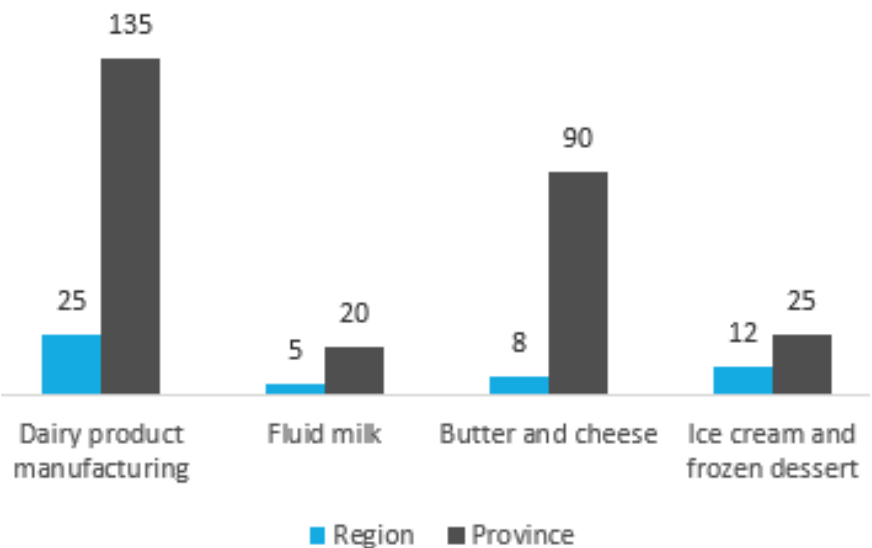
Source: Job Vacancy and Wage Survey Q3 2020 – Q2 2021, Quebec

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 Montreal region, there are 25 dairy processing establishments with a large emphasis on ice cream and frozen dessert production. The region accounts for approximately 19% of the dairy processing facilities in Quebec. Regional employment in the dairy processing sector is estimated in 2021 at 2,133, with the largest proportions of the workforce in management, finance, sales and administration (725; 34%), and skilled or semi-skilled (719; 34%) occupations. Other sizeable proportions of the regional dairy workforce are found in the trades (299; 14%), and entry-level labourers (218; 10%).

## Dairy Processing Establishments (2021)



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

**The Montreal region accounts for approximately 19% of the dairy processing facilities in Quebec.**

## Dairy Processing Employment (2021)

Occupation Group	# Employed
Management, Finance, Sales, and Administration	725
Entry-level Labourers	218
Other	37
Product Development and Quality Control	134
Skilled/Semi-Skilled	719
Trades	299
Total	2,133

Source: Prism Economics and Analysis, 2021

# dairy processing workforce outlook

Dairy processing employment in the Montreal region is expected to grow by approximately 10.7% over the upcoming decade rising from 2,133 in 2021 to 2,362 by 2030 a change of approximately 229. 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 733 workers. Anticipated growth will account for 230 new hires (31.3%) while the remaining 503 new hires (68.7%) 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 25 per year or approximately 20-25% 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 (i.e. retirements).

## Total Dairy Processing Workforce Outlook

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Labour Force	2,371	2,354	2,373	2,405	2,434	2,448	2,470	2,486	2,499	2,524
Employment	2,133	2,129	2,179	2,215	2,239	2,262	2,289	2,316	2,339	2,362
Net Hiring Requirement	30	28	84	77	59	79	83	95	97	101
Employment Growth	0	-3	49	36	24	24	26	27	24	23
Replacement	30	32	34	41	35	55	57	68	73	78
Youth New Entrants	63	22	22	21	20	19	21	22	23	23

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
Management, Finance, Sales, and Administration	725	782	800	813	822	830	840	850	858	866
Entry-level Labourers	218	244	249	254	256	259	262	266	268	271
Other	37	40	41	42	42	42	43	43	44	44
Product Development and Quality Control	134	150	153	155	157	158	160	161	163	164
Skilled/Semi-Skilled	719	605	620	630	637	644	652	660	667	673
Trades	299	309	316	321	325	328	332	336	340	343
<b>Total</b>	<b>2,133</b>	<b>2,129</b>	<b>2,179</b>	<b>2,215</b>	<b>2,239</b>	<b>2,262</b>	<b>2,289</b>	<b>2,316</b>	<b>2,339</b>	<b>2,362</b>

## Dairy Processing Hiring Requirement Outlook

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Management, Finance, Sales, and Administration	15	72	35	33	25	35	37	43	44	46
Entry-level Labourers	1	27	7	6	5	6	6	7	6	7
Other	3	5	4	4	3	5	5	6	6	7
Product Development and Quality Control	5	20	9	9	7	10	11	12	13	14
Skilled/Semi-Skilled	2	-111	17	13	10	11	12	13	12	12
Trades	5	15	12	11	9	12	12	14	15	15
<b>Total</b>	<b>30</b>	<b>28</b>	<b>84</b>	<b>77</b>	<b>59</b>	<b>79</b>	<b>83</b>	<b>95</b>	<b>97</b>	<b>101</b>

The types of workers needed for the Montreal region dairy processing industry will vary slightly, year to year, according to estimates. Yet across the decade, the largest proportion of new hires will be within the management, finance, sales and administration occupations with a total of 380 new workers needed accounting for approximately 52% of the total hiring requirements between 2021 and 2030. Similar numbers of trades (120; 16%) and product development and quality control (110; 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 Montreal 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: Montreal Region

<b>2021</b>	<b>1 - Less Tightness</b>
<b>2022</b>	<b>2 - Normal Tightness</b>
<b>2023</b>	<b>2 - Normal Tightness</b>
<b>2024</b>	<b>2 - Normal Tightness</b>
<b>2025</b>	<b>2 - Normal Tightness</b>
<b>2026</b>	<b>2 - Normal Tightness</b>
<b>2027</b>	<b>2 - Normal Tightness</b>
<b>2028</b>	<b>2 - Normal Tightness</b>
<b>2029</b>	<b>2 - Normal Tightness</b>
<b>2030</b>	<b>3 - Greater Tightness</b>





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Fresh Perspectives.



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