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# Filling the Talent Gap in Ontario's Food and Beverage Manufacturing Sector

A report commissioned by  
Food and Beverage Ontario



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# About Food and Beverage Ontario

Established in 2003 as the Alliance of Ontario Food Processors, Food and Beverage Ontario (FBO) is the provincial professional leadership organization for food and beverage (F&B) manufacturers across Ontario. The organization works to advocate for all categories of Ontario's F&B manufacturers and help them build successful businesses locally and around the globe.

Seeking to address the talent gap facing the F&B manufacturing sector, FBO has launched several initiatives:

➤ **CareersNOW!** was launched in May 2021, with support from Ontario's Ministry of Labour, Training and Skills Development. This initiative aims to educate job seekers and students about careers in the sector; offers mentorship, virtual job fairs and free "job-ready" skills training; connects job seekers with employers, a job, or a placement opportunity; and offers resources and an employment platform for employer – job seeker matchmaking.



Provided to the OCC by FBO.

➤ **Taste Your Future** is FBO's careers awareness campaign, launched in 2016, to educate post-secondary students and job seekers about career prospects in the F&B manufacturing sector. It also offers students access to employment resources and networking opportunities. For employers, this campaign provides a platform to share hiring information, workplace culture, and employee success stories with prospective employees.

➤ **Frontline Food Facts** is a public-facing campaign launched in May 2020 to promote the CareersNOW! resources and the variety of production and frontline jobs to job seekers. This campaign provides Ontarians considering a career in the F&B manufacturing sector (or those who were displaced from another industry) with information about Ontario's F&B companies and the range of available opportunities.

➤ **A Strategy for Jobs and Recovery in Ontario's F&B Manufacturing Sector** is a project to address workforce challenges with the following activities: essential skills trades pilot and industry survey; two new regional workforce pilots to identify barriers and opportunities to building talent pipelines; employer workplace development and culture webinar series; and regional labour market analysis and reporting.

➤ **Workplace Language Training in Food Manufacturing** is a partnership project with Mohawk College and the YMCA to support industry employers in more effectively hiring and retaining immigrant and newcomer employees with English language proficiency training.

➤ **A Study of Automation and Technology Implementation Guide** are two reports available to businesses to assist in making informed decision about adopting innovation and technology for facility and workforce improvements.

The findings of this report will serve to refine current and inform future initiatives by FBO to address workforce challenges and identify options for complementary actions by policymakers, employers, employment agencies, and post-secondary institutions.

# About the Ontario Chamber of Commerce

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Together with 157 member chambers of commerce and boards of trade and our network's diverse 60,000 members, the Ontario Chamber of Commerce (OCC) is the indispensable partner of business.

For more than a century, the OCC has undertaken important research on Ontario's most pressing policy issues, advocating for solutions that will foster the growth of Ontario businesses and lead to the creation of jobs in the province.

We support businesses of all sizes through our focused programs and services, encouraging workforce development and inclusive economic growth. This work is based on the belief that strong businesses are the foundation of a prosperous Ontario.

# Acknowledgements

This commissioned report draws on several sources, including expert input from members of the CareersNOW! Regional Workforce Pilot Steering Committee assembled by FBO and the City of Brampton. Composed of a cross-section of industry representatives, post-secondary institutions, and community organizations, the group participated in three consultations from December 2021 to March 2022.

Further, this commissioned report would not be possible without an understanding of job seekers' experiences. To provide a cross-cutting view, we worked with organizations who directly support the diverse array of job seekers in the City of Brampton. Jobseeker perspectives were derived from interviews with organizations that work directly with candidates in Brampton and have first-hand knowledge of their experiences.

Through these consultations and expert interviews, the Steering Committee shared critical insights and external resources to inform this report. For their support and engagement, the OCC would like to acknowledge and thank the City of Brampton and the Steering Committee members:

- ‡ **Blake Cornelius**, Director, Human Resources, TMF Foods
- ‡ **Kelsie Baranski**, Director, Service Delivery, Employment Ontario Peel
- ‡ **Kerry Towle**, Vice President, Government Relations, Sofina Foods
- ‡ **Nazlin Hirji**, Executive Director, Continuing and Professional Studies, Sheridan College
- ‡ **Neela Gomes**, Senior Director, Human Resources, Cardinal Meat Specialists Ltd.
- ‡ **Shalini da Cunha**, Executive Director, Peel Halton Workforce Development
- ‡ **Todd Letts**, Chief Executive Officer, Brampton Board of Trade
- ‡ **Vanessa White**, Director, Human Resources, Maple Lodge Farms
- ‡ **Wendy Cukier**, Founder and Director, Diversity Institute, Ryerson University
- ‡ **Chris Conway**, Chief Executive Officer, Food and Beverage Ontario

*This report is made possible by Food and Beverage Ontario through the Employment Ontario project.*

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This Employment Ontario project is funded in part by the Government of Canada and the Government of Ontario.

# Executive Summary

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Food and beverage (F&B) manufacturing is a major driver of Ontario's economy. With 65 percent of product from Ontario farms flowing through one of the 4,000 businesses that make up this sector, it is critical to our food supply chain. As of 2020, F&B manufacturing directly employed more Ontarians and contributed more to the province's GDP than any other type of manufacturing.

However, the sector faces a labour shortage that is expected to persist. The challenge spans hiring and retention. In Ontario, an estimated 25,000 positions will go unfilled by 2025.

This report, commissioned by Food & Beverage Ontario in partnership with the City of Brampton, explores: (i) issues hindering employers' ability to attract and retain talent in the sector and (ii) what can be done to fill the existing and projected talent gap. It examines the F&B manufacturing industry in Brampton as a case study to generate provincially relevant insights.

Interviews captured the perspectives of employers, post-secondary institutions, and job seekers. Five key themes emerged:

1. **Transit and transportation** – Many employees and job seekers rely on public transportation to get to and from work. However, the locations and shift hours of F&B manufacturers are not well served by existing transit options.
2. **Immigration and language skills** – Decreased levels of immigration due to COVID-19 stifled a key source of talent for the sector. Permanent residency scoring systems can be unfavourable to many F&B manufacturing roles. The requirement for English fluency in F&B manufacturing environments means language skills are a barrier for some would-be applicants.
3. **Housing, childcare, and the cost of living** – The increasing cost of living in Ontario raises compensation requirements for job seekers. Many small and medium-sized F&B manufacturers lack the financial flexibility to keep up. A shortage of affordable and proximal childcare options means caretaking responsibilities reduce the pool of candidates seeking positions. High housing costs can force candidates further from transit routes and F&B manufacturing locations while exacerbating upward pressure on wage requirements.

4. **Perceptions of the sector and the nature of work** – Job seekers do not look favourably upon roles in the sector where the work is physically demanding, repetitive, and/or entails shiftwork. Positions in the sector where these conditions are not experienced suffer by association. Job seekers and employees are often unaware of growth opportunities. The inability to work from home can be a detractor for those concerned with health and safety or seeking flexibility. Despite the essential nature of the work, many feel that F&B manufacturing does not receive the same public recognition and promotion as other critical and economically significant industries.
5. **The changing labour market** – Competition for talent has increased. The supply-demand balance in the labour market means that many job seekers receive financially attractive offers very quickly. Companies without rapid hiring processes or competitive compensation packages are at a disadvantage. F&B manufacturers say that competition with other employers, including in the logistics industry and global F&B firms with a regional footprint, exacerbate these effects. Employers express that many of the financial incentives and perks they put in place have now become table stakes. Additionally, employees are seeking more part-time and flexible work arrangements over the full-time positions many F&B manufacturers have traditionally offered. Retention is challenged when work shortages, attributed to both COVID-19 and hiring difficulties, increase the stress on existing employees and drive up the rate of attrition.

For each of these themes, interviewees ideated potential solutions. The report captures those ideas and identifies which stakeholders – policymakers, employers, post-secondary institutions, and/or organizations that support job seekers and newcomers – are best positioned to further prioritize, investigate, and execute against them.

In addition, automation has the potential to reduce the requirement for labour and lead to the creation of higher-skilled and less physically demanding roles. Further, automation can generate productivity and savings, which can be used to fund other initiatives. However, this is not a silver bullet – F&B manufacturers affirm, and secondary research supports, intervention is needed to accelerate automation among Ontario businesses, highlighting support for initial capital outlays and employee training.

While F&B manufacturing faces uncertainty due to the identified challenges, one thing is certain: this sector is critical to Ontario. Filling the talent gap in the F&B manufacturing sector is essential so that Canadians can fill their plates across the country.

# Glossary

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**Advanced manufacturing:** The use of innovative technologies, such as automation and the Internet of Things, to improve products or processes within the manufacturing sector.

**CareersNOW!:** A workforce development initiative launched in May 2021 by Food and Beverage Ontario (FBO) that seeks to connect job seekers and students with employers in Ontario's food and beverage processing industry.

**CareersNOW! and City of Brampton Regional Workforce Pilot:** A project that seeks to assess barriers and opportunities with the City of Brampton and develop an improved job seeker to employer pipeline within the region. The project is guided by a Regional Workforce Pilot Steering Committee composed of industry representatives, post-secondary institutions, and community organizations assembled by FBO and the City of Brampton.

**Childcare desert:** Postal codes with over 50 non-school-aged children that have less than one licensed childcare spot for every three children.

**Food supply chain:** Made up of various sub-sectors, namely farms and fishers; handling and processing centres; storage, warehouses, and cold houses; transportation and distribution; market and retail centres; and food service. The food and beverage manufacturing and processing sector is one component of the food supply chain.

**National Occupational Classification (NOC):** A nationally recognized and standardized system that assigns a four-digit code and job description to every occupation in Canada. This system is used to collect, analyze, and disseminate occupational data for labour market information and employment-related program administration. Immigration, Refugees and Citizenship Canada (IRCC) also uses NOC codes to evaluate every immigration applicant's work experience.

**The Great Resignation:** The large number of workers who quit their jobs in 2021 amid the COVID-19 pandemic. While some left for better opportunities, others decided to work for themselves, dropped out of the workforce due to caregiving responsibilities, or decided to take early retirement.

# Introduction

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With the onset of COVID-19, Ontario's food supply chain experienced many pressures and challenges. Despite these challenges, supply was maintained, and Ontarians continued to have access to healthy and nutritious food. The experience brought an often-overlooked fact to the forefront of public attention – access to food via a robust supply chain is a critical underpinning of a functional society.

However, Ontario's food supply chain still faces challenges. In particular, the food and beverage (F&B) manufacturing sector is experiencing a talent shortage, with an estimated 25,000 positions expected to go unfilled by 2025, barring any significant policy shifts or advancements within the industry.<sup>i ii</sup>

To better understand this issue, Food and Beverage Ontario (FBO), through the CareersNOW! initiative, partnered with the City of Brampton and commissioned the Ontario Chamber of Commerce (OCC) to explore what issues are hindering employers' ability to attract and retain talent in the sector and what can be done to fill the existing and projected talent gap.

This commissioned report focuses on the F&B manufacturing sector in one city – Brampton – as a pilot study. The report synthesizes insights from:

- Semi-structured interviews with 16 sector experts conducted between December 2021 and March 2022;
- Consultation with sector experts via the CareersNOW! Regional Workforce Pilot Steering Committee;
- Secondary research and analysis.

The report identifies five issues hindering employers' ability to attract and retain talent. It offers policymakers, employers, post-secondary institutions, and organizations helping job seekers and newcomers with suggestions to fill the talent gap in Ontario's F&B manufacturing sector.

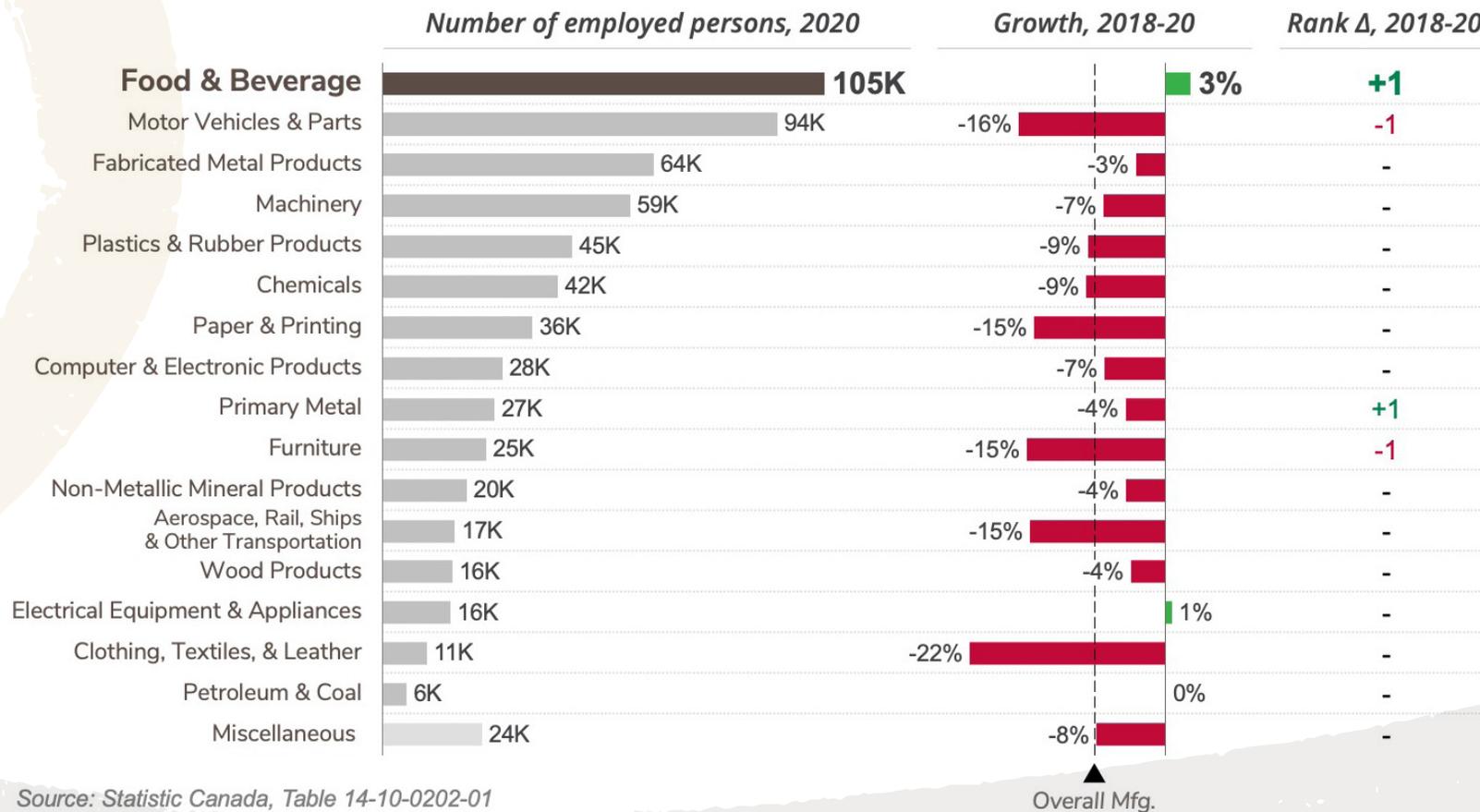
Section 1:

# Ontario's Food and Beverage Manufacturing Sector

Ontario is Canada's top F&B manufacturing hub and the third largest in North America.<sup>iii</sup> The province's rich agricultural base, large consumer population, educated workforce, and cluster of research institutions underpin its competitive advantage.

The F&B manufacturing sector is a significant driver of Ontario's economy. As of 2020, food & beverage manufacturing directly employed more Ontarians than any other manufacturing sector (including automotive), seeing three percent job growth from 2018 to 2020, when manufacturing experienced overall employment losses (Figure 1).

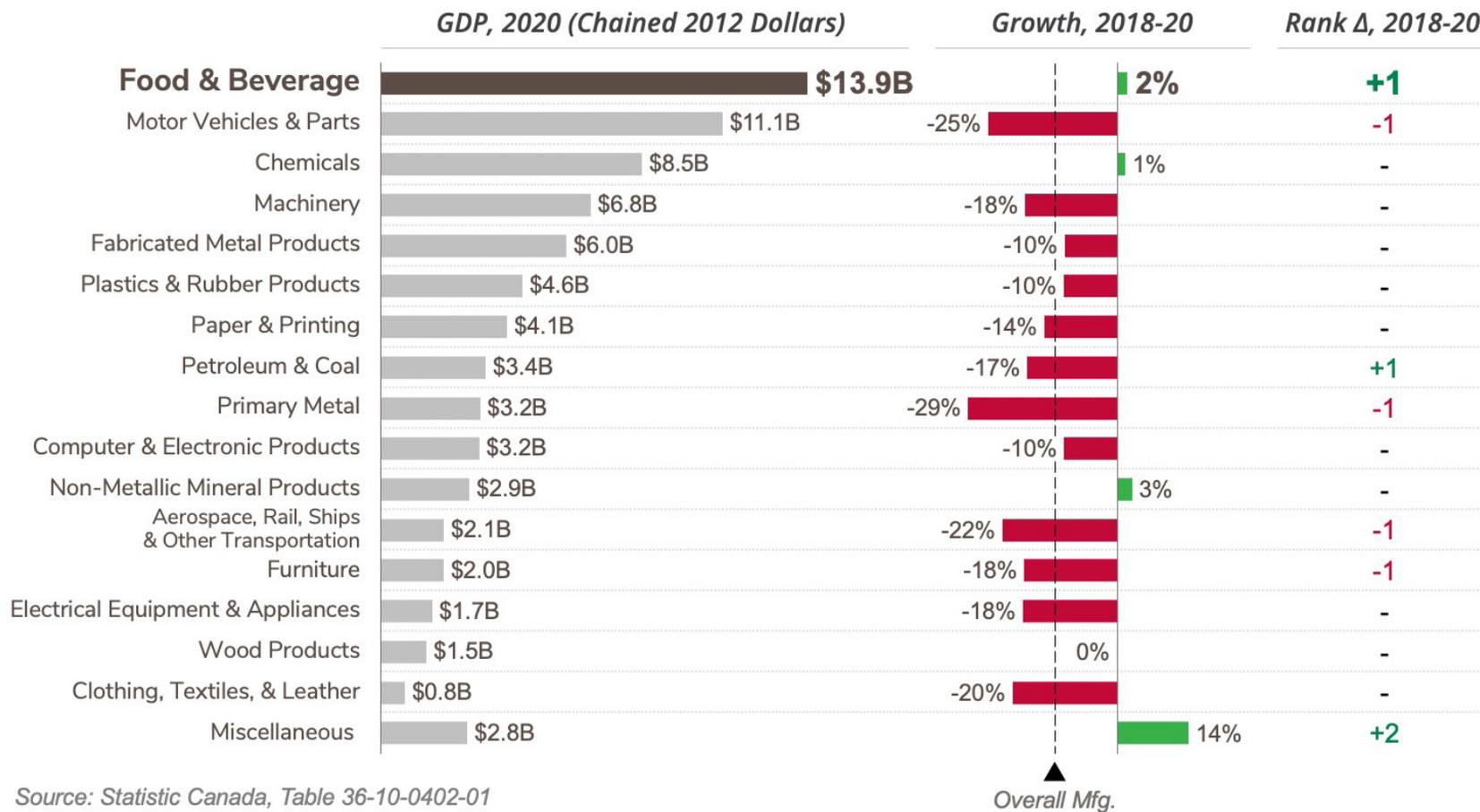
**Figure 1: Ontario's Manufacturing Employment by Sector**



Source: Statistic Canada, Table 14-10-0202-01

Over the same period, F&B manufacturing emerged among manufacturing subsectors as the top contributor to Ontario's gross domestic product (GDP), again delivering growth in the face of overall industry decline (Figure 2).

**Figure 2: Ontario's Manufacturing GDP by Sector**



The F&B manufacturing sector in Ontario is made up of over 4,000 businesses. These include start-ups, small to medium-sized businesses, and multi-national enterprises. They produce a wide variety of food and beverage products under 11 broad subsectors, listed in Table 1.

Animal/pet food manufacturing	Grain and oilseed milling	Sugar and confectionery product manufacturing	Fruit and vegetable preserving and specialty food manufacturing
Dairy product manufacturing	Meat product manufacturing	Seafood product preparation and packaging	
Bakeries and tortilla manufacturing	Other food manufacturing	Beverage manufacturing	Cannabis product manufacturing

The sector offers a variety of job opportunities, including but not limited to roles in:

- ⊃ Frontline production
- ⊃ Food safety and quality assurance
- ⊃ Product development
- ⊃ Process control
- ⊃ Machine operation
- ⊃ Baking
- ⊃ Meat cutting
- ⊃ Supervision
- ⊃ Various business support functions

In filling roles such as these, the F&B manufacturing sector in Ontario faces a future labour gap of 25,000 vacancies by 2025. Nationally, the sector is expected to face an employment gap of up to 56,000 people over the same time frame.<sup>ivv</sup>



### Snapshot: Ontario's Food and Beverage Manufacturing Sector by the Numbers<sup>vi vii viii ix</sup>

- ⇒ Largest F&B manufacturing sector in Canada and the third-largest in North America
- ⇒ Largest manufacturing sector employer, employing 105,000 Ontarians in 2020
- ⇒ Largest manufacturing sector contributor to GDP, contributing \$13.9B in 2020
- ⇒ Ontario F&B manufacturers purchase 65% of product that comes from Ontario farms
- ⇒ 4,000+ businesses make food and beverage products – from small to global enterprises
- ⇒ The top three subsectors are bakery, meat, and beverage manufacturing
- ⇒ Over 90% of firms employ fewer than 100 people, with 25% located in rural communities
- ⇒ By 2025, 25,000 positions will go unfilled in Ontario's F&B manufacturing sector



### Snapshot: Canada's Food and Beverage Manufacturing Sector by the Numbers<sup>x xi</sup>

- ⇒ 7,800+ F&B manufacturing firms in Canada, with the highest concentration of businesses in Ontario, Quebec, and British Columbia
- ⇒ Employing 286,000 Canadian in 2020
- ⇒ Accounts for 70% of goods sold to Canadians through grocery stores and restaurants
- ⇒ 31% of the sector's workforce consists of new Canadians, compared to only 23% of the overall labour force
- ⇒ Visible minorities account for 28% of the F&B manufacturing workforce – slightly higher than the proportion working in the overall manufacturing sector (23%)
- ⇒ 65% of employees are between 25 and 54 years of age
- ⇒ 25% of employees in the sector are between 55 and 64 years of age and will retire in the next decade
- ⇒ By 2025, up to 56,000 new workers will be required to fill employment needs in the sector

## Section 2:

# Methodology

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## Focusing on Brampton as a Pilot City

Three factors drove the selection of Brampton as an ideal geography for the study:

**1. A significant F&B manufacturing industry:** F&B manufacturing is one of four key sectors in Brampton.<sup>1</sup> Approximately 300 F&B manufacturing, processing, and support companies call Brampton home including but not limited to:

- ≥ Processing facilities
- ≥ Testing facilities
- ≥ Equipment providers
- ≥ Packaging facilities
- ≥ Packaging design firms
- ≥ Refrigerated storage facilities
- ≥ Transportation providers

Together, these firms employ 8,500 Ontarians and contribute \$1.3 billion annually to Canada's GDP.<sup>xii</sup> Brampton's F&B manufacturing sector took first place in the Business Facilities Magazine 16<sup>th</sup> Annual Metro Rankings Report in July 2020.<sup>xiii</sup> Selecting Brampton increased the potential for preliminary findings to impact the sector.

**2. Proximity to key institutions:** Brampton is located near several major food research centres and 25 academic institutions offering agri-food programs.<sup>xiv</sup> Graduates from these institutions represent a large talent pool relevant to the F&B manufacturing sector, including post-secondary and international students. Selecting Brampton for the study ensured the presence of potential talent to fill the employment gap and access to experts familiar with these talent pools.

<sup>1</sup> These four sectors are advanced manufacturing, food and beverage manufacturing, health and life sciences, and innovation and technology.

- 3. Access and relevance to international customers:** Brampton is centrally located in the middle of the Toronto-Waterloo Innovation Corridor and 20-minutes from the Ontario Food Terminal, providing firms with access to local and international markets. Brampton is not only part of Ontario's food cluster but also one of North America's largest agri-food sectors.<sup>xv</sup> Selecting Brampton meant the impact of initial findings could benefit both exports and local consumption.

#### About the City of Brampton

Located in the middle of Canada's Advanced Manufacturing Supercluster and the Toronto-Waterloo Innovation Corridor, the City of Brampton, has a diverse talent pool and strong economic base. In 2016, the City of Brampton was the fourth largest labour force in Ontario<sup>xvi</sup> and the ninth-largest in Canada.<sup>xvii</sup> It is also the second fastest growing city in Canada, with 14,000 new residents arriving every year. Close to 700,000 residents call Brampton home. Half (52 percent) of these residents are immigrants, with 234 different cultures and 115 languages found in the city.<sup>xviii</sup>

### Interview Methodology

Between December 2021 and March 2022, the OCC conducted semi-structured virtual interviews with 16 participants for this study. Interviewees included employers, post-secondary institutions, organizations supporting job seekers and newcomers, and a local business association. All interviewees had deep knowledge of the F&B sector and the labour market challenges in the pilot city. Most interviewees were in Brampton, and all had experience with the city. For a list of participating interviewees, see Appendix A.

Following preliminary research, the OCC developed an interview guide with open-ended questions for participants. Key questions were asked in the same way to every interviewee to gather reliable and comparable qualitative data. The researchers supplemented these with follow-up questions based on each interviewee's responses—this method allowed for a balance of comparable findings with richness from individual expertise.<sup>xix xx xxi</sup>

Although discussions varied, all interviews focused on one central question: what issues hinder employers' ability to attract and retain talent in the F&B manufacturing sector? Interview results were synthesized into themes, augmented with secondary research where appropriate, and presented in the following section.

## Summary of Findings

Ontario's F&B manufacturing sector faces current and projected talent shortages. In response, employers who participated in this pilot study described taking a variety of steps to attract and retain talent, listed in Table 2. Some employers chose to implement one or more of the strategies identified below, at times in partnership with other stakeholders. Although the list is not exhaustive, the range of strategies and multi-pronged approach speaks to the significance and urgency of the challenges facing F&B manufacturing employers in Brampton.

**Table 2: Steps Employers in the F&B Manufacturing Sector Have Taken to Address Talent Shortages**

- **Promotion of job opportunities**
  - Being active on social media, purchasing signage, and/or bus and radio advertisements
  - Organizing career fairs and posting vacancies on job boards
  - Implementing an employee referral initiative/bonus
  - Improving company branding
- **Financial incentives**
  - Increasing wages to remain competitive (based on sector-specific research)
  - Offering finder's fees, various bonuses, benefits, childcare subsidies, and/or pension plans
- **Training & growth opportunities**
  - Implementing an 'employee experience champion' to help onboard new employees
  - Considering internship opportunities and part-time roles
  - Talking to employees about their career trajectories, internal opportunities and offering cross-training or job shadowing
  - Leadership training
- **Non-financial incentives**
  - Implementing a shuttle bus service
  - Offering perks (lunches, gift cards, giveaways, etc.) to temporary and full-time employees
- **Other**
  - Implementing an equity, diversity, and inclusion plan

While some employers said they did not have issues filling talent shortages before COVID-19, others described being unable to fill specific roles (i.e., apprenticeship roles) or a large number of roles (200 or more). All agreed that COVID-19 exacerbated the challenges they face. The sheer volume of openings is problematic, and employers expressed difficulties and uncertainties with respect to attracting and retaining talent in the F&B manufacturing sector.

The interviews conducted by the OCC between December 2021 and March 2022 identified five key challenges hindering employers' ability to attract and/or retain talent, as well as issues impacting job seekers' interest in the sector. These five issues were:

**1. Transit and transportation**

**2. Immigration and language skills**

**3. Housing, childcare, and the cost of living**

**4. Perceptions of the sector and the nature of work**

**5. The changing labour market**

This section explores these themes in greater depth, summarizes what the OCC heard during interviews, and identifies potential steps stakeholders can consider to address each theme and close the projected talent gap in Ontario's F&B manufacturing sector.

## Theme 1

# Transit and transport

Most interviewees noted that employees in the sector rarely drive to work but instead rely on public transit. Although employees may live relatively close to their place of employment, their commute via public transit could be 45-minutes or more. This is due to low bus frequency and service hours that do not sufficiently align with the needs of shift workers, as most existing transit options are clustered around peak hours.

Moreover, F&B manufacturing facilities are often not located on main roads. As a result, employees must walk a great distance from the bus stop. Participants recognized that taking a cab is not a feasible long-term solution and that congestion on roads can also serve as a deterrent.

In response, some employers, particularly larger or global firms, have contracted a shuttle bus service for employees. Others have partnered with a local cab service and their municipality to offer other transportation options. Yet, these measures are expensive for employers to implement and challenging to arrange, especially if employees live in multiple cities within Peel Region. Moreover, these types of ride-sharing options became less feasible during COVID-19, given the need for physical distancing between passengers.

*“Transportation is a huge problem. There’s often an assumption that public transit will be sufficient, but that’s not the reality.”*

– **Employment Organization**

**Food for Thought**

What can policymakers and employers do to mitigate transit and transportation barriers?

Interviewees suggested the following:

	Policymakers	Employers
Improve transit in Peel Region (i.e., additional buses, a greater frequency of GO and Light Rail Transit, and transit hours that better align with the needs of shift workers).	×	
Take steps to improve regional connectivity, including better roads and highways, with neighbouring cities like Vaughan, Mississauga, and Etobicoke – to make it easier for employees commuting to and from Brampton.	×	
Consider innovative public-private partnerships that could be established between employers, the municipality, and on-demand transportation providers to help employees get to work. <sup>2</sup>	×	×
Consider whether a shuttle bus service or a ride-sharing program could be developed to help employees get to their workplace facility.		×
Consider whether working hours can be re-arranged to accommodate shift workers who rely on public transit.		×

<sup>2</sup> The Town of Innisfil provides an example of how a public-private partnership program could help provide affordable and reliable transit for a community. Innisfil Transit was introduced in 2017 as a first-of-its-kind partnership with Uber that offers riders going in the same direction a carpooling service that helps fill in the gaps for areas not well served by public transit in a cost-effective way.

Theme 2:

## Immigration and language skills

Given their talent needs and production demands, employers in the F&B manufacturing sector have turned to newcomers to help fill various roles. As a result, the sector includes a large immigrant workforce compared to Canada's overall workforce (31 percent and 23 percent, respectively). The highest proportion of newcomers work in meat product manufacturing, bakeries and tortilla manufacturing.<sup>xxii xxiii xxiv</sup>

With the onset of COVID-19, employers in the F&B manufacturing sector noted that the decline in immigration impacted their ability to access new talent, namely newcomers and international students.

Those working with job seekers challenged the assumption that most new immigrants are open to any roles with an attractive income stream. Rather, many newcomers to Canada are highly educated and looking for a position that matches their background and skillset.

Employers expressed that the National Occupational Classification (NOC) system could be leading to more attrition in the F&B manufacturing sector. In a permanent residency (PR) application, a worker's job title equates to a certain number of points. At times, newcomers approach their employers and ask to change to a job title that earns points for their PR application. If an employer cannot accommodate this request, some workers choose to "shop around" for an employment opportunity – or job title – that can provide them with additional points and improve their chances at permanent residency.

Employers also noted Ontario's complex immigration process limits the sector's ability to retain talent. They described instances where newcomers chose to leave Ontario and move to another province, such as Alberta or British Columbia, where obtaining PR or citizenship is comparably easier.

*"The assumption that new immigrants will just come to these frontline roles is false. Many are highly educated and looking for a better fit."*

– **Employment Organization**

Participants explained that English fluency requirements can also impact recruitment and retention. Many employers explained that a baseline of English is both expected and necessary for roles in the F&B manufacturing sector. English-language skills are not only critical for success in a role but also for occupational health and safety. When candidates do not have this baseline, some employers explain that they offer English language classes to help employees succeed in their current roles and to support long-term retention and advancement. For some firms, these classes shifted to a virtual environment because of the pandemic.

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### **The Succeeding at Work – Language Stream: An Initiative by Food Processing Skills Canada to Help Newcomers Improve their Skills**

Recognizing the limited English-language skills of newcomers in the F&B manufacturing sector, Food Processing Skills Canada (FPSC) launched, Succeeding at Work (SAW) – Language Stream in November 2021. The project includes over 20 Ontario-based companies and 300 employees. It provides employees with 4.5 weeks of free, industry-specific training (valued at \$25,000) available in seven languages – Tagalog, Punjabi, Russian, French, Spanish, Mandarin and English. Participants complete ten online courses covering a range of topics – from food processing, spoilage, and safety to Canadian workplace cultures.

FPSC notes the pandemic introduced additional food and workplace safety protocols that require employers in the sector to rapidly upskill and reskill their employees. Since the food sector has a large newcomer workforce, it can be particularly challenging to ensure non-English speaking employees fully comprehend job requirements, safety information, and changes to protocols. FPSC's SAW project aims to fill this gap and ensure newcomers working in this sector have the knowledge and skills to succeed.

## Food for Thought:

What can policymakers, employers, and post-secondary institutions do to mitigate immigration and language barriers?

Interviewees suggested the following:

	Policymakers	Employers	Post-secondary institutions
Streamline the immigration process in Ontario to encourage workers to stay in the province.	×		
Consider a pilot program that expedites PR for individuals working for a F&B manufacturing employer overseas and looking to work for the same firm in Ontario.	×		
Ensure employers are given enough spots through the Ontario Immigrant Nominee Program to address regional talent shortages.	×		
Revise NOC code requirements for PR applications, so that job titles are not a barrier for workers in the F&B manufacturing sector.	×		
Support employers looking to provide English language classes by fostering partnerships with community and non-profit organizations with skilled English-language instructors.	×		
Consider English-language training to help newcomers succeed and encourage retention.		×	
Connect with ethnocultural community organizations in Brampton to locate candidates and fill vacancies.		×	
Facilitate partnerships between employers and settlement agencies or community organizations to improve awareness of the programs/initiatives that can help employers hire newcomers.	×		
Consider how technology can be used to connect with and interview candidates in Brampton and/or overseas, assess their skills and make job offers virtually.		×	
Create a pilot program akin to the Personal Support Worker Challenge Fund (see below) that provides newcomers with intense training, including knowledge of the F&B manufacturing sector, basic technical skills, language training, a placement, and an opportunity for employers to connect directly with candidates for full-time roles.	×	×	×

### The Personal Support Worker Challenge Fund

In May 2021, the Government of Ontario announced it was investing \$86 million to train up to 8,000 personal support workers (PSWs) through private career colleges and district school boards.<sup>3</sup> To qualify for provincial funding, new students had to be enrolled in a PSW program at one of the participating Ontario Student Assistance Program (OSAP) approved private career colleges and started their PSW training between May 1 and July 31, 2021. The bursary applied to domestic students who were eligible for OSAP. It provided funding to help them pay for tuition, textbooks, and other mandatory fees (up to \$7,500) and a stipend to support students while completing a guaranteed work placement (up to \$5,735). The PSW Challenge Fund was developed in response to the significant demand for PSWs in Ontario's long-term care sector and is designed to help eligible students become PSWs without taking on additional debt or financial stress.<sup>xxv xxvi</sup>

Given the success of the PSW Challenge Fund, many stakeholders who participated in interviews noted this model could be replicated to fill the talent gap in Ontario's F&B manufacturing sector. Stakeholders expressed an eagerness to partner with government and others outside of their sector on a similar initiative to help employers address the talent shortages in Brampton's F&B manufacturing sector.

3 Students enrolled in a PSW program at an Ontario district school board were also eligible for a bursary under the PSW Fund. These students could receive up to \$7,735 to offset the cost of equipment, books, and other mandatory fees and a stipend for a guaranteed work placement. To be eligible for financial support, students must either be enrolled in a PSW program during the 2020-21 school year (as of September 2020) or start classes between April 1, 2021, and March 31, 2022.

Theme 3:

## Housing, childcare, and the cost of living

Interviewees had mixed feedback on housing and childcare. Some spoke of how Brampton's lack of affordable housing and/or childcare options impacted F&B employees. They described situations in which some employees moved from Brampton or the Greater Toronto Area (GTA) to a more affordable city, like London or Guelph. At the same time, other employers did not believe housing and childcare were key challenges facing their employees. Since many newcomers live with immediate and extended family members, those employers believed these employees could manage housing and childcare costs. Job seekers affirmed that, while childcare is not an issue for all cases, where it is an issue, it can make or break interest in a role.

All the interviewees acknowledged that the cost of living had become increasingly challenging in Brampton and, more broadly, in Ontario – a situation aggravated by inflationary pressures since the onset of COVID-19. Job seekers expressed wages were a top consideration for their job selection and needed to cover the cost of living. Employers and employment agencies noted that it is an employees' market, and they have choices when deciding where to work. While improving wages can be more feasible for large, multinational firms, it is often more challenging and less viable for small F&B manufacturers in Brampton.

*“The success of the business community centres on talent. Also, how affordable it is to live in a city, how accessible it is, and how affordable childcare is.”*

– **Industry Representative**

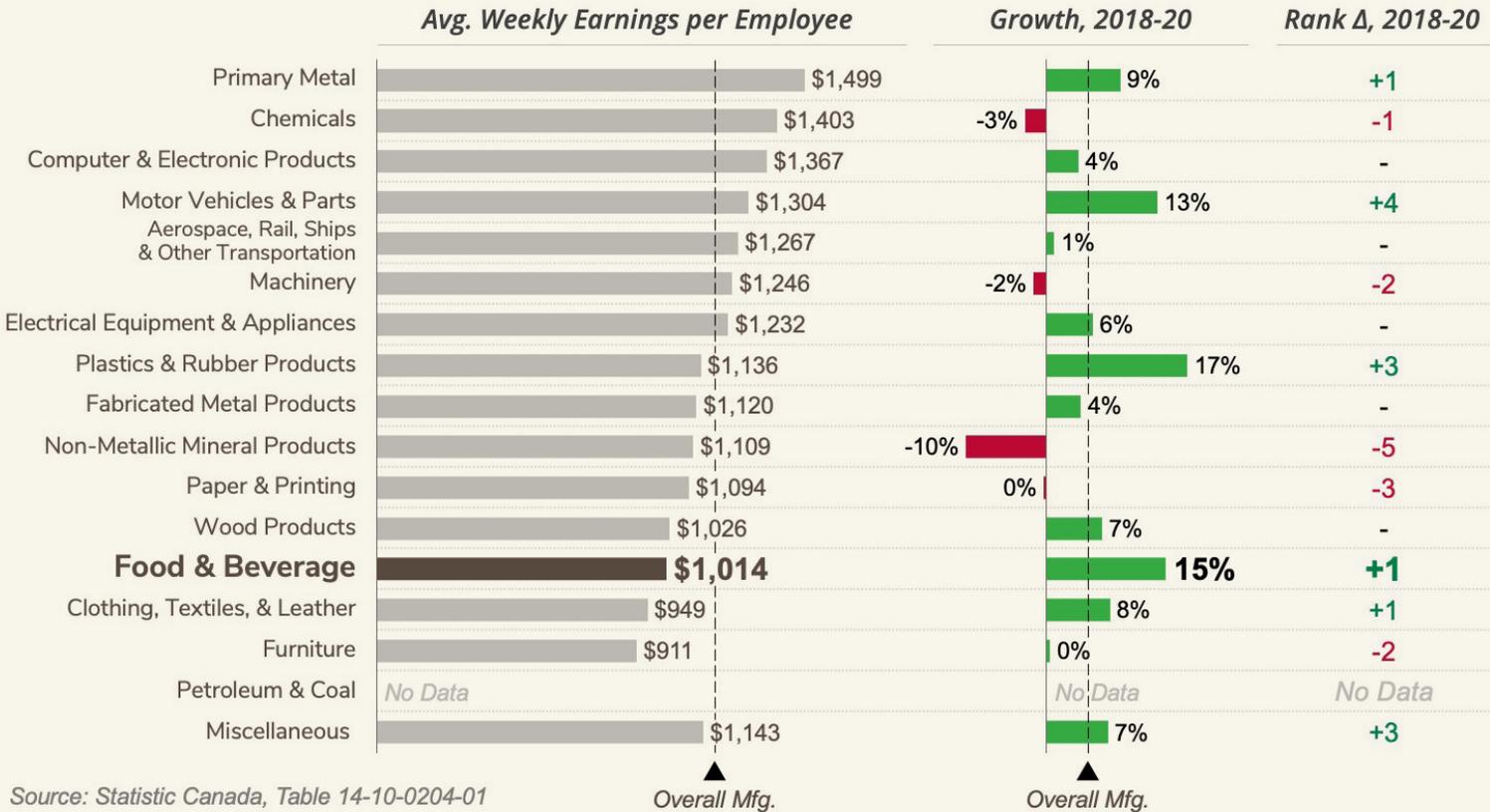
*“There was a time long ago when people without a formal education could work at our plant, own a car, take a vacation once a year, and put their kids through college. But people can't do that anymore in our region. The gap is so high in terms of the cost of living in the area and what we can offer salary-wise to employees.”*

– **Employer**

Additional research confirmed that, as of 2020, F&B manufacturing jobs had lower-than-average weekly wages among the manufacturing sectors. This is despite having among some of the highest increases in wages leading up to that time (Figure 3).

The averages displayed in Figure 3 are representative of all jobs within each sector and therefore does not differentiate between positions and salaries or the fact that some industries might rely more heavily on certain frontline production roles.

**Figure 3: Average Weekly Earnings by Manufacturing Sector in Ontario**



Where increasing wages is not feasible, job seekers noted that employers need to make it worthwhile for employees to stay with their current employer. This includes providing opportunities for growth and offering cross-training or upskilling to help existing employees advance in their firm and make sure newcomers are aware of these opportunities to improve retention.

**Brampton: A Childcare Desert?**

A 2018 report by the Canadian Centre for Policy Alternatives found an estimated 776,000 non-school aged children live in childcare deserts in Canada. Saskatoon, Brampton, and Kitchener had one licensed childcare space for every four children. In these cities, 95 percent, 94 percent, and 87 percent of their non-school-aged children, respectively, lived in a childcare desert. As a result, parents in these communities may rely more heavily on unlicensed home care; alternatively, they may lean on extended family for help or choose to stay home with their children. The onset of COVID-19 left many parents with no choice but to assume childcare and homeschooling responsibilities themselves, particularly as physical distancing guidelines limited their ability to rely on extended families for support.

In addition, the same report found Brampton had among the highest childcare fees at \$1,050 per month for full-day preschool care. The scarcity of spaces coupled with the high cost of childcare places an additional burden on working parents. The situation not only impacts parents' and women's labour force participation and household finances, but it could also undermine an inclusive recovery in Ontario.<sup>xxvii xxviii</sup>

**Food for Thought:**

What can policymakers and employers do to mitigate housing, childcare and cost of living barriers?

Interviewees suggested the following:

	Policymakers	Employers
Continue to work towards housing and childcare affordability and accessibility.	×	
Ensure childcare options align with the needs of shift workers.	×	
Enhance flexibility for employees juggling family responsibilities.		×
Increase wages where possible.		×

Theme 4:

## Perceptions of the sector and the nature of work

Participants in the pilot study noted that negative perceptions about the sector deter potential candidates from applying to roles. Job seekers expressed that they do not look favourably upon roles in the sector where the work is often physically demanding, requires heavy lifting and standing for long periods, can be repetitive, and entails irregular hours. With respect to the work environment, they can be deterred by cold or wet facilities. Employers noted that other roles in the sector, where these conditions are not experienced, still suffered by association.

Accordingly, employers emphasized the importance of proper onboarding, including encouraging new hires to dress warmly and informing them of regular breaks they can take to ensure new hires are prepared for their roles. One participant noted that most resignations occur within the first two months of an employee joining a company. This underscores the need for employers to review performance, check in on employees, gather feedback from new hires, and address issues quickly.

Some participants stated that these perceptions are not only prevalent among job seekers but also among employment consultants who provide newcomers with information, resources, and support to help them secure employment in Ontario. If employment consultants have negative or inaccurate perceptions of the F&B manufacturing sector, this can deter them from encouraging newcomers to consider a career in the sector. Some consultants may be hesitant to encourage newcomers with advanced degrees or credentials to pursue a career in the sector, not being aware of the growth opportunities relevant to their credentials. Since employment consultants are akin to gatekeepers, participants noted the importance of educating them about the career and advancement opportunities available in the sector.

Despite the F&B manufacturing sector being a large employer, participants also noted the sector does not have the same profile or recognition as other essential sectors. They indicated much more attention had been paid to other parts of the food supply chain, such as farming, food retail, and food service, which tend to be more front-of-mind for consumers. Further, participants suggested that accurate representation and promotion of F&B manufacturing as a critical sector by government would reinforce a sense of value and societal purpose.

Some employers directly connected the government's lack of promotional initiatives to recruitment challenges for F&B production and apprenticeship roles. This was of particular concern as experienced employees in these areas are approaching retirement. Although the Province has frequently promoted construction-related trades to students and youth, participants noted there had been less emphasis on skilled trades needed for the F&B manufacturing sector (i.e., millwrights, electricians, maintenance mechanics/technicians, etc.).<sup>xxix</sup> As a result, youth may be less aware of the well-paying and rewarding skilled trades opportunities available in the F&B manufacturing sector.

Unable to work from home, those in F&B production have been working onsite from the start of COVID-19 and were described as essential by many employers. The sector processes raw ingredients manufactures a wide variety of food and beverage products and has ensured Ontarians have access to safe and nutritious food. Participants described a tendency for policymakers and the public to lump the sub-sectors that make up the food supply chain together, which interviewees felt diminishes the profile and importance of the F&B manufacturing sector. Participants explained that each component of the food supply chain depends on or impacts the other, and each component deserves the same level of recognition and support.

Considering these perceptions, many employers interviewed in this study described how their respective organizations took proactive steps to address the stigma toward the sector and job opportunities. Their efforts ranged from developing videos for their websites showcasing their facilities to prospective employees to providing new hires with tours of their facilities and proactively answering their concerns.

*“Purpose has to go to the forefront to win in the talent war.”*

– **Industry Representative**

*“These perceptions of the sector are hard to overcome and hinder people from wanting to learn more about jobs in the sector.”*

– **Employment Organization**

*“Production [roles are] the hardest to hire [for] and, as experienced people retire, we won't have the people we need.”*

– **Employer**

*“All of the stuff in the grocery store doesn’t arrive magically. Food processing doesn’t get the attention it deserves.”*

– Post-secondary Institution

Other participants noted that longstanding strategies employers have used to attract employees need to be revised. For example, international students on a student visa cannot exceed 20 hours of work per week. Employers need to be mindful of this when approaching post-secondary institutions with job vacancies. Since full-time roles would violate student visa requirements, part-time roles are more suitable for these prospective new hires. As another example, employers need to consider that post-secondary students are looking for opportunities to apply the knowledge and skills they gained through their academic programs. This suggests that employers in the F&B manufacturing sector share a broader range of vacancies – both frontline production and higher-skilled roles – with post-secondary institutions and students.

Moreover, all employers who participated in this study acknowledged Brampton’s competitive labour market. Several noted employers should articulate their organization’s purpose in a compelling manner to attract potential candidates and stand out amongst competitors. This includes explaining to job seekers how their company is making a difference in their community or society more broadly by contributing to important social causes, especially when looking to attract younger job seekers.

Finally, several participants identified the importance of health and safety – a core value that employers in the sector have allocated additional resources towards throughout the pandemic to safeguard employees and customers. With the onset of COVID-19, job seekers express that they are worried about their health and safety, including contracting the virus and passing it to family members or children. If employees or prospective employees perceive that a workplace is unsafe, it becomes very difficult for the employer to attract and retain talent. Accordingly, employers described how critical rapid testing has been and will continue to be for both symptomatic and asymptomatic employees. In addition to other measures, making rapid antigen tests available has allowed these employers to demonstrate to staff that they prioritize safety and are taking steps to curb the spread of COVID-19 among employees, their families, and the wider community. This, in turn, fosters greater employee confidence in their employer and the F&B manufacturing sector more broadly.

## Food for Thought:

What can policymakers, employers, post-secondary institutions, and organizations helping job seekers and newcomers do to improve perceptions of the F&B manufacturing sector? Interviewees suggested the following:

	Policymakers	Employers	Post-secondary institutions	Organizations helping job seekers and newcomers
Educate job seekers and employment consultants about the F&B manufacturing sector, the various positions within the sector, the nature of the work, and advancement opportunities.	×	×	×	×
Share virtual tours of facilities, promote job vacancies on company websites, and/or share videos of current employees discussing their success stories and career trajectories to address negative perceptions.		×		
Offer job shadowing for employees looking to advance within the sector and multi-generational cross-training for young apprentices to learn from experienced journeypersons.		×		×
Encourage managers/supervisors to discuss career goals with employees to support retention and advancement.		×		
Elevate the profile of the F&B manufacturing sector when discussing issues facing Ontario's agri-food sector.	×			
Improve awareness of the F&B manufacturing sector among high school students through outreach and job fairs to highlight the sector's importance and showcase innovation and career opportunities within the sector.	×	×		
Continue to invest in training and upskilling programs to keep pace with the automation, digitization, and other innovations in the F&B manufacturing sector.	×	×	×	
Improve awareness among employers of relevant post-secondary programs and community and non-profit organizations that support job seekers and newcomers.	×	×	×	
Facilitate/develop partnerships between employers and post-secondary institutions offering programs and courses relevant to the F&B manufacturing sector to build the talent pipeline.	×	×	×	
Integrate F&B post-secondary programs into other in-demand programs (e.g., engineering) to attract a wider talent pool to the sector.	×		×	
Distribute rapid tests to F&B manufacturing employees to maintain health, safety, and confidence in the sector.	×	×		

Theme 5:

## The changing labour market

*“Wasting [a candidate’s] time is not an option in this kind of market.”*

– Employer

*“If we don’t start filling the [talent] pipeline at the other end [with new talent], there’ll be an issue.”*

– Employer

*“When we don’t have staff, we still have to hit targets, and that means we’re working current employees very hard... they have to make up for the people who are missing.”*

– Employer

Many employers spoke of the competitiveness within today’s labour market. Employers noted a large global firm has located in Brampton, presenting prospective candidates with several new career options outside of the F&B manufacturing sector. Employers also noted they face competition from temp agencies, which typically quickly place a job seeker in a role and offer payment in cash. Job seekers similarly expressed that rapidly receiving a financially attractive offer would prompt them to cancel other scheduled interviews. The competition for talent requires employers in the sector to act quickly or lose out on talented candidates.

Many employers described organizing job fairs where candidates attend to learn about job openings, including production and salaried roles. However, few individuals subsequently show up for interviews and even fewer sign on for permanent positions.

Participants noted that many other sectors are struggling to attract and retain talent, including but not limited to health care, hospitality and tourism, and trucking. When it comes to the F&B manufacturing sector, these shortages are particularly acute in frontline production and apprenticeship roles (i.e., quality control technicians, millwrights, electricians, and other skilled trades). While worker shortages in the sector predated the pandemic, these issues were magnified with the onset of COVID-19. Employers expressed concerns about pandemic-related absences and labour shortages, putting additional pressure on existing employees to fulfill production targets.

Employers also spoke of what some economists have termed the “great resignation”: the large, voluntary exodus of workers who quit their jobs in search of new opportunities in 2021.<sup>xxx</sup> Many interviewees expressed that they felt this had not come to fruition in Canada but worried that problems would be exacerbated if it did. Some participants were skeptical about the relevance of this phenomenon to the F&B manufacturing sector as individuals must be financially able to step away from the workforce.

F&B manufacturing employers were hyperaware of their competition from other sectors and employers in Brampton and Peel. They described instances where newcomers have elected to leave the F&B manufacturing sector for higher earnings, such as pursuing a role in the trucking industry or other logistics roles. Participants stated that individuals could be attracted to positions in international logistics firms because of signing bonuses large firms can offer, but the roles can be seasonal and less secure than permanent opportunities in the F&B manufacturing sector.

Several employers also expressed concerns that pandemic-related government subsidies deterred prospective candidates from seeking employment opportunities. At the same time, most employers recognized that the job market has changed along with employees' expectations.

Beyond this, employers noted that many employees are looking for additional flexibility in full-time, permanent, and/or more part-time options. Accordingly, employers need to know what employees want to better attract and retain talent in the F&B manufacturing sector. For example, newcomers may want to travel back home for an extended period to visit family overseas. This is less feasible if an employee only has a two-week vacation period, underscoring how a supportive and flexible workplace culture can help retain employees in the long run.

Most employers described various financial incentives and other perks they are offering to attract candidates. As a result, many candidates have come to expect these benefits. Recognizing how costly financial incentives can be for employers, one participant underscored a need for employers to consider implementing different measures, such as technological solutions to locate candidates in Peel and/or abroad.

**Food for Thought:**

How can policymakers, employers, and post-secondary institutions respond to labour market changes?

Interviewees suggested the following:

	Policymakers	Employers	Post-secondary institutions
Better communicate “why” a candidate should apply and “what’s in it for them” in job postings, provide candidates with flexibility regarding interview times to accommodate their schedules, and ensure the interview process is swift.		×	
Provide flexibility regarding vacation periods; consider different staffing models to attract newcomers looking for greater flexibility, and consider part-time roles to attract employees, post-secondary students, and international students with varying preferences of employment arrangements.		×	
Provide new hires with a smooth transition, review performance, promptly address issues, showcase career progression options, and consider cross-training opportunities to encourage retention.		×	
Develop positive workplace cultures to foster loyalty and consider perks (i.e., teambuilding, wellness initiatives, lunches, gift cards, etc.) to attract and retain talent.		×	
Consider whether microcredentials can be developed to equip job seekers with in-demand skills for careers in the F&B manufacturing sector.	×	×	×
Generate more awareness of F&B post-secondary programs among employers to fill job vacancies and apprenticeships roles.	×		×

## Section 4:

# Advanced Manufacturing and Automation

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It is clear from the interview findings that there are many practical actions that employers, policymakers, and post-secondary institutions can take to help attract and retain talent in the F&B manufacturing sector. However, there are still factors at play that will make closing the labour gap a challenge.

For example, some of the negative perceptions of work in the F&B manufacturing industry (e.g., heavy lifting, repetitive actions, cold environments) are inherent to the work as currently structured. Additionally, there is a practical limit to how much employers can invest in interventions without further inflating food prices, which have increased significantly since COVID-19.

This is where advanced manufacturing technologies, including automation, may help address the worker shortage. Automation is broadly recognized as an innovation that will continue to change the nature of work in the F&B manufacturing industry.<sup>xxxii</sup> It presents an opportunity for companies to increase productivity and shift employment away from physically demanding and menial tasks, focusing talent on higher-skilled, more knowledge-intensive roles. This potential is captured in a quote by the Chair of Canada's Advisory Council on Economic Growth, speaking on advanced manufacturing priorities:

*"We're picking one [industry] in particular, which is agriculture and food, because it can employ a lot of people, there's a lot of innovation technology around it and huge demand. There's going to be a massive demand for food, for protein, over the next 10 to 20 years. It's also a big employment provider, and we could generate even more employment - and high-skilled employment - because of technology."*

- **Dominic Barton, Chair, Advisory Council on Economic Growth** <sup>xxxiii</sup>

Typically, the concern with most automation initiatives is that some people will lose jobs and financial security in the transition. Roles are eliminated in exchange for mechanized processes that offer greater productivity at a lower overall cost. A leader in the F&B manufacturing sector put it as follows:

*“The quality of jobs goes up, but the quantity of jobs goes down.”*

- Member of the 2020 Food Processing Skills Canada, InnovateNOW! Future Skills Roundtable<sup>xxxiii</sup>

However, that trade-off changes against the backdrop of a labour shortage. Instead of displacing existing workers, automation in the F&B manufacturing sector should reduce the number of job vacancies, while improving the attractiveness of jobs in the sector. Companies are recognizing this. In a survey of Ontario, F&B manufacturers who had adopted automation and robotics technology, “alleviating lack of labour availability” was the third most common motivation, cited by 73 percent of respondents.<sup>xxxiv</sup>

There are however barriers to adopting new technology. The upfront capital investment required for automation can be seen as prohibitive, especially for small enterprises. Large and medium-sized companies cite the cost of maintenance as an issue and have concerns about incurring major downtime when switching production. Across all sizes of businesses surveyed, Ontario F&B manufacturers highlighted a shortage of workers with the technical skills needed to operate, install, and maintain automation and robotic equipment.<sup>xxxv</sup> The result is a catch-22, where automation is a partial solution to labour shortages, but a shortage of labour prevents automation adoption. This reinforces the need for action by policymakers, employers, and post-secondary institutions to alleviate the talent gap through other levers while seeing automation as a part of the solution rather than a silver bullet.

## A Changing Outlook

In 2016, a study by the University of Guelph found that Canadian food processors lagged their U.S. counterparts in technology investment.

*“For every dollar invested per worker in the United States, [Canadians] invest 62 cents.”<sup>xxxvi</sup>*

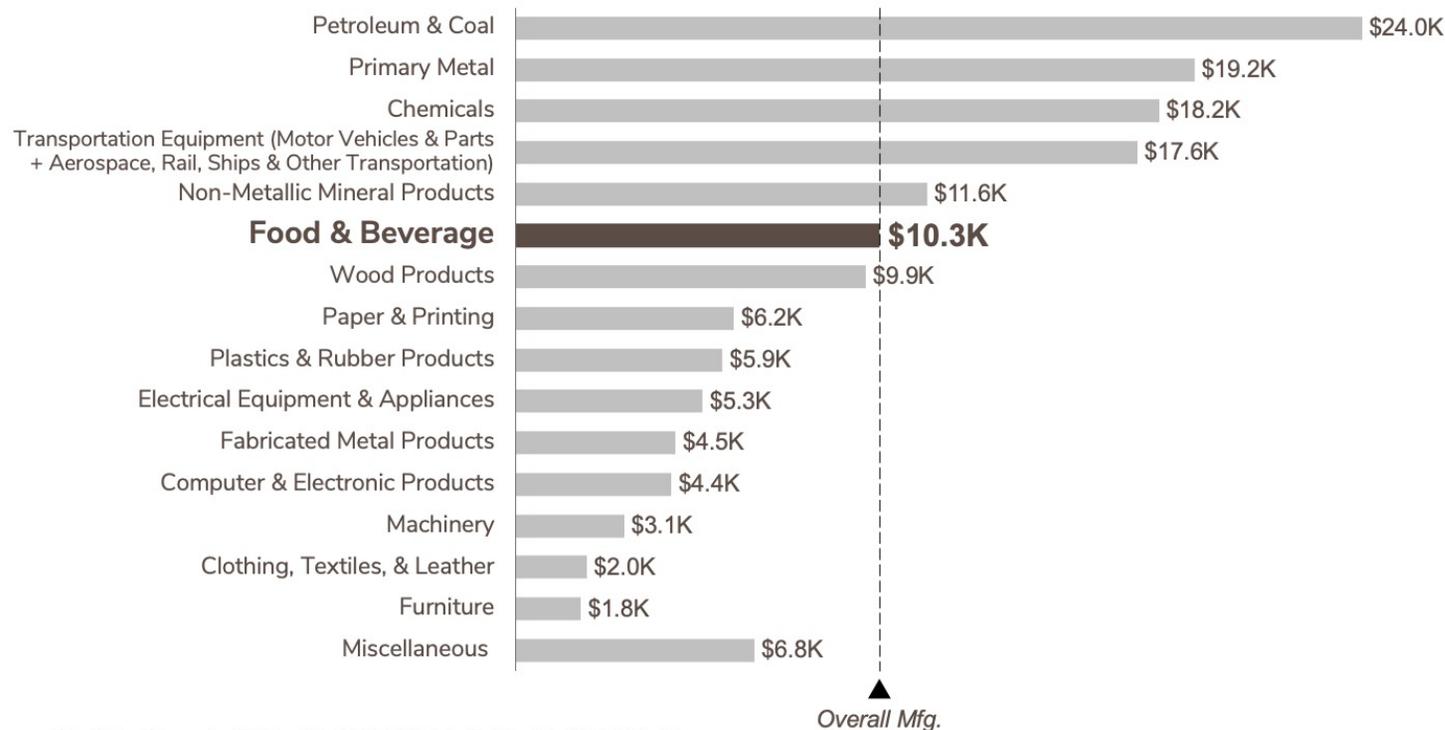
- Natalia Piedrahita, University of Guelph

A recent report found that in 2020, life sciences, food, and consumer goods manufacturers in North America adopted robots at a faster pace than automotive manufacturers for the first time. Year-over-year orders in food and consumer goods specifically increased 56 percent.<sup>xxxvii</sup>

In Ontario, an analysis of annual expenditures on equipment and machinery shows that, among manufacturers, the food and beverage sector is neither leading nor lagging (Figure 4).

**Figure 4: Ontario Manufacturing Machinery and Equipment Capital Expenditure per Employee, by Sector**

*Excludes construction capital & expenditure on repairs to better represent automation investment*



Source: Statistic Canada, Table 34-10-0035-01, Table 14-10-0202-01

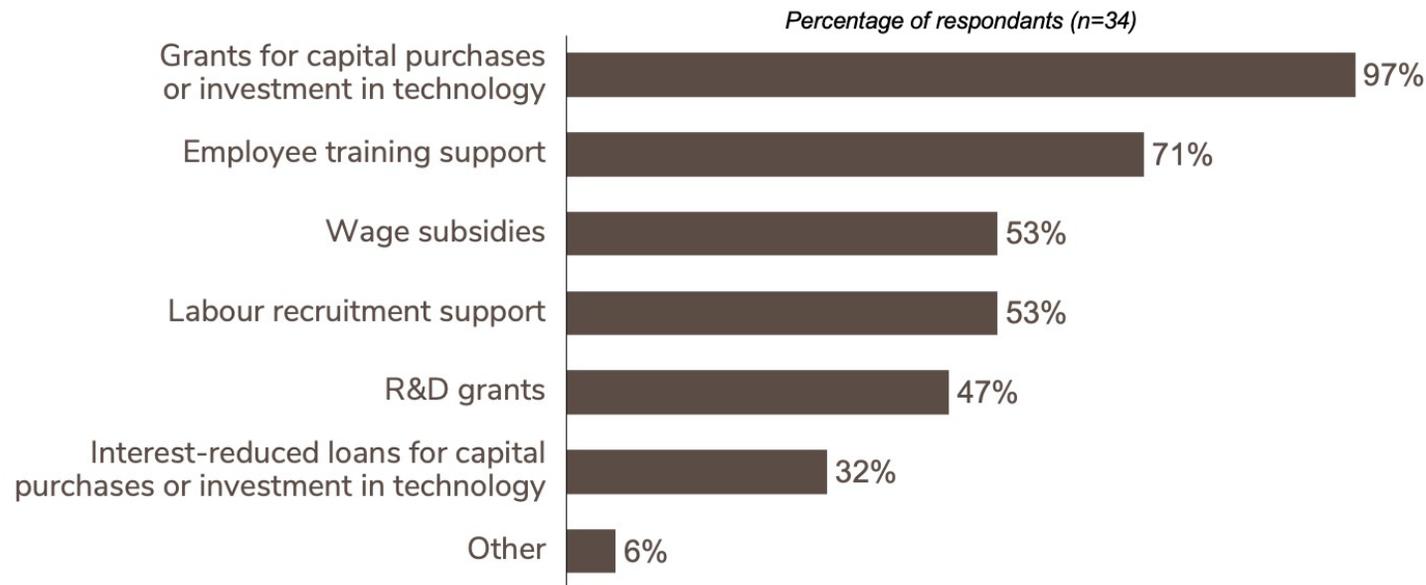
A closer look reveals some nuance. A 2021 investigation of automation readiness among manufacturers in Brampton found that the adoption of advanced production technologies in the food processing industry is not yet widespread, nor is it uniform.<sup>xxxviii</sup> Many food processors rely on lower-wage employees and an available labour pool, as perishable food categories in the GTA cannot be easily serviced by manufacturers outside Ontario. If this thinking persists, these businesses will be particularly susceptible to the projected talent gap.

Still, 90 percent of surveyed F&B manufacturers in Ontario indicate that they intend to pursue further automation and robotics technology within the next three years.<sup>xxxix</sup> It is an open question whether these intentions will be realized and whether smaller players will participate in the upside or be pushed out.

Here there is an opportunity for policy intervention. While this was not investigated directly in interviews, companies highlighted what kinds of automation adoption supports they would find most valuable in a previous survey commissioned by the FBO (Figure 5). The top responses included grants for capital purchases or investments in technology (97 percent) and employee training support (71 percent).

### Figure 5: Most Valuable Supports for the Future Adoption of Automation and Robotics Technology

*As informed by a survey of relevant decision makers in Ontario F&B manufacturing companies, 2021*



It is unclear how automation will play out in the F&B manufacturing sector. If leveraged strategically, it can help the sector reduce its labour shortages and create higher-paying jobs. This will change the nature of employment within the sector, which will, in turn, require policymakers, employers, and post-secondary institutions to work together to ensure there is a pipeline of talent with technology skills.

## What Comes Next?

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Despite the immediate worker shortages, participants in this study acknowledged that the F&B manufacturing sector and labour market are shifting, and so too must the response from employers, post-secondary institutions, and organizations that support job seekers and newcomers.

The themes identified in this commissioned report put into focus the challenges this sector faces: a competitive job market, negative industry perceptions, and logistical and economic hurdles. The potential levers outlined in this report are not conclusive; instead, they are a starting point – a collection of ideas by those closest to the challenges that can be prioritized and developed with the support of all stakeholders.

All participants expressed an interest and willingness to partner with other stakeholders to fill their talent gaps, including employers, post-secondary institutions, organizations that support job seekers and newcomers, and governments. To move the dial, participants underscored the need for innovative solutions (e.g., leveraging technology to connect with candidates in Peel or overseas, last-mile solutions to address transit issues, and replicating pilot programs that successfully addressed talent shortages in other sectors) to prevent production interruptions and ensure the industry continues to thrive in Brampton.

As the manufacturing sector begins to integrate advanced manufacturing technologies such as automation, jobs in the sector are likely to become less physically demanding, representing an opportunity to attract more youth, women, and a broader range of new immigrants to the sector.

While the F&B manufacturing sector faces uncertainty due to the identified challenges, one thing is certain: this sector is critical to Ontario. Filling the talent gap in the F&B manufacturing sector is essential to ensure that Canadians can fill their plates across the province and the country.

*“We’re at a place where we need to think outside of the box.”*

**– Post-secondary Institution**

# Appendix A: Interviewees

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Between December 2021 and March 2022, the OCC conducted semi-structured interviews with a diverse cross-section of participants for this pilot study. Participants included employers, post-secondary institutions, organizations supporting job seekers and newcomers, and a business association.

- ⊃ Brampton Board of Trade
- ⊃ Cardinal Meat Specialists Limited
- ⊃ Coke Canada Bottling
- ⊃ Diversity Institute at Ryerson University
- ⊃ Italpasta Limited
- ⊃ Employment Ontario Peel Region
- ⊃ Give & Go Prepared Foods
- ⊃ Jan K Overweel Limited
- ⊃ Lactalis Canada
- ⊃ Maple Leaf Foods
- ⊃ Maple Lodge Farms Limited
- ⊃ Niagara College
- ⊃ Peel Halton Workforce Development Group
- ⊃ Sheridan College
- ⊃ TMF Foods
- ⊃ triOS College
- ⊃ Employment Ontario Peel
- ⊃ Peel Halton Workforce Development

# Appendix B: Manufacturing Sector NAICS Codes

For the figures in this study, we combined data from the food and beverage manufacturing sectors using North American Industry Classification System (NAICS) codes. The intent was to represent FBO’s constituencies as one group and allow for juxtaposition of the F&B manufacturing sector to Ontario’s more visible automotive manufacturing sector, separate from the aerospace, ship, and rail sectors.

For transparency and replicability of analysis, the mapping of NAICS codes to the categories presented throughout this report is provided below:

Category	NAICS Codes	Category	NAICS Codes
Food & Beverage	311, 312	Non-metallic Mineral Products	327
Motor Vehicles & Parts	3361, 3362, 3363	Aerospace, Rail, Ships, & Other Transportation	3364, 3365, 3366, 3369
Fabricated Metal Products	332	Wood Products	321
Machinery	333	Electrical Equipment & Appliances	335
Plastics & Rubber Products	326	Clothing, Textiles, & Leather	313, 314, 315, 316
Chemicals	325	Petroleum & Coal	324
Paper & Printing	322, 323	Miscellaneous	339
Computer & Electronic Products	334	Manufacturing Overall	31-33
Primary Metal	331		
Furniture	337		

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## About the OCC's Commissioned Work

The OCC now offers member organizations the opportunity to commission reports authored by our Policy team. These reports use objective data and analysis to investigate and contextualize issues or opportunities faced by individual organizations and industries and provide independent, third-party analysis on a variety of topics. For more information, please contact our Vice President of Policy, Daniel Safayeni ([danielsafayeni@occ.ca](mailto:danielsafayeni@occ.ca)).

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