



BC ASSOCIATION OF
ABATTOIRS

Safe, Local Meat Products for BC Families

BC Meat Processing Sector

'Cut to the bone'

Labour Market Partnership Engagement Final Report

December 2016



Canada 



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Introduction

Very little specific labour market information is available for the diverse sizes of meat processing facilities in BC. Most of the Canadian data is skewed by the few, very large, heavily automated federal processing facilities. These facilities reduce the wide ranging individual skills required to perform operations during a production day by assigning workers to a single, repetitive, task. Little is known about the labour needs of the small scale, 'craft' industry that predominates in BC where each employee is required to perform a wide range of different tasks each production day.

At the BC Association of Abattoirs' AGM in 2016, the abattoirs and butcher shops in attendance quickly agreed that they all had a shortage of workers and that an initiative was required to find more skilled people in the industry. In addition to this shortage, the operators of many of the small abattoirs and butcher shops that offer local access to locally raised meat are getting close to retirement and are having difficulty finding not only workers for their plants to help with the heavy work, but also to find buyers of their business.

The intention of the partnership is to provide abattoirs and butcher shops an opportunity to collaborate on shared challenges, build a clear consensus and direction on the labour issues, and to establish a leadership and governance structure for subsequent Sector Labour Market Partnerships (LMP) program phases to ensure success for the industry.

Meetings with representatives from the meat processing sector highlighted the following impacts to the industry of the shortage of workers:

- Restricted ability to meet demand and limited business growth
- Key skilled individuals required to work constant overtime
- Production efficiency decreased which results in working longer hours
- Threat of business closure or downsizing due to aging skilled employees with no grass roots or succession plans
- Increased stress in work environment resulting in more sick days and injuries
- Competition between businesses to recruit employees and poaching
- High turnover hiring practises, i.e. no available suitable candidates so businesses settle for anyone that applies
- Low morale – management is focused on the problems with limited resources to implement solutions
- Decision makers feeling despondent i.e. the situation is beyond their control

Meat Processing Industry Overview

Butchery was, at one time, an honoured trade which allowed people to access locally raised meat. In Canada, as elsewhere, meat processing has become industrialized, which has resulted in large packing plants where animals are disassembled in a production line environment. Thanks to vacuum sealing and other packaging technologies, the speed and efficiency of modern transportation networks, and the capital concentrated in large supermarket chains, even high-end supermarkets usually only cut a small percentage of their fresh meat on-site. And most of that is cut from 'primal cuts', not full carcasses. What has changed is that the butchers of old, at least most of them, are now just 'meat cutters.' Once trades people, they are now the last stop on an assembly line. Often their hourly wage is the same now as it was in the 1980s, at which time it was on par with many of the construction trades.

Luckily in BC, there are still small abattoirs and traditional butcher shops to be found, and indeed new artisanal shops operating in the traditional manner and offering meats of the highest quality are springing up across the Province. This growth in demand for locally produced and processed meats has resulted in a need for trained, highly skilled butchers and meat cutters; unfortunately it has proved difficult to find trained people for these positions.

Definition of the Meat Processing Sector

The meat product processing sector can be divided up into two main categories: abattoirs (slaughterhouses) and butcher shops. The majority of abattoirs in BC have butcher shops attached to their premises (Class A) while others only process the animals, not the carcasses (Class B). Federally inspected abattoirs are able to sell outside the province, while provincially inspected ones are restricted to sales in BC. There are some federally licensed butcher shops that can only purchase meat from federally inspected abattoirs (within BC or outside the province), and they have the ability to sell beyond the provincial boundary.

Within BC's provincially licensed abattoirs, the sector is further divided into those plants that process red meat and those that process poultry. Again this is further divided into those that mainly do custom processing of other people's animals and those that process their own animals for sale to butcher shops, restaurants or directly to consumers. Custom processing plants are generally seasonal, with poultry plants being operational during the summer months and red meat plants being busiest during the fall and into early winter. The seasonality of the custom plants makes recruiting particularly difficult as the pool of potential employees excludes individuals seeking year-round employment only. The larger abattoirs in BC operate throughout the year and require a steady, dedicated and trained workforce.

Butcher shops can be divided into two broad categories: those whose main business is selling meat, and those that also sell a wide assortment of other grocery type items but also have a butcher counter. Customers still want to ask about the different cuts and have conversations with butchers and it appears that the large grocery chains are investigating putting trained butchers back into their shops.

Recent BC Abattoir History

Up to 2004, only some abattoirs in BC were inspected, however, there were approximately 300 uninspected abattoirs throughout the province, including very small farm abattoirs. In 2004, a licensing program was implemented by the Provincial Government for a 2 year phase-in transition, which took until 2012 to be fully implemented. Most of the small, previously uninspected abattoirs shut down and only 11 moved to the new inspection system. Since the new licenses focused on food safety, the Ministry of Agriculture supplied \$12 million in funding for plant improvements to meet these new regulatory requirements. There are currently 65 abattoirs licensed and inspected by the Ministry of Agriculture.

In 2009, a group of BC provincially inspected abattoir operators decided to form a stand-alone association dedicated to addressing human resource challenges and other issues faced by abattoirs, and the BC Association of Abattoirs was formed. This group has been instrumental in helping the meat industry by working with livestock producers, retail and wholesale butcher shops and chefs to encourage keeping BC meat in BC.

In September 2015, the Ministry of Agriculture took over inspection at provincially licensed abattoirs from the Canadian Food Inspection Agency and the BC Center for Disease Control. In 2017, it will also take over inspection from the Ministry of Health for the 'cut-and-wrap' activities at those abattoirs that have a butcher shop attached to their abattoirs (Class A). The number of provincially licensed abattoirs has steadily increased since the Ministry of Agriculture took over, going from 40 to 65 in less than 2 years. This increase in facilities is occurring in rural areas where un-met demand for local processing has encouraged small family and community based abattoirs to open. These craft abattoirs and butchers will continue to have the largest growth potential in BC.

Structure of Abattoirs in BC

Abattoirs in BC can be broken down into the following categories.

Table 1: Abattoir Classification

Licence Type	Activities Permitted	Sales Permitted	Geographic Scope	# of Animal Units	Oversight
Class A	Slaughter, and cut and wrap	Retail and direct to consumer	B.C.	Unlimited	Pre and post slaughter inspection of each animal
Class B	Slaughter only	Retail and direct to consumer	B.C.	Unlimited	Pre and post slaughter inspection of each animal
Class D	Slaughter only (own animals and other peoples' animals)	Retail and direct to consumer	Sales restricted within the regional district where meat is produced	1-25	Periodic site assessments and audit of operational slaughter records
Class E	Slaughter only (own animals only)	Direct to consumer only	Sales restricted within the regional district where meat is produced	1-10	Periodic site assessments and audit of operational slaughter records
Federal	Slaughter, and cut and wrap	Retail and direct to consumer	Canada and Export	Unlimited	Canadian Food Inspection Agency

Class A provincial abattoirs and some federal abattoirs, perform both animal processing and value-added processing (cut and wrap, sausage making), or the equivalent of what would occur at a butcher shop. Many of the challenges and issues faced by butcher shops are the same for these abattoirs.

The majority of abattoirs in BC are small, craft type. As a benchmark, the High River, Alberta plant can process 4,500 head of cattle per day, while the largest federal beef abattoir in BC currently processes 25-30 animals a week, and would only have the physical capacity to do 200 if it had sufficient trained workers.

Structure of Butcher Shops in BC

Unlike the abattoirs, information on the different types of butcher shops is not readily available. Broadly speaking, they can be broken down into the following:

- Stand-alone independent meat stores
- Small chains with meat departments
- Large grocery stores that cut in-house
- Central cutting factories that distribute to stores with no in-house butcher work.

According to Canadian Industry Statistics (establishments by employment type and province/territory), there are currently about 360 establishments classified as Meat Markets (NAICS 44521) in BC but statistics on this industry are difficult to obtain. The broader category NAICS 4452, Specialty Food Store, has 1,689 establishments in BC, but it is unknown how many of these have departments that cut meat.

Table 2: Butcher Shop Structure

Type	Activities	Inspected by	# of plants in 2016
Butcher shop	Breakdown carcasses or block ready cuts into retail cuts	Ministry of Health	360
Specialty Food Markets	May include small meat cutting departments	Ministry of Health	1689
Central Ready-to-Sell Plants	Take carcasses and block ready cuts and cut to retail specifications, package and distribute to stores that sell meat. No direct sales to customers.	Canadian Food Inspection Agency or/ Ministry of Health	6-12

Factors Affecting the Butcher and Abattoir Industries

In 1990, a large multinational meat processing establishment opened in High River, Alberta and started the process of changing the nature of the workforce required by the industry from a skilled trade to a low-skilled assembly-line role paying \$7.50 per hour.

Later in the 1990's, the large retail grocery stores in BC cut wages paid to their butchers. This enabled the stores to sell meat at lower prices, which then affected the independent and small chain butcher shops and Class A abattoirs. The smaller operators had difficulty competing on price, so they too had to drop the wages they were able to pay. This changed the living wage aspect of becoming a butcher. Soon after, the large chains went to central packing houses to disassembly style operations thereby reducing the overall skill level required by each person. This further affected the perception that butchering was a highly skilled trade.

Corresponding with reduced industry wages, enrolment in industry training programs declined and training programs closed. This phenomenon was not restricted to BC- it was seen across Canada, the US and parts of Europe. Training requirements to work in abattoirs as meat-cutters could be met in three months; down from the four-or-so years required to become a Master Butcher.

Competition from other, expanding sectors and the impact of immigration policies in different jurisdictions affects the meat industry in BC. One of the factors facilitating the devaluation of butchery as a trade was the rise in oil prices, the expansion of the oil sands in northern Alberta and Saskatchewan and the growth of the natural gas sector in BC. Many potential butchers went into traditional construction trades, such as electrician, carpentry, and plumber, since there were a lot of jobs in these fields. This resulted in high wages for these trades and made it more attractive to workers.

Although oil prices have dropped recently, if that industry recovers, the promise of high wages could once again lure people to that industry. The meat processing sector needs to be able to provide a living wage and offer quality of life to be sustainable. Construction trades now get paid on average \$28 per hour, while abattoir workers get paid an average of \$17 (Government of Canada Industry Statistics 2013). There is no wage data available for Meat Markets (NAICS 44521) from the Government of Canada Industry Statistics, nor for the upper NAICS of 4452 - Specialty Food Stores.

Other provinces, particularly Alberta and Saskatchewan recognize the importance of the meat sector to their economy and the need for immigrant workers in the industry. These lower skilled (NOC C level) positions are supported by the Provincial Nominee Program (PNP) and are allowed to immigrate to Canada to become citizens at wages less than \$20/hour. However, in BC, to qualify for the PNP program, wages paid must be greater than \$28/hour, which then affects the wage scale and invalidates union agreements currently in place. This in turn affects the viability of the business.

Some Impacts the Lack of Skilled Workers is having on the Industry

- Current owners and skilled workers are putting in long work hours resulting in an increase in injuries, stress and burn out

- There is a high level of frustration among employers trying to cope with too few skilled workers to meet the high demand for local product. Abattoirs and butcher shops could close if employees or new owner-operators are not found
- Producers wait until they can get their animal processed which can result in:
 - Animals that are no longer at their optimal finishing stage (or are over-sized)
 - Producers need to feed the animals for longer periods of time increasing their costs
 - Animals may have to be kept over colder months causing them to lose weight
- Animals raised in BC leave the province to be processed
- There is high employee turn-over and low retention due to hiring 'anybody' just to make sure the work gets done
- Plants are losing money with unskilled workers taking longer to do the required work; Abattoir employers have reported 6 unskilled workers do on average the same amount as one master butcher
- Abattoirs are concerned that there is an increased potential for animals to be processed at unlicensed, uninspected facilities

Statistics and Classification

North American Industry Classification System (NAICS)

Meat Product Manufacturing (NAICS 3116): Definition

This industry group comprises establishments primarily engaged in manufacturing meat products (i.e. abattoirs).

The meat products manufacturing sector (NAICS 3116) created \$1.6 billion⁽¹⁾ in manufacturing activity in BC in 2015; and while this is only 4% of the overall manufacturing activity in BC, it is linked up and down the supply chain with animal producers and butcher shops that also add significantly to the BC economy.

Between 2004 and 2012, the ratio of administrative workers to production workers has increased as a result of the increase in food safety standards, new animal welfare requirements, traceability for animal disease outbreaks, labelling requirements and additional reporting requirements to producer groups and government departments. These legislated requirements have put an additional burden on the abattoirs with no ability to pass on the increased production costs satisfactorily.

Table 3: Meat Product Manufacturing (NAICS 3116)

Type of Employee	Number of Employees		Average Annual Salary		Median Provincial Salary 2015
	2004	2012	2004	2012	
Production	58,534	54,137	31,325	36,708	37,812
Administration	8,967	10,433	48,104	57,246	N/A

Source: Canadian Industry Statistics and WorkBC

(1) BC Stats: B.C. Manufacturing Sales (Shipments) by Industry

Meat Markets (NAICS 44521): Definition

This industry comprises establishments primarily engaged in retailing fresh, frozen, or cured meats and poultry. Delicatessens primarily engaged in retailing fresh meat are included.

No industry statistics for NAICS 44521 are available on the number of employees or average annual salary from Canadian Industry Statistics.

Main National Occupational Codes (NOC)**Industrial butchers and meat cutters, poultry preparers and related workers** (NOC 9462)

- Prepare meat and poultry for further processing, for packaging or for marketing
- Work in meat and poultry slaughtering, processing and packing establishments
<https://www.workbc.ca/jobs-careers/explore-careers/browse-career-profile/9462>

There is no differentiation in this NOC code between large industrial, production line abattoir workers and the smaller craft style where workers perform a multitude of different tasks. See Appendix 5 for more details on NOC 9462

Butchers, meat cutters and fishmongers - retail and wholesale (NOC 6331)

- Butchers, meat cutters and fishmongers prepare standard cuts of meat, poultry, fish and shellfish for sale in various food establishments.
<https://www.workbc.ca/Jobs-Careers/Explore-Careers/Browse-Career-Profile/6331>

As with NOC 9462, there is no differentiation between larger disassembly type butcher and the craft style butcher. See Appendix 6 for more details on NOC 6331.

In BC, the median wage for NOC code 9462 is \$18 (industrial butchers) with a range of \$10.45 to \$28.96 per hour (2015). For 2015-NOC 6331; Butcher, meat cutter retail and wholesale, the median wage is \$12/hr and a range of \$10.45 to \$25.50.

Further studies will allow these numbers to be verified and validated with differentiation between sizes of operation. The establishments that require more skilled workers would be expected to have a higher median wage. This will enable recruitment to the sector as people realize they can make a living doing this in a non-assembly style operation and with skilled training.

Limitations of NAICS and NOCS

Official classification systems, both NAICS and NOC, conceal the considerable variation of roles and skills required in the meat sector and lead to misunderstanding of labour market dynamics and challenges experienced by both employers and employees.

The skill level required in the classifications needs to be better defined. For example, Sausage maker used to be the most skilled person, the “Master Butcher”, but the position has now been reduced to 'machine' operator NOC 9461 Class C. There are still programs in Europe that offer a 4 year apprenticeship in Master Butcher, but not in Canada/BC.

Industry Training

Training generally takes place in house. With no added resources or support it has the following consequences: The time taken to train reduces the plants productivity; not all plant managers are good trainers; training could restrict the mobility of the worker.

According to the Food Processors Human Resource Council (FPHRC) in Ottawa 'National Competency Standards for Industrial Meat Cutter', individual tasks only take about 3 months to learn. At the smaller craft type places in BC, with workers required to be proficient at multiple tasks, each task needs to be performed at some point. With approximately 30 different tasks identified, and assuming some crossing-over of the skills, it would still take 5 years to become a competent and productive worker in beef and pork processing alone. If employees could be found with the basic skill training in place and only half the time was taken to get up to full skill level, productivity and profitability would result.

Training schools for butchering have been in decline in Canada for a number of years. At one time, most community colleges offered some form of training to become a butcher. Currently, Olds College in Alberta is the only school left in North America that teaches animal processing (slaughter) and is also one of only 4 or 5 places left in Canada that teaches retail meat cutting.

There is only one ITA certified retail meat cutting program in BC offered at Thompson Rivers University (TRU) in Kamloops. TRU developed a program to be delivered in the Lower Mainland, however, they were unable to find a suitable instructor. As recently as the 1980's, there was heavy competition for butcher training programs, with students having to undergo rigorous interviews and competency tests to be admitted. Now, those schools that remain take most students that apply and hope to get a 25% industry retention.

This does not mean that the need isn't out there for trained workers in this industry. All provinces report a shortage of skilled butchers and abattoir workers and the FPHRC has undertaken a number of projects to address this shortage. Their focus has been on Industrial Meat Cutters who work in larger, more automated plants, but the basic skills sets are the same for the more artisanal abattoirs and butcher shops in BC. The BC Association of Abattoirs received funding from the B.C. government in 2016/2017 to hold an Abattoir Processor training program to train twenty new entrants to the industry to begin addressing some of the shortage of workers. This program has been a great success, but will fill less than ten percent of the reported shortage of workers at abattoirs in B.C

Phase 1: Meat Processing Sector Engagement

At the BC Association of Abattoirs' AGM in 2016, a representative from Jobs, Tourism, Skills Training presented initiatives supported by the province in finding and training workers. Those abattoirs and butcher shops in attendance, quickly agreed that they all had a shortage of workers and that an initiative was required to find more skilled people in the industry. In addition to this shortage, the operators of many of the small abattoirs and butcher shops that offer local access to locally raised meat are getting close to retirement and are having difficulty finding not only workers for their plants to help with the heavy work, but also to find buyers of their business.

Initial subjective conversations with the abattoirs revealed that there is an estimated 30% worker shortage currently. Potential growth of the sector is being impeded by a shortage of skilled workers. The skilled labour pool has been further tightened due to the Federal Government's changes to immigration programs, specifically the Temporary Foreign Worker Program. Businesses are having to poach employees from one another which undermines efforts to develop a healthy and sustainable industry.

As a result of this anecdotal information, the Association applied and received funding to formalize a partnership between abattoirs and butcher shops to come to an agreement on a strategy moving forward.

During the early planning stages for the partnership, livestock producers, game cutters and seafood processors were considered. Since the skill sets required at abattoirs and butcher shops are very closely related, these groups were excluded from the partnership; however, the question was posed to each focus group during Phase 1 as to whether they should be included and it was decided that they did not need to be directly involved in the partnership.

During the preliminary stages of the meat processing partnership engagement, it was necessary to focus on the purpose of the project, which was to:

1. Agree that the meat processing industry needs to form a partnership
2. Obtain feedback on potential labour market priorities to act as a guide for further research
3. Form a steering committee for subsequent phases of the Sector Labour Market Partnership

Very little specific labour market information is available for the diverse sizes of meat processing facilities in BC. Most of the Canadian data is skewed by the few, very large, heavily automated federal processing facilities. These facilities reduce the wide ranging individual skills required to perform operations during a production day by assign workers to a single, repetitive, task. Little is known about the labour needs of the small scale, 'craft' industry that predominates in BC where each employee is required to perform a wide range of different tasks each production day. To better grow the sector and create a sustainable industry, a broad labour market information study is needed; however, the first stage is to organize and coordinate the sector initiatives.

The intention of the partnership is to provide abattoirs and butcher shops an opportunity to collaborate on shared challenges, build a clear consensus and direction on the labour issues, and to establish a leadership and governance structure for subsequent LMP phases to ensure

success for the industry. The following objectives were agreed upon for Phase 1 - Sector Engagement:

1. Coordinate the meat processing sector
2. Obtain consensus on labour market issues
3. Build consensus on labour market priorities moving forward
4. Establish a steering committee for Phase 2, Labour Market Information study and subsequent phases

To reach these objectives, the following activities were undertaken:

Table 5: Phase 1: Sector Engagement Objectives

Step	Objective	Details	Outcomes
1	Define size and breadth of sector based on NOC codes 6331 and 9462	Identified sector industry associations, federal abattoirs, provincial abattoirs and butcher shops	Industry is comprised of: - 12 Federal abattoirs - 65 Provincial abattoirs - 350 Butcher shops - 5 Industry associations - 1 Training institution
2	Develop a questionnaire and canvass list and conduct 30 telephone interviews - 5 Federal abattoirs - 15 Provincial abattoirs - 16 Butcher shops - 2 Industry associations	The questionnaire for canvassing was written to determine the interest level in participating in this project, it included open-ended questions to allow for the maximum amount of free-flow thoughts. The main point was to identify if the respondent has a labour issue, what they see as the major factors contributing to it and if they are interested in further participation in the Labour Market Partnership	Contacted: - 5 Federal abattoirs - 15 Provincial abattoirs - 16 Butcher shops - 2 Industry associations The outcome from the telephone questionnaire clearly reinforced the labour market challenges faced by the meat processing industry and all agreed that a partnership should be formed to address these issues.
3	Hold 8 in-person focus group meetings throughout the province	Collate information from the telephone survey for presentation at each focus group. At each focus group: a) provide companies with an opportunity to collaborate on shared challenges, b) build clear consensus and direction on the labour market issue(s) to be addressed, and c) establish a leadership and governance structure for subsequent LMP phases.	Focus group meetings were held in: Kamloops, Prince George, Abbotsford, Burnaby, Victoria, Nanaimo, Vernon and Prince George. The meetings were held in the evening to accommodate the busy work day. Each focus group had average of 10 attendees. Information gathered mirrored what was found during the telephone interviews and reinforced the need to form a partnership to address labour issues
4	Develop steering committee for future LMP phases	Contact key people from the focus groups to become part of the Steering Committee	The steering committee is comprised of 3 provincial abattoirs, 1 federal abattoir, 4 butcher shops, 1 training institution and 1 representative from the BC Association of Abattoirs.
5	Analyze results and write interim report	Interim report included results of the meetings, interviews and recommendations on moving forward	Present interim report to initial planning committee before sending to the new steering committee.
6	Write Final Report	Finalize results and recommendations for Phase 1 report	

Step 1: Define size and breadth of the sector

Since the abattoir industry is licensed, it was not difficult to obtain information on the provincial and federal abattoirs. Locating butcher shops was facilitated by industry connections since the BC Association of Abattoirs and its members supply many of the butcher shops or know who they are. Again, as the industry is organized, tightly knit and connected, it was not difficult to locate appropriate industry associations and the one training institution left in the province that teaches the ITA certified Retail Meat Cutting course.

Step 2: Conduct telephone interviews

Representatives from each of the groups were contacted and asked questions (See Appendix 1 for a list of people contacted and Appendix 2 for the questionnaire) about the industry and their experience with finding skilled and unskilled labour. The questionnaire was designed to be completed within 10 minutes, however, each interview averaged an hour. Respondents were relieved that the issues were being addressed, and all had ideas on why and what to do about it.

The outcome clearly reinforces the labour market challenges faced by meat processing facilities and the need to form a partnership between abattoirs and butcher shops to address these issues.

Table 6: Key National Occupational Classification (NOC) Codes

- used for the telephone interview:

Main Positions				
Job Type	NOC	Skill Level	Job Description	Occurs at:
Slaughter Person	9462	C	Slaughterer, primal fabrication, slaughter house butcher	Abattoir
Master Butcher	6331	B	Cuts meat and makes sausage, etc.	Abattoir and butcher shops
Butcher Apprentice	6331	B	Master butcher in-training	Abattoir and butcher shops
Meat cutter	6331	B	Cuts meat - usually production work	Abattoir and butcher shops
Secondary Positions				
Job Type	NOC	Skill Level	Job Description	Occurs at:
Meat grader	9465	C	Grades Meat	Abattoir
Processor	9461	C	Makes sausage, etc doesn't cut meat	Abattoir and butcher shops
Wrapper	9617	D	Wraps and packages	Abattoir and butcher shops
Shipper	1521	C	Shipper/receiver	Abattoirs and some butcher shops
Counter sales	6421	C	Serves customers, some food assembly	Butcher shops
Supervisor	9213	B	Supervise and coordinate	Abattoir and butcher shops
Manager	0621	0	Retail and wholesale managers	Abattoir and butcher shops
Office staff	1411	C	Office support workers	Abattoirs and some butcher shops
Senior office staff	1221	B	Administration duties	Abattoirs and some butcher shops
Sanitation	6733	D	Clean-up	Abattoir and butcher shops
General unskilled	9619	D	Labourer, various unspecified tasks	Abattoir and butcher shops

Results from the telephone interviews:

Through one-on-one phone interviews, it was determined that seventy five percent of the BC companies interviewed were currently experiencing a labour shortage, high turnover and that there were key skilled positions such as "meat cutters" that were difficult to fill. Twenty five percent of the companies were not currently experiencing a shortage of workers, but either had

done so in the past year, or expect to soon. These interviews also highlighted some of the impact that these labour issues had sector-wide including increased pressure on existing skilled workers, and impacting business productivity and growth.

The impact of the shortage of workers included:

- Restricted ability to meet demand and limited business growth
- Key skilled individuals required to work constant overtime
- Production efficiency decreased which results in working longer hours
- Threat of business closure or downsizing due to aging skilled employees with no grass roots or succession plans
- Increased stress in work environment resulting in more sick days and injuries
- Competition between businesses to recruit employees and poaching
- High turnover hiring practises, i.e. no available suitable candidates so businesses settle for anyone' that applies
- Low morale – management is focused on the problems with limited resources to implement solutions
- Decision makers feeling despondent i.e. the situation is beyond their control

Some of the reasons for not currently experiencing a shortage of workers included:

- Acquired foreign workers
- Retained good staff, many of them mentors for new hires
- Cross trained workers
- Lowered hiring expectations i.e. unskilled
- Increased the overtime required by key individuals
- Brought in ready-to-go product and did less meat cutting in-house
- Downsized in response to lack of skilled labour

Table 7: Turnover and Replacement

Highest Turnover	Difficult to fill
1. Meat cutters	1. Meat cutters
2. General unskilled labour	2. Slaughter person
3. Packaging/wrappers & Clerks	3. Sausage Makers

The survey also addressed some of the reasons for the labour shortage and included perceptions of the industry, competition from other trades and the working environment (see Table 8).

Table 8: Reasons for Labour Shortage

Lack of industry training
Work environment
Perceptions of the industry
Salary/Wage able to pay
Applicant skill level
Urban demographics/younger generation expectations
Seasonal or part-time employment
Hard, difficult work
Competition from other trades
Government support/foreign worker program accessibility
Employee benefit packages needed

[Step 3: Conduct focus group meetings](#)

Eight focus group locations were identified to ensure each development region was represented: Kamloops, Vernon, Prince George, Abbotsford, Burnaby, Victoria, Nanaimo and Cranbrook. People were contacted from the key subsectors to attend each of the meetings. Meetings were held in the evening between 6 and 8 pm to accommodate busy work days. A list of who attended the meetings can be found in Appendix 1 and key points from each focus group are in Appendix 3.

The information gathered reflected the outcome from the telephone interviews, but there was more of an opportunity to not only commiserate on the state of their employment issues, but also brainstorm and discuss possible solutions. The ideas from each group were generally consistent and consensus was created on the need for a partnership in addressing the issues. A lot of interest was also generated in participating in the steering committee.

The focus groups recommended that plans going forward should include a multi-faceted approach to a strategic solution. Initiatives such as marketing to recruit workers into the industry and to change perceptions of the industry sector were established as priorities. In addition to these, the following were also recommended: Facilitate employee retention and recruitment wage/training subsidies; Address the current critical labour shortages of both skilled/unskilled employees; Remove barriers to accessing foreign workers and/or find the resources to support recruitment of foreign workers/immigrants, and; Fill the skilled labour gap, training programs that have flexibility should be implemented and be balanced by longer-term more robust initiatives such as development of a trade apprenticeship program for slaughter people and support the retail butcher apprenticeship programs.

An overview of the key issues are:

- Recruiting workers to this industry
- Perceived image of the industry

- Lack of training programs to address gaps in skilled labour
- Barriers to accessing foreign workers
- Wage competitiveness
- Access to labour pools to fill gaps for seasonal/part-time employees

Step 4: Develop a steering committee

Once all the focus groups were completed, key people were identified to become members of the steering committee for further phases of the LMP. These members represent a cross section of the meat processing sector in BC; they come from different regions of the province, process different animal species, and are a mixture of abattoirs and butcher shops. Each of them are dedicated to addressing the issues and solutions identified and are particularly passionate about some of the focus group outcomes. The steering committee will guide the work for the research firm in Phase 2, ensuring issues are correctly addressed and milestones are met.

The steering committee members as of November 18th are in Table 9.

Step 5: Analyze Result and Write Interim Report

The results of the telephone interviews and in-person focus groups reinforces the initiative to form a partnership to fully understand and address the labour issues faced by the meat processing industry. An interim report was circulated to the BC Association of Abattoirs' Directors for input and identification of the steering committee members.

Step 6: Write Final Report

An initial teleconference was held with the Steering Committee on December 13th to review the interim report and discuss changes and additions. All agreed that the report accurately reflected their experience in the industry and minor modifications were suggested including adding more to the impact of the shortage of skilled workers; include collecting wage range information by job type; and, the shortage of skilled instructors. These suggestions have been incorporated into the final report.

Participating in the call were Corey Davison, Dave Fernie, Rob Hunt, Nova Woodbury, Sheldon Gunter, Ericka Maarhuis and Philip Evans from the Ministry of Jobs Tourism Skills Training.

Table 9: Governance: Proposed Steering Committee LMP Phase 2

Name	Company affiliation	Sector	Expertise& Responsibilities
Corey Davison	Meat cutter program instructor, Thompson River University, Kamloops	Training	Training and Apprenticeship programs
Dave Fernie	Plant Manager, KML Meats Westwold	Federal Abattoir	Government policy
Erika Zazzi	Manager, Rocana Meats, Salmon Arm	Provincial Abattoir	Training and Apprenticeship
Rob Hunt	Choices Market – Head office, Delta	Butcher Shop	Sector Leadership and engagement
Joe Falk	Operations Manager, Fraser Valley Specialty Poultry, Chilliwack	Provincial Abattoir	Foreign Worker Programs
Jon Grady	Meat Manager, Red Barn Market, Victoria	Butcher Shop	Grassroots/Marketing Initiatives
Margaret Jordens	Owner, Summit Meats, Kamloops	Butcher Shop	Training and Apprenticeship
Nova Woodbury	Executive Director, BC Association of Abattoirs	Abattoirs	Project Manager
Sheldon Gunter	Manager, Gunter Bros, Courtenay	Provincial Abattoir	HR (benefit packages wage and training subsidies)
Erika Maarhuis	Magnum Meats, Rock Creek	Provincial Abattoir	Training and Apprenticeship

Steering Committee Terms of Reference

Steering Committee Role

The role of the Steering Committee will be to provide feedback and advice to the BC Association of Abattoirs for the duration of the Sector Labour Market Partnership. Specifically, the Committee will:

- Review interim and final reports and provide feedback and recommendations
- Provide continuity between all phases of the project
- Make recommendations for next-phase activities based on the results of the current phase

Steering Committee Chair Responsibilities

The Steering Committee Chair will be appointed by the Committee through a majority election. The committee will be contacted prior to the election meeting and asked to put forward names from the existing committee list. The names of the nominees will be shared with the Committee and they will have an opportunity to address the group prior to the election.

The Chair has the following responsibilities:

- Sets up and approves the agenda for each meeting in consultation with the BC Association of Abattoirs
- Ensure that agendas and any supporting information are shared with the Committee prior to meetings
- Encourages participation
- Acts as facilitator and lead for each meeting unless another is appointed

Steering Committee Member Responsibilities

All members of the Steering Committee will have the following responsibilities:

- Actively participate in meetings through attendance, discussion and reviewing any supplied papers and documents
- Encourage other Steering Committee members to voice their insights and support open discussion and debate
- Encourage others in the industry to engage with the research phases of the partnership
- Champion the goals and objectives of the Sector Labour Market Partnership and take genuine interest in its success

Terms of Office

Ideally, individuals will serve for the duration of the partnership and all its phases; however, should a committee member resign, a replacement will be appointed in consultation with the BC Association of Abattoirs, the steering committee and its chair. Regional and sector diversity will be maintained.

Quorum and Decision Making

A quorum will be defined as two thirds of the Steering Committee, or 7 members in order for a decision to be valid. The Committee will use consensus whenever possible, but in the event that a consensus cannot be reached, decisions will be made based on a majority vote. The vote can be held during the meeting, or through a ballot.

Summary of Phase 1 Key Themes and Recommendations

During Phase 1, issues and possible solutions were brought forward and potential strategies were presented which reflect the urgency to address the skilled labour shortage felt by employers. Despite the importance of this sector to BC's economy, very little hard factual data is available on the industry, its growth potential and need for skilled workers. The purpose for Phase 2 will be to further investigate the findings from Phase 1 and gather data to better support the industry and help it create and fill jobs in the meat sector.

1. Labour Market Information - Quantify Labour Force

- a. Collect statistics on employment numbers and job skill levels in the industry by size of organization and sector.
 - a.i. Investigate if micro and craft places with occupations listed as NOC 9462, or other industry NOC codes really reflect the level of skill required.
 - a.ii. Gather information on types of jobs and skills needed in the meat industry; compare to the profile of unemployed people in each region.
 - a.iii. Collect data to differentiate between abattoirs by production levels and species as well as differentiate butcher retail from wholesale.
 - a.iv. Create new organizational size categories and investigate the impact on the statistics: for example micro businesses (1-4 employees); micro-small (5-15); small (16-50); small to medium (51-100); medium (100-500); large (>500).
 - a.v. Collect volume information (current as well as capacity) in addition to information on the number of employees.
 - a.vi. Define job roles, areas of responsibility based on organization size.
 - a.vii. Identify employee retention issues, which could include, but not be limited to: aging out, injuries, hiring the wrong type of worker and employees having impatience with their career path.
 - a.viii. Conduct a wage compensation survey based on sector occupations.
- b. Collect information to forecast labour demand and corresponding skill requirements.
 - b.i. Need the number of unfilled positions, number employed, real skill level required, how long it takes to get trained - comparing employees with no industry background to those that have had some proficiency training/experience.
 - b.ii. Collect base demographic info on existing abattoirs and butcher shops.
 - b.iii. Compare industry collected information with government statistics
- c. Investigate methods to overcome labour shortages.
 - c.i. This could involve comparing industry labour profiles of other provinces and countries and researching labour model options to follow.
 - c.ii. Investigate the logistics and effectiveness of sharing a pool of skilled workers between multiple sites. Include skill transferability and labour mobility.
- d. Determine which employers, industries and/or sectors compete with abattoirs and butcher shops for labour, and the nature of that competition.

2. Foreign Workers - Temporary Foreign Worker Program, Provincial Nominee Program and Express Entry.
 - a. Determine the impact of the 2014 changes to the Temporary Foreign Worker Program on abattoir and butcher shop labour forces.

3. BC Residents Recruitment:
 - a. Identify untapped and non-traditional sources of labour. Document anticipated number of labour market entrants graduating from high-school
 - b. Determine factors that influence graduating students' career decision making, to inform sector recruitment strategies.

4. Marketing the Industry to Enhance Recruitment:
 - a. Identify the prevailing perception of the industry
 - b. Research how changing consumer trends influence the labour market, including buy local initiatives.
 - c. Determine which organizations are equipped to market the industry.

5. Training: Focus on the BC occupational industry landscape.
 - a. Identify and define core occupations, career pathways and foundation training required.
 - b. Understand the interaction between the number of applicants to courses and the number of available training seats.
 - c. Determine why there is a shortage of skilled instructors in the abattoir and butcher industry.
 - d. Look at what types of skills training are core to the industry, both high level skills and low-level.
 - e. Investigate different training models for new entrants to the industry, explore developing a training package and developing a relationship with the ITA and their support programs.
 - f. Investigate skill levels of existing employees and compare to required skill levels based on nationally recognized competencies

Consensus and Direction:

Set the stage for progression into Phase II Sector LMP. Use robust data collection and research methods to create a profile of the industry that allows for a cohesive assessment of labour issues in BC. Use statistical analysis to reinforce, and to be used as measurable indices to support and assess future strategies implementation.

Draft Outline for Phase 2: Labour Market Information Research

The Labour Market Information phase is intended to produce sector specific research and reports to augment the information available through the Province's Labour Market Outlook and other government sources. The information to be collected is based on the Key Themes from Phase 1 and will ultimately be used to develop strategies (Phase 3) designed to ensure a sustainable workforce for the meat sector which has considerable potential for growth and diversification.

The work undertaken will include both primary and secondary research to provide additional context for provincial sector trends and occupational details. Baseline data will be collected to provide a foundation for the strategy and implementation phases of this sector's LMP project.

Budget and Timeline Estimate for Phase 2

Requests for proposals will be sent to qualified research companies and consultants. Once they are chosen, the questions outlined above will be fine-tuned and the method of data collection will be determined along with an accurate budget and timelines.

Research Guidelines for Phase 2

To address the key themes from Phase I - Sector Engagement, the following research guidelines will be put into a Request for Proposal and sent to qualified market research firms and consultants for quoting and bidding on.

A. Profile of the meat processing sector labour market in BC

Purpose

To better understand the labour market dynamics of the industry in BC, collect statistics on the profile of the industry, its growth potential and wages paid to augment the statistics collected by the province. Information will be collected across the province and will represent a cross section of establishments.

Key questions for the both abattoir and butcher shops will include business demographic information; worker retention information including issues broken down by NOC and strategies for retaining workers; education/training level of skilled workers and apprentices; Current labour shortage broken down by NOC including recruitment strategies and the impact of the shortage of workers; expected labour shortage broken down by NOC over the next 5 to 10 years; experience with, and interest in, hiring foreign workers, and; the growth potential of the business, factors limiting growth and the impact of growth limitations

Key questions specific to abattoirs will include the type of establishment (Provincial A,B and E, Federal); species processed (poultry, red meat, both); service delivery model

(custom, seasonal, year-round); sales method (direct to customer, stores, restaurants, farmers markets), and: source of livestock (broken down by species).

Key questions specific to butcher shops will include the type of establishment (primarily a meat shop, specialty food store, grocery store or wholesale); profile of incoming meat, and; future expectations of the meat counter

Perform a case study to develop a profile of occupational skill requirements for craft abattoirs and butchers. This will clearly identify the skills and activities that occur in craft abattoirs and butcher shops to build an accurate job/career profile for the industry in BC.

B. Profile of employees in the meat processing sector in BC

Purpose

To develop a profile of current and former meat processing employees which will assist in developing a labour strategy to attract new workers.

Key questions for employees across the meat processing sector will include employee demographics; experience in the industry; training received; what they like most/least, and; Ideas on how to attract people to the industry Former employees will also be asked reasons for leaving the sector.

C. Profile of the workforce in BC

Purpose

Using existing sources of information, compile a profile of employed, unemployed and under-employed workers as well as those currently categorized as not-in-the-workforce. This profile will help identify non-traditional labour pools and help with building the meat processing sector's labour strategy.

D. Profile of BC high school graduates and youth

Purpose

Using existing sources of information to compile a profile of BC high school graduates. This profile will help with identifying sources of new employees and what industries are competing for the same people and help forecast labour market youth entrants to the meat industry.

E. Profile of BC high school trades training programs

Purpose

Develop a profile of high school trades training programs to identify potential sources of new employees. Key questions will include the location of the school and area demographics; trades offered and where they are held, and; number of students at the school

F. Investigate changing consumer preferences

Purpose

To better understand the trends and growth of the buy local, slow food, organic, 100 mile diet and related movements and its impact on the labour market, particularly the meat sector. This research will help build a marketing strategy to attract potential employees to the industry and to augment the growth predictions for the meat processing sector.

G. Investigate the impact of changes to the temporary foreign worker program

Purpose

Identify current access and barriers to the recruitment of foreign workers experienced by the sector employers to better understand and navigate the process of securing workers through such programs as the temporary foreign worker program, the provincial nominee program and express entry

H. Training programs and models

Purpose

To identify existing foundation training, core work and career pathways for workers in the meat processing sector. Investigate different training models, in addition to the current ones, that could be adopted by the meat processing sector.

Key information to collect will include foundation and core skills required in the industry; training institutions in BC and across Canada that offer training in meat processing; Investigate training models; contact the Industry Training Authority to determine what support programs are offered, and; identify any wage subsidy, training subsidy and new-hire funding that is available

APPENDIX 1: Labour Market Partnership Sector Engagement

Appendix 1 A – Associations and Abattoirs Contacted

Associations/University/Consultants:	Contact Person	Title	Region
BC Association of Abattoirs	Ken Falk	President	BC
BC Food Processors Association	Christine Koch	Program Manger	BC
Small Scale Food Processors Association	Candice Appleby	Executive Director	Canada
Thompson River University	Corey Davison	Program Instructor	Kamloops, BC
Industry Consultant	Dave Charchuck	Consultant	Kamloops, BC
Industry Consultant	Cornell Lazurca	Consultant	Chilliwack, BC
Ministry of Agriculture	Tim Pigg	Meat Sector	Kelowna, BC
Food Processor Human Resource Council	Jennifer Griffiths	Executive Director	Ottawa, Ont.
Industry Training Authority	Rod Bianchini	Manager, Apprenticeship Advisors	Richmond, BC
Industry Training Authority	Marlin Ratch	Apprenticeship Advisor	Cranbrook, BC
<u>Provincial Abattoirs</u>			
Lawrence Meats	Garth Meldrum	Plant Manager	Dawson Creek, BC
Kawano Farms	Larry & Mike Noullett	Owners	Prince George, BC
Country Locker	Dwain Funk	Owner	Vanderhoof, BC
Walk'n Acres	Wilma Watkin	Owner	Quesnel, BC
Magnum Meats	Erika Maarhius	Owner	Rock Creek, BC
Valley Wide Meats	Richard Yntema	Owner	Enderby, BC
Silvernails	Lisa Duek	Owner	Falkland, BC
Rocana Meats	Erika Zazzi	Manager	Salmon Arm, BC
Rocana Meats	Dave Deboer	Plant Manger	Salmon Arm, BC
Kam Lakeview Meats	Ron & Ron Jr. Keely	Owners	Kamloops, bC
Rainers Custom Cutting	Ben Rainer	Owner	Darfield, BC
Rodear Meats	Dave Fernie	Owner	Big Lake, BC
Johnston's	Bonnie Windsor	Plant Manager	Chilliwack, BC
Johnstons	Amy Jo	HR manager	Chilliwack, BC
Fraser Valley Spec Poultry	Ken & Joe Falk	Owner/Managers	Chilliwack, BC
Meadow Valley Meats	Chris Les	Plant Manger	Chilliwack, BC
Meadow Valley Meats	Brenda Law	HR manager	Chilliwack, BC
Gunter Bros	Dennis Gunter	Owner	Courtney, BC
Gunter Bros	Sheldon Gunter	Manager	Courtney, BC
Salt Spring Island Abattoir	Anne Macey & David Astill	Owners	Salt Spring, BC
Braun Custom Butcher Shop	Karen and Alfred Braun	Owners	Duncan, BC
Island Farmhouse Poultry	Wendy King	HR Manager	Cowichan Bay, BC
Campbell Farms	Jacques Campbell & Nan Logan	Owners	Saturna Island, BC
Parry Bay Sheep Farm	John and Lorraine	Owners	Victoria, BC

	Buchanan		
Plecas Meats	Rod & Rhonda Plecas	Owners	Nanaimo, BC
Farmcrest Foods	Hazel Bell	Owners	Salmon Arm, BC
Arenbrook Acres	Paige Thompson	Owner	Falkland, BC
Arenbrook Acres	Jason Walsh	Manager	Falkland, BC
Chuckareese	Curtis Smith	Owner	Creston, BC
Chuckareese	Megan Smith	Owner	Creston, BC
Creston Valley Poultry Processing/Goat River	Dale McNamar	Owner	Creston, BC
Gwinners Country Butcher	Uwe Gwinner	Owner	Kimberley, BC
Gwinners Country Butcher	Greg Dixon	Apprentice	Kimberley, BC
<u>Federal Abattoirs</u>			
KML Meats	Dave Fernie	Plant Manger	Westwold, BC
Colonial Farms	Allan King	Plant Manger	Salmon Arm, BC
Britco (Donald's Fine Foods)	Ray Fehr	Manager	Langley, BC

Appendix 1 B –Retailers/ Butcher Shops/Distributors Contacted

<u>Retailers/Butcher Shops/Distributors</u>	<u>Contact Person</u>	<u>Title</u>	<u>Region</u>
Summit Meats	Margaret Jordens	Owner	Kamloops, BC
Erik's Sausage & Meats	Erik Fuenders	Owner	Kamloops, BC
Homesteaders Meats	Ben Klassen	Owner	Prince George, BC
Chelton Specialty Northern Meats	Chelton	Owner	Prince George, BC
Chilakon Meats	Allan McCloud	Owner	Prince George, BC
Two Rivers Meats	Jason Pleym	Owner	North Van., BC
Trimpac Specialty Meats	Aly Kaba	Manager	Vancouver, BC
Hertels Meats	Ron Caldwell	Manager	Port Alberni, BC
Newtons Hi Quality Meats	Ernie Wettig	Controllor	Surrey, BC
Davis Quality Meats	Dale Herbert	President	Abbotsford, BC
Lakeview Market	Brad Struck	Owner	Kelowna, BC
Gary's European Sausage	Gary Gemsa	Owner	Kamloops, BC
A&K Grimms	Kelly Grimm	Owner	Pentiction, BC
Bonanza Meats	Marc Vanden Erenbeemt	Owner	Kelowna, BC
Coiffi's	Reno Coiffi	Owner	Burnaby, BC
Penguin Meats	Vic Michaluk	Owner	White Rock, BC
Bonettis	Carlos Bonetti	Owner	Langley, BC
Sundowner Meats & Deli	Uwe Lauterbacher	Owner	Lumby, BC
Smither's Sausage Factory	Fred Feitsma	Owner	Smithers, BC
Choices Market – Head office	Rob Hunt	Meat Op Manager	Delta, BC
Choices Market – Head office	Jon Janower	COO	Delta, BC
Choices Market - Kelowna	Cam	Meat Manager	Kelowna, BC
Nesters Market - Squamish	Joe Rush	Meat Manager	Squamish, BC
Nesters Market./Buy Low Foods - Head Office	Jerry Ruscheinski	Regional Meat Manager	Vancouver, BC
Ferry	Vincent Lo	Manager	
Red Barn Market	Jon Grady	Meat Manager	Oak Bay, BC
Red Barn Market	Jay Benneit	Meat Manager	Saanichton, BC
B & C Foods	Shawn Hartley	Manager	Victoria, BC
B & C Foods	Daryl Milne	Assist Manager	Victoria, BC
Farm Town Meats	Josh	Owner	Burnaby, BC
Askew Foods	Karl Kreipe	Meat Manager	Salmon Arm, BC
Choices Market	Cam Tucker	Meat Manager	Kelowna, BC
Wes' Country Meat and Sausage	Wes Horvath	Owner	Fernie, BC
Cliff's Meats	Cliff Wilson & Laurie Janbert	Owners	Kimberley, BC

APPENDIX 2: Telephone Interview Questions

Introduction narrative:

“The BC Association of Abattoirs are seeking to understand why there is a shortage of skilled workers in the meat industry. We have recently secured funding to carry out a “Labour Market Partnership program”. As part of the initial phase of this program, we are interviewing key people in the industry, such as yourself, to identify common challenges and priorities, as well as determine the scope of the labour market issues that should be followed up in further studies.

This phone call will take less than 10 minutes and all answers will become part of an industry overview and your specific information will be kept confidential.

Job Type	NOC	Class	Description
Slaughter Person	9462	C	Slaughterer, primal fabrication, slaughter house butcher
Master Butcher	6331	B	Cuts meat and makes sausage, etc
Butcher Apprentice	6331	B	Master butcher in-training
Meat cutter	6331	B	Just cuts meat - usually production work
Meat grader	9465	C	Grades Meat
Processor	9461	C	Makes sausage, etc doesn't cut meat
Wrapper	9617	D	Wraps and packages
Shipper	1521	C	Shipper/receiver
Counter sales	6421	C	Serves customers, some food assembly
Manager	9213	B	Supervise and coordinate
Office staff	1411	C	Office support workers
Senior office staff	1221	B	Administration duties
Sanitation	6733	D	Clean-up
General unskilled	9619	D	Labourer, various unspecified task

1. Are you experiencing a shortage of workers? If so, which type of jobs would they be doing?
2. Are you currently advertising to fill any vacant positions?
3. Which positions have the highest turnover rate for you?
4. Which positions are the most difficult to fill?
5. Do you believe your situation is also being faced by other abattoirs like yours? (elaborate)
6. Is there a training program geared to you industry? If so, do you think it is adequate?
7. If not, do you think a training program geared to your industry would be of benefit?
8. What types of training do you see a need for and what skills need to be covered?
9. What do you think the reason for the shortage of labour is?
10. Is there anything you would like to add related to your labour issues?
11. Would you be interested in taking part in a focus group in your area to discuss the labour market issues in more detail? Focus group meetings will be 2 -3 hours and take place mid to late October
12. We also want to identify key stakeholders in this industry that would be willing act on committees and/or be involved in further development of this program .” Would this be something of interest?

Closing narrative:

Thank you very much for participating in this study. Again, all your specific responses will be kept confidential.

APPENDIX 3: Points of Emphasis by Focus Group:

Kamloops

Points brought up by participants

- Butchers are paid a low wage and customers don't see the value in paying more
- A passion for food is needed to work in this industry
- The industry work needs to be seen as an "Art"
- Current public school system doesn't offer the meat industry as a career option to students
- A wage subsidy would help attract and retain skilled workers
- Look at tax concessions for businesses to keep the buy local option viable
- Build awareness of the industry as a career choice
- Create a marketing campaign on the industry to employment groups and consumers
- Develop a mentorship program
- Develop a labour pool program much like that for agriculture producers
- Build the perception that this is a trade

Agreed upon points for moving forward

- Build awareness of the industry for recruitment, training and jobs
- Develop a mentorship model
- Investigate NOC code levels to allow foreign workers
- Find out what is happening in the other provinces
- Develop a grassroots marketing campaign for the industry
- Look into wage/training subsidy possibilities

Prince George

Points brought up by participants

- Youth today don't know how to work; how do we get them engaged?
- Foreign workers are the only solution
- Hiring low skilled workers resulted in only 1 in 47 being retained
- Difficulty competing against mining and the oil sands for employees
- The work must be re-established as a trade
- Subsidized wages during training
- Provide subsidy to students to take training
- Develop a training program suitable for being held in different locations
- There is a disconnect between government's perspective of the skill level needed and what the industry believes
- There are health consequences if an improperly trained worker makes a mistake

Agreed upon points for moving forward

- Market the industry
- Look at developing a training model that will work for both employers and employees
- Investigate really what it will take to bring in foreign workers
- Work more closely with Chefs

Victoria

Points brought up by participants

- Develop a training model that can be used at the plant level
- Off-site training model should be flexible and allow students to work during the training (e.g. weekend classes once a month)
- Align with Chefs to make the industry more appealing
- Tie in with culinary/cafeteria/chef programs and demonstrations offered at high schools
- Get accreditation for competencies achieved
- Get a third party to provide on-site mentoring
- Develop a benefit package to retain and attract workers
- Develop a pool of workers to share between abattoirs - not all process every day so workers can go to the plants that are
- Build on the buy local movement, and the craft aspect; create a 'story' to recruit
- Develop an industry marketing campaign and a culture of 'knowing where your meat comes from'
- Foster a small business, family feel
- Develop match funding or a wage subsidy for on-site training

Agreed upon points for moving forward

- A grassroots marketing campaign is needed for the industry
- A flexible training program needs to be developed
- Go to schools and present the industry as a viable option to attract youth

Nanaimo

Points brought up by participants

- Need to keep existing employees engaged
- Many shops have given up looking for workers
- Younger people are choosing higher paying trades and don't see the meat industry as a career possibility
- Recruitment should target people already engaged in the industry such as farmers, hunters, 4H and outdoors people
- A scholarship program could be developed for training
 - people who take subsidized training may not really be interested in working in the industry
- Develop a work practicum at abattoirs and butcher shops
- High schools need to let students know that agriculture related work is a skill, career and opportunity
- Work on cafeteria programs and sponsor field trips for students
- Wages need to be increased to compete against other trades
- Need to reinforce the work as a proper trade
- Develop a sponsored training/apprenticeship program with a pay-back requirement
 - wage subsidy or training allowance from government
- Training programs need to be held closer to where the need is
- A pool of shared workers would be of benefit

- Implement a benefits program for attracting and retaining workers
- Need to get more exposure in the community through sponsorships
- Need to market the industry and re-brand it
- Focus on craft, buy local; showcase these are real people

Agreed upon points for moving forward

- Develop a grassroots marketing campaign for the industry
- Approach high schools to get students interested in a career in the meat industry
- Develop a flexible training program that meets the needs and focuses on key skills

Abbotsford

Points brought up by participants

- Need to improve access to foreign worker programs
- Should develop worker retention and benefit programs
- Need to develop wage subsidy programs
- Establish an apprenticeship program for slaughter'men'
- Develop flexible and regional training programs
- "Professional" Marketing – recruitment of the younger generation and improve perceptions industry

Agreed upon points for moving forward

- There is a critical lack of labour unskilled and skilled
- Labour retention (wages/cost of living) issues
- Recruitment/perceptions of the industry

Burnaby

Points brought up by participants

- Lack of awareness of meat processing/cutting as a trade
- Build awareness of the opportunities in this industry
- Start recruitment at the high school level
- Professional marketing to change perceptions of industry and make it more "appealing"
- Target marketing to millennials to figure out how to change industry to fit their values
- Look at scholarship programs and apprenticeship sponsorship
- Become involved in curriculums high school and college – opportunity to connect to existing food science/chef programs
- Support industry mentorship initiatives
- Focus on the job skills in industry as an "art"
- Investigate foreign workers programs and removing barriers to supply critical need for both skilled and unskilled

Agreed upon points for moving forward

- Solution should be multi-faceted to address the critical need to find skilled workers now, and longer term programs to support growth in industry
- Grassroots marketing industry as an "art" and developing training/apprenticeship funding programs should be a priority

- Remove barriers to access foreign worker programs

Vernon

Points brought up by participants

- Need to be able to pay a living wage and pay competitive trade rates
- Look into subsidy or wage concessions
 - get a subsidy while training on-the-job
- Need foreign workers and to change the NOC skill level (temporary and provincial nominee programs)
 - foreign workers not an option for retail butcher shops
- A career in meat processing needs to be made interesting to youth
- Need to make it a recognized trade
- Develop a sausage maker or meat cutting competition
- Create a marketing campaign geared toward youth and make it something for them to brag about
- Develop a flexible part-time training program
- Have a forgivable student load for taking training

Agreed upon points for moving forward

- Look into wage subsidy and training subsidy
- Develop a marketing program for the industry
- Investigate issues with getting foreign workers
- Develop a flexible training program

Cranbrook

Points brought up by participants

- Put together an industry presentation to take to high schools
- Need to be able to pay a better wage since are competing against higher paying trades
- It is possible to make a good living
- Government regulations are making it difficult for new entries into the business
- Efforts should be made to present BC as an option to graduates of meat processing programs in Alberta through their career days
- Market the industry focusing on the fullness of the type of work and the ability for it to be a rewarding career - not an assembly line job
- Develop in-house training program that is paid for by the students themselves
 - One of the butcher shops that participated in the Cranbrook focus group had recently advertised to train two people for 400 hours in his own shop. He shared his success in doing this.
- Look at other training models with emphasis on practical experience
- Develop a mentorship program
- Investigate abattoir and butcher shop inclusion in high school work experience programs

Agreed upon points for moving forward

- Develop an industry marketing program
- Look into flexible and unique training programs
- Develop a program to get out and speak to high school and retail meat cutting students

APPENDIX 4: Sector Labour Market Partnership Program Phases

The Government of British Columbia has recognized that existing labour information may be insufficient, so they developed a five-phase model for addressing these issues, called the Sector Labour Market Partnership (LMP).

The LMP Program helps industry and employers understand and respond to changing labour market demands. The Program provides funding for partnership-led projects that address broader sector and regional labour market issues within British Columbia's diverse economy.

The Sector LMP Program has five distinct phases described in the diagram below. Each phase is negotiated as a separate contract.



Phase 1: Sector Engagement

This phase provides support to more fully engage key partners within a sector on relevant labour force issues. The intent is to:

- Provide sectors with an opportunity to develop a broad-based partnership.
- Build clear consensus and direction on the labour market issue(s) to be addressed.
- Establish a leadership and governance structure for any subsequent Sector LMP project phases.

Phase 2: Labour Market Information Research

Phase 2 is intended to produce sector-specific research and reports, augmenting LMI available through the JTST's B.C. Labour Market Outlook and other available sources.

LMI reports should include primary research along with secondary research to provide additional provincial context for sector trends, occupational detail, or further validates or identifies labour market issues for the sector. LMI reports should meet established research standards and guidelines provided by the ministry. LMI can also provide some baseline data for measurable outcomes, as well as provide the foundation for the strategy and implementation phases of the Sector LMP project.

Phase 3: Strategy Development

This phase is intended to engage sectors in developing labour market strategies informed by data collected in the LMI phase. The Strategy Development phase is designed to identify and prioritize actions to address the key workforce issues substantiated through labour market research (Phase 2).

Phase 4: Implementation

In this phase, sectors will implement the eligible activities and produce the products outlined in the strategy. This stage will also entail tracking and collecting information on project outputs and progress towards measurable outcomes to prepare for the evaluation stage. Note, in this phase there is an expectation that project partners will make a cash (in addition to any in-kind) contribution to support implementation.

Phase 5: Evaluation

The Evaluation phase is intended to support contract holders to assess and document the impact of strategy implementation (Phase 4) on desired outcomes. Evaluations will provide the sector with valuable information on overall return on investment for the project, as well as the degree to which project benefits have been sustained beyond the end of implementation funding.

APPENDIX 5: National Occupational Classification (NOC 9462) 2016

National Occupational Classification (NOC) 2016

- [9 - Occupations in manufacturing and utilities](#)
- [94 - Processing and manufacturing machine operators and related production workers](#)
- [946 - Machine operators and related workers in food, beverage and associated products processing](#)

9462 - Industrial butchers and meat cutters, poultry preparers and related workers

Workers in this unit group prepare meat and poultry for further processing, for packaging or for marketing. They are employed in meat and poultry slaughtering, processing and packing establishments.

Illustrative example(s)

- o beef boner
- o ham cutter
- o industrial butcher
- o industrial meat cutter
- o meat trimmer
- o poultry preparer
- o slaughterer

Exclusion(s)

- o Butchers, meat cutters and fishmongers - retail and wholesale (6331)
- o Meat graders (See 9465 Testers and graders, food, beverage and associated products processing)
- o Meat inspectors (See 2222 Agricultural and fish products inspectors)
- o Supervisors, meat packing (See 9213 Supervisors, food, beverage and associated products processing)

Main duties

Workers in this unit group perform some or all of the following duties:

- o Industrial butchers slaughter livestock using stunning devices and knives; skin, clean and trim carcasses; remove viscera and other inedible parts from carcasses; split carcasses into smaller portions to facilitate handling; and may slaughter cattle, calves and sheep as prescribed by religious laws.
- o Industrial meat cutters cut beef, lamb, pork or veal carcasses or sides or quarters of carcasses into primal cuts for further cutting, processing or packaging; remove bones from meat; and cut meat and poultry into specific cuts for institutional, commercial or other wholesale use.
- o Poultry preparers slaughter poultry and remove inedible parts; remove feathers and singe and wash poultry to prepare for further processing or packaging.
- o Trimmers remove skin, excess fat, bruises or other blemishes from carcasses or meat portions.

Employment requirements

- o Completion of secondary school may be required.
- o For industrial meat cutters, completion of a program in industrial meat cutting or
- o Experience as an industrial butcher or trimmer is required.
- o On-the-job training is provided for industrial butchers, poultry preparers and trimmers.

Additional information

- o Industrial meat cutters may progress to inspecting, testing and grading jobs.
- o Progression to supervisory positions is possible with experience.
- o

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2016-10-21

<http://www23.statcan.gc.ca/imdb/p3VD.pl?Function=getVD&TVD=314243&CVD=314247&CPV=9462&CST=01012016&CLV=4&MLV=4>

APPENDIX 6: National Occupational Classification (NOC 6331) 2016

NOC 2016- 6331 - Butchers, meat cutters and fishmongers - retail and wholesale

Statistics Canada
Statistique Canada

Home • [Definitions, data sources and methods](#) • [Statistical classifications](#) • National Occupational Classification (NOC) 2016

- [6 - Sales and service occupations](#)
- [63 - Service supervisors and specialized service occupations](#)
- [633 - Butchers and bakers](#)

6331 - Butchers, meat cutters and fishmongers - retail and wholesale

Butchers, meat cutters and fishmongers, retail and wholesale, prepare standard cuts of meat, poultry, fish and shellfish for sale in retail or wholesale food establishments. They are employed in supermarkets, grocery stores, butcher shops and fish stores or may be self-employed. Butchers who are supervisors or heads of departments are included in this group.

Illustrative example(s)

- o butcher apprentice
- o butcher, retail
- o fishmonger - retail
- o head butcher - wholesale
- o meat cutter - retail or wholesale
- o supermarket meat cutter [All examples](#)

Exclusion(s)

- o Fish cutters (See 9463 Fish and seafood plant workers)
- o Industrial butchers and meat cutters, poultry preparers and related workers (9462)
- o Seafood sales clerks (See 6421 Retail salespersons)

Main duties

Butchers, meat cutters and fishmongers in this unit group perform some or all of the following duties:

- o Cut, trim, and otherwise prepare standard cuts of meat, poultry, fish and shellfish for sale at self-serve counters or according to customers' orders
- o Grind meats and slice cooked meats using powered grinders and slicing machines
- o Prepare special displays of meat, poultry, fish and shellfish
- o Shape, lace and tie roasts and other meats, poultry or fish and may wrap prepared meats, poultry, fish and shellfish
- o Manage inventory, keep records of sales and determine amount, product line and freshness of products according to company and customer requirements
- o Ensure food storage conditions are adequate
- o May supervise other butchers, or meat cutters or fishmongers.

Employment requirements

- o Completion of secondary school may be required.
- o Completion of a college or other meat-and-fish-cutting training program, or a three-year meat cutting apprenticeship may be required.
- o On-the-job training in food stores is usually provided for retail butchers, meat cutters and fishmongers.
- o Trade certification is available, but voluntary, in Quebec and British Columbia.
- o

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<http://www23.statcan.gc.ca/imdb/p3VD.pl?Function=getVD&TVD=314243&CVD=314247&CPV=6331&CST=01012016&CLV=4&MLV=4>

APPENDIX 7: References

Statistics Canada

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- <https://strategis.ic.gc.ca/app/scr/sbms/sbb/cis/definition.html?code=311&lang=eng>
- http://www.servicecanada.gc.ca/eng/qc/job_futures/statistics/9462.shtml#outlook

WorkBC

- <https://www.workbc.ca/jobs-careers/explore-careers/browse-career-profile/9462>
- <https://www.workbc.ca/Jobs-Careers/Explore-Careers/Browse-Career-Profile/6331>

BC Stats

- <http://www.bcstats.gov.bc.ca/StatisticsBySubject/Economy/ManufacturingShipments.aspx>