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Conseil canadien pour
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CFA
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Food and
Beverage
Canada



Aliments
et boissons
Canada

National Workforce Strategic Plan for Agriculture and Food and Beverage Manufacturing

Interim Report

December 6, 2022

Submitted on behalf of The Canadian Agricultural Human Resource Council,
The Canadian Federation of Agriculture, and Food and Beverage Canada

National Workforce Strategic Framework for Agriculture and Food and Beverage Manufacturing
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Table of Contents

Report Signatories	3
National Workforce Strategic Framework for Agriculture and Food & Beverage Manufacturing	4
Five Strategic Pillars.....	4
Elements of the Strategic Framework.....	5
Pillar 1: Perception and Awareness of Industry and Careers.....	6
1. Improving Positive Perceptions of Employment in the Industry among Canadians.....	6
2. Raising Awareness of the Variety of Occupations Suited to Various Skill Sets	7
Pillar 2: People and Workplace Culture	8
1. Developing and Promoting Workplace Culture Models	8
2. Identifying and Adopting HR Best Practices.....	9
3. Attracting and Retaining Workers, Including Underrepresented Groups	9
Pillar 3: Immigration and Foreign Workers.....	11
1. Public and Government Understanding and Acceptance of Foreign Workers	11
2. Programs for Seasonal Foreign Workers	12
3. Programs for Year-Round Foreign Workers.....	12
4. Worker Experience and Employer Supports	12
Pillar 4: Skill Development	14
1. Identify Skills Needed by Employers	14
2. Training Programs	14
Pillar 5: Automation and Technology	16
1. Automation and Technology Adoption.....	16
2. Skill Alignment	16
Annex A - Perceptions and Awareness of Industry and Careers SWOT Analysis.....	18
Annex B - People and Workplace Culture SWOT Analysis	21
Annex C - Immigration and Temporary Foreign Working SWOT Analysis	23
Annex D - Skill Development SWOT Analysis	25
Annex E - Automation and Technology SWOT Analysis.....	26

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National Workforce Strategic Framework for Agriculture and Food & Beverage Manufacturing

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Labour is one of the most serious issues facing Canada's agri-food sector. Chronic labour shortages and serious skills gaps undermine Canada's ability to maintain current levels of food production. This in turn is threatening local food security and weakening the sector's future economic development and trade growth.

Today, food and beverage manufacturing – Canada's largest manufacturing employer – is estimated to be short 20 per cent of its workforce, a situation that was exacerbated during the pandemic and is expected to worsen in the coming years. Similarly, 40 per cent of employers surveyed in primary agriculture in 2020 reported not being able to fill vacancies and the industry suffered earning losses of \$2.9B in total sales, directly attributable to unfilled vacancies tied to the pandemic. This is nearly double the \$1.5B in lost sales recorded in 2014. Both sectors struggle to attract and retain workers and to ensure workers have the skills required for today and the future.

Ensuring a stable and skilled agri-food workforce is complex. It requires the participation of a diverse group of stakeholders including employers, employee groups, producer and industry associations, academic and training institutions, and federal, provincial and territorial governments. It also requires industry leadership.

Stakeholders from across Canada's agriculture and food and beverage manufacturing sector recognize that their leadership and collaboration are critical if we are to achieve workforce stability. While many stakeholders actively work on different aspects of workforce development, they often working in isolation. Given the scope and gravity of industry's workforce situation, stakeholders must collaborate - learning from each other, identifying common goals, and identifying new and different ways of tackling this challenge.

The *National Workforce Strategic Framework for Agriculture and Food & Beverage Manufacturing* was launched in winter 2020 with funding from the Federal Government's Future Skills Center. It includes a framework for evaluating industry's workforce challenges and establishing shared goals, focused on five Strategic Pillars. These pillars provide the foundation for a comprehensive action plan that will encourage industry to work together towards common goals and support workforce stability in Canada's agriculture and food and beverage manufacturing sectors by 2030.

Five Strategic Pillars

Labour is a complex topic: the problems and the solutions are multi-faceted, labour issues are sometimes structural but often local, and the adoption of technology is shifting the skills required in the workplace. In addition, across the country hundreds of stakeholders are simultaneously working on various workforce issues, often independent of each other.

The *National Workforce Strategic Framework for Agriculture and Food & Beverage Manufacturing* recognizes that addressing our workforce problems requires that we approach the issues through a common framework. A common framework ensures better understanding of the issues impacting workforce planning, facilitates meaningful discussion among different groups, and better supports the identification of coordinated, lasting solutions.

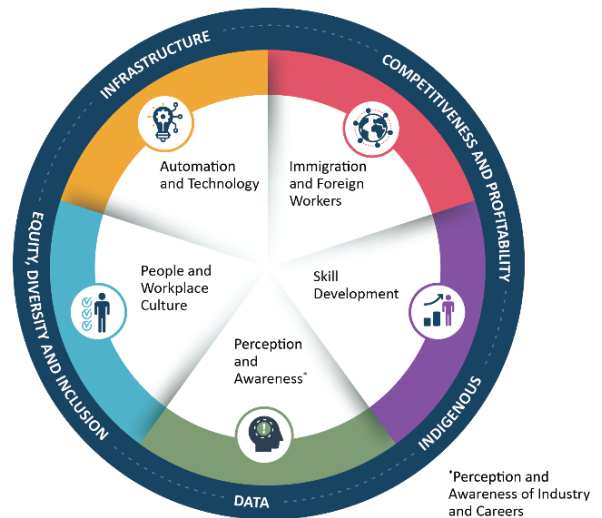
The *National Workforce Strategic Framework* recognizes five Strategic Pillars that contribute to a strong and sustainable workforce, including:

- Perception and Awareness of Industry and Careers
- People and Workplace Culture
- Immigration and Foreign Workers
- Skill Development
- Automation and Technology

The Framework also identifies five foundational themes – themes that extend beyond the scope of this initiative and, in some cases, the sector. These foundational themes include:

- Infrastructure
- Competitiveness and Profitability
- Indigenous Perspectives
- Equity, Diversity and Inclusion
- Data

National Workforce Strategic Pillars



Elements of the Strategic Framework

The *National Workforce Strategic Framework* is intended to be an actionable and measurable roadmap for industry to achieve workforce stability by 2030 and a foundation for the desired workforce of the future. For each of the five Strategic Pillars, the *National Workforce Strategic Framework* identifies specific Goals, Objectives and Measures of Success. Each of these Strategic Pillars and its key elements is described below.

Work on the *Strategic Framework* continues, with the establishment of five expert Working Groups to lay out action plans for each of the five Pillars. Working with a facilitator, each of Working Groups has undertaken an in-depth SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis, which can be found in Annex A through E. The Working Groups are now meeting to refine the objectives and actions under each pillar and to develop detailed action plans by year-end.

Pillar 1: Perception and Awareness of Industry and Careers

To attract the workforce of the future, industry must work to increase perception and awareness of the Canadian agriculture and food and beverage manufacturing sectors among potential workers, including those in underrepresented groups. This requires a focus on improving positive perceptions of employment in the industry and on raising awareness of career options.

Work on this Strategic Pillar is being undertaken by the Perceptions and Awareness Working Group. This Working Group's SWOT Analysis can be found in Annex A.

Perception and Awareness of Industry and Careers Goals and Objectives

Achieving workforce stability requires that, by 2030, the number of people entering the sector has increased due to positive perceptions of employment in the industry and greater awareness of the variety of occupations suited to various skill sets, the diverse communities in which careers are available, and the paths to career advancement.

We will do this by:

- 1. Improving positive perceptions of employment in the industry among Canadians.*
- 2. Raising awareness of the variety of occupations suited to various skill sets.*

1. Improving Positive Perceptions of Employment in the Industry among Canadians

Industry recognizes the need to increase positive perceptions and address negative perceptions of the industry from job seekers and students, targeting the most impactful perceptions for under-represented groups in the economy, on both a regional and national basis.

In the Short Term, we need to:

- Determine whether a positive perception of work in a sector leads to more job applicants, including a comparison of perception and application trends in competing industries.
- Undertake segmentation research to understand perceptions of underrepresented groups in the economy as they relate to work in agriculture and food and beverage manufacturing.
- Understand the pay and benefits of select occupations in agriculture and food and beverage manufacturing.

In the Medium Term, we need to:

- Secure funding for a National Careers Now campaign to speak directly to underrepresented groups in the economy through multiple channels, including digital awareness raising and engaging trusted thought leaders to speak to Canadians.

In the Long Term, we need to:

- Measure changes to perceptions of work in the agriculture and food and beverage manufacturing sectors.

We will know we have been successful when:

- Employers understand the effectiveness of perception in industry-specific recruitment.
- Compared to baseline data collected before action is taken, Canadians have more positive perceptions of work in agriculture and food and beverage manufacturing.
- Two million Canadians hear messages that reinforce positive perceptions and address negative perceptions about work in agriculture and food and beverage manufacturing.
- Positive perceptions of industry increase and negative perceptions decrease among specific target groups.
- Employment in both agriculture and food and beverage manufacturing increases.
- Educational enrollment in, and the number of agriculture and food and beverage manufacturing programs at Post-Secondary Education institutions, are both increased.
- A catalogue of existing resources is maintained.

2. Raising Awareness of the Variety of Occupations Suited to Various Skill Sets

Industry's objective is to improve the efficacy, scale, and scope of agriculture and food and beverage manufacturing career promotions, including the targeting of underrepresented groups

In the Short Term, we need to:

- Apply a regional lens to the environmental scan of existing research, resources, and career initiatives in the agriculture and food and beverage manufacturing sectors.
- Evaluate the effectiveness and awareness of existing career-promotion activities based on segmentation to identify best practices.
- Develop communication materials that provide career pathways, leveraging existing materials, for different education and skill levels, targeting unique opportunities for low-skill levels.
- Add food and beverage manufacturing careers to AITC-C's thinkAg program.

In the Medium Term, we need to:

- Create and implement a pan-industry plan to promote careers, similar to the approach taken by the skilled trades, leveraging perceptions research.
- Target specific groups with individualized messages.
- Develop supports for new business owners and potential entrepreneurs (e.g., regulatory compliance, labour resources).

In the Long Term, we need to:

- Evaluate the effectiveness of career-promotion activities developed through this strategy.

We know we will be successful when:

- The share of underrepresented groups entering food and beverage manufacturing and agriculture positions (e.g., youth) doubles from 1% to 2%.
- The number of food and beverage manufacturing careers profiled in AITC's thinkAg is increased by 10.
- The number of WIL placements for post-secondary students increases by 300.
- Job vacancies decrease and employment increases in agriculture and food and beverage manufacturing by 2025.

Pillar 2: People and Workplace Culture

Industry recognizes that to attract and retain workers, employees must develop Human Resources (HR) capacity and foster workplace environments that are attractive to job seekers.

Work on this Strategic Pillar is being undertaken by the People and Workplace Culture Working Group. This Working Group's SWOT Analysis can be found in Annex B.

**People and Workplace Culture
Goals and Objectives**

Achieving workforce stability requires that, by 2030, the sector is viewed as a desired choice for work in Canada by job seekers and workers.

We will do this by:

- 1. Developing and promoting workplace culture models.*
- 2. Identifying HR Best Practices.*
- 3. Attracting and retaining workers, including underrepresented groups.*

1. Developing and Promoting Workplace Culture Models

Industry's objective are to:

- Develop and promote workplace culture models, for the sector and for individual businesses that are highly attractive to job seekers and existing employees.
- Ensure that workplace culture models recognize the impact the pandemic has had on workers, on the workplace, and on business culture; and include the HR programs, policies, and supports that may be needed in a post-pandemic business and work environment (e.g., right to disconnect, flexible work hours).
- Identify opportunities to align employee expectations with sector and business needs to operate efficiently and profitably.
- Build a culture change by adopting culture change methods used in other sectors and areas (e.g., climate change, mental health conversations).
- Build a culture change among employers around accepting workers from underrepresented groups.

In the Short Term, we need to:

- Review the lasting impacts of the pandemic on the workplace and the sector and provide recommendations on how workplace and business culture and HR programs, policies and supports should adapt.
- Develop and implement a plan to create a culture change by adopting methods used in climate change and mental health conversations.
- Identify a suite of three big things and three small things that the sector and businesses can do to positively enhance their workplace culture, supported by a knowledge transformation program.

In the Medium Term, we need to:

- Develop models, guides and programming that support a dedicated Equity, Diversity and Inclusion culture.

We will know we have been successful when:

- The agriculture and food and beverage manufacturing sectors are recognized as a top employer through established workforce surveys.
- Agriculture and food and beverage manufacturing businesses are positively regarded as top employers.
- Food and beverage manufacturing companies rank among the top workplaces in Canada.
- By 2025, 'People and workplace culture' is ranked in the top 3 priorities by 75% of employers.

2. Identifying and Adopting HR Best Practices

Industry's objective is to increase adoption of HR best management practices among sector employers and to adopt, amplify, and embed human resource capabilities and best practices across the workplace (e.g., tools, training, best practices)

In the Short Term, we need to:

- Conduct an employer HR survey to establish why employers do not make use of existing HRM tools and resources.
- Undertake a Return on Investment (ROI) analysis of using HR tools and resources from the perspective of business profitability and sustainability, to inform communications to employers of the value of investing in HR best practices.
- Develop an HR Community of Practice to create a common body of knowledge.
- Inventory the work that is already being done by employers and organizations to understand lessons learned and best practices.

In the Medium Term, we need to:

- Develop a feasibility plan for the creation of HR Hubs, provincially or regionally, that provide a concierge service to employers.
- Increase the uptake of available HR management tools and resources.
- Develop five tools to assist employers in decreasing barriers to groups that are underrepresented in the economy in the recruitment and retention process.

We will know we have been successful when:

- By 2025, 50% of all agriculture and food and beverage manufacturing businesses have a defined Equity, Diversity, and Inclusion action-oriented plan.
- By 2025, 50% of all agriculture and food and beverage manufacturing employers have participated in an HR training program.
- The share of agricultural employers with a written HR management plan increases from 25% to 50%.
- The share of employers in food and beverage manufacturing with a written HR management plan increases.
- The share of agriculture and food and beverage manufacturing employers with written policies and SOPs increases.

3. Attracting and Retaining Workers, Including Underrepresented Groups

Industry's objectives are to identify the key pillars for the future of work and how the sector will attract and retain employees in 2025, 2030, and 2035; and to increase recruitment and retention of members of underrepresented groups by identifying and addressing barriers to employment

In the Short Term we need to:

- Engage underrepresented groups at the outset of this work.
- Conduct research to inform stakeholders on workforce expectations and what will be needed to retain and attract workers and develop tools and resource content for workers over the next 5–10 years.
- Define ‘underrepresented groups.’

We will know we have been successful when:

- Members of underrepresented groups are contributing to the process.
- The perception of the sector as a place to work, with data broken down by underrepresented groups, is improved.
- The industry turnover rate, with data broken down by employer, is reduced.

Pillar 3: Immigration and Foreign Workers

International workers – through permanent immigration and the Temporary Foreign Worker (TFW) program – play a critical role in Canada’s agriculture and food and beverage manufacturing workforce. These workers make significant contributions to Canada’s food system and are vital contributors to their Canadian communities.

Work on this Strategic Pillar is being undertaken by the Immigration and Foreign Workers Working Group. This Working Group’s SWOT Analysis can be found in Annex C.

Immigration and Foreign Workers Goals and Objectives

Achieving workforce stability requires that, by 2025, Canada has publicly accepted programs to facilitate the entry of foreign workers and new Canadians into Canada’s agriculture and food and beverage manufacturing sectors; and that by 2030, foreign workers are publicly recognized as a valued pillar of Canada’s agricultural and food and beverage manufacturing workforce

We will achieve this by:

- 1. Building understanding and acceptance of the importance of foreign workers*
- 2. Ensuring Canada has seasonal foreign worker programs that facilitate the entry of workers for seasonal jobs and ensure worker protections.*
- 3. Establishing programs that facilitate the entry of foreign workers into Canada to fill year-round jobs.*
- 4. Ensuring supports for workers and increasing employer knowledge.*

1. Public and Government Understanding and Acceptance of Foreign Workers

Industry’s objective is to build understanding and acceptance of the continued importance of foreign workers in the agriculture and food and beverage manufacturing sectors.

In the Short Term, we need to:

- Develop messages and other tools to demonstrate the importance of foreign workers and how employers and programs work together to protect the rights and interests of foreign workers.
- Conduct a public relations campaign to increase the public knowledge and acceptance of foreign workers in the sectors.
- Conduct a collective advocacy campaign to foster consistent messages of the need for foreign workers and worker protection.
- Establish partnerships with worker rights groups.

We will know we have been successful when:

- Polling results show increasing public understanding and acceptance of the role of foreign workers in this sector.
- Media scanning shows an increased presence of positive media stories featuring the role of foreign workers in the agriculture and food and beverage manufacturing sectors.

2. Programs for Seasonal Foreign Workers

Industry's objective is to ensure the continuation of the Seasonal Agricultural Worker Program (SAWP) for primary agriculture and, where SAWP does not apply, to ensure that Canada has seasonal foreign worker programs that facilitate the entry of agriculture and food and beverage manufacturing workers and ensure worker protections.

In the Short Term, we need to:

- In consultation with employer stakeholders, design the ideal agri-food seasonal foreign worker program.
- Determine what steps are required to move to the ideal agri-food seasonal foreign worker program.
- Identify and engage key labour/worker stakeholder groups for input and buy-in.
- Lobby the federal government to implement changes.

We will know we have been successful when:

- Programs have the support of key stakeholder groups.
- Employer satisfaction with seasonal foreign worker program increases.
- Compliance with program requirements is maintained at a high level.
- Processing time for foreign worker applications is dramatically improved.

3. Programs for Year-Round Foreign Workers

Industry's objective is to establish programs that facilitate the entry of foreign workers into Canada to fill year-round agriculture and food and beverage manufacturing jobs and ensure that these programs are supported by immigration streams that provide clear pathways to permanent residency

To accomplish this, we need to:

- In consultation with employer stakeholders, design the ideal program to facilitate the entry of foreign workers for year-round jobs, including pathways to permanent residency/immigration.
- Determine what steps are required to move to the ideal foreign worker program.
- Identify and engage key labour/worker stakeholder groups for input and buy-in.
- Conduct a collective advocacy campaign to encourage the federal government to reform immigration policy.

We will know we have been successful when:

- The number of workers who gain permanent residency status increases.
- The time between application, the entry of foreign workers, and the granting of permanent residency/immigration is dramatically reduced.

4. Worker Experience and Employer Supports

Industry's objective is to implement infrastructure and networks to ensure that foreign workers and new Canadians have the supports they need while in Canada; and to increase employers' knowledge of foreign worker programs, including navigating red tape, regulations, audits, and worker rights.

To accomplish this, we need to:

- Engage immigration settlement agencies and worker support groups to ensure supports for foreign workers and new Canadians for this sector.
- Ensure that government funding programs support partnership-based initiatives between industry and community groups to support these outcomes.
- Build partnerships and tools to provide concierge services to support employers in navigating the foreign worker programs.

We will know we have been successful when:

- Funding to support tripartite partnerships (employer, community, and dedicated worker support groups) is increased.
- Worker satisfaction improves.
- Employer satisfaction improves.

Pillar 4: Skill Development

A strong workforce is a skilled workforce. Canada's agriculture and food and beverage manufacturing sectors need to ensure strong alignment between the skills and competency requirements of the sector and the skills and competencies of employees and job entrants. This in turn requires knowledge of both current and future skills needs, and the ability to translate this into education and training programs through partnerships involving the sector, educators and training organizations.

Work on this Strategic Pillar is being undertaken by the Skill Development Working Group. This Working Group's SWOT Analysis can be found in Annex D.

Skill Development Goals and Objectives

Achieving workforce stability requires that, by 2030, we have developed and adopted a National Skills Strategy that ensures that the agriculture and food beverage manufacturing workforce is appropriately skilled.

We will achieve this by:

- 1. Identifying Skills Needed by Employers*
- 2. Ensuring appropriate training programs exist*

1. Identify Skills Needed by Employers

Industry's objective is to understand, on an on-going basis, the current and future skill needs of the sectors.

In the Short Term, and on-going we need to:

- Conduct research to understand the skills, number, and types of workers required by the sectors.
- Develop a mechanism to report regularly on the sector's skill needs

We will know we have been successful when:

- The register of skills needed to support the sectors is updated annually.

2. Training Programs

Industry's objective is to ensure that training programs exist, and to respond to the sectors' evolving skill needs (including lifelong learning).

In the Short Term, and on-going we need to:

- Ensure that training institutions (e.g., government, post-secondary institutions, private trainers, CAF) have programs to meet the skill needs of the sectors by creating links between industry and education, by developing a coordinated mechanism, such as a symposium, to deliver information on needs.

In the Medium Term, and on-going we need to:

- Develop new ways of training to respond to rapidly evolving skill needs, including foreign credential recognition.
- Implement AGRICarières- training LMS (called CIBLE) for employers and workers, domestic and foreign.

In the Medium to Long-Term, we need to:

- Ensure that training institutions have sufficient funding to support training programs (through advocacy).

We will know we have been successful when:

- The employment rate of recent graduates in the sector increases.
- Employers perceive that graduates' skills are aligned with sector needs.
- Skills gaps, measured through the LMI, are reduced.
- The employment rate of recent post-secondary graduates increases.
- The numbers of highly qualified personnel (HQP) increases.
- The increased investment in post-secondary education is measured by identifying industry research and development (volume and diversity of contracts).

Pillar 5: Automation and Technology

Increasing the adoption of innovation and, longer-term, fostering a culture of innovation will be critical to ensuring the stability and growth of Canada’s agriculture and food and beverage manufacturing sector. Greater adoption of innovation and technology will, however, also have a significant impact on the skills required in the sector. It will also play a key role in mitigating labour shortages in the sector and in enhancing the quality of jobs.

Work on this Strategic Pillar is being undertaken by the Automation and Technology Working Group. This Working Group’s SWOT Analysis can be found in Annex E.

**Automation and Technology
Goal and Objectives**

Achieving workforce stability requires that, by 2030, automation and technology decreases labor demand and increases productivity and competitiveness.

We will achieve this by:

- 1. Increasing adoption of automation and technology across the sectors Ensuring appropriate training programs exist.*
- 2. Ensuring that the workforce has the necessary skills for evolving technology.*

1. Automation and Technology Adoption

Industry’s objective is to increase adoption of automation and technology across both the agriculture and food and beverage manufacturing sectors.

In the Short Term, we need to:

- Identify the barriers to increasing the adoption of automation and technology by reviewing current literature and convening focus groups of thought leaders.
- Develop strategies to overcome barriers, as identified above, to the adoption of automation and technology by convening working groups.
- Determine other actions based on above.

We will know we have been successful when:

- Capital investments are increased.
- Labour productivity is increased.

2. Skill Alignment

Industry’s objective is to ensure that the workforce has the necessary skills for evolving technology.

In the Short Term, and on-going we need to:

- Understand the impact of automation and technology on the skills required and the number and types of workers required, through research.
- Ensure that training institutions (e.g., government, post-secondary institutions, private trainers, CAF) have programs to meet the skill needs of the sectors by creating links between industry and education, by developing a coordinated mechanism to deliver information on needs.

We also need to:

- Build on existing networks between training institutions and industry.
- Develop strategies to connect employers with skilled workers (e.g., work integrated learning, experiential learning).

We will know we have been successful when:

- Employers perceive that graduates' skills are aligned with sector needs.
- Skill gaps, measured through the LMI, are reduced.
- The increased investment in post-secondary education is measured by identifying industry research and development (volume and diversity of contracts).

Annex A - Perceptions and Awareness of Industry and Careers

SWOT Analysis

Strengths

- There is a real buzz around food production by consumers.
- Food safety/ sustainability from the farm to processing is important to consumers, which is reflected in Canada's strict food safety regulations and industry practices.
- Massive diversity in available careers:
 - Interesting high-tech jobs involved in some sectors of the industry.
 - The many possibilities and careers/jobs available in agriculture.
 - Job stability - there is not a lot of job loss in the industry.
 - Lots of opportunity for advancement – interprovincial/ national/global.
- There is real strength in the ability to adopt technology, and the ability to promote jobs related to adoption of technology.
- Pay is comparable to or better than competing Industries.
- When the agriculture sector is profitable (currently) progress is made. People's willingness to work together to improve perception is evident.
- Young people want to be part of something bigger, have meaningful employment, which food production can provide.
- While perceptions of the industry may not be great, they are not as bad as some competing industries.

Weaknesses

- People's perception of the industry and lack of knowledge of the industry result in them having trouble connecting with the term "agriculture" (i.e. still have images of the pitchfork couple) or having awareness of the diversity of careers available.
- There is a lack of familiarity with education opportunities.
 - Education training colleges need to promote opportunities in the workforce.
 - Industry must acknowledge the importance of skilled trades.
 - Food careers are not currently widely promoted to the younger generations.
- Significant vacancies in entry level positions paying under \$20/hr, which are challenging to fill.
- There is a lack of awareness of opportunities for high wage careers by some new Canadians that have agricultural backgrounds and look for high wage careers upon arrival for themselves and for future careers for their children.
- Entering primary agriculture sector as an owner-operator/employer/producer requires large capital investments.
- New Canadians/ 1st generation producers lack support to enter the industry.
- Rural infrastructure (i.e. lack of access to high-speed internet) and housing impact ability to attract workforce. The majority of the agriculture industry is in rural Canada.
- Most opportunities do not seem attractive to younger people – no draw to the industry.
- Lack of openness to diversify food production to meet changing consumer demands.
- Connection between non-Indigenous food production and Indigenous communities, including awareness of opportunities for Indigenous people for career opportunities in the industry.
- International students come hoping to be managers, but in Canada you work up the chain:
 - Companies sometimes try to get a worker to work on the floor for a bit to understand the processes, even if they work in an office and those people turn down the job.

- Perception that government programs direct job seekers to office and traditionally perceived 'high-skilled' work.
- Rural location of most agriculture production and some food and beverage manufacturers reduces awareness of job opportunities to urban population. Although food and beverage manufacturers can move their plants closer to urban settings, they face a lot of municipal regulations and costs to do so.
- Regulations must be amended to allow 1st generation producers to be successful.

Opportunities

- Agriculture is conscious of the environmental impact (climate change) on the land and aware of the importance of accessing clean water and a healthy environment. Extend the knowledge on climate change and the work on-going in agriculture to mitigate the effects.
- Net zero targets of other companies can be met by working with agriculture.
- Acknowledge equity, diversity, inclusivity and belonging in the sector.
- Indigenous agriculture sector is growing, and Indigenous people are finding their way back to food production.
- Farm to Plate is popular and consumer continue to incorporate food production into their lives:
 - As the demographics of Canada changes, so does the plate.
 - Canada is an opportunity to expand our food production.
 - Agriculture has additional palettes to satisfy.
- Increase promotion to the younger generations as early as elementary school.
 - Increase awareness of STEM careers in the industry, promoting the cool, innovative technology used.
 - Increase accurate perception of the industry as 91% of Canadians know little or nothing about agriculture/food production but 60% are interested in learning more. Source: CCFI.
- Promote the tremendous opportunity to grow within an organization.
- Government can do a better job to promote the industry and highlighting the modernization of the industry (tech, climate change).
- Industry can increase understanding of how people are getting introduced to the sector, what was their journey.
- Highlighting the importance of foreign workers for the industry and their contribution to the sector.

Threats

- Government understands the importance of STEM careers but does not associate AgTech as a priority. As workforce continues to shrink, agriculture need to be able capture more of the labor market, otherwise, we continue down this path.
- International worker programs are always at risk and what may be good for one group may not work for another.
- Negative incidents involving employers of foreign workers can tarnish the perception of all agriculture employers. Misinformation on animal agriculture / non-meat alternatives and how food is produced, social media and the internet. Information circulating online is often from the United States, where regulations are not as strict as Canada.
- Pressure from some consumers for non-meat alternative to animal agriculture.
- When hiring for roles, job descriptions tend to have the line "agricultural background is preferred" deterring potential job applicants without this specific experience, but perhaps transferrable skills and experience, from applying.
- Reality of the sector, staple commodity, cannot just increase price to accommodate wages.
- Facilities are located in one place – can restrict the access to the labor market.

- Perceived disconnect between skills available in rural Canada and the future skills needed to support automation, which could negatively affect businesses and rural communities.

Annex B - People and Workplace Culture SWOT Analysis

Strengths

- Family-centric business model of many agriculture operations / SMEs. Many operations are multigenerational and pass on the values and the passion for making food for people.
- There are Best Management Practices currently in place and tools available to SMEs. Larger enterprises have the ability to hire staff to facilitate tools in house.
- Agriculture and food and beverage manufacturing have many career paths and opportunities for advancement.
- Potential employees have the ability to enter with very little external training and leverage on-the-job training.
- Canadian agriculture and food and beverage manufacturing have a reputation for excellence among global trade partners:
 - Canada is seen to have high standards for food production, transparency and regulation.

Weaknesses

- Industry is in constant crisis mode and there still has not been time to assess the impact from COVID on the sector and its employers.
- Employers struggle with a reduced workforce, more responsibility, more regulatory changes.
- Lack of time to be proactive and plan long-term for the sector - 3, 5, 10yrs.
- Rural services and amenities can be limited, challenging talent attraction and retention.
- Diversity is limited in certain subsectors of primary agriculture.
- Life - Work Balance is important to the next generation of the workforce. The sector must become a more dynamic/flexible environment to keep employees engaged.
- Automation may not reduce workforce needs but result in a reallocation of workers across new, higher paying jobs requiring different skill sets than current workforce.
- Limited expertise in adjusting HR practices- posting jobs, conducting interviews, properly articulating business culture.
- Governments lack understanding of critical labour constraints.
 - E.g. Accessing larger workforce - Cannot move plants into city limits.

Opportunities

- Continue to develop domestic recognition of Canadian agriculture and food manufacturing, learning from successful / recognition programs in other jurisdictions.
- Labour pressures may be resolved through plant closures and job elimination. Creating a shared workforce at peak times between plants would reduce the labor gap and maintain productivity.
- Introduce processes to increase more efficient farming such as cluster cropping (processor next to farm operations) and involve educators to support further research and innovation. The Netherlands is recognized as an example to learn from in this approach.
- Must amplify the success stories of immigration within the agri-food industry.

- Support future industry plans, ensuring companies remain competitive by establishing regulations that allow for a more competitive environment.
- Capitalize on funding of tech industry and interest from venture capital organizations to invest in AgTech.
- Consumers are more aware of food systems and curious about from where their food comes. Highlight best practices that are important to today's consumer (i.e. using recycled products for packaging) to increase their understanding and perception of the industry.
- Due to COVID we have learned to accept change – now is the time to implement new practices including reformatting tasks to work differently and continue to support remote work/flexibility where possible. Job-hopping is a reality – create an environment where the next generation wants to stay.

Threats

- Chronic labour shortage across Canada has made it even more important that industry understands their current and future workforce.

Annex C - Immigration and Temporary Foreign Working SWOT Analysis

Strengths

- Communities are welcoming to newcomers.
- Some foreign worker streams work well such as Manitoba's provincial nominee process.
- Annual, collaborative review of SAWP has helped improved the program over time and presents a model for other streams to emulate.
- COVID showed the importance of temporary foreign workers in our industry.

Weaknesses

- Application Process:
 - Overly complex application process – inaccessible to employers without HR resources/time.
 - Not aligned with food production cycle timelines.
 - Inconsistencies in application of rules, including different processing times by stream, country of origin, Canadian province.
 - Lack of transparency regarding where applications are in the process.
 - Lack of coordination between government departments and orders of government.
- Housing:
 - Lack of available housing and difficulties finding workers homes during a housing crisis.
 - Impacts of housing deduction caps on employers, particularly those looking to transition workers to permanent residency.
- Wages:
 - TFWP wage rates do not accurately depict regional labour market realities, creating inequities and tensions between TFWs and Canadian workers that challenge transitioning workers to permanent residency.
 - TFWP rules constrain employers' ability to pay TFWs higher wages due to experience and performance, limiting opportunities for their career advancement in the process.
- Program parameters:
 - Fundamental need for other provincial nominee programs that are responsive to employers.
 - Lack of flexibility to allow for labour mobility within companies.
 - Current cap on food processing sector for TFW employment is 30%. To be able to grow the business more foreign workers are required. Increasing the cap to 50% would be a significant improvement.
 - Language Standards are different among provinces.
 - Suggestions that Recognized Employer Program will require a payment – should not be perceived as a “pay to play” model.

Opportunities

- Recognized Employer Program could address some concerns with program parameters.
- Develop stories that show case the importance of workers to food production, and importance of jobs to support their families and futures.

- Build understanding amongst Canadians about the value temporary foreign workers bring to the employer, country, and the worker themselves.
- Automate the LMIA application process to enable uploading and sending all necessary associated documentation.
- Provide consistent messaging to:
 - Employers seeking workers about rules, regulations, obligations and processing.
 - Provide the public information as to why the industry relies on foreign labor.
- TFW inspection rates are around 100% at this moment. A risk-based approach to inspection could optimize use of resources, increase focus on “bad actors”, and eliminate stress for employers who are compliant with program.

Threats

- Not clear on whether the government (departments and political) is/is not supportive of the T+FW program.
- Lack of coordination across orders of government.
- Inability to access workers in a timely fashion results in the destruction/loss of agriculture products and reduction in overall production outputs across the value chain.
- No effective enforcement of legislation or penalization for those who break the rules.

Annex D - Skill Development SWOT Analysis

Strengths

- Skills mapping tools exist (CAHRC and FPSC) that can be developed and expanded.
- Quebec has implemented training materials (Agricarières) that may be available to apply outside the province.

Weaknesses

- Lack of awareness of opportunities in the industry and difficulty getting information out to students (and people) efficiently, in an easy-to-understand way, that generates interest. Industry needs to convey realistic opportunities of what agriculture and food processing jobs are like beyond meat processing or long hours/weekend work.
- Current training available may not be meeting the need for what will be required next year, two years, five years, ten years in the future.
- Sometimes post-secondary students lock into primary agriculture and do not consider food processing either due to lack of knowledge of the sector or perception of the industry.

Opportunities

- There is a growing interest in the skills space:
 - There are many players in the space and a lot of opportunity to collaborate.
 - Interest across the different levels of government to support skills development.
 - The private sector is interested in this and is already coming together on their own.
- More Work Integrated Learning (WIL) / micro-credential opportunities.
- Integrating a validation method into university training programs will allow for more effective training. Build programs in a way that allows them to be easily adaptable to shifts in the industry.
- Recognition of skills and knowledge that immigrants, new Canadians, and Indigenous people have in agriculture and food and beverage manufacturing.
- Increased inclusion of women and visible minorities to grow participation in skilled trades and other occupations in agriculture and food and beverage manufacturing.

Threats

- Low enrollment rates result in cancellation of programs/courses.
- There is no consistency across the country in education on agriculture and food production. Education is often controlled at a provincial or municipal level and therefore varies widely.
- Automation does not solve the labour issue, as we still do not have the workers to service the machinery.
- Competition for labour between provinces and industries for skilled workers is increasing.
- Inter-Provincial labour mobility difficulties.

Annex E - Automation and Technology SWOT Analysis

Strengths

- New graduates have had access to technologies their whole lives and enter the workforce ready with technology-based skills.
- Companies who are adopting technological solutions are seeing huge gains in operational efficiency.
- A real appetite in agriculture and food production for automation and tech solutions.
- There is innovation happening all over Canada and many wonderful new technologies are being developed each year.

Weaknesses

- Employers have indicated they are not looking Canada-wide for technology solutions, but instead looking within their province and then internationally.
- The majority of manufacturers and equipment suppliers are currently located outside of Canada increasing purchase, implementation and service costs and leading to delays in service that cause downtime.
- Lack of awareness by students of the role technology plays in many jobs in agriculture, food and beverage manufacturing, resulting also in a lack of interest to work in the industry.
- Capital investment - the amount of time it can take to get equipment delivered, as well as up and operational can be significant.
- Investors are looking for quick gains and need to be educated about the payout if they can provide patient capital.
- Infrastructure including:
 - Lack of internet in rural areas.
 - Lack of access to affordable housing.
 - Lack of access to public transportation.

Opportunities

- Skills and reskilling of workers to support technology adoption/advancement.
- Automation may help alleviate some of the strain from the significant labour gap in agriculture and food production.
- Increased industry-educator partnership to help inform curriculum development, involve students in research (e.g. genome sequencing, or creating technology solutions).
- Technology companies within Canada have often not thought of the agriculture or food industries when it comes to investing and innovating. There is growing interest in this space now because the technology is available to make the AgTech and food tech industry more profitable for venture capitalists.
- Automation and technology in food and agriculture can reduce food waste and help food security.
- New businesses entering the food industry are the ideal adopters of automation and technology because they do not have other investments to depreciate.

Threats

- Adding automation or technology does not always mean you are replacing jobs, but it does have an impact on the skills required by workers.
- There has been a lag when it comes to tech adoption, particularly in food processing because many solutions require a complete change over to new technology.
- Reliance on imported equipment and manufacturers/suppliers located outside of Canada.
- Access to capital is an issue for companies in a growth mode or wanting to introduce new technology.