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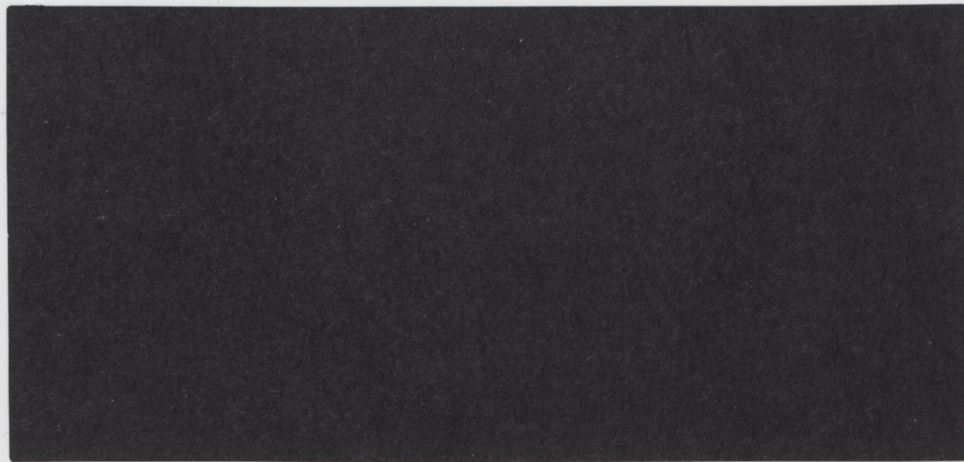


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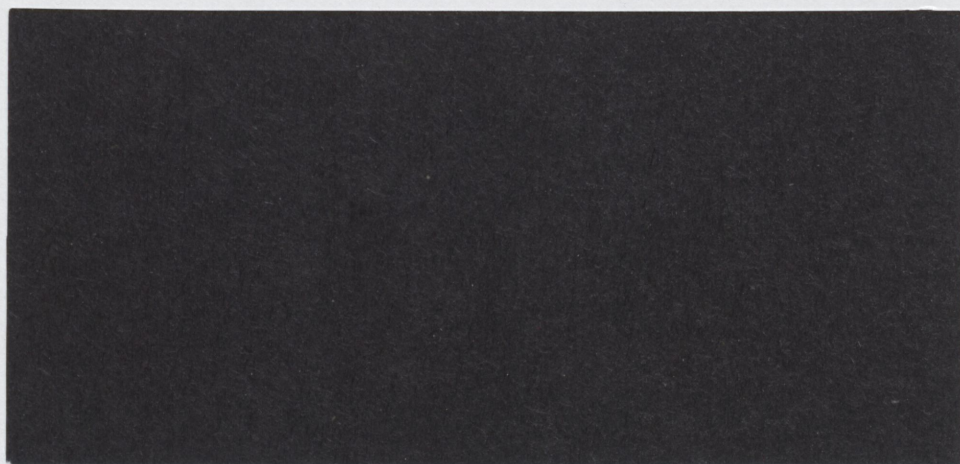
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September 1997

**A PROFILE OF EMPLOYMENT
IN THE AGRI-FOOD SECTOR**

Working Paper No. 1-97

by

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Vous pourriez également obtenir un exemplaire du rapport en français intitulé :
«Un profil de l'emploi dans le secteur agroalimentaire».

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EXECUTIVE SUMMARY

The information provided in this report is derived from a special tabulation of the Labour Force Survey (LFS). As with all surveys, the LFS provides an imperfect data set whose limitations must be recognized and respected. The LFS was used as the main source of information in this report because it permits fair inter-sector and intra-sector comparisons of employment patterns.

According to the LFS, the agri-food sector employs 1.8 million people and accounts for 13.5% of total employment in Canada. The food services sub-sector is the largest employer in agri-food, accounting for 35% of total sector employment. In 1995, employment levels in agri-food sub-sectors totalled:

Agri-food Sub-sector	1995 Employment	% Sector Employment
Food Services	646,000	(35%)
Agriculture	431,000	(24%)
Food Retail	411,000	(22%)
Food, Beverage & Tobacco Processing	232,000	(13%)
Food Wholesale	109,000	(6%)

Since 1984, employment in the agri-food sector has grown by 261,000. The strongest net employment growth was recorded in the food services (214,000), food retail (80,000), and food wholesale (21,000) sub-sectors. Employment in the agri-food processing sub-sector (food, beverage and tobacco processing excluding fish processing) was only slightly greater in 1995 than in 1984 while the agriculture sub-sector employed 60,000 fewer people in 1995.

A majority of the decline in agriculture employment took place between 1984 and 1990, when employment in the sub-sector fell by 50,000. Employment levels in agriculture have fluctuated since then but still registered a further net decline of 10,000 between 1990 and 1995. Employment in the other agri-food sub-sectors on the other hand, either registered little change in employment levels or recorded net employment gains during the period between 1984 and 1995. Even during the recession, employment in most agri-food sectors registered little change. The only sub-sector to experience a significant decline in employment between 1990 and 1992 was the food wholesale sub-sector which registered a net decline of 7,000 over the period. Food services on the other hand, registered a net gain of 15,000 in employment from 1990 to 1992.

Between 1992 and 1995, employment grew faster in food services and food wholesale than in any other agri-food sub-sector, each growing at a rate of 3% per year during this period and registering an employment gain of 43,000 and 9,000, respectively.

Employment growth in the agri-food sector was split equally between full time and part time positions. From 1984 to 1995, full time employment in agri-food increased by 131,000 while part time employment in the sector increased by 130,000. In the food services sector, where 41% of employment is part time, full time employment increased by 118,000 while part time employment grew by 96,000.

Across Canada agri-food is an important employer, accounting for no less than 10% of employment in each province. In Saskatchewan, agri-food employment totalled nearly 115,000 in 1995, accounting for 25% of provincial employment. In Ontario and Quebec, where a majority of Canada's population resides, the agri-food sector provided jobs for nearly 13% of employed individuals in each province. Even in Newfoundland, where agri-food sector employment was of least importance, agri-food still provided for 10% of employment. These factors underscore the importance of the sector in all provinces of Canada.

The agri-food sector is also an important supplier of employment to Canada's youth. In 1995, the sector employed 559,000 young Canadians (age 15-24), accounting for 27% of total youth employment, second only to the service sector (excluding food services). Fifty-four percent of these youth were employed in food services (mainly as servers and kitchen help). Youth make up around 45% of total employment in food services. In agriculture, on the other hand, youth make up only 15% of total employment, including unpaid family labour. Canadians over the age of 55 make up a large proportion of those employed in agriculture, accounting for 28% of employment in the sub-sector. This proportion is greater than the national average, where Canadians age 55 and over make up only 9% of employment.

Women made up the majority of those employed in food services and food retail, accounting for 57% and 52% of employment in each sub-sector. Men on the other hand made up close to 70% of employment in each of the agriculture, agri-food processing (food, beverage and tobacco processing excluding fish processing) and food wholesale trade sub-sectors.

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INTRODUCTION

The Canadian Labour Market has changed significantly over the past decade. Globalization and the factors that have facilitated the growth of the global marketplace (eg., technological change, the reduction of barriers to international trade and investment, etc.) have led to fundamental structural changes in the Canadian economy. This reshaping of the economy, coupled with the 1990/91 recession and the period of slow economic growth which ensued and lasted well into 1992, have resulted in a new and increasingly competitive job market.

In the private sector, industry has been going through a process of restructuring to improve its competitive position in the global marketplace. In the public sector, governments have been cutting spending in an effort to reduce deficits that have led to unmanageable debt loads. The result has been layoffs in both sectors.

Today, employers are attempting to increase their flexibility and reduce costs by better utilizing part time, contract and other forms of temporary labour. This has led many Canadians to turn to "non-standard" employment as a means of earning a living. Part time employment, contract and temporary work arrangements, and the incidence of multiple job holders are all on the rise in Canada.

A better understanding of these patterns is necessary to interpret their impacts on the jobs of the future, including employment in the agri-food sector.

PURPOSE OF THE STUDY

An inter-branch working group has been established to study employment trends in Canada's agri-food sector and to resolve issues concerning inconsistent and sometimes contradictory information on employment levels being reported within agri-food. This paper represents phase one of the study. The paper does not attempt to analyse trends in agri-food employment. Its purpose, instead, is to provide baseline information on employment in the agri-food sector and its sub-sectors, information that will be used as a basis for future analysis.

Subsequent phases will examine the underlying factors that have led to the occurrence of employment patterns observed in phase one and establish where future growth opportunities in the sector may be. Future work will include: shifts in employment patterns, growth in hired farm labour, underlying shifts in employment in agri-food processing, changes in skill requirements and the relative role of women in part time employment, among others.

In phase one, employment patterns are identified across regions, by age, by gender, by full time/part time employment and compared across different sectors of the economy and sub-sectors of the agri-food sector.

The paper is organized into seven major sections. The first focuses on general employment patterns in Canada; the second compares employment patterns across sectors; the third describes employment patterns in the agri-food sector; the fourth looks at full time and part time employment patterns; the fifth explores employment patterns by province; the sixth describes employment patterns by age cohort; and the final section examines differences in employment patterns by gender.

Within each section, employment patterns are examined through the course of three periods, each defined by the characteristics which describe the Canadian economy during that period. The first period covers 1984 to 1990 and is characterized by economic growth and expansion. The second period is characterized by recession and slow economic growth, beginning in 1990 and continuing well into 1992. The third period, between 1992 and 1995, covers the recovery from the recession which began to take hold as the Canadian economy strengthened.

Two appendices follow the main body of the paper. Appendix I contains the tables referenced in this paper, while Appendix II describes the differences in data obtained from the Labour Force Survey and other sources of employment information for the agri-food processing sub-sector.

THE DATA

The main source of data used in this profile is the Labour Force Survey (LFS). The LFS is a household survey with a sample base of approximately 56,000 Canadian households. It is conducted by Statistics Canada on a monthly basis, and is used regularly by the Department of Human Resources Development and Statistics Canada to report on national trends in the labour force, including employment and unemployment levels.

Within the LFS, employed individuals are defined as those who, during the reference week, did any work at all or had a job but were not at work due to illness or disability, personal or family responsibilities, bad weather, vacation, etc. LFS employment figures refer to paid labour, self-employment and unpaid family labour (important in agriculture) and include both full time and part time employment. In addition, the LFS provides information on main and secondary occupations. In this study employment only includes main occupations.

As with all data sources, the LFS does have some shortcomings, especially when used to analyse employment in a specific sub-sector. The LFS is designed to provide information on employment in broad sectors of the Canadian economy. Consequently, information derived from the LFS may provide employment patterns in individual agri-food sub-sectors that may differ from those obtained from other, more sector-specific data sources.

Establishment-based surveys, which target the employers as survey respondents (eg., the Annual Survey of Manufactures and the Survey of Employment, Payroll and Hours), can provide a different and sometimes more accurate picture of employment in agri-food sub-

sectors. Comparison of 1994 employment numbers for the agri-food processing sub-sector (food, beverage and tobacco processing excluding fish processing) stresses such differences. The LFS reported employment in agri-food processing to be 224,000 in 1994, while the Annual Survey of Manufactures and the Survey of Employment, Payroll and Hours reported employment in the sub-sector to be 201,300 and 192,300, respectively.

Though these establishment-based surveys are in some cases more accurate than the LFS, they do not provide the range of information necessary to produce an overview of the entire agri-food sector (as it is defined in this profile). The LFS was chosen as the premiere data source for this paper because it is a well defined survey which provides long term data for all components of the agri-food sector. It also allows for comparisons with employment levels in other sectors and the Canadian economy as a whole; provides information on unpaid labour and proprietor labour, two components that are prevalent in the agri-food sector; and includes information on full time and part time employment.

The LFS does not, however, distinguish between part time and full time labour and therefore, employment numbers derived from the LFS do not reflect the differences in the number of hours worked within full time and part time positions. This may mask underlying shifts in the structure of employment within sectors and sub-sectors. In sectors characterized by high levels of part time employment, such as in food services, food retail and agriculture, an analysis of the total number of hours worked may show a different trend in employment than a count of the number of employed. Though employment hours are not contained in this report, it is important to weigh this fact when interpreting the information provided. Future analysis will investigate discrepancies between employment trends and the number of working hours in the agri-food sector, as reported by the LFS.

It is important to acknowledge that there are other sources for much of the information contained in this document and to consider these sources when exploring employment in the agri-food sector in more detail.

DEFINITIONS

I. The Agri-food Sector

For the purposes of this paper the agri-food sector is defined as including:

<i>Agriculture:</i>	includes employment in agricultural industries and services incidental to agriculture (except in the age cohort analysis where agriculture excludes employment in incidental services).
<i>Agri-food Processing:</i>	food industries, beverage industries and tobacco product industries.
<i>Food Wholesale:</i>	grain elevator industry, wholesale farm products (grain, livestock, etc.), food wholesale, beverages wholesale, tobacco products wholesale.
<i>Food Retail:</i>	food, liquor, wine, and beer stores.
<i>Food Services:</i>	food service, taverns, bars and night clubs.

II. Employment/unemployment related definitions

In analysing employment trends, terms such as working age population, labour force, the labour force participation rate and unemployment rate are used to describe employment conditions in Canada. Definitions for these terms are as follows:

Working Age Population: the number of Canadians age 15 and over, or those Canadians considered eligible for employment.

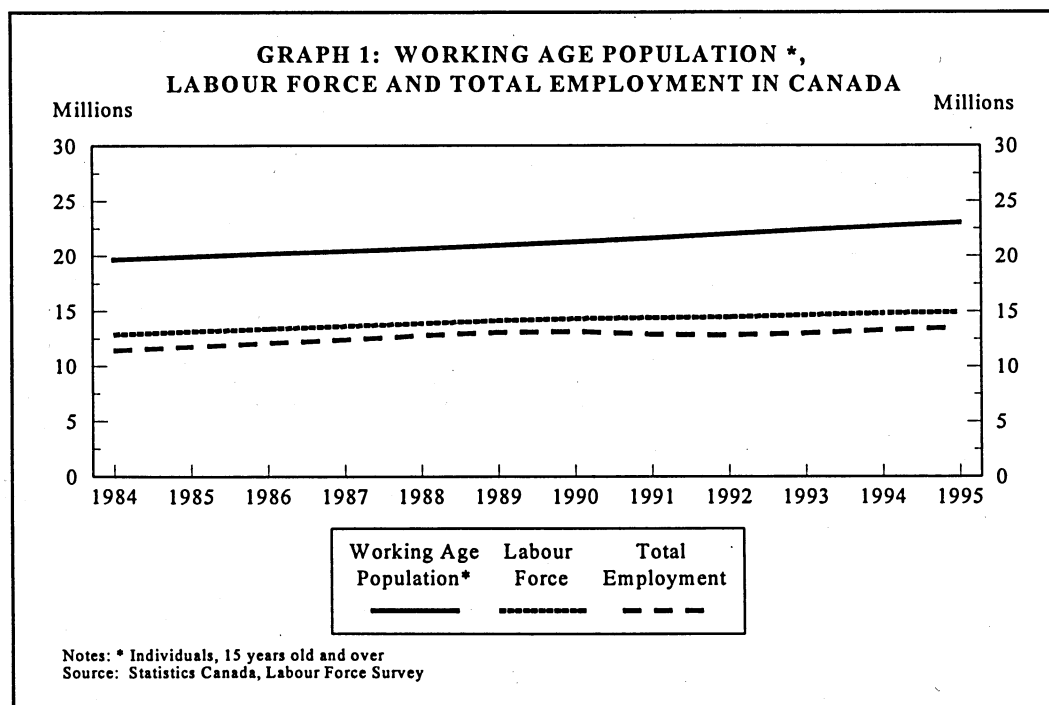
Labour Force: the number of Canadians who are either employed or unemployed, but actively searching for a job.

Labour Force Participation Rate: the proportion of the working age population that is part of the labour force.

The Unemployment Rate: the number of Canadians who are not employed but are actively searching for a job, expressed as a percent of the labour force.

I. EMPLOYMENT IN CANADA

Over the past decade, the Canadian working age population has steadily increased by more than 17% (Graph 1). During this same period, the labour force grew by 16%, from 12.9 million in 1984 to 14.9 million in 1995.



From 1984 to 1990, employment grew from 11.4 million to a peak of 13.2 million and unemployment declined from nearly 1.5 million to 1.2 million. As a result the unemployment rate fell from 11.3% to 8.1% (Table 1).

The 1990's began with a recession which lasted from the winter of 1990 to the end of 1991. During this period, employment declined to 12.9 million and the unemployment rate rose to 10.4%, leaving 1.5 million Canadians without a job by the end of 1991. The end of the recession was marked by a period of minimal economic growth which lasted well into 1992. By the end of 1992, employment had declined to 12.8 million and unemployment grew to 1.6 million.

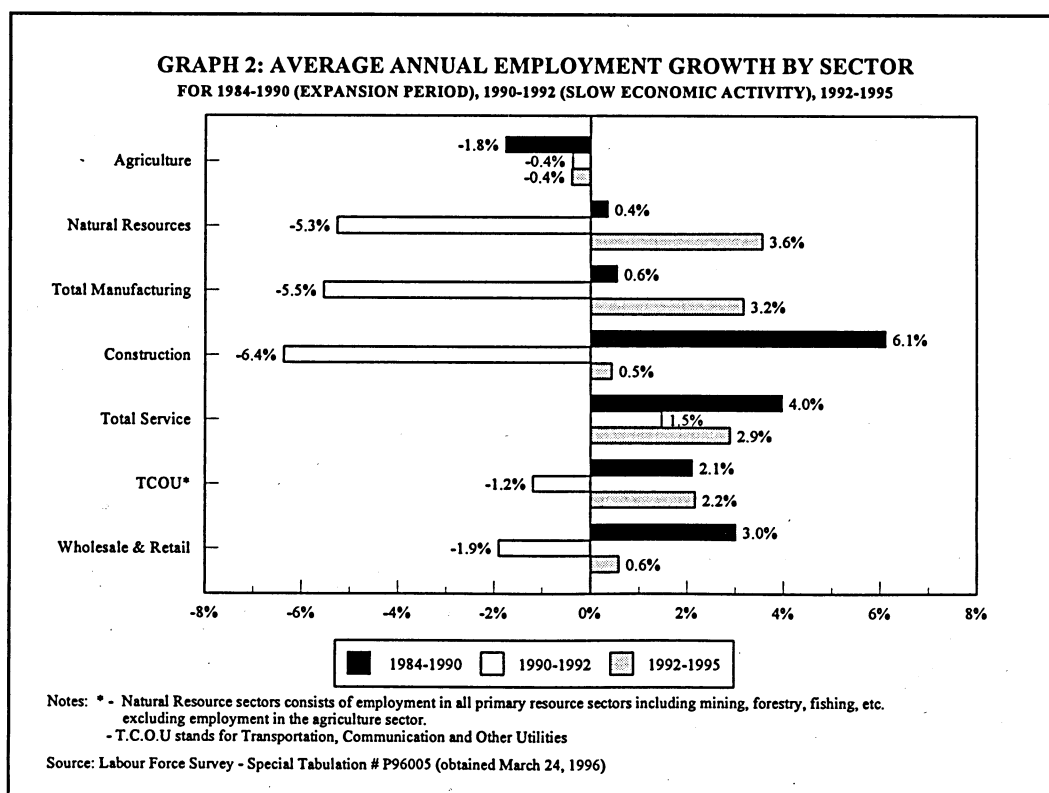
In 1993, the economy began to improve as the recovery from the recession began to take hold. Employment grew at an average annual rate of 1.7% after 1992, reaching 13.5 million and exceeding pre-recession levels by 1995. Unemployment rose slightly in 1993, but declined to 1.4 million by 1995. Though the rate of decline in unemployment following 1992 exceeded that of the pre-recessionary period, the number of Canadians searching for employment remained 33% higher in 1995 than it had been in 1989.

The unemployment rate also declined between 1992 and 1995. This decline was a product not only of falling unemployment levels and increased employment, but also of a declining labour force participation rate. While the labour force consistently grew since 1990, it did not grow as fast as the working age population. Many left the labour force discouraged by poor employment prospects. As a result the labour force participation rate dropped from 67.3% in 1990 to 64.8% in 1995. Had the growth in the labour force kept pace with the increase in the working age population and employment remained at its present level, the unemployment rate would have been higher than it currently is.

II. CANADIAN EMPLOYMENT BY SECTOR

i. Employment Trends between 1984 and 1990

From 1984 to 1990, employment in all sectors grew with the exception of agriculture (Graph 2). The service sector (including food services) supplied the largest number of jobs to Canadians and grew as a proportion of total employment, increasing from 31% in 1984 to 34% in 1990. The annual growth rate of the service sector was the second highest for this period, growing at a rate of 4% per annum. By 1990, 4.5 million Canadians were working in the service sector (Table 2).



The second largest supplier of jobs in 1990 was the wholesale and retail sector (including food wholesale and food retail) which provided employment to 2.4 million Canadians by

1990, 17.9% of total employment. Average annual employment growth in this sector was 3% between 1984 and 1990, the third fastest behind the service and construction sectors.

The manufacturing sector (including food, beverage and tobacco processing) accounted for 16% of total employment by 1990, down from 18% in 1984. Though employment in manufacturing fluctuated during this period, the sector still registered a net employment gain of 64,000 from 1984 to 1990.

At 6.1% per annum, construction proved to have the highest average annual growth rate during this period. By 1990, it accounted for 6% of total employment. Other natural resource sectors (excluding agriculture) had the slowest annual growth rate at an average of only 0.4% per year, accounting for 2.3% of total employment in 1990.

ii. Employment Trends between 1990 and 1992

During the recession and period of slow economic growth which ensued, employment in all sectors declined with the exception of the service sector, where employment grew by 134,000 (Graph 2). By 1992, the service sector provided 4.6 million Canadians with employment and accounted for 36% of all jobs.

The manufacturing sector experienced the second largest decline in employment during this period, falling an average of 5.5% per annum, from 2.1 million to 1.9 million by 1992. The only sector to experience a greater rate of decline in employment was the construction sector, where employment fell at a rate of 6.4% per annum during this period. Employment in other natural resource sectors also declined quickly from 1990 to 1992, falling at an average annual rate of 5.3%. Employment in the wholesale and retail sector fell at an average rate of 1.9% per annum during this period. By 1992, the wholesale and retail sector employed 2.4 million Canadians and accounted for 18% of total employment.

iii. Employment Trends between 1992 and 1995

Employment in most sectors of the Canadian economy grew between 1992 and 1995 (Graph 2). In the manufacturing sector, employment grew at an average rate of 3.2% per annum, second only to natural resource sectors other than agriculture. By 1995, the manufacturing sector employed more than two million Canadians and accounted for 15% of employment. Natural resource sectors other than agriculture grew at a rate of 3.6% per annum during this period, reaching 296,000 by 1995, near pre-recessionary levels.

Employment in the service sector grew at an annual rate of 2.9% from 1992 to 1995, employing more than five million Canadians by the end of the period and accounting for 37% of total employment, more than any other sector (Table 2). Although the wholesale and retail sectors had the second slowest rate of growth in employment during this time (next to construction), an average of 0.6% per annum, they continued to be the second largest suppliers of jobs in Canada, supplying jobs for 2.3 million Canadians by 1995.

iv. Employment Trends between 1984 and 1995

Though there were annual fluctuations in most sectors, employment levels were generally higher in 1995 than they were in 1984 across all sectors. The service sector proved to be the only sector to experience consistent growth in employment between 1984 and 1995.

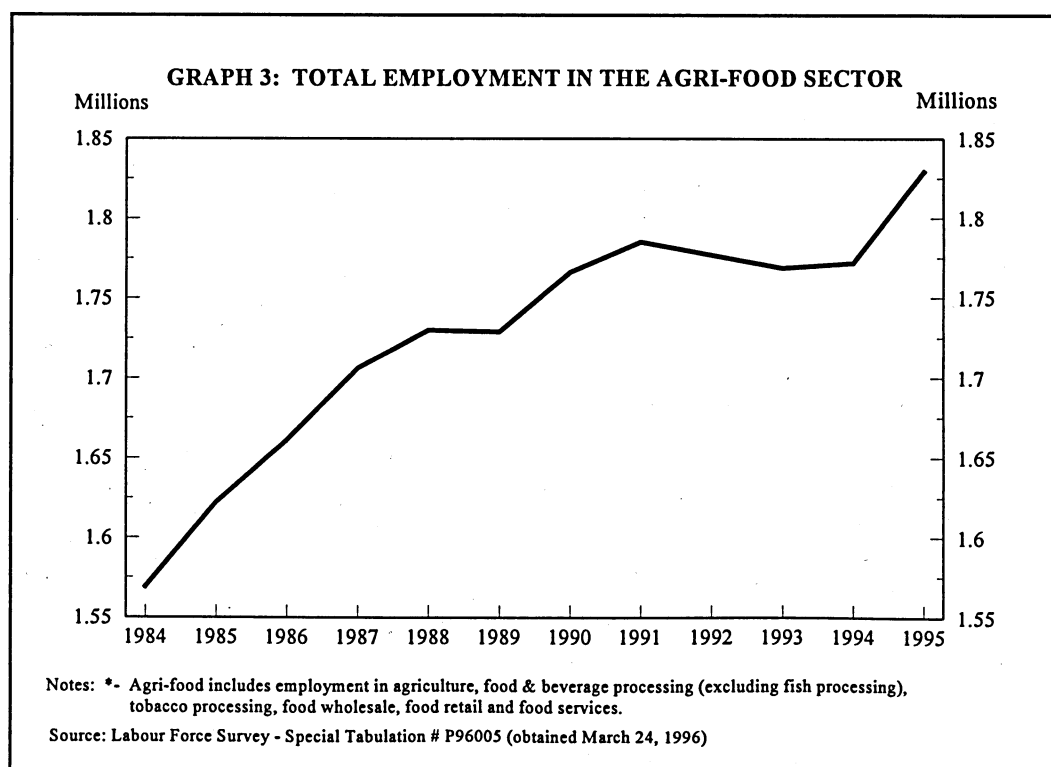
Agriculture was the only exception. Employment levels in agriculture declined by 60,000 over the entire period between 1984 and 1995. This is consistent with the decline in the number of farms which fell by 18,134 from 1986 to 1996 according to the Census Agriculture.

III. EMPLOYMENT IN THE AGRI-FOOD SECTOR

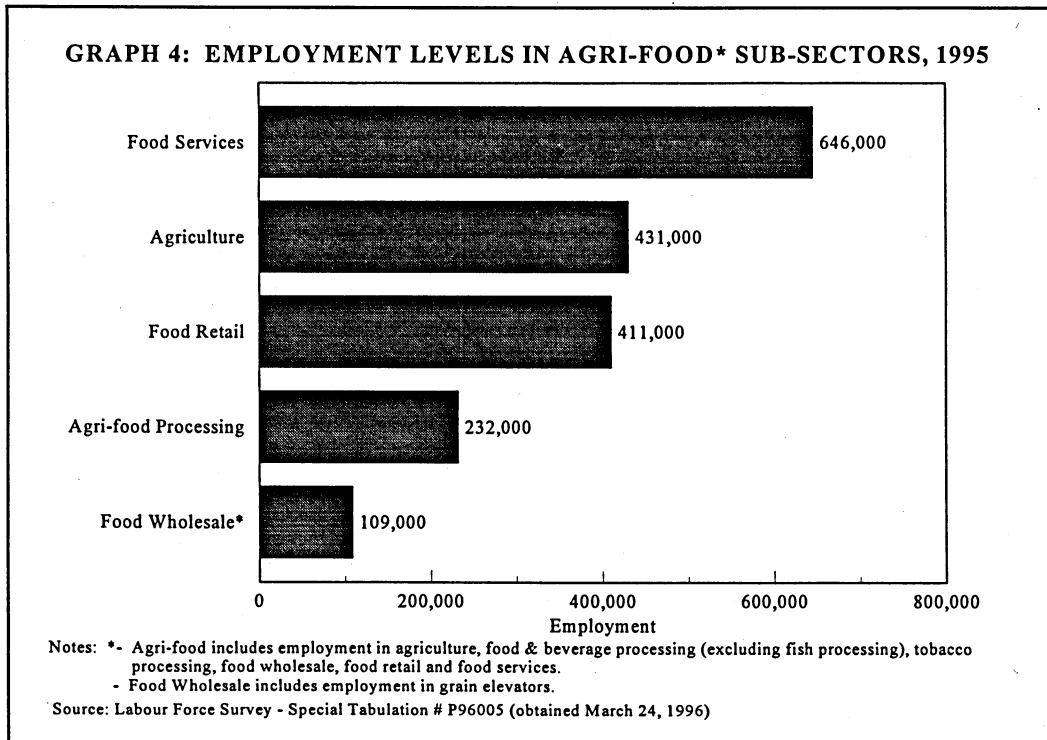
i. Agri-food Sector Employment

The agri-food sector is composed of five sub-sectors: agriculture, agri-food processing (food, beverage and tobacco processing), food wholesale, food retail, and food services (Table 3).

Employment in the agri-food sector as an aggregate (excluding fish processing) has grown since 1984, totalling over 1.8 million and accounting for 13.5% of total employment in 1995 (Graph 3).

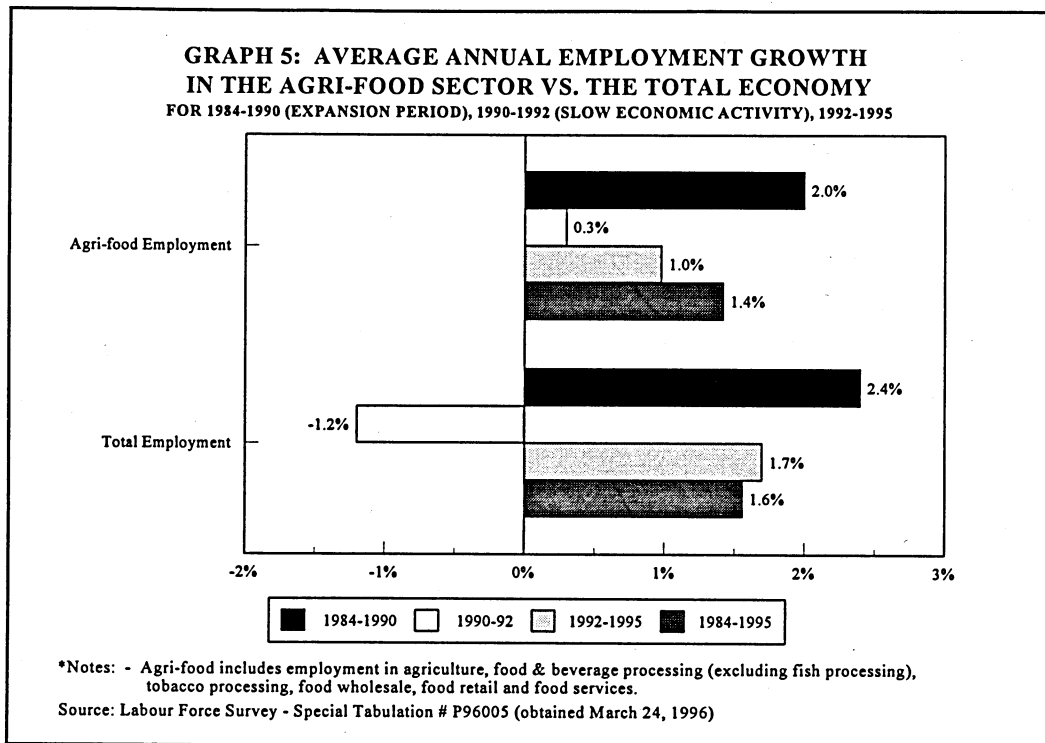


Food services is the largest employer in the agri-food sector, accounting for 35% of total sector employment in 1995 (Graph 4). Agriculture is the second largest supplier of jobs in the sector, providing for 24% of total agri-food employment.



Food retail employed slightly fewer Canadians than agriculture, accounting for 22% of sector employment. Agri-food processing (excluding fish processing) employed 13% of total sector employment, while food wholesale provided the least employment in the sector, accounting for 6% of agri-food employment in 1995.

From 1984 to 1990, employment in the agri-food sector grew at an average annual rate of 2.0%, slightly slower than the 2.4% annual growth rate for total employment in Canada (Graph 5). Employment in the sector grew from 1.6 million in 1984 to 1.8 million in 1990, accounting for around 13% of total employment. Employment in other sectors of the economy also grew during this period. In services excluding food services, employment growth out-paced all other sectors from 1984 to 1990 (Table 4).



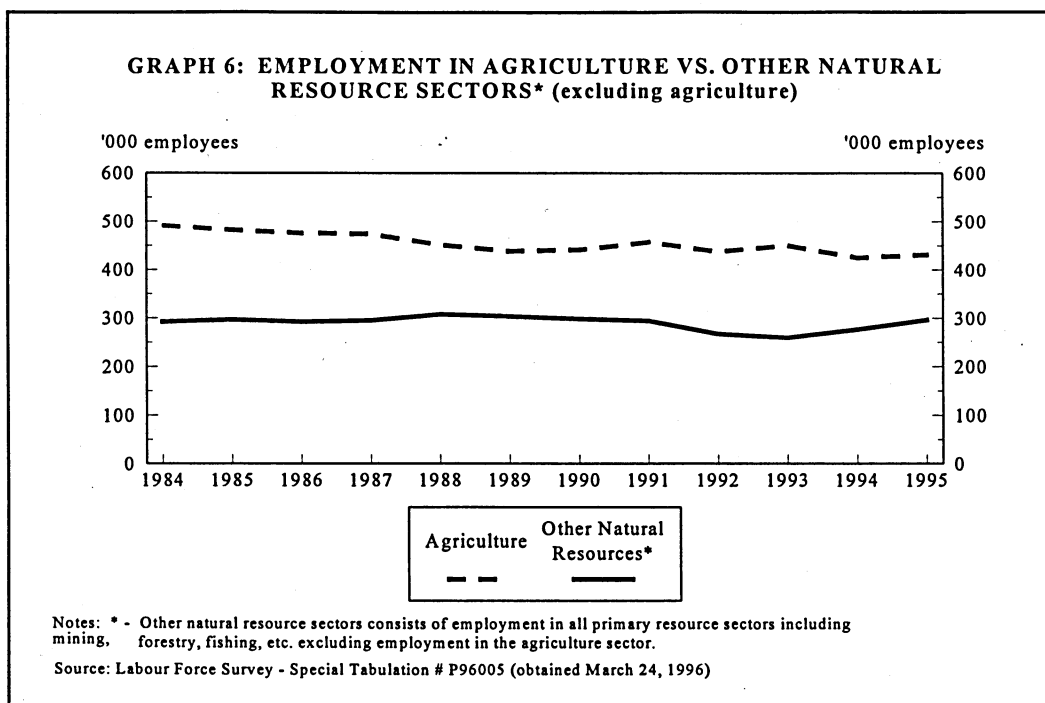
From 1990 to 1992, employment in agri-food remained relatively constant, while employment in the economy as a whole fell by 323,000. Fuelled mainly by a growth in employment in food services, the share of total employment accounted for by the agri-food sector increased from 13% to 14% by 1992. The only other sector to experience employment growth during this period was the service sector (excluding food services) which grew by 119,000.

From 1992 to 1995, employment in agri-food grew by 52,000. Growing at an average annual rate of 1.0%, employment growth in the agri-food sector approached but did not quite match employment growth in the economy as a whole. As a result, the proportion of total employment accounted for by the agri-food sector declined to 13.5% by 1995.

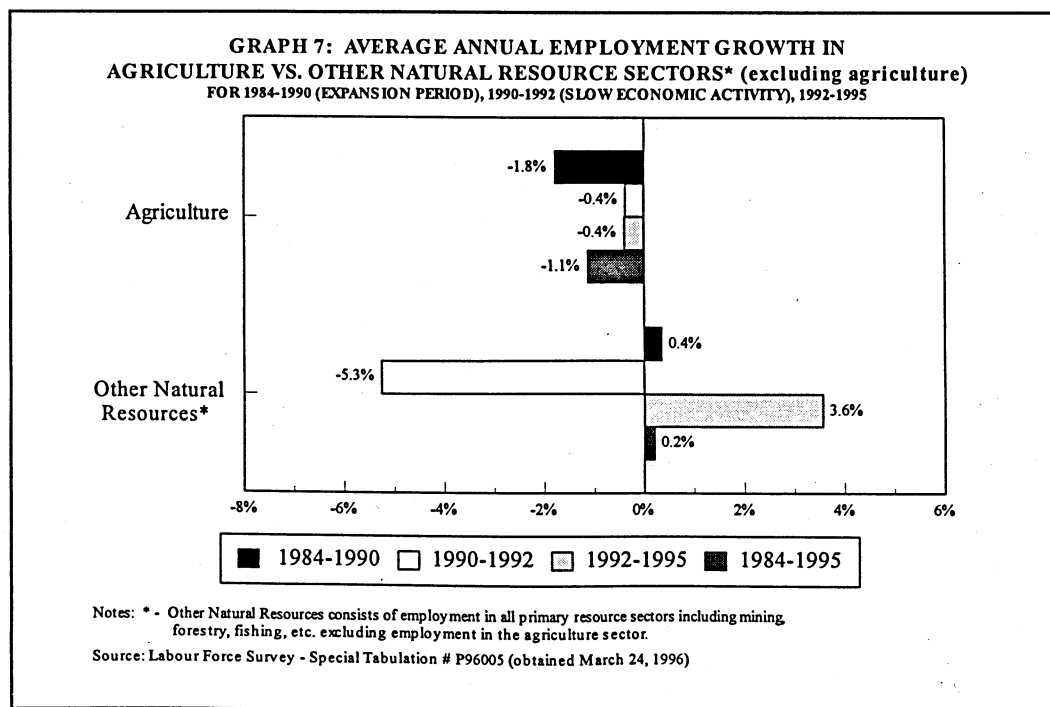
Overall, employment in agri-food generally grew between 1984 and 1995. Any declines during this period were slight, even during the 1990/91 recession.

ii. Agriculture

Employment in agriculture accounted for 3.2% of total employment, employing 431,000 Canadians in 1995. Other natural resource sectors (primary sectors including mining, forestry, fishing), on the other hand, accounted for just 2.2% of employment, providing 296,000 jobs in 1995 (Graph 6).



Employment in agriculture generally declined between 1984 and 1990, registering a net loss of 50,000 during this period. Employment in other natural resource sectors generally grew from 292,000 in 1984 to 307,000 in 1988 but then declined to 298,000 in 1990 (Graph 7).



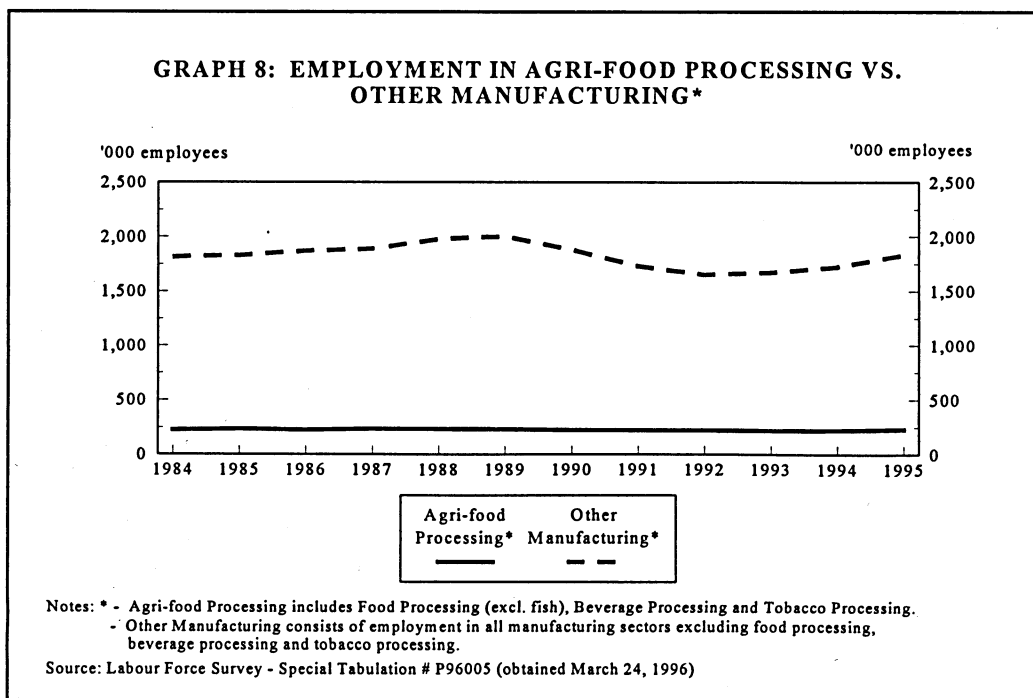
Between 1990 and 1991, employment in agriculture grew by 16,000 to 457,000 but then declined to 437,000 by 1992. During this same period, employment levels in other natural resource sector fell by 31,000 to 267,000 by 1992.

Between 1992 and 1995 employment in agriculture fluctuated, growing by 13,000 from 1992 to 1993 and then falling by 25,000 from 1993 to 1994. By 1995 agriculture employment stood at 431,000, a net loss of 6,000 since 1992. Employment in other natural resource sectors, on the other hand, grew by 37,000 during this period, reaching 296,000 by 1995.

Though levels fluctuated from year to year over the entire period, agriculture registered a net employment loss of 60,000 from 1984 to 1995. This loss reflects the decline in the number of Canadian farms which has totalled 18,134 since 1986, falling to 274,955 farms by 1996 according to the Census of Agriculture.

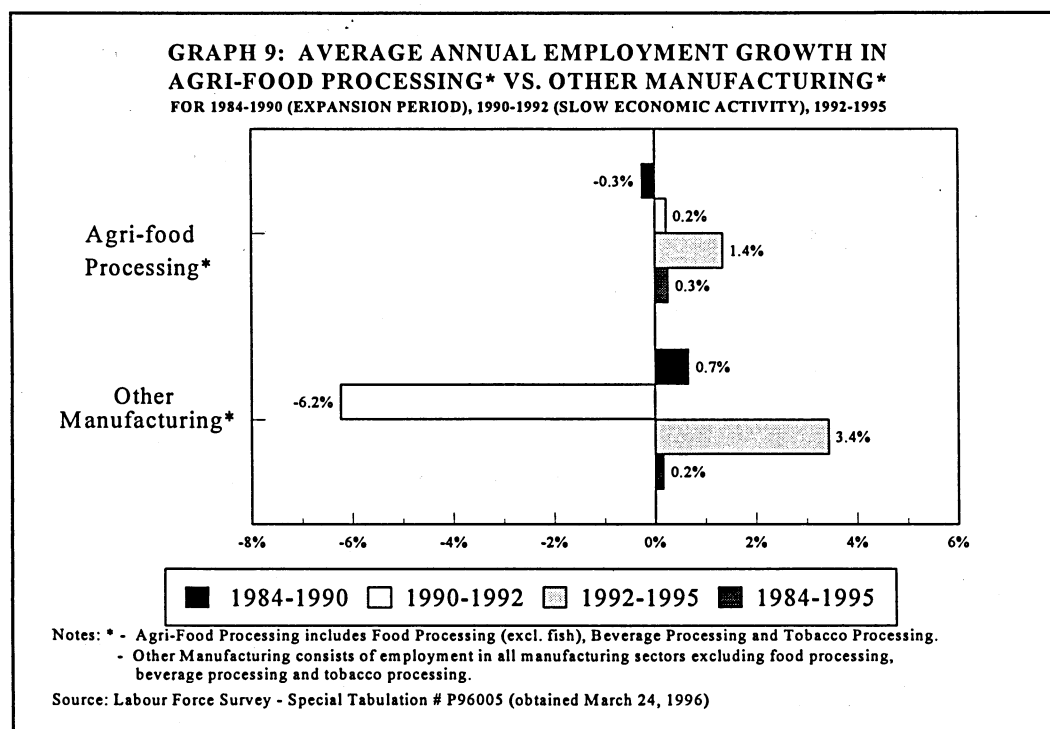
iii. Agri-food Processing

In 1995, the agri-food processing sub-sector (food, beverage and tobacco processing excluding fish processing) employed 232,000 Canadians and accounted for 1.7% of total employment (Graph 8).



Employment in agri-food processing fluctuated from 1984 to 1990, growing from 226,000 to 235,000 by 1987 and then declining by 13,000 to 222,000 by 1990. Employment in other manufacturing sectors (excluding food, beverage and tobacco

processing) grew by 189,000 from 1984 to 1989 and then fell by 121,000 to less than 1.9 million by 1990 (Graph 9).



From 1990 to 1992, agri-food processing employment remained relatively stable, growing by only 0.5% to 223,000. Employment in other manufacturing sectors on the other hand fell by more than 200,000 to less than 1.7 million by 1992.

From 1992 to 1995, employment in both the agri-food processing sub-sector and other manufacturing sectors grew at an annual rate of 1.4% and 3.4%, respectively. By 1995, employment in the agri-food processing sector reached 232,000, approaching pre-recessionary levels. Employment in other manufacturing sectors also grew reaching 1.8 million by 1995.

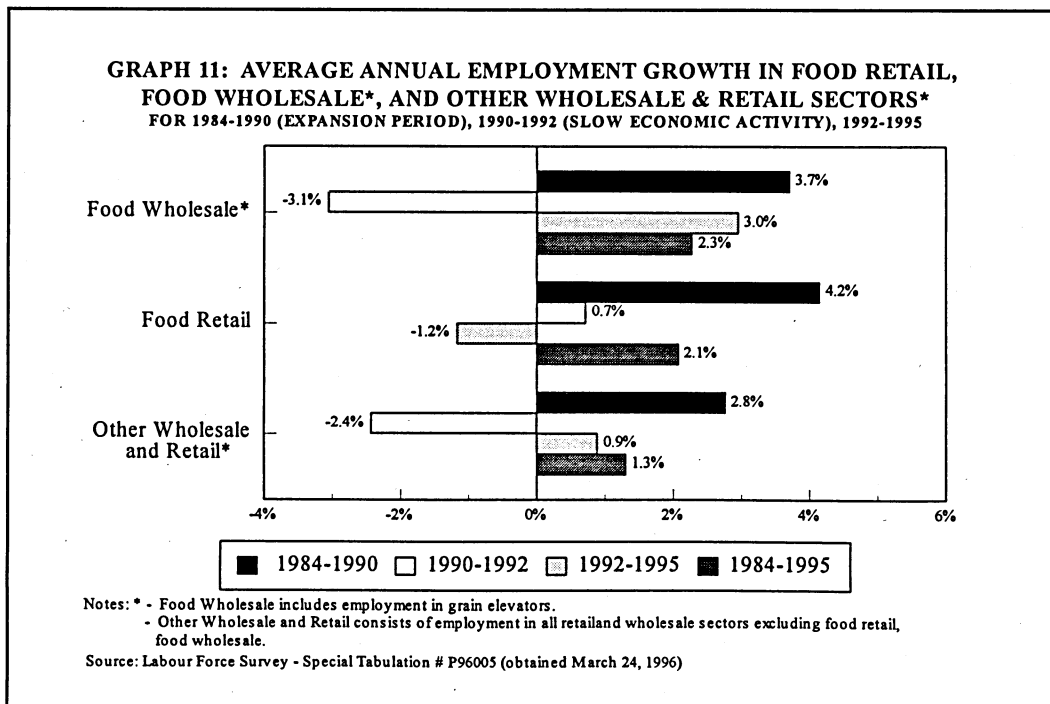
Despite yearly fluctuations, the agri-food processing sector registered a small net employment gain of 6,000 between 1984 and 1995. In other manufacturing sectors, employment levels dipped sharply from 1989 to 1992, but have recovered somewhat since then.

iv. Food Wholesale

In food wholesale, employment totalled 109,000 in 1995, accounting for less than 1% of total employment in Canada (Graph 10).



From 1984 to 1990, employment in the food wholesale sub-sector fluctuated but generally grew at an average annual rate of 3.7%, totalling 107,000 by 1990 (Graph 11). This growth rate was greater than the 2.8% annual growth rate that characterised the other wholesale and retail sectors in Canada during this period.



From 1990 to 1991, employment in the food wholesale sub-sector fell by 11,000 to 96,000 but then grew to 100,000 by 1992. Employment in other wholesale and retail sectors declined by 88,000 from 1990 to 1992, falling at an average rate of 2.4% per annum during this period.

Since 1992, employment in food wholesale has increased at an average rate of more than 3% per year, reaching 109,000 and surpassing pre-recessionary levels by 1995. Employment in other wholesale and retail sectors increased by 68,000 from 1992 to 1994 but then declined by 22,000 to 1.8 million by 1995.

From 1984 to 1995 employment in food wholesale fluctuated, but still managed to register a net gain of 21,000. In fact, employment in food wholesale grew at a faster pace for the overall period (1984 to 1995) than employment levels in other wholesale and retail sectors.

v. Food Retail

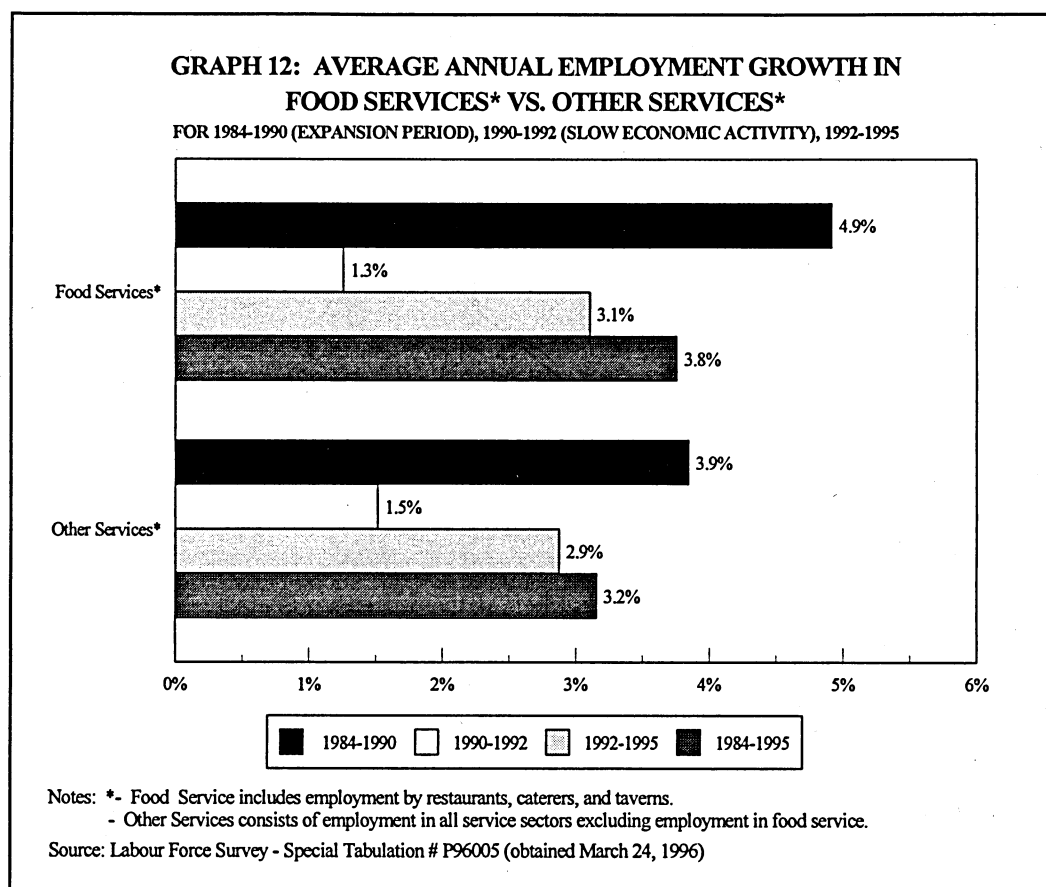
Employment in food retail totalled 411,000 in 1995, accounting for 3.0% of total employment. Between 1984 and 1990, employment in the food retail sub-sector generally grew at an average rate of 4.2% per annum from 331,000 to 421,000 (Graph 11). This growth rate was greater than the growth rate for other wholesale and retail sectors in Canada, which grew at an average rate of 2.8% per annum or by 275,000 during this period.

From 1990 to 1992, employment in the food retail sub-sector fluctuated, declining by 4,000 to 417,000 by 1991 but then increasing to 427,000 by 1992. During this same period, employment in other wholesale and retail sectors fell by nearly 88,000.

Employment in food retail fluctuated from 1992 to 1995 but generally declined by 16,000 to 411,000. Employment in other wholesale and retail sectors grew by 68,000 from 1992 to 1994, but then declined by 22,000 to 1.8 million by 1995. Overall, the food retail sub-sector recorded a net employment gain of 80,000 between 1984 and 1995. The only sub-sector in agri-food to register a greater net gain in employment during this period was food services.

vi. Food Services

Employment in the food services sub-sector totalled 646,000 in 1995, accounting for 4.8% of total employment. From 1984 to 1990, employment in the food services sub-sector grew at an average annual rate of 4.9% from 432,000 to 575,000. During the same period, employment in other service sectors increased at an average rate of 3.9% annually, from 3.1 million to 3.9 million (Graph 12).

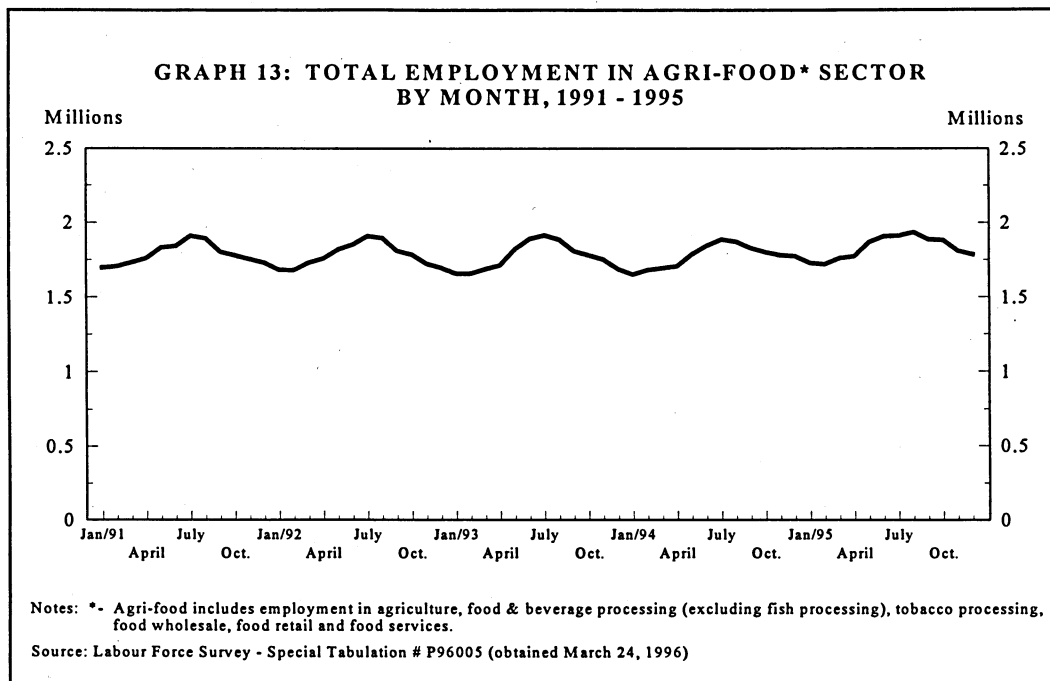


From 1990 to 1992, employment in both the food services sub-sector and other service sectors continued to grow but at reduced annual rates, averaging 1.3% and 1.5% per annum, respectively. Since 1992, employment growth has picked up considerably in both the food services sub-sector (3.1% annually) and other service sectors (2.9% annually).

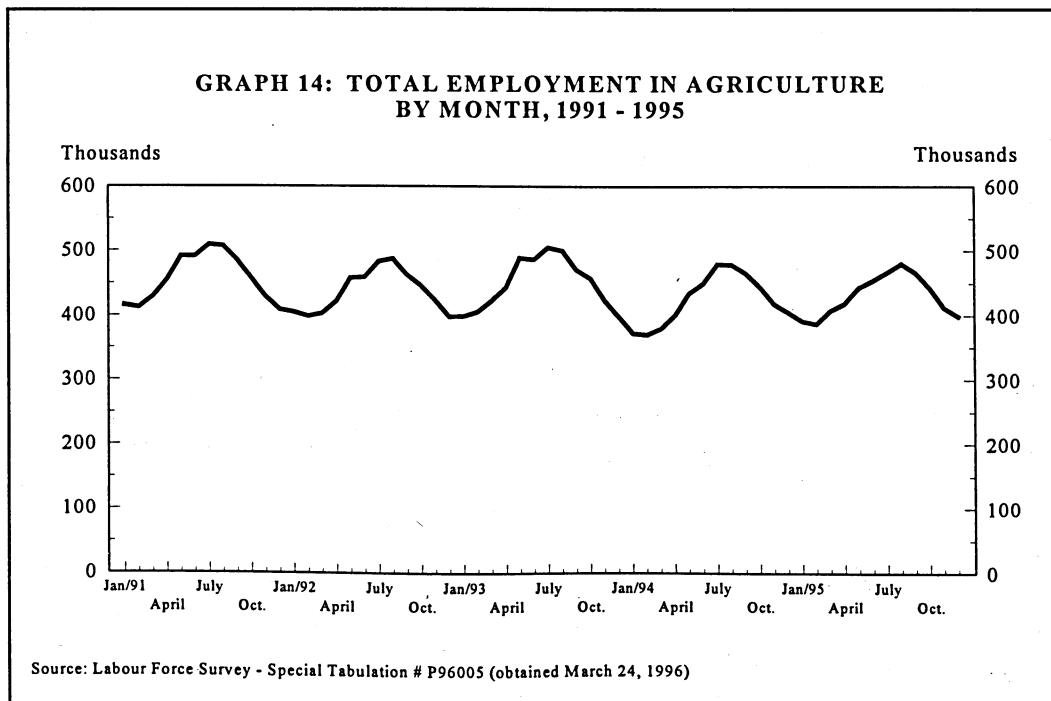
From 1984 to 1995, employment in food services grew by 214,000. Though employment in food services did not fair as well as employment in other service sectors during the recessionary period, overall annual growth for food services exceeded that of other service sectors during the entire 1984-1995 period.

vii. Seasonality of Employment in the Agri-food Sector

Seasonal employment is characteristic of the agri-food sector (Graph 13). Employment levels begin to rise in January/February, peak in July and then decline through to December. Employment levels in the sector may vary by more than 200,000 employees during each cycle, peaking at around 2 million in July and dropping to around 1.8 million in December/January.



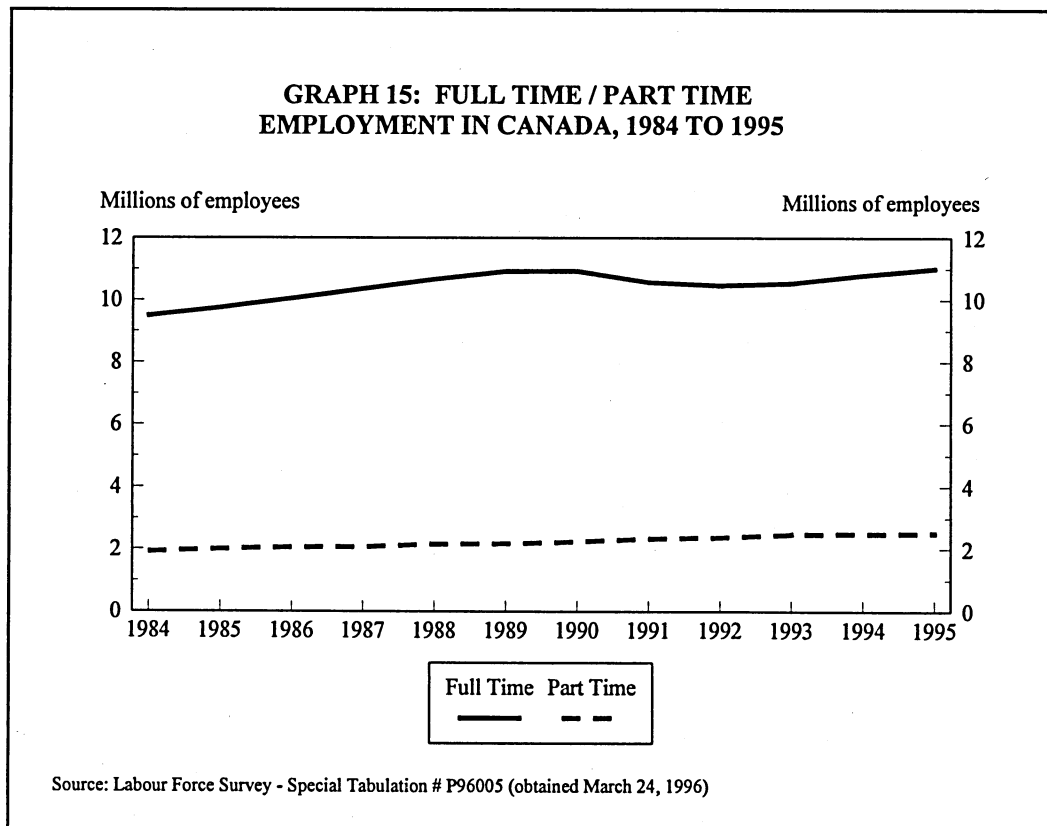
This seasonal trend is mainly the result of the seasonal nature inherent in agriculture (Graph 14), as well as seasonal trends evident in the food wholesale sub-sector and to some extent the food processing sub-sector. Seasonal employment trends in food processing result mainly from the necessity to process fruits and vegetables near harvest time as these commodities are extremely perishable.



IV. FULL TIME / PART TIME EMPLOYMENT

i. Full Time/Part Time Employment in Canada

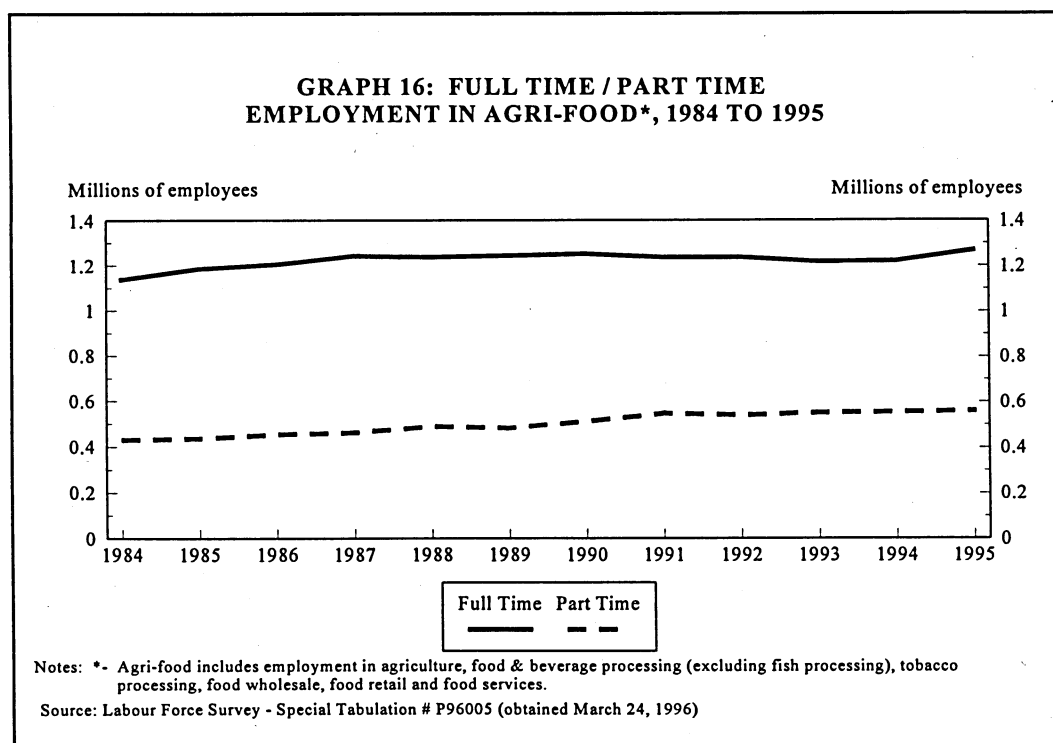
Since 1984, the number of Canadians employed on a part time basis has increased from 1.9 million to 2.5 million in 1995. Today, part time employment accounts for 19% of all jobs in Canada (Table 5). Full time employment also grew during this period, totalling almost 11 million in 1995, 1.5 million more than in 1984 (Graph 15).



The service sector is the greatest employer of both full time and part time labour, accounting for 34% of total full time employment and 54% of total part time employment. In 1995, the service sector provided nearly 3.7 million Canadians with full time positions and nearly 1.4 million Canadians with part time positions (Table 6). Twenty-seven percent of employment in this sector is part time. In contrast, the manufacturing sector provides few part time jobs. Five percent of employment in manufacturing is on a part time basis.

ii. Full Time/Part Time Employment in the Agri-food Sector

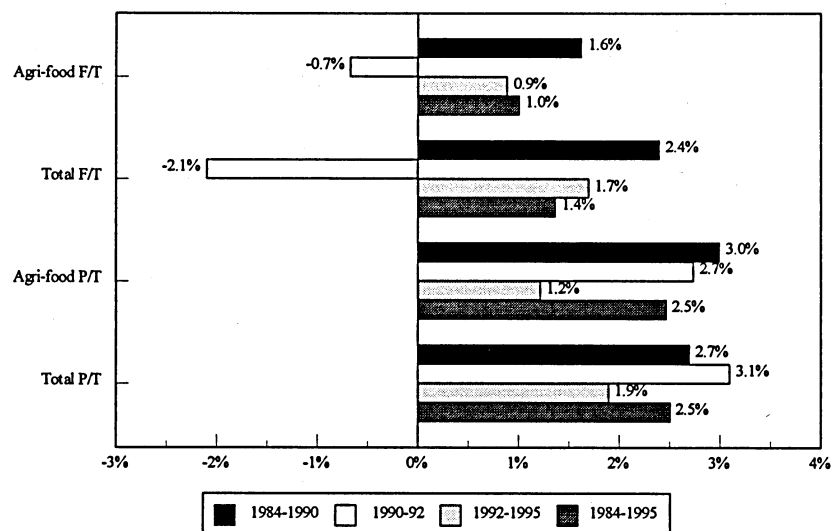
As in the rest of the economy, full time and part time employment in the agri-food sector has been growing since 1984. Employment growth in the agri-food sector was evenly split between full time and part time positions each growing by 131,000 and 130,000, respectively, from 1984 to 1995 (Graph 16).



Although the number of full time positions created in the agri-food sector equalled the number of part time positions created, part time employment grew at a faster pace. As a result, a growing proportion of those employed in the sector are being employed in part time positions, growing from 27% in 1984 to 31% in 1995.

From 1984 to 1990, full time employment in agri-food grew at a slower pace than full time employment in the total Canadian economy. Part time employment growth in agri-food, on the other hand, out-paced part time employment growth in the economy as a whole (Graph 17).

GRAPH 17: AVERAGE ANNUAL FULL TIME AND PART TIME EMPLOYMENT GROWTH IN THE AGRI-FOOD SECTOR* VS. THE TOTAL ECONOMY FOR 1984-1990 (EXPANSION PERIOD), 1990-1992 (SLOW ECONOMIC ACTIVITY), 1992-1995



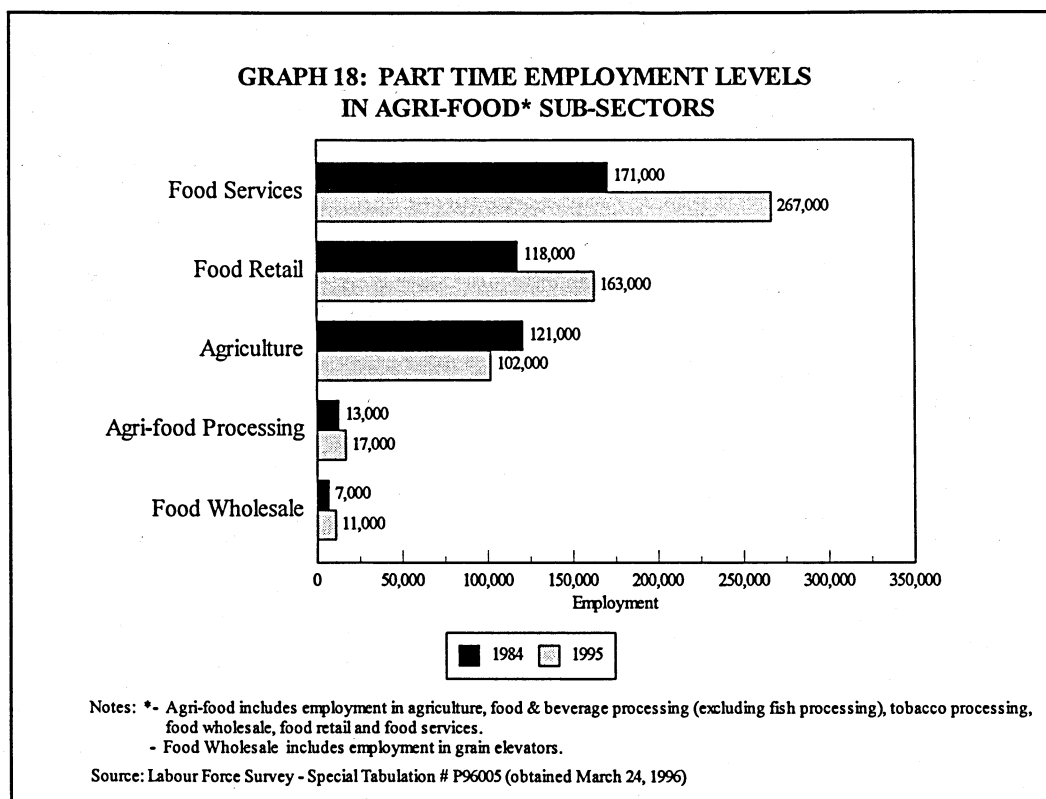
Notes: *- Agri-food includes employment in agriculture, food & beverage processing (excluding fish processing), tobacco processing, food wholesale, food retail and food services.

Source: Labour Force Survey - Special Tabulation # P96005 (obtained March 24, 1996)

Between 1990 and 1992, full time employment in agri-food fell at an average annual rate of 0.7%. This decline proved to be at a slower pace than that for the overall economy. Part time employment in agri-food, on the other hand, grew during this period but did not keep pace with the growth in part time employment in the total economy.

From 1992 to 1995, full time and part time employment grew in both the agri-food sector and in the economy as a whole. Most of the increase in part time employment for the agri-food sector was in food services which employs 267,000 part timers, making this sub-sector the most important supplier of part time positions in the agri-food sector (Graph 18).

Forty-one percent of employment in food services is on a part time basis. The food retail sub-sector (40% is part time) is the second largest part time employer, while food wholesale (10%) and agri-food processing (7%) provide the least amount of part time employment in the sector. Part time employment generally increased across agri-food sub-sectors between 1984 and 1995, with the exception of agriculture where part time employment fell by 19,000.



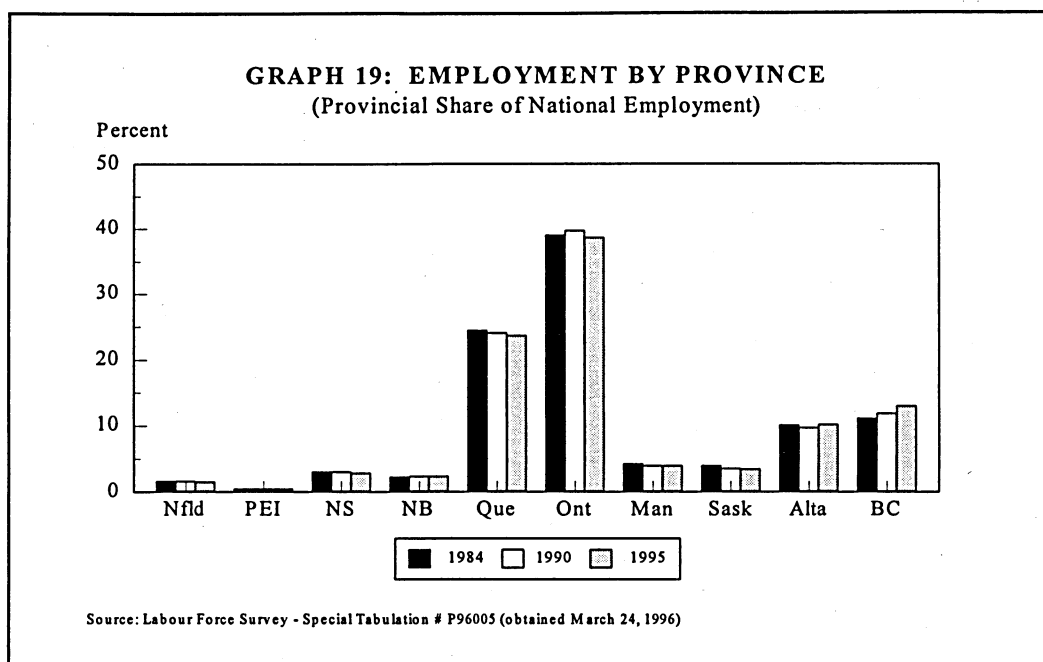
V. EMPLOYMENT BY PROVINCE

i. Provincial Employment Levels

Employment levels across Canada vary with population levels in each province and region (Graph 19). Ontario and Quebec make up the largest proportion of the total population for Canada and account for the greatest proportion of employment. Together, employment in Ontario and Quebec comprise more than 60% of total employment in Canada (Table 8).

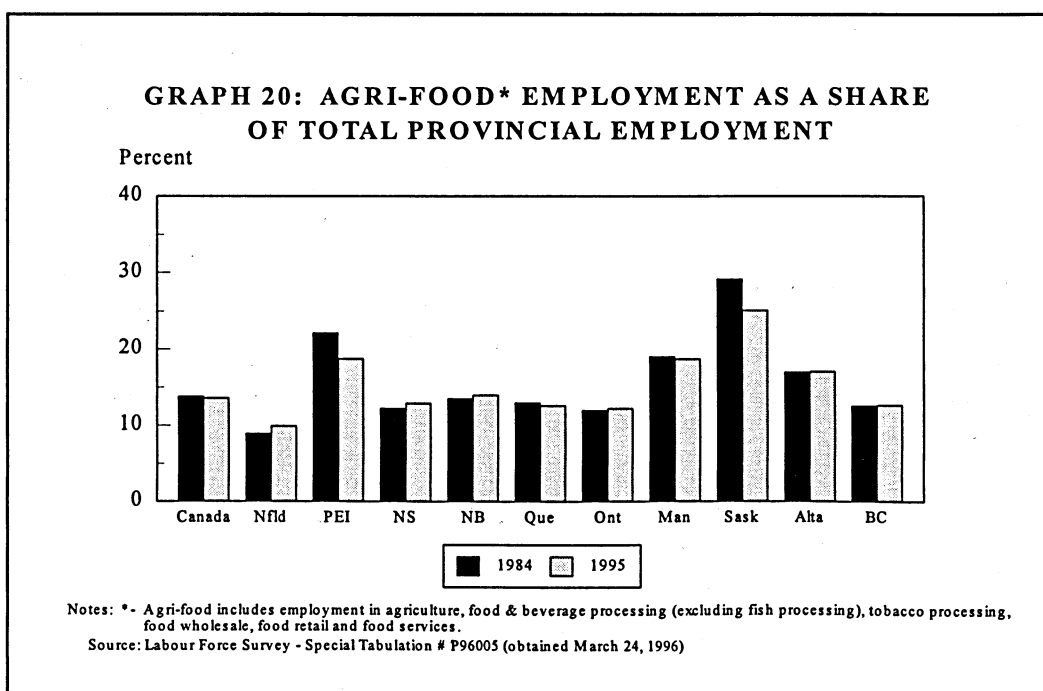
The Atlantic provinces (Newfoundland, PEI, Nova Scotia and New Brunswick) have the lowest proportion of employment. As an aggregate, employment in the Atlantic provinces totalled 954,000 or 7% of total Canadian employment in 1995. Employment in the Prairies (Manitoba, Saskatchewan and Alberta) totalled 2.3 million or 17% of total employment. In British Columbia, employment levels reached 1.8 million or 13% of employment.

From 1984 to 1990, employment grew for all provinces with the greatest increases taking place in BC and New Brunswick. From 1990 to 1992, employment declined in 7 of the 10 provinces, with New Brunswick, Alberta and BC being the exceptions. Since 1992, employment levels in all provinces have grown, with BC and Alberta experiencing the greatest growth.



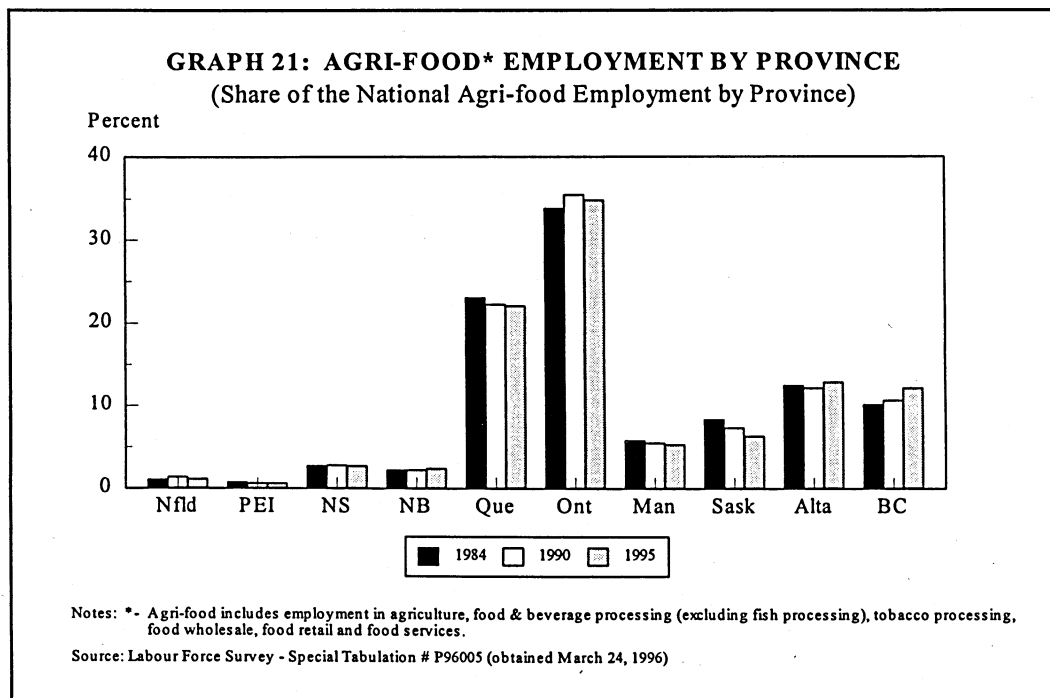
ii. Agri-food Employment by Province

Across provinces, the agri-food sector is an important employer, accounting for at least 10% of employment in every provinces (Graph 20). In Saskatchewan, the agri-food sector employs 115,000 or 25% of the total employment for the province. In Manitoba and PEI, the agri-food sector accounts for 19% of total provincial employment.



In Ontario 12% of employment is in the agri-food sector while in Quebec and BC the proportion is closer to 13% of employment. In Newfoundland, the agri-food sector constitutes the least proportion of provincial employment but still accounts for 10% of the total.

Employment levels in the agri-food sector also vary with population levels across provinces and regions. Ontario and Quebec account for the largest proportions of employment in the agri-food sector, reflecting the large populations in these provinces (Graph 21). Ontario accounted for 35% of sector employment. In Quebec, the agri-food industry employed 401,000, making up 22% of sector employment. Agri-food employment in Manitoba, Saskatchewan and Alberta accounted for a total of 24% of sector employment. The agri-food sector in BC made up 12% of sector employment. While in the Atlantic provinces, 124,000 were employed in the agri-food sector, making up 7% of total sector employment.



The relative importance of individual agri-food sub-sectors as employers also varies across provinces. In Ontario, Quebec and BC, food services and food retail were the largest agri-food sector employers, reflecting the large populations in these provinces. In Manitoba, Saskatchewan and Alberta, agriculture was the largest sectoral employer, reflective of the availability and quality of agricultural land in these provinces. In the Atlantic region, food services and food retail were the largest agri-food employers, but in this case, sub-sector employment levels reflected the lack of agricultural land rather than population levels.

VI. EMPLOYMENT BY AGE

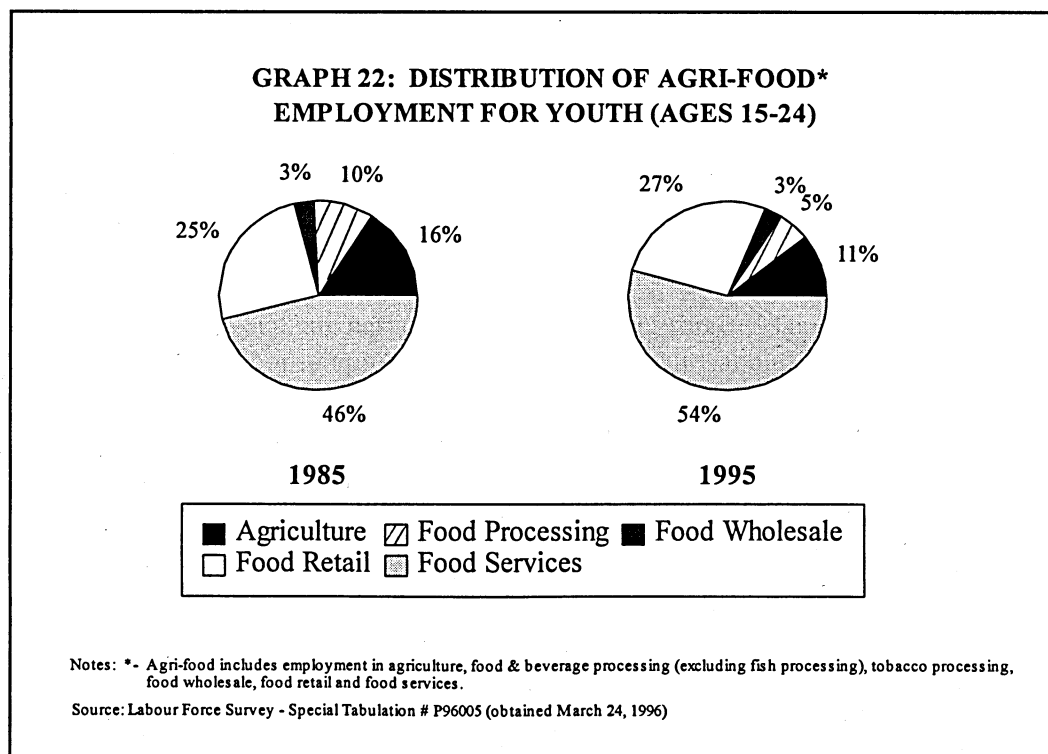
Age is an important factor in the employment status of all Canadians. The opportunities and obstacles Canada's youth (age 15 to 24) encounter in today's job market are different from those faced by older Canadians. Those aged 25 to 54, have unique considerations that affect their employment decisions, while those 55 and over are either close to retirement or retired and working to supplement their income.

i. Youth Employment

Youth (age 15-24) employment in Canada has been declining over the past decade (Table 9). Since 1984, the number of employed youth dropped from over 2.5 million to around 2 million by 1995, accounting for a declining proportion of employed Canadians.

Fewer of Canada's youth are participating in the labour force. Many young Canadians are discouraged by poor job prospects and are leaving the labour force to further their education and/or training in hopes of improving their prospects for employment when they re-enter the labour force. As a result, the unemployment rate reported for youth, which measures the level of youth unemployment relative to the labour force, clearly under-estimates the youth unemployment problem in this country.

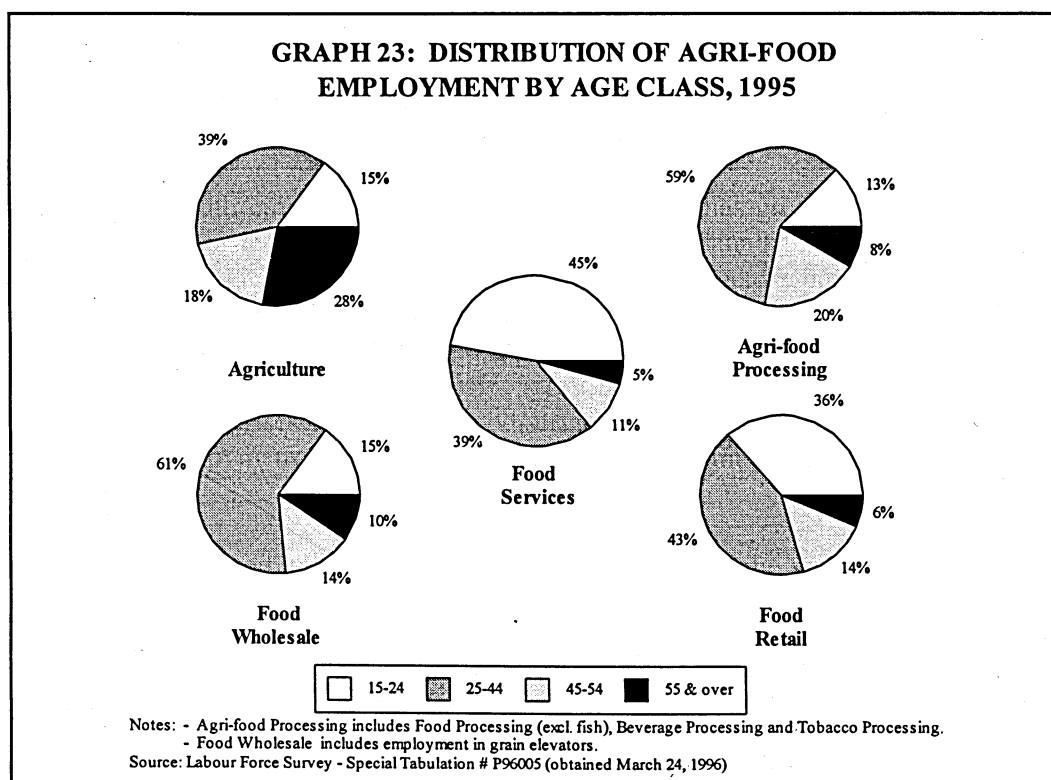
The agri-food sector is one of the largest employers of youth (Table 10), providing employment to 559,000 young Canadians or 27% of employed youth. Fifty-four percent of youth employment in the agri-food sector is in food services where many are employed as waiters, waitresses and dishwashers (Graph 22).



Since 1984, youth employment in the agri-food sector has grown and agri-food has become an increasingly important supplier of jobs for Canadian youth. Most of this growth is from food retail and food services. In these sub-sectors, employment of 15-24 year olds increased while youth employment in the agriculture and agri-food processing sub-sectors declined.

Today, youth comprises 45% of total food services employment, while only accounting for 15% of employment in agriculture and 13% of employment in agri-food processing (Graph 23).

Yet, within agri-food the proportion of youth employed in the sector is declining. In 1984, youth comprised more than 33% of total employment in the sector but by 1995 this proportion declined to 31%.



“A Profile of Canadian Youth: Focus on the Agri-food Industry” (available from the Cross Sectoral Policy Development Division of Policy Branch) provides a more detailed analysis of youth employment in the agri-food sector.

ii. Employment for Canadians age 25-44

Fifty-five percent of all employed Canadians are between the ages of 25 and 44, increasing from 52% since 1985 (Table 9). The general services sector (excluding food services) is the most important employer for Canadians within this age group, comprising 32% of employment for 25-44 year olds.

The number of employed Canadians (age 25-44) has increased from 5.9 million in 1984 to 7.4 million in 1995. Employment declined slightly between 1990 and 1992, but recovered to pre-recessionary levels by 1995. Most of this increase in employment has been in the general services sector which employed 2.5 million in 1995, up from 1.7 million in 1984 .

The agri-food sector accounts for 11% of employment for Canadians within this age cohort (Table 11). Forty-three percent of employees in the agri-food sector are within this age group, increasing from 36% in 1984. Employees in this age bracket comprise the greatest proportion of employment in each of the agri-food sub-sectors except food services, where they account for 39% of employment (Graph 23). In agri-food processing, 59% of employees are between the ages of 25 and 44, while in food wholesale 61% of employees are in this age group. In agriculture, 39% of employees are between the ages of 25 and 44. Food services, food retail, agriculture and agri-food processing are the biggest sectoral suppliers of employment for Canadians in this age group.

iii. Employment for Canadians age 45-54

Canadians between the ages of 45 and 54 constitute 20% of total employment (Table 9). The service sector is the largest employer, accounting for 38% of employment for Canadians in this age bracket. From 1984 to 1995, the number of employed in this age cohort grew from 1.7 million to 2.7 million, making up an increasing proportion of the employed labour force. Employment grew in all sectors but the biggest increase was in the service sector where employment grew from 491,000 in 1984 to over 1 million in 1995.

In 1995, 256,000 Canadians between the ages of 45 and 54 were employed in the agri-food sector, accounting for more than 9% of all employment for this age group (Table 12). Employees in this age cohort comprise 14% of total employment in the sector. Food services, food retail and agriculture are the biggest sectoral suppliers of employment for this age group. Agri-food sector employment has grown from 192,000 in 1984 to 256,000 in 1995. Employees in this age bracket now comprise a greater proportion of sector employment, but across sub-sectors they account for no more than 20% of employment (Graph 23).

SUMMARY AND CONCLUSIONS

The agri-food sector employs 1.8 million Canadians, supplying jobs for 13.5% of Canada's employed work force in 1995. The food services sub-sector is the largest employer in agri-food, providing employment for 646,000 Canadians and accounting for 35% of sectoral employment. Other sub-sectors include agriculture (431,000), food retail (411,000), agri-food processing (232,000) and food wholesale (109,000).

Since 1984, employment in the agri-food sector has grown by 261,000. Food services accounted for a majority of the increase in the agri-food sector, growing by 214,000 since 1984. In food retail, employment grew by 80,000 while in food wholesale, employment grew by 21,000 between 1984 and 1995. The only sub-sector to experience a substantive decline in employment over this period was agriculture where there was a net employment loss of 60,000 from 1984 to 1995. All other agri-food sub-sectors either registered little change in employment levels, as in the case of agri-food processing, or recorded a net gain in employment from 1984 to 1995.

During the 1990/91 recession and the period of minimal economic growth that ensued, the agri-food sector suffered few job losses compared with other sectors of the economy. The only agri-food sub-sector to experience a significant decline in employment between 1990 and 1992 was food wholesale in which there was a net employment loss of 7,000 between 1990 and 1992. Food services on the other hand recorded a net employment gain of 15,000 over this period.

Employment growth in the agri-food sector was split equally between full time and part time positions. From 1984 to 1995, full time employment in agri-food increased by 131,000 while part time employment in the sector increased by 130,000. In the food services sector, where 41% of employment is part time, full time employment increased by 118,000 while part time employment grew by 96,000. Part time employment continues to be important in three agri-food sub-sectors, food services (41%), food retail (40%) and agriculture (24%).

Across Canada, the agri-food industry is an important employer, accounting for no less than 10% of employment in each of the provinces. In Saskatchewan, the agri-food industry accounted for 25% of employment, providing jobs for 115,000 in the province in 1995. In Ontario and Quebec, where a majority of Canada's population resides, the agri-food sector supplied jobs to 12% and 13% of employed individuals, respectively. Even in Newfoundland, where agri-food sector employment was of least importance, the sector still provided for more than 10% of employment. These factors underscore the importance of the sector in all provinces of Canada.

The agri-food sector is also an important supplier of employment to Canada's youth. In 1995, the sector employed 559,000 young Canadians (age 15-24), accounting for 27% of total youth employment, second only to the service sector. Fifty-four percent of these youth were employed in the food services sub-sector (mainly as servers and kitchen help). Youth make up around 45% of total employment in the food services. In agriculture, on

iv. Employment for Canadians age 55 and Over

Nine percent of employed Canadians are aged 55 or over (Table 9). In 1995, nearly 1.3 million Canadians in this age group were employed. Since 1984, this number has remained fairly constant, with a slight decrease from 1990 to 1992. Thirty-six percent are employed in the service sector which provides employment for 456,000 Canadians in this age group. Employment for Canadians 55 and over in the service sector has grown from 1984 to 1995, while employment in manufacturing, retail and wholesale has declined.

More than 15% of employed Canadians in this age bracket are employed in the agri-food sector (Table 13). This age group makes up over 11% of the total employment in agri-food.

Fifty-seven percent work in agriculture. Since 1992, agriculture employment for this age group grew from 108,000 to 111,000 in 1995 and now accounts for a full 28% of employment in agriculture.

VII. EMPLOYMENT BY GENDER

i. Employment by Gender

Women make up 51% of the working age population and 45% of the labour force. The number of women in the labour force has grown since 1984 from 3.9 million to 6.7 million in 1995. Ninety percent of the male and female labour force were employed in 1995, while unemployment rates were slightly higher for men than for women. From 1990 to 1992, employment of both males and females declined, but by 1995 employment of both sexes had surpassed pre-recessionary levels.

ii. Agri-food Employment by Gender

In the agri-food sector, males comprised 55% of employment (Table 14). From 1984 to 1995, female employment in the sector has increased by 30%, accounting for a growing proportion of total agri-food employment. The greatest employer of women in the sector is food services, accounting for 44% of female employment in the sector. For men the largest supplier of employment in the agri-food sector is agriculture, accounting for 29% of male employment in the sector. Food services is a close second, accounting for 28% of male agri-food employment. Men account for between 68% and 70% of employment in agriculture, agri-food processing, and food wholesale. Women, on the other hand make up the greatest proportion of employment in food services and food retail where they account for 57% and 52% of sub-sector employment, respectively.

the other hand, youth make up only 15% of total employment, including unpaid family labour. Canadians over the age of 55 make up a large proportion of those employed in this sub-sector, accounting for 28% of employment in agriculture. This proportion is higher than the national average, which lies at 9% of employed.

Women made up the majority of those employed in food services and food retail, accounting for 57% and 52% of employment in each sub-sector. Men on the other hand made up close to 70% of employment in each of the agriculture, food and beverage processing, and food wholesale trade sub-sectors.

APPENDIX 1: TABLES

TABLE 1: LABOUR FORCE AND EMPLOYMENT IN CANADA (Employment in Thousands)

													Average Annual Growth (%)			
	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1984/1990	1990/1992	1992/1995	1984/1995
Working Age Population (15 yrs and over)	19,681	19,929	20,182	20,432	20,690	20,968	21,277	21,613	21,986	22,371	22,717	23,027	1.3	1.7	1.6	1.44
Labour Force	12,853	13,123	13,378	13,631	13,901	14,151	14,329	14,408	14,482	14,664	14,832	14,928	1.8	0.5	1.0	1.37
Participation Rate	65.3%	65.8%	66.3%	66.7%	67.2%	67.5%	67.3%	66.7%	65.9%	65.5%	65.3%	64.8%				
Total Employment	11,402	11,742	12,095	12,422	12,819	13,086	13,165	12,916	12,842	13,015	13,292	13,506	2.4	-1.2	1.7	1.58
Total Unemployment	1,450	1,381	1,283	1,208	1,082	1,065	1,164	1,492	1,640	1,649	1,541	1,422	-3.4	19.1	-4.6	0.36
Unemployment Rate	11.3%	10.5%	9.6%	8.9%	7.8%	7.5%	8.1%	10.4%	11.3%	11.2%	10.4%	9.5%				

Source: Labour Force Survey

TABLE 2: EMPLOYMENT BY SECTOR (Employment in Thousands)

													Average Annual Growth (%)			
	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1984/1990	1990/1992	1992/1995	1984/1995
Other Natural Resources(1)	292	297	292	295	307	303	298	294	287	259	276	296	0.36	-5.26	3.57	0.21
Total Manufacturing	2,040	2,062	2,096	2,124	2,213	2,234	2,104	1,955	1,877	1,892	1,947	2,061	0.56	-5.54	3.18	0.17
Construction	575	605	648	708	765	809	820	728	717	691	748	724	6.12	-6.37	0.45	2.31
Total Service	3,553	3,795	3,942	4,090	4,245	4,352	4,488	4,572	4,622	4,790	4,933	5,036	3.98	1.48	2.90	3.23
T.C.O.U.	877	917	934	941	949	1,007	993	960	969	960	978	1,033	2.12	-1.19	2.18	1.54
Total Wholesale & Retail	1,972	2,089	2,177	2,205	2,273	2,293	2,356	2,276	2,267	2,253	2,314	2,307	3.02	-1.90	0.59	1.47

(1) other than agriculture
Source: Labour Force Survey, Special Tabulation #P96005 (obtained March 24, 1996)

TABLE 3: EMPLOYMENT IN THE AGRIL-FOOD SECTOR (Employment in Thousands)

	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	Average Annual Growth (%)			
														1984/1990	1990/1992	1992/1995
Agriculture	491	482	476	474	451	438	441	457	437	450	425	431	-1.76	-0.37	-0.39	-1.13
Agri-Food Processing	260	264	261	269	273	266	254	253	252	245	249	254	-0.35	-0.39	0.29	-0.19
Agri-Food Processing (1)	226	234	227	235	235	231	222	223	223	219	224	232	-0.25	0.23	1.35	0.27
Food Wholesale	88	98	107	91	97	104	107	96	100	100	107	109	3.71	-3.06	2.96	2.28
Food Retail	331	347	348	376	389	392	421	417	427	397	399	411	4.15	0.72	-1.17	2.08
Food Services	432	462	502	531	547	565	575	592	590	603	617	646	4.91	1.31	3.08	3.75
Agri-Food Sector (as reported by the LFS Survey)	1,602	1,653	1,684	1,741	1,767	1,765	1,788	1,815	1,806	1,785	1,797	1,851	1.95	0.22	0.84	1.33
Agri-Food Sector (minus fish processing)	1,568	1,623	1,660	1,707	1,729	1,730	1,766	1,785	1,777	1,769	1,772	1,829	2.01	0.31	0.98	1.42
(1) minus fish																

Source: Labour Force Survey, Special Tabulation #P96005 (obtained March 24, 1996)

TABLE 4: EMPLOYMENT COMPARISON ACROSS SECTORS (Employment in Thousands)

	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	Average Annual Growth (%)			
														1984/1990	1990/1992	1992/1995
Agri-Food Sector	1,602	1,653	1,684	1,741	1,767	1,765	1,788	1,815	1,806	1,785	1,797	1,851	1.95	0.22	0.84	1.33
Agri-Food Sector (1)	1,568	1,623	1,660	1,707	1,729	1,730	1,766	1,785	1,777	1,769	1,772	1,829	2.01	0.31	0.98	1.42
Other Natural Resources	292	297	292	295	307	303	298	294	267	259	276	296	0.36	-5.26	3.57	0.21
Other Manufacturing (2)	1,814	1,828	1,869	1,889	1,978	2,003	1,882	1,732	1,654	1,673	1,723	1,829	0.67	-6.23	3.44	0.17
Other Services (3)	3,121	3,333	3,440	3,559	3,698	3,787	3,913	3,980	4,032	4,187	4,316	4,390	3.85	1.52	2.88	3.16
Other Wholesale & Retail (4)	1,553	1,644	1,721	1,739	1,776	1,797	1,828	1,763	1,740	1,756	1,808	1,786	2.77	-2.43	0.89	1.31

(1) minus fish
(2) excluding food, beverages & tobacco
(3) excluding food services
(4) excluding food wholesale & retail

Source: Labour Force Survey, Special Tabulation #P96005 (obtained March 24, 1996)

TABLE 5: FULL TIME AND PART TIME EMPLOYMENT IN CANADA (Employment in Thousands)

	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	Average Annual Growth (%)			
													1984/1990	1990/1992	1992/1995	1984/1995
Full time Employment	9,491	9,745	10,045	10,354	10,667	10,918	10,929	10,574	10,467	10,534	10,798	10,997	2.4	-2.1	1.7	1.37
Full time - % of Total Employment	83.2	83.0	83.1	83.4	83.2	83.4	83.0	81.9	81.5	80.9	81.2	81.4				
Part Time Employment	1,912	1,997	2,049	2,068	2,152	2,169	2,236	2,343	2,375	2,480	2,493	2,509	2.7	3.1	1.9	2.51
Part Time - % of Total Employment	16.8	17.0	16.9	16.7	16.8	16.6	17.0	18.1	18.5	19.1	18.8	18.6				

Source: Labour Force Survey

TABLE 6: FULL TIME AND PART TIME EMPLOYMENT BY SECTOR (Employment in Thousands)

	Employment in Thousands														Average Annual Growth (%)		
	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1984/1990	1990/1992	1992/1995	1984/1995	
Full Time Employment by Sector																	
Agri-Food Sector	1,168	1,212	1,236	1,273	1,272	1,276	1,282	1,282	1,262	1,240	1,240	1,289	1.57	-0.78	0.74	0.91	
Agri-Food Sector (1)	1,138	1,185	1,205	1,243	1,239	1,246	1,253	1,237	1,237	1,218	1,219	1,269	1.63	-0.67	0.89	1.01	
Other Natural Resources	283	286	281	286	295	292	287	282	254	247	265	282	0.25	-5.84	3.60	0.08	
Construction	528	552	595	653	711	750	763	660	634	615	672	647	6.36	-8.72	0.87	2.12	
Total Manufacturing	1,968	1,979	2,017	2,045	2,125	2,141	2,026	1,873	1,789	1,807	1,856	1,960	0.54	-8.02	3.11	0.05	
Other Manufacturing (2)	1,753	1,759	1,803	1,822	1,905	1,923	1,818	1,664	1,581	1,601	1,647	1,745	0.65	-6.75	3.37	0.05	
Total Service	2,636	2,783	2,904	3,040	3,150	3,247	3,338	3,351	3,385	3,474	3,601	3,687	4.02	0.70	2.89	3.11	
Other Services (3)	2,375	2,509	2,604	2,712	2,821	2,895	2,990	3,013	3,042	3,127	3,243	3,307	3.92	0.86	2.83	3.06	
Total Wholesale & Retail	1,475	1,572	1,644	1,666	1,704	1,730	1,775	1,684	1,682	1,656	1,706	1,717	3.15	-2.62	0.71	1.44	
Other Wholesale & Retail (4)	1,180	1,253	1,316	1,337	1,358	1,368	1,413	1,346	1,327	1,332	1,378	1,371	3.06	-3.07	1.11	1.41	
T.C.O.U.	812	847	863	869	875	923	910	870	874	867	886	936	1.94	-1.97	2.33	1.34	
Part Time Employment by Sector																	
Agri-Food Sector	434	441	459	467	495	488	516	553	545	555	557	583	2.95	2.84	1.09	2.42	
Agri-Food Sector (1)	430	437	455	463	491	484	513	548	540	551	554	560	3.00	2.74	1.22	2.47	
Other Natural Resources	7	8	8	8	9	8	7	9	9	9	9	14	0.53	14.29	18.88	8.03	
Construction	44	50	51	47	47	53	55	64	79	74	73	76	4.06	19.90	-1.07	5.54	
Total Manufacturing	72	79	76	77	85	92	76	78	87	84	90	101	1.41	7.09	5.30	3.50	
Other Manufacturing (2)	59	65	63	65	70	80	62	64	72	70	75	84	1.62	8.47	5.42	3.90	
Total Service	917	1,008	1,032	1,049	1,090	1,100	1,142	1,218	1,231	1,314	1,329	1,350	3.77	3.86	3.15	3.61	
Other Services (3)	746	821	830	846	872	887	914	964	984	1,058	1,070	1,083	3.50	3.76	3.28	3.49	
Total Wholesale & Retail	497	513	529	536	564	557	578	588	577	593	608	589	2.51	0.11	0.75	1.59	
Other Wholesale & Retail (4)	372	387	401	398	414	403	410	413	405	420	430	415	1.64	-0.62	0.89	1.02	
T.C.O.U.	82	84	86	86	83	83	83	89	83	92	80	97	5.07	5.86	1.55	4.26	

(1) minus fish

(2) excluding food, beverages & tobacco

(3) excluding food services

(4) excluding food wholesale & retail

Source: Labour Force Survey, Special Tabulation #P96005 (obtained March 24, 1996)

TABLE 7: FULL TIME AND PART TIME EMPLOYMENT IN THE AGRIFOOD SECTOR (Employment in Thousands)

	Average Annual Growth (%)															
	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1984/1990	1990/1992	1992/1995	1984/1995
Full Time Employment by Sub-Sector																
Agriculture	370	372	363	364	344	333	336	352	330	342	324	328	-1.59	-0.68	-0.14	-1.03
Agri-Food Processing	242	246	245	252	253	249	238	235	234	228	230	235	-0.39	-0.54	0.21	-0.25
Agri-Food Processing (1)	213	220	214	223	220	218	208	209	208	206	209	215	-0.33	0.16	1.04	0.13
Food Wholesale	81	89	97	83	90	96	99	86	91	88	97	98	3.65	-3.43	2.58	2.07
Food Retail	213	230	231	245	256	246	263	251	264	235	231	248	3.65	0.18	-1.74	1.55
Food Services	261	274	300	328	329	352	348	338	343	347	358	379	4.99	-0.67	3.46	3.55
Agri-Food Sector (as reported by the LFS Survey)	1,168	1,212	1,236	1,273	1,272	1,276	1,282	1,282	1,282	1,240	1,240	1,289	1.57	-0.78	0.74	0.91
Agri-Food Sector (minus fish processing)	1,138	1,185	1,205	1,243	1,239	1,246	1,253	1,237	1,237	1,218	1,219	1,269	1.63	-0.67	0.89	1.01
Part Time Employment by Sub-Sector																
Agriculture	121	110	113	110	107	105	105	105	107	108	101	102	-2.31	0.95	-1.31	-1.45
Agri-Food Processing	17	18	17	17	19	17	18	18	19	18	19	19	0.57	3.86	0.47	1.14
Agri-Food Processing (1)	13	14	13	12	15	12	14	14	15	14	15	17	2.17	0.88	4.70	2.63
Food Wholesale	7	9	10	7	7	8	8	10	9	12	11	11	4.04	5.93	9.94	5.99
Food Retail	118	117	118	130	143	146	158	168	164	181	168	163	5.15	1.73	0.01	3.13
Food Services	171	187	202	203	218	213	228	254	247	256	259	267	4.95	4.39	2.64	4.22
Agri-Food Sector (as reported by the LFS Survey)	434	441	459	467	495	488	516	553	545	555	557	563	2.95	2.84	1.09	2.42
Agri-Food Sector (minus fish processing)	430	437	455	463	491	484	513	548	540	551	554	560	3.00	2.74	1.22	2.47

(1) minus fish

Note: Numbers for agri-food sub-sectors may not add up to total employment for the overall Agri-food Sector due to rounding.
Source: Labour Force Survey, Special Tabulation #P96005 (obtained March 24, 1998)

TABLE 8: EMPLOYMENT BY PROVINCE AND PROVINCIAL SHARE OF TOTAL EMPLOYMENT (Employment in Thousands)

Province	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995
Canada	11,402	11,742	12,095	12,422	12,819	13,086	13,165	12,916	12,842	13,015	13,292	13,506
Newfoundland	178	179	184	188	198	206	206	203	194	193	195	197
Prince Edward Island	50	51	52	53	54	55	55	53	54	54	56	59
Nova Scotia	344	344	353	360	377	384	390	382	371	368	380	384
New Brunswick	255	264	273	282	291	296	302	297	302	305	307	314
Québec	2,789	2,879	2,948	3,034	3,121	3,157	3,172	3,099	3,067	3,080	3,156	3,204
Ontario	4,444	4,608	4,772	4,951	5,136	5,241	5,226	5,044	5,001	5,089	5,160	5,231
Manitoba	484	491	503	508	508	513	518	506	498	509	511	521
Saskatchewan	449	459	466	468	465	458	459	458	451	455	457	460
Alberta	1,149	1,170	1,189	1,188	1,224	1,254	1,277	1,290	1,285	1,296	1,337	1,373
British Columbia	1,263	1,297	1,354	1,390	1,444	1,524	1,561	1,585	1,619	1,666	1,733	1,762
PROVINCIAL SHARE OF TOTAL EMPLOYMENT												
Newfoundland	1.6%	1.5%	1.5%	1.5%	1.5%	1.6%	1.6%	1.6%	1.5%	1.5%	1.5%	1.5%
Prince Edward Island	0.4%	0.4%	0.4%	0.4%	0.4%	0.4%	0.4%	0.4%	0.4%	0.4%	0.4%	0.4%
Nova Scotia	3.0%	2.9%	2.9%	2.9%	2.9%	2.9%	3.0%	3.0%	2.9%	2.8%	2.9%	2.8%
New Brunswick	2.2%	2.3%	2.3%	2.3%	2.3%	2.3%	2.3%	2.3%	2.4%	2.3%	2.3%	2.3%
Québec	24.5%	24.5%	24.4%	24.4%	24.3%	24.1%	24.1%	24.0%	23.9%	23.7%	23.7%	23.7%
Ontario	39.0%	39.2%	39.5%	39.9%	40.1%	40.0%	39.7%	39.0%	38.9%	39.1%	38.8%	38.7%
Manitoba	4.2%	4.2%	4.2%	4.1%	4.0%	3.9%	3.9%	3.9%	3.9%	3.9%	3.8%	3.9%
Saskatchewan	3.9%	3.9%	3.9%	3.8%	3.6%	3.5%	3.5%	3.5%	3.5%	3.5%	3.4%	3.4%
Alberta	10.1%	10.0%	9.8%	9.6%	9.6%	9.6%	9.7%	10.0%	10.0%	10.0%	10.1%	10.2%
British Columbia	11.1%	11.0%	11.2%	11.2%	11.3%	11.6%	11.9%	12.3%	12.6%	12.8%	13.0%	13.0%

Source: Labour Force Survey

TABLE 9: TOTAL CANADIAN EMPLOYMENT BY AGE (Employment in Thousands)

	Average Annual Growth (%)															
	1984/1990	1990/1992	1992/1995	1984/1995	1984/1990	1990/1992	1992/1995	1984/1995	1984/1990	1990/1992	1992/1995	1984/1995				
15-24 years	2,523	2,544	2,576	2,584	2,517	2,384	2,214	2,107	2,061	2,074	2,072	2,072	-0.92	-5.98	-0.55	-1.74
Share of Total (15-24)	22%	22%	21%	21%	19%	18%	17%	16%	16%	16%	15%	15%	3.76	-1.20	1.34	2.2
25-44 years	5,889	6,131	6,431	6,880	7,185	7,322	7,226	7,147	7,247	7,342	7,438	7,438	3.53	4.21	5.35	4.15
Share of Total (25-44)	51%	52%	53%	54%	55%	56%	56%	56%	56%	55%	55%	55%	0.81	-2.07	0.40	0.06
45-54 years	1,739	1,787	1,818	1,895	1,988	2,081	2,208	2,325	2,451	2,583	2,718	2,718	2.43	-1.23	1.69	1.56
Share of Total (45-54)	15%	15%	15%	15%	16%	16%	17%	18%	19%	19%	20%	20%				
55 and over	1,271	1,279	1,270	1,283	1,312	1,304	1,268	1,283	1,256	1,293	1,278	1,278				
Share of Total (55 & over)	11%	11%	10%	10%	10%	10%	10%	10%	10%	10%	9%	9%				
Total	11,402	11,742	12,095	12,422	12,819	13,086	13,165	12,842	13,015	13,292	13,506	13,506				

Source: Labour Force Survey

TABLE 10: SECTOR COMPARISONS OF EMPLOYMENT LEVELS, AGES 15-24 (Employment in Thousands)

	Average Annual Growth (%)															
	1984/1990	1990/1992	1992/1995	1984/1995	1984/1990	1990/1992	1992/1995	1984/1995	1984/1990	1990/1992	1992/1995	1984/1995				
Agri-Food Sector (1)	534	551	561	554	572	548	546	531	521	530	563	563	0.53	-1.74	1.99	0.52
Agri-Food Sector (1)(2)	527	545	555	549	568	544	550	531	521	530	559	559	0.75	-1.74	1.77	0.58
Other Natural Resources	45	44	40	36	38	36	32	29	24	27	34	34	-5.98	-13.31	12.98	-1.80
Other Manufacturing (3)	333	323	310	317	312	296	234	176	156	171	189	189	-5.40	-16.94	5.83	-4.44
Construction	101	106	120	136	137	143	128	102	93	82	88	88	4.35	-14.57	-1.29	-0.63
Other Services (4)	636	658	676	660	645	654	625	609	589	578	580	580	-0.25	-3.99	0.25	-0.79
T.C.O.U.	117	109	112	101	106	113	102	83	74	67	73	73	-2.01	-8.91	-3.59	-3.70
Other Wholesale & Retail (5)	482	511	534	530	518	503	501	468	446	468	436	436	0.70	-5.86	-0.49	-0.81

(1) excluding services incidental to agriculture

(2) minus fish

(3) excluding food, beverages & tobacco

(4) excluding food services

(5) excluding food wholesale & retail

Source: Labour Force Survey, Special Tabulation #P96005 (obtained March 24, 1996)

TABLE 11: SECTOR COMPARISONS OF EMPLOYMENT LEVELS, AGES 25-44 (Employment in Thousands)

	Average Annual Growth (%)															
	1984/1990	1990/1992	1992/1995	1984/1995	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995
Agri-Food Sector (1)	4.54	1.25	1.11	3.01	580	632	676	710	707	722	755	759	774	754	746	798
Agri-Food Sector (1)(2)	4.61	1.28	1.37	3.12	564	616	657	690	684	702	737	740	756	739	731	785
Other Natural Resources	1.40	-7.28	4.25	0.60	165	170	175	178	185	178	179	179	153	150	159	173
Other Manufacturing (3)	2.66	-5.49	3.29	1.35	965	1,002	1,056	1,069	1,156	1,189	1,124	1,058	1,004	1,021	1,045	1,106
Construction	7.19	-6.21	0.71	2.88	311	327	338	373	425	447	470	426	413	414	446	420
Other Services (4)	4.79	1.04	2.14	3.39	1,679	1,808	1,880	1,967	2,069	2,127	2,222	2,268	2,268	2,343	2,383	2,417
T.C.O.U.	3.64	-0.96	1.60	2.25	500	538	569	580	583	619	618	602	606	595	615	635
Other Wholesale & Retail (5)	4.18	-1.67	1.52	2.39	757	801	870	870	901	939	966	943	934	942	978	977

- (1) excluding services incidental to agriculture
(2) minus fish
(3) excluding food, beverages & tobacco
(4) excluding food services
(5) excluding food wholesale & retail

Source: Labour Force Survey, Special Tabulation #P96005 (obtained March 24, 1996)

TABLE 12: SECTOR COMPARISONS OF EMPLOYMENT LEVELS, AGES 45-54 (Employment in Thousands)

	Average Annual Growth (%)															
	1984/1990	1990/1992	1992/1995	1984/1995	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995
Agri-Food Sector (1)	2.25	3.13	3.80	2.83	196	222	202	218	217	233	220	228	234	244	238	261
Agri-Food Sector (1)(2)	2.29	3.21	3.93	2.90	192	222	198	214	212	227	215	223	229	240	234	256
Other Natural Resources	3.23	-0.22	11.59	4.88	39	39	43	45	47	46	47	53	48	44	53	63
Other Manufacturing (3)	1.51	0.66	4.93	2.29	295	284	297	295	306	327	322	315	326	342	347	376
Construction	4.35	1.94	1.88	3.24	101	104	116	118	125	128	130	129	135	121	135	141
Other Services (4)	7.07	8.07	6.75	7.17	451	499	527	553	596	636	679	736	783	845	927	964
T.C.O.U.	1.57	3.18	9.07	3.91	158	156	152	162	164	171	173	173	184	200	206	238
Other Wholesale & Retail (5)	3.29	1.10	2.48	2.67	232	240	246	250	269	264	281	276	287	305	310	309

- (1) excluding services incidental to agriculture
(2) minus fish
(3) excluding food, beverages & tobacco
(4) excluding food services
(5) excluding food wholesale & retail

Source: Labour Force Survey, Special Tabulation #P96005 (obtained March 24, 1996)

TABLE 13: SECTOR COMPARISONS OF EMPLOYMENT LEVELS, AGES 55 AND OVER (Employment in Thousands)

	Average Annual Growth (%)															
	1984/1985	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1984/1990	1990/1992	1992/1995	1984/1995
Agri-Food Sector (1)	169	181	192	188	188	183	197	191	191	187	191	198	2.75	-1.52	1.23	1.56
Agri-Food Sector (1)(2)	169	181	192	188	198	183	197	191	191	187	191	196	2.75	-1.52	0.94	1.48
Other Natural Resources	24	21	19	19	22	29	20	24	22	24	19	28	-0.91	5.83	8.05	2.76
Other Manufacturing (3)	192	182	185	183	186	175	173	165	149	137	150	159	-1.68	-7.16	2.37	-1.57
Construction	55	63	72	70	72	84	87	69	67	74	80	75	8.19	-11.79	4.15	3.48
Other Services (4)	355	370	358	379	391	379	388	382	400	421	432	428	1.55	1.58	2.35	1.78
T.C.O.U.	85	99	84	85	85	91	88	93	85	80	78	88	1.05	-1.46	0.78	0.52
Other Wholesale & Retail (5)	184	192	186	186	190	201	190	180	184	167	172	174	0.82	-1.52	-1.73	-0.41

(1) excluding services incidental to agriculture

(2) minus fish

(3) excluding food, beverages & tobacco

(4) excluding food services

(5) excluding food wholesale & retail

Source: Labour Force Survey, Special Tabulation #P96005 (obtained March 24, 1996)

TABLE 14: TOTAL EMPLOYMENT IN THE AGRI-FOOD SECTOR, BY GENDER, 1984-95 (Employment in Thousands)

	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	Share of Sub-sector Employment (%)
MALES													
Agriculture	349	341	333	336	313	301	301	309	300	306	285	292	67.9
Agri-Food Processing	180	185	180	180	181	182	172	168	164	165	168	173	67.9
Agri-Food Processing (1)	161	167	161	162	160	162	155	152	148	152	155	160	69.1
Food Wholesale	67	74	78	67	70	75	77	68	73	70	77	74	68.0
Food Retail	176	180	183	190	197	193	207	200	201	192	189	196	47.8
Food Services	178	193	213	231	238	244	240	247	246	264	268	279	43.2
Agri-Food Sector	950	972	987	1,004	999	984	997	993	984	997	989	1,014	54.8
Agri-Food Sector (minus fish processing)	931	955	968	986	978	975	980	977	968	984	978	1,002	54.8
FEMALES													
Agriculture	142	140	143	138	138	137	140	148	137	145	140	138	32.1
Agri-Food Processing	80	80	81	88	92	84	82	85	88	80	81	81	32.1
Agri-Food Processing (1)	65	67	66	73	75	69	67	71	75	67	69	71	30.9
Food Wholesale	21	24	29	24	28	29	30	28	27	30	30	35	32.0
Food Retail	156	168	166	186	202	199	215	217	226	205	210	216	52.4
Food Services	254	269	289	300	309	321	335	345	344	339	349	367	56.8
Agri-Food Sector	652	680	708	736	768	770	801	823	823	799	808	837	45.2
Agri-Food Sector (minus fish processing)	638	667	683	720	752	755	788	808	809	785	797	827	45.2
(1) minus fish													
Source: Labour Force Survey, Special Tabulation #P96005 (obtained March 24, 1996)													

APPENDIX 2:

**A Comparison of 1984-1995 Employment Trends
from the Labour Force Survey, Annual Survey of
Manufactures and Survey of Employment,
Payroll and Hours**

APPENDIX 2:**A Comparison of 1984-1995 Employment Trends
from the
Labour Force Survey,
Annual Survey of Manufactures
and
Survey of Employment, Payroll and Hours (SEPH)****A Note on the SEPH**

The SEPH is an establishment-based survey which, on a monthly basis, collects employment, earnings and hours data from a sample of approximately 30,000 large and medium sized establishments and the administrative records of smaller employers across Canada, at the detailed sector level. Included in the survey are all establishments with 300 employees or more, a sample of establishments employing between 100 and 299 employees, and a sample of administrative records for employers with less than 99 employees. The survey is designed to cover all employers in Canada, except those primarily engaged in agriculture, fishing, trapping, private household services, religious organizations, and defence services.

The industry coverage of SEPH is at a considerably more detailed level than that provided by the Labour Force Survey, although not as detailed as that offered by the industry breakdowns in the Annual Survey of Manufactures. SEPH employment statistics are mainly at the 3-digit SIC code level. Within food and beverage manufacturing, for example, the SEPH includes employment statistics on ten separate food and beverage processing industry categories from SIC 101-109 for food to SIC 111-114 combined for beverages. This information is provided on a monthly basis. Although the Annual Survey of Manufactures provides additional industry breakdowns at the 4-digit SIC code level so that, for example, employment statistics for a total of twenty-four food and beverage processing industry categories can be identified, this is only available on an annual basis with between a fifteen to twenty-seven month delay.

The reliability of the LFS and SEPH employment statistics are affected by both sampling and non-sampling errors. The sampling error for the Canada-wide employment estimates provided by the LFS and the SEPH, as indicated by calculated coefficients of variation, are much the same, hovering between 2.6%-5% for food processing as a whole. For most individual food industries at the 3-digit level, employment statistics provided by the SEPH have a coefficient of variation between 5.1%-10%, except for the other food products industry where it is 10.1%-15%. For beverage processing, the indicated coefficient of variation for employment levels provided by the LFS and the SEPH are between 5.1%-10%. Employment statistics at the provincial level are somewhat less reliable than those at the national level.

Food and Beverage Manufacturing Sub-Sector Employment Trends, 1984-1995

Figures 1 and 2 provide a comparison of employment trends in Canadian food, beverage and tobacco processing industries provided by the Survey of Employment, Payroll and Hours (SEPH), the Labour Force Survey (LFS), and the Annual Survey of Manufactures (ASM). The data in each of the figures has been aggregated to correspond with currently used LFS food and beverage manufacturing employment categories, i.e., food (including and excluding fish), beverages, and tobacco. Because of its annual nature and the extent and coverage of the survey, ASM data for 1995 was not available at the time of this study.

As Figures 1 and 2 show, data from the LFS provides a consistently higher total for food and beverage manufacturing as a whole than either the SEPH or the ASM. This proves to be the case whether or not fish processing is included in the totals being compared. These overall differences range from around 14,000 to 40,000 persons over the eleven year time frame involved. Between the SEPH and the ASM, differences in indicated levels of employment are somewhat smaller throughout the period, ranging from 400 to around 12,000 depending on the particular year concerned.

Overall trends in employment levels indicated by each of the data sources are generally similar over the period with a few noticeable exceptions. One such exception is during the period from 1985-1986. The LFS indicates that employment in food and beverage processing declined during this period, while the SEPH and the ASM indicate that employment grew during this period.

From 1984 to 1988, growth in the employment levels for food, beverage and tobacco processing combined were larger for the SEPH (11.1% including fish and 9.6% excluding fish) than for the ASM (5.0% including fish and 2.2% excluding fish) or the LFS (5.0% including fish and 4.0% excluding fish).

From 1988-1994, the LFS, SEPH and the ASM show declines in employment for food, beverage and tobacco processing. Again, the indicated employment losses in the food, beverage and tobacco manufacturing sub-sector combined were larger for the SEPH (-13.9% including fish and -11.5% excluding fish) than for either the ASM (-7.4% including fish and -4.0% excluding fish) or the LFS (-7.0% including fish and -1.3% excluding fish).

For periods to 1995, data are only available from the SEPH and the LFS. From 1993-1995 the SEPH shows employment increases of 2.2% for food and beverages (including fish) and 3.3% for food and beverages (excluding fish), while the LFS shows employment growth of 3.7% for food and beverages (including fish) and 5.9% for food and beverages (excluding fish). From 1993 to 1994, the Annual Survey of Manufactures showed a slight decline in employment for food and beverages (including and excluding fish).

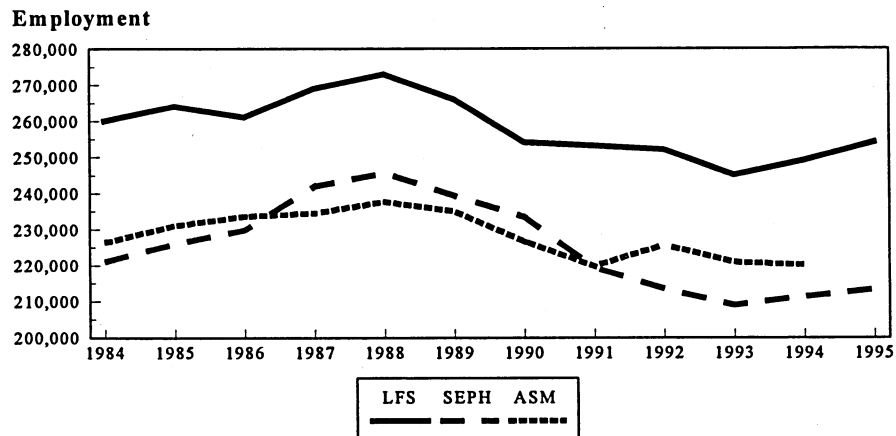
For 1984-1995 as a whole, SEPH shows employment declines of -3.3% for food and beverages (including fish) and -1.4% for food and beverages (excluding fish), while the LFS shows an employment loss of -2.3% for food and beverages (including fish) and an employment increase of 2.7% for food and beverages (excluding fish).

Conclusions

In considering the most appropriate set of employment estimates to use for the ongoing monitoring of Canadian food and beverage processing sub-sector employment, it is clear that, given the reliance on household rather than establishment-based data and the lack of industry information available from the Labour Force Survey, the SEPH and ASM estimates have important advantages as indicators of employment changes at the more detailed food and beverage processing sub-sector level. As between the SEPH and the ASM, the latter has the advantage of more detailed industry breakdowns and a possibly wider sector coverage than the former. However, it is an annual survey only, and its annual employment estimates are from fifteen months to more than two years behind. The SEPH employment data, by contrast, are on a monthly basis and available within approximately two months of being collected.

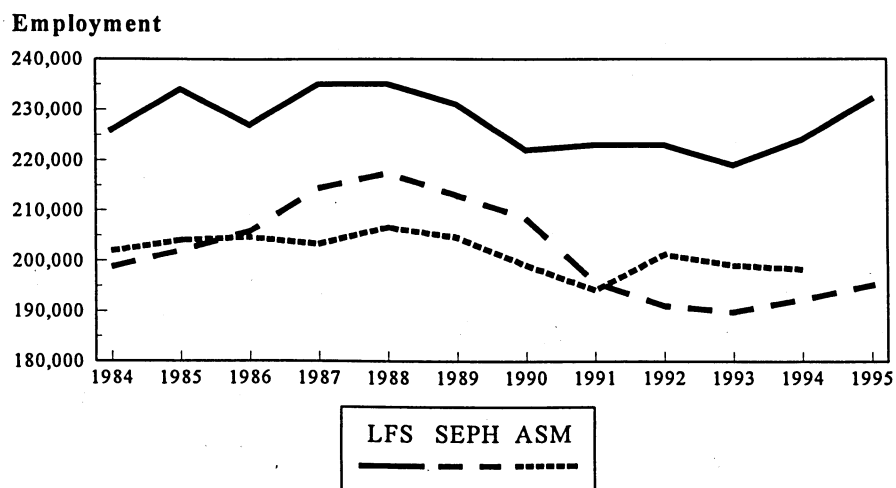
Overall, the LFS provides the best employment data series for inter-sectoral comparisons at the aggregate agri-food sector level and for intra-sectoral comparisons across sub-sectors of the agri-food sector. But when looking at employment levels within each sub-sector, other data sources may provide more detailed and sometimes more accurate information.

Figure 1
Employment in Canadian Food, Beverage and Tobacco Manufacturing Industries, 1984-1995



Source: Labour Force Survey; Survey of Employment, Payroll and Hours, Annual Survey of Manufactures

Figure 2
Employment in Canadian Food (minus fish), Beverage and Tobacco Manufacturing Industries, 1984-1995



Source: Labour Force Survey (LFS), Survey of Employment, Payroll and Hours (SEPH), and Annual Survey of Manufactures (ASM) - February 10, 1997

