

**BRITISH COLUMBIA
SEAFOOD PROCESSING EMPLOYMENT
2014**



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Executive Summary

B.C. seafood processing operations generated 4,815 year-round equivalent jobs in 2014. Active seafood processing operations were attributed to 235 companies operating in 246 plants. An additional 42 companies in 39 plants reported they did not carry out seafood processing in 2014.

Of the 4,815 jobs, the majority (70 per cent) were processing jobs, followed by administrative positions (23 per cent) and maintenance jobs (7 per cent). In total, the sector reported paying \$153.6 million in wages in 2014. Seafood processing plants are located throughout the province. The Lower Mainland had the highest concentration with 58 per cent of jobs and 63 per cent of total wages paid.

Year-round operations were reported by 81 per cent (199) of the 246 active plants. The remaining 19 per cent (47) were seasonal operations reporting employment for as little as one month up to 11 months. Many of the seasonal plants were up-river sport caught seafood processors that operated only during salmon season and cold-storage plants that were used as temporary storage.

Plants carrying out processing solely for their own use or sale made up the majority (55 per cent) of active operations with the other 45 per cent carried out solely custom processing or a combination of self- and custom processing.

Processing of wild salmon generated the most (28 per cent) jobs in the sector followed by groundfish (at 16 per cent), wild shellfish (at 13 per cent), farmed salmon (at 11 per cent), herring (at seven per cent) and halibut (at six per cent). An additional eight per cent of the jobs were attributed to the “other species” category which included tuna, cod, hake, sole, carp, krill, skate mackerel and marine plants. Five per cent of the jobs were not attributed to a species.

Since 1996, seven B.C. seafood processing employment surveys have been conducted and sector employment has ranged from a low of 4,176 in 2008 to a high of 5,679 in 2002. The 4,815 jobs estimated for 2014 varies less than 2 per cent from the long-term (1996-2014) average of 4,924.



British Columbia Seafood Processing Employment 2014 Survey Results

The Ministry of Agriculture regularly conducts the seafood processing employment survey of all provincially licensed seafood processing plants in British Columbia.

For 2014, the survey was distributed to 284 processing companies licensed to operate in 292 plants. Industry survey response rate of 95 per cent was achieved. Estimates for jobs, wages and species were developed for an additional 8 operations, bringing the capture rate to 98 per cent or 285 plants.

Active seafood processing operations were attributed to 235 companies operating in 246 plants. An additional 42 companies in 39 plants reported they did not carry out seafood processing in 2014. Multiple companies can operate out of a single plant and a single company can operate out of multiple plant locations.

Jobs by Occupation Category and Month

B.C. seafood processing operations generated 4,815 year-round equivalent jobs in 2014. Employment fluctuated from month to month throughout 2014. The summer months (May through August) saw the highest levels of employment with a maximum of 6,045 in August. Winter months (January, February and December) exhibited the lowest levels of employment dropping to 3,945 in February.

Employment was attributed to one of three broad occupation categories: processing, administrative and maintenance. Processing jobs were defined as all jobs directly involved in seafood processing. Jobs that were classified as administrative or maintenance were not directly involved in seafood processing but existed because the plant carried out seafood processing activities. Processing jobs accounted for the largest portion of the sector with 70 per cent (3,382) of all plant jobs. Administrative and maintenance jobs made up 23 per cent (1,083) and seven per cent (351), respectively.

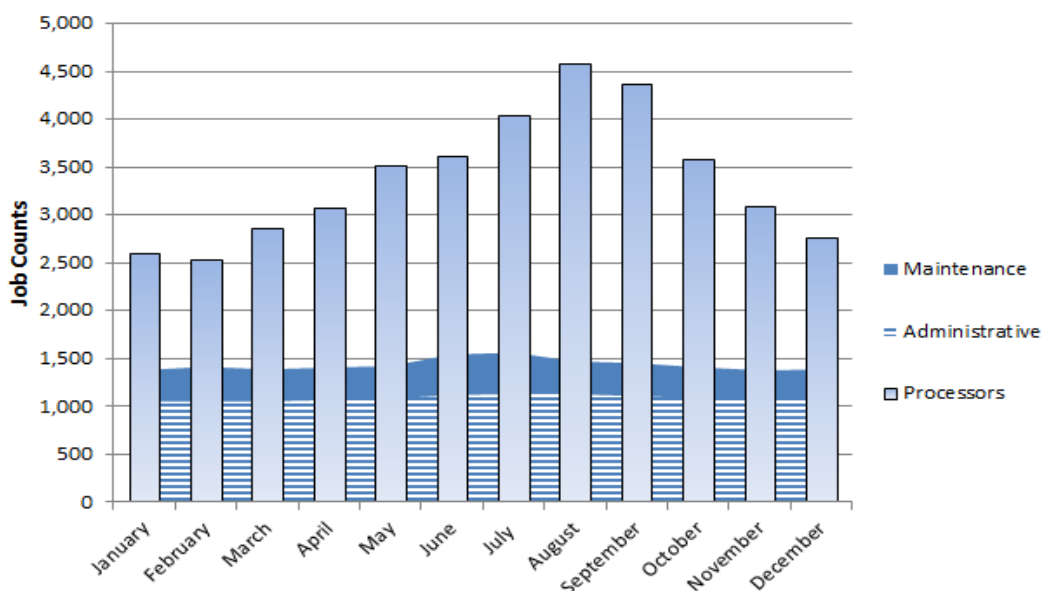
Table 1: Jobs in B.C. Seafood Processing by Month and Occupation Category

Month	Processing	Administrative	Maintenance	Total
January	2,592	1,048	332	3,972
February	2,531	1,053	362	3,945
March	2,852	1,053	334	4,239
April	3,071	1,066	340	4,478
May	3,509	1,082	341	4,929
June	3,617	1,117	426	5,158
July	4,031	1,131	432	5,591
August	4,578	1,126	344	6,045
September	4,365	1,108	343	5,817
October	3,578	1,086	323	4,986
November	3,091	1,063	316	4,471
December	2,766	1,062	322	4,150
Annual Average	3,382	1,083	351	4,815

- totals may not match due to rounding

The number of processing jobs ranged from a high of 4,578 in August to a low of 2,531 in February with an annual average 3,382. The number of administrative jobs ranged from a low in January of 1,048 to a high in July of 1,131 with an annual average of 1,083. Maintenance jobs ranged between a low of 316 in November to a high of 432 in July with an average of 351. In 2014, administrative and maintenance job counts appeared to be more year-round with less month-to-month variation than seafood processing jobs.

Figure 1 Monthly Employment in B.C. Seafood Processing by Occupation Category



Since 1996, seven B.C. seafood processing employment surveys have been conducted and sector employment has ranged from a low of 4,176 in 2008 to a high of 5,679 in 2002. Sector employment trends observed in 2014 were relatively consistent with results observed in the previous surveys. The 4,815 jobs estimated for 2014 varies two per cent from the long-term (1996-2014) average of 4,924. In 2014, the breakdown of employment by occupation category within the sector showed similar distribution to historical figures with processing jobs dominating. There was a notable shift in 2014 with fewer jobs attributed to processing (70 per cent in 2014 compared to 77 per cent historically); and more jobs attributed to administration (23 per cent in 2014 compared to 17 per cent historically) and maintenance (seven per cent in 2014 compared to six per cent historically).

Table 2: Jobs in B.C. Seafood Processing by Occupation Category (1996-2014)

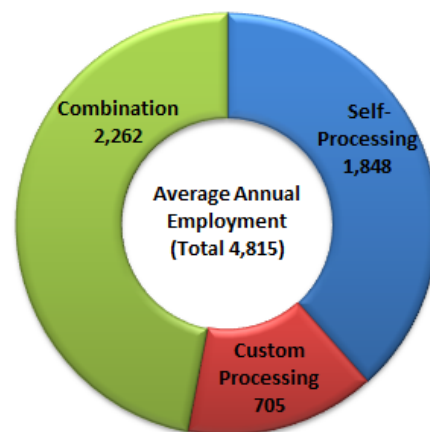
Year	Processing	Administrative	Maintenance	Total
1996	3,929	749	231	4,909
1999	3,574	740	245	4,558
2002	4,626	779	274	5,679
2005	4,343	917	241	5,500
2008	3,101	823	251	4,176
2011	3,615	858	356	4,829
2014	3,382	1,083	351	4,815
1996 -2014 Average	3,796	850	278	4,924

Processing Activity

Of the 246 operations that provided information on their self- and/or custom processing activities in 2014, 136 reported self-processing only, 44 reported custom processing only and 66 reported a combination of the two processing types. Plants carrying out processing solely for their own use or sale made up the majority (55 per cent) of active operations with the other 45 per cent carried out solely custom processing or a combination of self- and custom processing.

An estimated 38 per cent (1,848) of provincial seafood processing employment occurred in self-processing only plants, 15 per cent (705) in custom processing only plants and 47 per cent (2,262) in plants that carried out both self- and custom processing activities during 2014.

Figure 2 B.C. Seafood Processing Employment by Processing Activity



Jobs by Species Processed

A breakdown of own vs. custom processing by species category was available for 4,815 jobs. Processing of wild salmon generated the most jobs (28 per cent) in the sector followed by groundfish (at 16 per cent), wild shellfish (at 13 per cent) and farmed salmon (at 11 per cent).

Additional shares of total employment were attributed to the processing of herring (at seven percent), halibut (at six per cent) and farmed shellfish (at six per cent). An estimated eight per cent of jobs were attributed to the “other species” category which included tuna, cod, hake, sole, carp, krill, skate mackerel and marine plants. For the remaining five per cent of jobs no species information was available.

Table 3: Employment in B.C. Seafood Processing by Species and Processing Activity

Species Category	Number of Jobs			Number of Plants
	Self-Processing	Custom Processing	Annual Average	
Wild Salmon	964	402	1,366	121
Farmed Salmon	287	241	528	43
Herring	166	175	341	22
Halibut	229	63	293	70
Groundfish	534	222	756	90
Wild Shellfish	565	42	607	74
Farmed Shellfish	251	21	271	38
Other Species	304	98	403	58
Not Specified	58	193	250	17
Total	3,357	1,458	4,815	246

- For combination plants, job estimates were divided into custom or self-processing based on the percentage of jobs attributed to each processing type
- One plant may process more than one species; therefore, the total number of plants by species is greater than the total number of active plants

Wages Paid

In 2014, 224 plants reported paying wages totalling \$153.6 million. Of these plants, 123 self-processing only plants paid out \$66.4 million in wages, 40 custom processing only plants paid out \$16.7 million in wages and 61 combination plants paid out \$70.4 million in wages and salaries.

A total of 22 plants did not report paying wages in 2014. These plants fell into two main categories: 1) owner-operated plants where no wages or salaries were paid; and 2) employees working in a plant but where their primary employment wages were paid from another aspect of the operation e.g. fish guiding; retail store etc.

Wages by Species Processed

For plants that provided species category information, wage estimates by species were also developed. Wild salmon, groundfish and wild shellfish accounted for the highest per cent of wages paid at 29 per cent, 16 per cent and 13 per cent, respectively. Additional shares of wages were attributed to farmed salmon (at 12 per cent), halibut (at eight per cent) herring (at six per cent), and farmed shellfish (at five per cent). Ten per cent of wages were attributed to species in the “other species” category and the remaining two per cent attributed to unspecified species.

Figure 3 B.C. Seafood Processing Wages Paid by Processing Activity

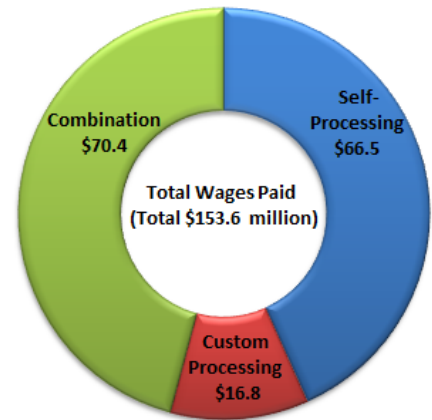


Table 4: Wages Paid by B.C. Seafood Processors by Species and Processing Activity (\$ Millions)

Species Category	Self-Processing	Custom Processing	Total Wages Paid
Wild Salmon	32.5	12.0	44.5
Farmed Salmon	10.5	7.7	18.1
Herring	7.2	32.5	12.3
Halibut	6.8	2.4	9.2
Groundfish	17.3	6.6	23.9
Wild Shellfish	19.2	1.2	20.3
Farmed Shellfish	7.1	0.7	7.8
Other Species	10.5	4.2	14.7
Not Specified	1.0	1.7	2.7
Total	112.2	41.4	153.6

- For combination plants, job estimates were divided into custom or self-processing based on the percentage of jobs attributed to each processing type
- One plant may process more than one species; therefore, the total number of plants involved per species is greater than the total number of active plants



Employment and Wages Paid by Region

Seafood processing plants are located throughout the province. The Lower Mainland had the highest concentration with 58 per cent of jobs and 63 per cent of total wages paid. The Southern Vancouver Island region was the second largest contributor, accounting for 18 per cent of jobs and 17 per cent of wages. The North Coast/Prince Rupert region ranked third with six per cent of jobs and wages paid, followed by Northern Vancouver Island with five per cent of jobs and wages paid. The West Coast of Vancouver Island was the fifth largest contributor with four per cent of jobs and wages paid. The Sunshine Coast, Central Coast, Haida Gwaii and the Interior of BC regions combined to make up the remaining nine per cent of jobs and five per cent of wages.

The North Coast/Prince Rupert, Haida Gwaii and Sunshine Coast regions displayed the greatest range in job numbers between the low and high seasons. The Lower Mainland, Northern Vancouver Island and Southern Vancouver Island showed the least amount of seasonal variation between the low and high seasons.



Table 5: Regional B.C. Seafood Processing Plant and Company Counts with Jobs and Wages Paid

Region	Company Count	Plant Count	Job Count			Wages Paid (\$ Millions)
			Seasonal Low	Seasonal High	Annual Average	
Lower Mainland	126	130	2,484	3,166	2,809	96.3
Southern Vancouver Island	50	48	700	1,097	861	26.2
West Coast Vancouver Island	9	9	96	284	174	5.6
Northern Vancouver Island	6	6	199	296	233	7.7
Sunshine Coast	8	8	49	227	87	4.0
Central Coast	6	6	44	128	74	1.2
North Coast/Prince Rupert	14	16	71	797	306	9.7
Haida Gwaii	9	10	25	126	66	1.3
Interior of BC	11	13	196	219	205	1.6
Total BC*	239	246			4,815	\$153.6

- One company may operate plants in more than one region; therefore, the company total for B.C. is less than the combined region totals.

Map of Seafood Processing Regions in British Columbia



Notes on Methodology

Employment

The survey collects the number of persons employed each month. The survey does not collect information on the number of hours worked (i.e. whether a job was full-time or part-time). The resultant summary data provides the number of jobs and whether they are seasonal or year-round but cannot be used to report on full-time equivalents (FTE) or person years (PY) for the sector.

Wages Paid

Companies reported on the total T4 wages paid to persons employed in the seafood processing plant. For those operations where seafood processing was a partial component of their overall operation (e.g. cold storage plants) the companies were asked to only attribute wages for those jobs that were dependent upon seafood (i.e. would cease to exist if the operation did not process seafood).

Species Shares

Companies provided additional information on the species group(s) that were processed in the facility and estimated the per cent of jobs attributed to each group. These percentages were applied to job counts and T4 wages reported by each company. For some companies, mostly cold storage plants, it was not possible to provide species breakdown. These jobs were classified in the report as species 'not specified.'

Contact Information

This report is available online at <https://www2.gov.bc.ca/gov/content/industry/agriculture-seafood/statistics/industry-and-sector-profiles>

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