

2011 British Columbia Fish Processing Employment Survey Results

Survey Overview

In 2011, 256 Fish Processing licences were issued by the Ministry of Agriculture. Each company with employees working in a plant is required to take out a provincial fish processing licence. In 2011, a total of 228 companies operating in 248 facilities participated in the 2011 Fish Processing Employment Survey. Two licence holders did not participate in the survey as they went out of business during the 2011 calendar year.

Employment

An estimated 4,829 year round equivalent jobs were reported by B.C. fish processors in 2011. Thirty-eight plants reported no employment or no fish processing in 2011. Of the 216 plants operating in 2011, a total of 171 (79 per cent) operated year-round with the remaining 45 plants running between one and 11 months of the year. Many of these seasonal plants are up-river sport caught fish processors that are in operation during salmon season or cold-storage facilities utilized for temporary storage.

EMPLOYMENT

Number of Jobs for Self Processing Activities	Number of Jobs for Custom Processing Activities	Total Employment
3,032	1,797	4,829

Wages Paid

British Columbia's fish processing sector reported paying \$152.4 million in wages in 2011. Twenty-seven of the operating plants reported paying no wages and salaries. These operations fell into two main categories: 1) owner-operated facilities where no wages/salaries were paid; and 2) employee(s) working in the facility had their primary employment wages paid from another aspect of the operation e.g. fishing guides and retail store clerks.

WAGES (\$ millions)

Wages Paid for Self Processing Activities	Wages Paid for Custom Processing Activities	Total Wages
103.7	48.7	152.4

Processing Activity

Self-Processing or Custom Processing

Operations reported on whether they processed fish for themselves and/or for others. Of those providing this detailed information, 122 operations reported that all the seafood they processed was for their own use and sale and 45 reported their operation did custom processing only. An additional 50 operations reported carrying out a combination of self- and custom-processing during 2011. Based on this information the wages and jobs were attributed as percentages to these activities and an estimate for each was calculated.

Species Shares

Of those seafood processing operations where they could attribute their processing activity by species, wild salmon processing generated an estimated 31 per cent of jobs in 2011. Cultured seafood (salmon and shellfish) processing generated 22 per cent of all jobs in the sector and groundfish/halibut combined generated another 22 per cent. Herring processing generated an estimated five per cent of the jobs with the remaining nine per cent of the jobs coming from processing of all other seafood species including marine plants, tuna, farmed sablefish and sturgeon and sardines.

Estimate of Jobs by Species & Processing Activity

	Wild Salmon	Cultured Salmon	Herring	Halibut	Groundfish	Wild Shellfish	Farmed Shellfish	All Other Species	Subtotal
Self Processing	908	305	211	198	383	482	262	277	3,026
Custom Processing	566	470	51	64	390	67	26	147	1,780
Species Totals	1,473	775	262	262	773	549	288	424	4,807

Estimate of Wages by Species & Processing Activity

	Wild Salmon	Cultured Salmon	Herring	Halibut	Groundfish	Wild Shellfish	Farmed Shellfish	All Other Species	Subtotal
Self Processing	\$30.7	\$10.5	\$7.2	\$8.2	\$13.7	\$16.1	\$7.5	\$9.7	\$103.7
Custom Processing	\$14.3	\$14.7	\$1.3	\$1.9	\$10.2	\$1.3	\$0.5	\$4.2	\$48.5
Species Totals	\$45.1	\$25.2	\$8.5	\$10.1	\$23.9	\$17.4	\$8.0	\$13.9	\$152.1

Job Categories

Executive/Processing/Maintenance

Employment counts were attributed to one of three categories: executive, processing or maintenance. The survey indicated that average monthly employment in the fish processing industry for all categories combined ranged from a low of 3,655 jobs in January to a high of 6,142 jobs in August.

Processing jobs accounted for 75 per cent of all fish plant jobs with employee counts ranging from 2,508 in January to a high of 4,897 in August with an annual average of 3,615. Executive and maintenance job counts tended to be more year-round with less fluctuations from month to month. Executive positions made up 18 per cent of the plant workforce ranging from 828 to 888 employees and averaging 858 for the year. Maintenance job counts ranged between 316 and 423 with an average of 356 positions representing seven per cent of all fish processing plant jobs.

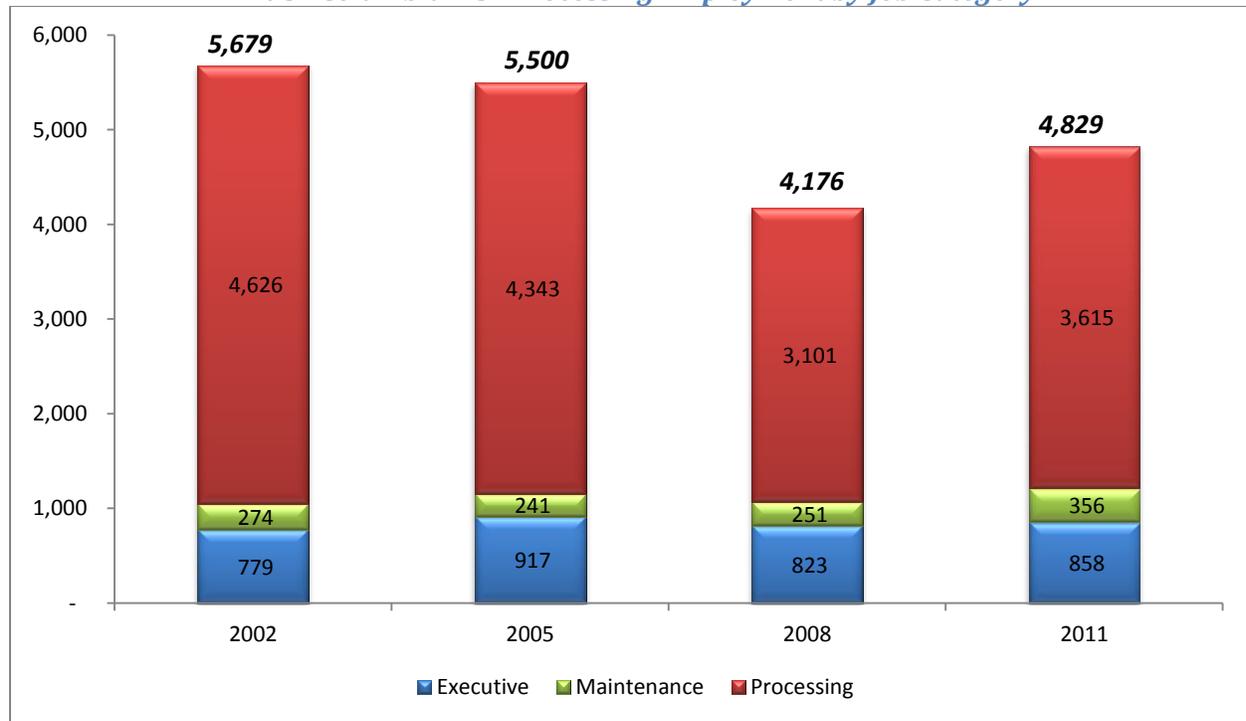
Jobs by Month and Category

Month	Executive	Processing	Maintenance	Total
January	828	2,508	319	3,655
February	836	2,547	337	3,720
March	842	2,886	333	4,061
April	854	3,172	335	4,361
May	858	3,677	415	4,950
June	877	3,817	423	5,117
July	881	4,720	417	6,018
August	888	4,897	357	6,142
September	868	4,605	352	5,825
October	865	4,089	340	5,294
November	856	3,592	333	4,781
December	842	2,868	316	4,026
Annual Average	858	3,615	356	4,829

Fish Processing Employment 2002-2011

B.C.'s fish processing sector provides generally year-round employment for the executive and maintenance staff. While salmon aquaculture has provided for more year-round jobs the seasonality and cyclical nature of the wild fisheries results in year-over-year fluctuations in both the number of processing jobs and ultimately the total workforce.

British Columbia Fish Processing Employment by Job Category



Regional Details

The Lower Mainland region accounted for 61 per cent of all employment and almost 65 per cent of wages followed by the Southern Vancouver Island region which contributed 17 per cent of the jobs and 15 per cent of the wages. The next most important regions were Northern Vancouver Island with seven per cent of jobs and six per cent of wages and North Coast/Prince Rupert with six per cent of jobs and five per cent of wages. The remaining nine per cent of jobs and wages were contributed by the West Coast Vancouver Island, Sunshine Coast, Central Coast, Haida Gwaii and Interior regions of B.C.

Fish Processing Plants, Companies, Jobs and Wages by Region

Region	Plant Count	Company Count	Jobs			T4 Wages Paid (\$ millions)
			Seasonal Low	Seasonal High	Annual Average	
Central Coast	4	4	47	75	61	0.9
Haida Gwaii	7	7	3	125	40	1.3
Interior of BC	7	7	2	23	7	0.05
Lower Mainland	144	128	2,464	3,384	2,948	98.4
North Coast / Prince Rupert	23	22	94	764	309	7.3
Northern Vancouver Island	8	7	263	432	334	9.7
Southern Vancouver Island	44	43	687	932	804	23.2
Sunshine Coast	8	8	34	250	102	4.8
West Coast Vancouver Island and At Sea	9	8	44	428	224	6.7
Total B.C.	254	228*	3,638	6,413	4,829	152.4

*The same company may operate plants in more than one region therefore the company total for B.C. is less than the combined region totals.

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 fish processing plant. For those operations where fish processing was a partial component of their overall operation (e.g. cold storage facilities) 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

When possible companies provided additional information on the species group(s) that were processed in the facility and estimated the per cent of jobs attribute to each group. These percentages were applied to the total annual average job counts and the total T4 wages.

Rounding Error

Totals may not add due to rounding.

British Columbia Fish Processing Regions

