Sectoral Profile

Food, Beverage and Tobacco Product Manufacturing

Ontario

2018-2020

Sectoral Profiles provide an overview of recent labour market developments and outlooks for some of the key industries in various regions of the country

FOOD, BEVERAGE AND TOBACCO PROCESSING REMAINS A KEY INGREDIENT OF ONTARIO'S MANUFACTURING HEARTLAND

- Food, beverage and tobacco processing is one of the largest areas of manufacturing in many regions of Ontario with deep roots in rural communities
- Manufacturing sales in this industry have grown steadily over the last several years in the province, but the industry faces headwinds from stiff competition, automation, foreign entrants, and closures of older facilities
- Although the industry is rather competitive, producers may find opportunities as domestic consumers push for locally-sourced, plant-based, healthier and fresher foods
- Although meat-based products and highly processed foods are losing ground in domestic markets, consumers in foreign markets are incorporating more of these products into their diets, enhancing opportunities for growth
- The expected legalization of edible cannabis products in October 2019, is projected to create new avenues for growth, investment, and employment in the FBT sector
- Labour market conditions should remain positive in the food, beverage and tobacco product manufacturing industry over the 2018 to 2020 period

Ontario is the top food-processing region in Canada and the third largest in North America.[1] It is home to many of the country's biggest food and beverage producers along with numerous smaller homegrown establishments. In 2017, Ontario employed about 35.9% of Canada's workforce in food, beverage and tobacco product manufacturing (FBT).[2] The vast majority of Ontarians in this industry work in food processing with a smaller number in beverage and tobacco production. The food processing industry is broken down into nine categories based on the type of goods produced. Bakeries and tortilla manufacturing, and meat product manufacturing employ about half of the labour force in the province's food processing sector.[3] Meanwhile, seafood product manufacturing, animal food processing, grain and oilseed milling, sugar and confectionary products, and fruit and vegetable preserving and specialty food manufacturing have the fewest number of employees.

The FBT processing industry is a vital part of the provincial manufacturing base, especially in southern Ontario. It is the second largest employer in manufacturing after transportation equipment manufacturing. FBT

Canada

processing has a significant footprint in both urban and rural regions. Growth in this industry has a ripple effect in the economy because it supports activities across multiple industries such as transportation, packaging, retail and food services, and food science. However, one of the strongest ties is with Ontario's farmers as the FBT product manufacturing industry buys nearly two-thirds of all locally grown produce.[4,5]

Average manufacturing sales for food, beverage and tobacco products increased by about 1.5% in Ontario in 2017. Food, beverage and tobacco product sales have increased for four consecutive years in the province and will likely post another gain in 2019. Much of this stems from a steady rise in the purchase of food products and non-alcoholic beverages.[6]

Sector outlook: employment should remain positive in the food, beverage and tobacco processing industry

Over the 2018 to 2020 period, the FBT product manufacturing industry should experience moderate job growth in Ontario. Despite some high-profile closures in recent years, the industry has received several investments to open, expand or upgrade processing facilities. There are also new avenues for food manufacturers to fill niche markets and satisfy consumer preferences for local and sustainable food.

Labour market conditions in food, beverage and tobacco production continue to stand out

Employment in the sector has seen a dip since 2013 owing largely to a decline in employment in food manufacturing.[7] Employment in beverage and tobacco manufacturing, on the other hand, has been increasing since 2011.

Key occupations in the FBT product manufacturing industry

The FBT product manufacturing industry supports thousands of jobs across Ontario in various fields. Some of the key occupations in the industry are:

- Process control and machine operators in food and beverage processing (NOC 9461)
- Labourers in food, beverage and tobacco processing (NOC 9617)
- Bakers (NOC 6332)

FBT manufacturers seek new skill sets as automation and sector crossover increases

As FBT product manufacturing continues to shift, there has been some concern about recruiting job seekers with the right skill set for the industry.[8,9] Many FBT employers have indicated that there is not enough supply of qualified candidates owing to an ageing workforce, competition from more attractive industries, changing immigration policies, and changes in technology requiring higher skilled labour. [10,11]

FBT firms are increasingly investing in automation to meet increasing demand and reduce costs while expanding operations and improving productivity and quality.[12,13] While this may affect job growth,[14] it is also changing the skill set that workers may need in this field.[15,16,17] As equipment continues to be computerized, workers may need to increase their digital technology skills such as those used for automated equipment like programmable logic controller (PLC), manufacturing software like Daily Manufacturing Systems (DMS), and business management software like Enterprise Resource Planning (ERP). Job seekers with experience in robotics, computer-controlled equipment and manufacturing software may fare better in the labour market. Food safety is a top priority for many manufacturers so some positions in the industry may require knowledge of safety protocols such as the Hazard Analysis Critical Control Point (HACCP) principles. As the lines between food manufacturing, retail, and e-commerce continue to blur, employees may be required to have a cache of skills in different areas that would allow them to move seamlessly between operations.[18]

To help support employers and workers, there are specialized training institutions in Ontario. The Institute of Food Processing Technology (IFPT) at Conestoga College provides up-to-date training in food manufacturing and targets new entrants and students into this field. Meanwhile, the NSF International in Guelph offers services to food and beverage manufacturers on food safety, quality control and advanced technologies to increase efficiency. Also, the provincial government is offering the Specialist High Skills Major (SHSM)- Food Processing which is a program enabling high school students to gain sector-focused knowledge and skills to support future endeavours related to food processing.[19]

Competition, costs, and consolidations drive changes in the FBT processing landscape

The FBT product manufacturing industry remains quite competitive. Shifts in consumer preferences, foreign competition, and pressure from buyers to keep prices down are some of the big challenges that confront local producers. Food and beverage manufacturers face more demand from customers to provide product information, higher quality products, and use environmentally responsible practices. At the same time greater retail competition is weighing down on consumer prices and placing strain on FBT product manufacturers to meet these needs.[20] External factors such as higher input costs are further cutting into profits. Agricultural products are the main input for the industry and prices for farmed goods have been steadily going up.[21] The sector may face additional pressures to lower prices in the coming years as the food retail sector contends with increasing competition from the entrance of e-commerce firms, such as Amazon and Walmart, into the food retail space.[22]

To stay competitive some of the larger players in the industry have consolidated and merged, reducing the number of food and beverage manufacturers in Ontario.[23,24,25,26] Some companies have closed older, less efficient plants and moved operations to newer facilities. In fact, one of the most common reasons for plant closures is that the site is no longer competitive to run.[27,28,29] Closures have been more common among large, multinational companies compared to smaller producers and homegrown establishments. These smaller companies are actually more likely to invest and open facilities, which often use advanced technologies and result in lower production costs. However, it is worth noting that several larger producers are upgrading or expanding their operations to better serve demand for new and old products.[30,31,32,33]

Overall the sector is shifting from larger firms to a greater number of smaller firms. This can be attributed to a number of factors including increased demand for locally grown/processed products, craft and artisanal products, diversity of cultural foods, and sustainable products;[34] increasing government and private sector support for small and medium firms;[35,36,37,38] as well as the ability of small and medium firms to be more flexible and in keeping with new trends and consumer concerns.[39] The sector could also change significantly in the coming years as manufacturing becomes increasingly connected to direct marketing, retail, and e-commerce. Recent efforts by the provincial government to support small cider and spirits manufacturers by permitting them to have a bar or restaurant at each of their licensed manufacturing sites is a major step towards bolstering this manufacturing-direct retail connection.[40] Similarly, grocery retailers are increasingly manufacturing food under their own private labels to meet consumer demand for value, quality, and specific food trends which is further blurring the line between manufacturing and retail.[41] These changes could create new avenues for employment in the FBT sector.

The sector may continue to face challenges as the food manufacturing sector grapples with competitive pressures particularly related to the United States (U.S.). Several major manufacturers (e.g. Campbells, Nestle, Dr. Oetker) have moved to the U.S. in recent years which may contribute to changes in the sector. This trend may be further enhanced by changes in U.S. trade policies that are incentivizing movement to the U.S as well as other ostensible competitive advantages such as lower corporate tax rates, lower electricity costs, and a more favourable regulatory climate.

Changing consumer tastes create new opportunities for FBT processors

The FBT product manufacturing industry has new avenues within its reach as consumer tastes shift and global markets continue to open up. The biggest opportunity may lie in changing demographics where younger consumers are increasingly concerned about environmentally friendly and healthy food options and better information about production processes and food content.[42] This leads to an increase in demand for locally grown and processed foods, also driving the demand for artisanal foods and beverages, which can meet these consumer concerns.

A major trend in changing consumer tastes is a shift towards healthier and fresher foods. The impact of these shifting tastes has been felt most significantly by the fruit and vegetable preserving and speciality food manufacturing segment which has experienced a somewhat steady decline in sales and employment over the last few years.[43,44] Indeed, the recent closure of Campbell Soup Company's Etobicoke plant as well as the fall in its stocks in August 2017 were attributed to declining sales and revenues as more people are choosing fresher foods over canned soups and bottled juices. Changes in consumer preference may be further boosted by Health Canada's new Healthy Eating Strategy which encourages limiting of processed foods that are high in sugars, sodium and fat as well as upcoming restrictions on commercial marketing of unhealthy foods to children.[45] However, efforts of frozen food companies to expand to frozen vegetables and fruits are further bolstering the segment as customers can now access a more convenient, cost-effective substitute for fresh produce. While the impact of Canadians' increasing preference for healthier foods can lead to a decline in sales for some FBT segments, it is creating new avenues for foreign direct investment (FDI) as international producers capitalize on this growing Canadian market.[46]

Alternative proteins have become an important new avenue for growth for the FBT sector as more consumers reduce their meat intake; actively incorporate plant-based foods into their diets; and/or move towards vegetarian and/ or vegan diets. In addition to individual choice, there is a wider emphasis on increasing the intake of plant-based foods.[47,48,49] Many larger firms, notably Loblaws, Maple Leaf Foods and Saputo, have acknowledged this shift and are making efforts to acquire a share of this growing market.[50,51,52,53] Additionally, speciality products such as organic, gluten-free, and non- GMO foods are also gaining ground as a growing market for the FBT sector[54,55,56] and producers are making significant efforts to meet this demand.[57] Functional foods and beverages are also showing promise as a segment for growth owing to increasing consumer interest, aging population, rising costs of health care, and greater understanding of food-health relationships.[58]

Strength may also lie in the ethnic and fusion food market because of the province's diverse population and increasing numbers of newcomers. Local manufacturers are benefitting from a growing demand for ethnic and specialty meats, vegetables, and spices that cater to the consumer tastes of diverse communities, specific dietary preferences, and/or religious needs.[59,60,61,62,63,64] Combined with the provincial government's efforts to support locally grown and produced ethnic foods, this burgeoning segment of the industry should continue to flourish and create employment.[65]

Prepared or ready-to-eat meals are forming a more significant part of Canadians' eating habits and grocery bills as consumers seek convenience and affordability.[66,67,68] Meat producers have also noted a growing demand for meat products that are either fully prepared or ready-to-eat.[69] These trends should create new opportunities for investments and employment gains for the sector.

Ontario may also be able to capitalize on consumer tastes in foreign markets. Ontario's increasing foray into growing and processing ethnic/world foods is creating a significant area for growth as consumers in current and emerging markets are increasingly showing interest in Canadian products.[70] Additionally, while domestic consumer tastes are moving away from meats and heavily processed foods and beverages, consumers in foreign markets are incorporating more of these products into their diets, further enhancing opportunities for growth for the FBT sector.[71,72,73,74] Foreign markets for functional foods are also expanding, especially child-specific functional foods, providing another avenue for FBT growth.[75]

Joint ventures create high expectations for cannabis in FBT sector

The legalization of cannabis for recreational use on October 17, 2018, and the expected legalization of edible cannabis products in October 2019, is projected to create new avenues for growth, investment, and employment in the FBT sector.[76]

The beverage subsector is forecasted to create a significant splash with investments by major beverage companies in not only cannabis infused alcoholic beverages like beers and wines[77] but also infused health and wellness-based beverages like juices, shakes, and iced teas.[78] The foray into wellness- based beverages may blur the line between medical and recreational marijuana use and potentially create new areas for growth for the FBT sector in pharmaceutical related ventures.[79] Additionally, beverages derived directly from cannabis, rather than just infused with it, are also providing new areas for expansion of the beverage subsector.[80,81,82]

The food sector could also experience a boost from a growing market for cannabis-infused edibles[83] as well as significant investments.[84] The bakeries and sugar and confectionary product segments of the sector may be particularly affected as cannabis-infused chocolate, candy, cookies and other baked goods tend to mark the first incursion into cannabis-based edibles.[85,86] Cannabis companies could also create avenues for growth and employment in other areas of food production through the development of cannabis- infused pet food;[87,88,89] and cannabis –infused powders, sugar products, and salts that can be used in beverages and food products.[90,91] Growing interest and research into the use of non-psychoactive ingredients in cannabis is drawing the attention of food and beverage producers and could generate a market among consumers who may be interested in the ability of cannabis to provide relief from various ailments without the psychoactive effects.[92,93]

The U.S. recently reinstated the strict enforcement of federal cannabis prohibition across the country including in states were cannabis has been legalized. On one hand, this may cause Canadian companies to lose access to the U.S. market. On the other hand, this decision could suppress the emergence of any large U.S. cannabis companies that could challenge the global expansion of Canadian firms.[94] It could also drive more U.S. investment[95,96,97] and tourism[98] north of the border further supporting growth and employment for the industry.

The emergence of the cannabis industry is creating new jobs and adding new job titles to existing occupations. Employers in the industry have indicated a growing need for workers with industry specific knowledge and several colleges and universities are providing training for careers in the industry.[99,100]

Automation, robotics, and nanotechnology changing the face of FBT manufacturing

The demand for automation and robotics is expected to grow in the FBT sector as companies operate in a highly competitive global landscape and face decreasing availability of low cost labour; increasing demand for hygiene; growing legislations on health, safety, and security of employees; rising commodity costs; increasing demand for high quality convenient food and consistent product quality; and growing requirements for product traceability.[101,102] Increasing concerns about food waste and demand for locally sourced food could further support the adoption of automation and robotics in the sector.[103,104] The Ontario supercluster initiative is supporting this push for advanced manufacturing in food processing by funding the sector to develop innovative products, optimize production processes, and meet the need for highly skilled and engaged workers.[105,106]

While larger companies tend to have various levels of automation in their plants, small and medium size companies are not far behind. These companies are increasingly investing in automation as they face similar competitive pressures as large companies requiring them to increase productivity, reduce costs, and improve quality.[107] Levels of automation may also differ by subsector. The meat, fish, and seafood processing subsectors face relatively more barriers to the availability and adoption of technology, automation, and robotics that can adapt to the seasonality of the food and harsh processing environment. Interestingly, these subsectors have relatively greater challenges in attracting and retaining labour, and would benefit significantly from higher levels of automation to address labour scarcity.[108]

Nanotechnology has been gaining ground in the sector in recent years in two major areas, namely, food additives (nano inside) and food packaging (nano outside).[109] Such innovation could potentially contribute to growth in the industry by increasing shelf life allowing food to travel further and be available for sale longer, ensuring long-term food safety which could reduce recalls, improve and maintain taste; and reduce packaging waste.[110,111,112,113] Growing uses of nanotechnology could affect the type of skills needed for employment in the sector in the long term.

The increasing adoption of automation and robotics could act as a double-edged sword for the sector. On one hand, automation and robotics could affect job growth in the sector as more tasks are automated.[114] Additionally, the lag in automation and outdated facilities may also affect job growth as bigger manufacturers, like Dr. Oetkers, Campbells, and Maple Leaf Foods close aging facilities and consolidate operations to plants that can allow for growth and comply with modern-day standards of food safety and product development.[115] On the other hand, there is some indication that while automation and robotics may affect lower skilled jobs, they may create new higher skilled jobs and change the employment skills needed in the sector.[116]

Beefing up trade: CETA and CPTPP open new markets while NAFTA packs a punch

In 2017, Ontario exported over $10 billion worth of food, beverage, and tobacco products, an increase of about 3.0% from 2016.[117] International trade is extremely valuable for the FBT sector as the domestic industry is saturated and future growth opportunities will depend on increasing access to international markets.[118] Additionally, growing demand for agri-food products internationally, especially in Asia- Pacific markets, can provide the FBT sector with a strong global growth opportunity.[119] Compared to other sectors, the FBT sector has been a stable and predictable contributor to FDI[120] and this share could be boosted through new trade agreements. Stronger FDI will contribute to healthier productivity growth, increased competitiveness and improved product quality.[121]

The United States is Ontario's main export market for this sector with close to 90% of its exports going to the U.S. in 2017.[122] On November 30, 2018, Canada, Mexico, and the United States signed the new Canada-United States-Mexico Agreement (CUSMA), which will replace the North American Free Trade Agreement (NAFTA) established in 1994. CUSMA will now need to be ratified by all three member countries' respective governments. The FBT sector could be impacted by increased access of U.S. dairy products to the Canadian market; elimination of dairy classes 6 and 7 from the pricing system; limiting exports of Canadian milk protein concentrates, skim milk powder and infant formula; and raised import limits of poultry and eggs. There is some concern that these proposed changes could affect the competitiveness of Canadian dairy products, impact production, and affect capital investment in the sector.[123,124] However, access to cheaper dairy and poultry products may provide cheaper inputs for the FBT sector and create avenues for cost savings. The sector could also benefit from removal of tariffs on further-processed products like margarine as well as increased market access for Canadian-produced refined sugar and sugar- containing products.[125,126]

In 2017, the European Union (EU) accounted for about 1.7% of exports from Ontario's FBT manufacturing sector.[127] EU tariffs on several food products were eliminated immediately upon CETA's entry into force on September 21 2017. CETA provides FBT goods with access to the EU market through the elimination/reduction of some or all tariffs on Canadian exports of processed meats, pet food, frozen and processed fruits and vegetables, processed grains and pulses, baked goods etc.[128] In addition to increasing sales and employment, the preferential duty-free access to EU markets afforded by CETA could boost Foreign Direct Investment, and potentially increase the establishment of Ontario operations from countries like US, China, India, and Japan.[129,130] Excluding cheese and milk protein substances, CETA will not affect Canada's supply management system and supply managed products like dairy, egg, and poultry will remain exempt from increases in market access.[131] [132] The dairy industry has expressed concern that the increasing access for European cheeses will impact the market for Canadian dairy products and potentially affect income while providing limited access to EU markets.[133]

The anticipated launch of the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) could potentially boost the sector by increasing access to markets in Asia- Pacific and South America which currently make up only about 4.0% of exports from this sector.[134,135] The FBT manufacturing industry could benefit from the CPTPP through the elimination/reduction of some or all tariffs on Canadian exports of confectionery, wines and spirits, pork, beef, malt, processed food and beverages, animal feeds, maple syrup, cereals, grains, pulses, fruits and vegetables, and processed grains and pulse products.[136] The potential inclusion of the United Kingdom in CPTPP[137] could also benefit the sector by providing preferential access to the UK market that will be lost under CETA post-Brexit. There is some indication that market access concessions granted under the CPTPP may create competition for Canadian food producers, particular dairy, egg, and poultry producers, and may affect employment in the sector.[138,139,140] Other FBT producers and processors (e.g. pork, beef, sugar, tobacco, beverages) , however, could benefit greatly from CPTPP as it provides preferential access to key markets like Japan and New Zealand, increases opportunities for value-added growth and diversification of trade for these segments.[141142143] It should be noted that gains from CPTPP could be offset to some extent by decline in exports and imports from existing free trade partners like Chile, Mexico, and Peru. [144]

There is some concern that the combined concessions from CETA, CPTPP, and CUSMA will have a cumulative impact on the agri-food and processing segments related to dairy and poultry, the effects of which will be felt most significantly in rural areas where these producers are based.[145] However, other segments such as pork, beef, sugar, and processed foods could see a net gain from these agreements.

On January 1, 2015, the Canada-Korea Free Trade Agreement (CKFTA) entered into force giving Canadian exporters preferential access to the South Korean market and the potential to expand Canadian business in emerging markets in the Asia-Pacific region. The FBT manufacturing industry has benefitted from the CKFTA through the elimination/reduction of some or all tariffs on Canadian exports of wines, spirits, beef, pork, processed foods, bakery and confectionery products, pet food, food-grade soybeans, maple sugar, canola oil, malt and pulses. Since the CKTFA came into force, Ontario has seen export gains[146] with the FBT manufacturing sector posting over $50 million in exports to South Korea in 2017, an almost 80% gain since 2014.[147]

Sub-Regional Analysis: Ontario's food, beverage and tobacco processing hubs

Ontario has several strengths in the FBT product manufacturing industry that have helped shape the region as a top food-processing area. The province has a rich agricultural base that directly supplies many of the inputs for the FBT product manufacturing industry. This can help reduce transportation time and costs for producers. Another advantage is that Ontario is a research hub for the industry and one of the leaders in food technology and innovation. Institutes like the University of Guelph, Agri-Tech Commercialization Centre, NSF International, Toronto Food Business Incubator, and the Vineland Research and Innovation Centre are actively involved in areas such as biotechnology and innovative ingredients. Most of these institutions are located in the Toronto–Guelph corridor.[148]

The FBT product manufacturing industry is a key player in many parts of southern Ontario. In particular, almost 25.0% of Ontario's food manufacturers are located in rural communities.[149] These localities offer reduced land costs, lower staff turnover, and are within close reach to farms. Labour market activity created by FBT product manufacturers is a big driver of the local economy in these rural regions.

FBT processing is the second largest employer in the manufacturing industry in the **Ottawa** economic region.[150] Several manufacturers are located outside of the city of Ottawa in areas like Cornwall and Hastings. A new investor, Leclerc Group, will be establishing a new cookie, snack bar and cracker manufacturing plant in Cornwall in spring 2019.[151] The region has also seen a rising interest in microbreweries and beverage manufacturing with several start-ups and expansions from beverage producers such as [152] such as Overflow Brewing and Full Beard Brewing Co.[153]

According to the Labour Force Survey, FBT processing accounts for one-quarter of employment in the manufacturing industry in the **Kingston-Pembroke** region with Belleville being a core hub for food processing in Ontario. The FBT sector in the region has seen several expansions and new investments including Hain Celestial establishing a new manufacturing plant in Quinte West creating 26 jobs by 2020;[154] Frulact Canada opening a plant in Kingston in 2018, creating 55 jobs;[155] Spearhead Brewing Company opening a new brewing facility in Kingston, resulting in 10 new positions;[156] and Feihe International Inc. will open a baby formula manufacturing facility in Kingston in late 2019, creating up to 250 jobs.[157]

FBT processing is one of the larger employers in the manufacturing industry in the **Muskoka-Kawarthas** region with key centres in Peterborough and Cobourg. The region has seen an expansion in its dairy segment with the expansion of Kawartha Dairy Limited's plant in Bobcaygeon creating 10 new jobs and securing 115.[158] The beverages segment is also seeing significant investment from breweries including Muskoka Brewery, Pie-Eyed Monk Brewery, Old Dog Brewing Company, Bobcaygeon Brewing Company, and Fenelon Falls Brewing Company.[159] [160] Coca-Cola has also recently invested $85 million to build a new facility in Peterborough that is expected to create 35 new jobs and support 100 jobs when it becomes operational in 2020.[161]

The **Toronto** region has the largest cluster of food processing companies in Ontario and one of the biggest across North America. Toronto serves as the headquarters for several major companies in the industry and is a leader in specialty foods, particularly ethnic and fusion goods because of its diverse population. There have been several investments and expansions in the region of late from manufacturers including Olymel LP redeveloping its Orenda plant and acquiring a new plant in Westwyn creating 100 new jobs;[162] Sargent Farms Ltd. investing $10M over three years, starting 2018, to retrofit its chicken processing facility in Milton, maintaining 300 jobs;[163] Steam Whistle Brewing opening a new $22.8M manufacturing facility in Etobicoke, creating 100 jobs; [164] Mondelez Canada Inc. investing $130M towards modernization and expansion project in Toronto, supporting 450 jobs;[165] and Griffith Foods Ltd. investing $14.2M to modernize and scale-up operations at its facility in Toronto, creating eight jobs and retaining 337 positions.[166] The sector in the region will be significantly affected by the closing of the Campbell Soup Company's Etobicoke factory in 2019 affecting about 380 jobs; Nestle Purina shutting their Mississauga facility in 2019 impacting 87 employees;[167] as well as the recent announcement that Maple Leaf Foods will be closing its Toronto and Brampton plants in 2022.[168,169]

FBT processing is one of the larger employers in the manufacturing industry in the **Kitchener–Waterloo–Barrie** region with key centres in Guelph, Kitchener and Cambridge. Guelph is the leading centre for food research and innovation in the province. The region has seen closures by major producers in recent years including General Mills and Nestle Canada. However, new investments and expansions by Florentina Foods,[170] Sleeman,[171] Conestoga Meat Packers[172] and various brewing facilities[173,174,175] could provide new employment opportunities over the forecast period.

FBT processing is the second largest employer in the manufacturing industry in the **Hamilton–Niagara Peninsula** region with key centres in Brantford and Hamilton. Brantford is one of the core food manufacturing hubs in Ontario and has been able to attract global companies over the past few years. Niagara-on-the-Lake is the heart of the provincial wine and icewine industry. The economic region is also home to two of the biggest tobacco manufacturers in the province–Norfolk Leaf Company Ltd. and Grand River Enterprises, Six Nations Ltd. Recent investments and expansions by Harvest Specialty Mills in Burlington, Gay Lea Foods Cooperative Ltd. in Hamilton, and Ferrero Canada in Brantford[176] should provide new employment opportunities over the forecast period.

FBT processing is the second largest employer in the manufacturing industry in the **London** region. London is a core hub for food processing with many national and global players located here. In 2018, Dr. Oetker announced that it will be moving part of its New Brunswick operations to its London facility, adding more than 100 jobs to its current workforce.[177] The local sector will also experience a boost from Nestle Canada's $51.5 million expansion of its London ice cream factory, [178] as well as the establishment of Maple Leaf Foods new plant in London by 2021, resulting in the creation of about 1,450 jobs.[179] However, the region may experience some instability from the closing of Maple Leaf Foods' turkey processing plant in Thamesford, affecting about 400 employees,[180] and the shuttering of Canada Bread Factory in Woodstock, affecting 70 positions.[181].

FBT processing is a significant employer in the **Windsor–Sarnia** region with several manufacturers operating in smaller communities throughout the region. New investments and expansions by Whyte's Foods,[182] Bonduelle Ontario Inc.,[183] Barry Callebaut Group,[184] and Golden Miles Foods, [185] should create new jobs over the forecast period.

FBT processing is one of the largest employers in the manufacturing industry with several small and mid-size food manufacturers operating in rural communities throughout the **Stratford-Bruce Peninsula** region. New investments should create additional jobs over the forecast period as the Cowbell Brewery expands its Blyth facility in 2019[186] and Black Swan Brewing doubles its brewing capacity in Stratford.[187] However, the region will be significantly affected by the recent announcement that Maple Leaf Foods will be closing its St. Marys plant in 2021.[188]

While FBT processing is not a significant sector in the **Northeast** and **Northwest** regions, efforts are underway to develop this sector[189] as an important part of the local economies[190]. A growing interest in locally sourced food in Ontario is driving initiatives and investments to improve livestock and aquaculture production and adapt new crops for use in Northern Ontario.[191] Recent investments in the region such as Canadian Freshwater Fish processing plant[192] in Thunder Bay, Boreal Berry Farm & Winery,[193] and Nickel City Cheese in Sudbury[194] are creating job opportunities. The region has also seen a rising interest in microbreweries and beverage manufacturing with several start-ups and expansions from beverage producers such as Crosscut Distillery in Sudbury[195], Sleeping Giant Brewing Company in Thunder Bay[196] and OutSpoken Brewing in Sault Ste. Marie[197].

The food, beverage and tobacco processing industry should continue to perform well in Ontario

The FBT product manufacturing industry is a key ingredient to the provincial economy. It supports thousands of direct and indirect jobs, and plays a vital role in rural Ontario and with our farmers. The industry has outperformed many other areas of manufacturing, making it a stable part of Ontario's industrial base. Plant openings, expansions and investments have helped balance past closures and layoffs over the years. A growing Ontario population, a firm base for research and innovation, and greater demand for locally sourced foods, should bode well for companies. On the other hand, foreign competition, lower profit margins, and higher input costs are factors to keep on the radar. As FBT product manufacturing moves forward, the provincial industry will likely continue to expand as it looks for new ways to bring food from the farm to the table.

Note: *In preparing this document, the authors have taken care to provide clients with labour market information that is timely and accurate at the time of publication. Since labour market conditions are dynamic, some of the information presented here may have changed since this document was published. Users are encouraged to also refer to other sources for additional information on the local economy and labour market. Information contained in this document does not necessarily reflect official policies of Employment and Social Development Canada.*

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