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Canadian Seed Trade Association
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ACCESS TO LABOUR FOR SEED GROWERS

SEED SECTOR AGRIWORKFORCE RESEARCH PAPER

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RESEARCH CONDUCTED BY:



CANADIAN AGRICULTURAL
HUMAN RESOURCE COUNCIL
CONSEIL CANADIEN POUR LES
RESSOURCES HUMAINES EN AGRICULTURE

SEED SECTOR AGRIWORKFORCE OVERVIEW

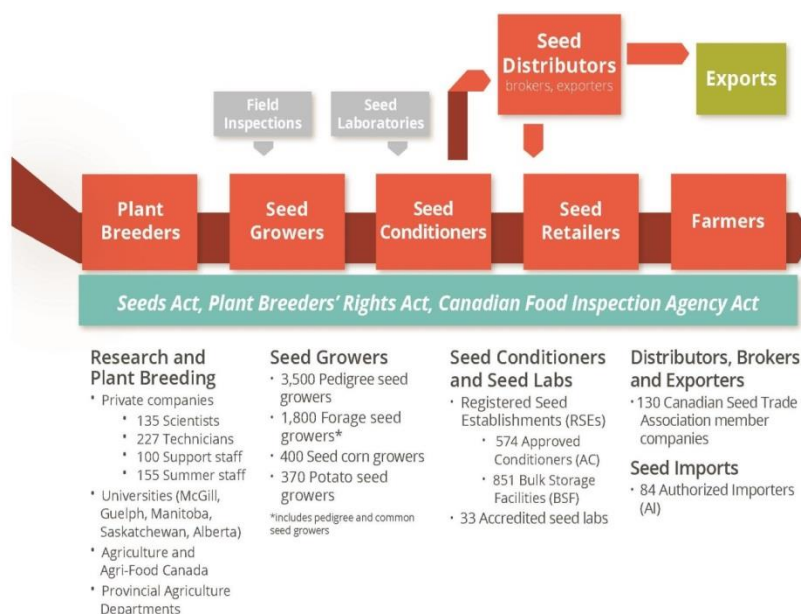
It all begins with seed. Innovation for the crop value chain starts with seed. Food processors differentiate their products and increase their marketing edge by choosing innovative grains and oilseed varieties produced from pedigreed seed. Seed is a high growth sector with a total economic impact (direct and indirect) for the Canadian economy estimated at \$5.61 billionⁱ. The seed sector creates 57,420 Canadian jobs and pays \$1.67 billion in wages and salaries which generates \$81.9 million in tax revenueⁱⁱ. 3,500 Canadian seed growers produce seed for over 112,000 Canadian farmersⁱⁱⁱ who rely on seed to grow their commercial crops which becomes our food in the grocery stores.

Even though seed farms make maximum use of innovation and new technology, many processes still require a large amount of manual labour. Seed production is the most labour intensive segment of the crop value chain. Extra labour is needed to complete the activities that take place on seed growing operations. Besides working with heavy machinery such as tractors and combines, seed farm operations also have manual, labour intensive jobs such as roguing (removal by hand of off-type and other kinds of crop plants and weeds required to meet varietal purity standards set by the CSGA), corn detasseling, as well as, seed cleaning, conditioning, processing, sampling, packaging and labelling operations. These labour intensive activities are unique to seed growing operations and this manual labour is necessary to ensure seed quality and purity (genetic purity) which is certified and regulated through the *Seeds Act* and *Seeds Regulations*. Seed certification protects a Plant Breeder's investment and creation of a new innovative variety from the research stage to the commercialization phase.

Growth of the seed sector relies on a stable labour workforce. Unfortunately, the National Commodity List is creating obstacles for seed growers including: limiting diversification of farmers into seed crops, limiting expansion of seed operations, limiting environmental biodiversity, crop rotation, and production options. These obstacles are restricting innovation and growth. Without access to labour, there is **significant risk of Canada losing seed growing companies' investments.**

Seed growers hire Canadians first, expending significant effort to recruit Canadian employees. **New** research conducted by the Canadian Agricultural Human Resource Council (CAHRC) for the CSGA in the summer of 2017 clarifies that on average seed farms employ close to 16 Canadian workers including farm owner-operators and their families, paid employees, and contractors. Canadian seed growers also report significant recruitment strategies that include: advertisement, recruitment agencies, career fairs, connecting with colleges and university graduates through job postings on university and college job boards, usage of temporary agencies, and "word of mouth". Many growers continue to look for new ways to expand their recruitment strategies.

If Canadians cannot be found, broadening access to the SAWP and Agricultural Stream is an important part of the seed sector's workforce strategy. Seed farm sizes are increasing and demographics show that families are smaller. There is less and less of a labour pool to draw on for these sorts of manual farm labour jobs which most Canadians are not interested in doing. All seed growers would like access to the Temporary Foreign Worker Program's Seasonal Agriculture Worker Program's or the Agricultural Stream when Canadians cannot be found.



The Seed Sector Value Chain: Step 2 in the value chain diagram, Seed Growers, is primary agriculture function, involving intensive labour and special skills to ensure seed purity.

LABOUR MARKET INFORMATION FOR CROPS INCLUDING SEED

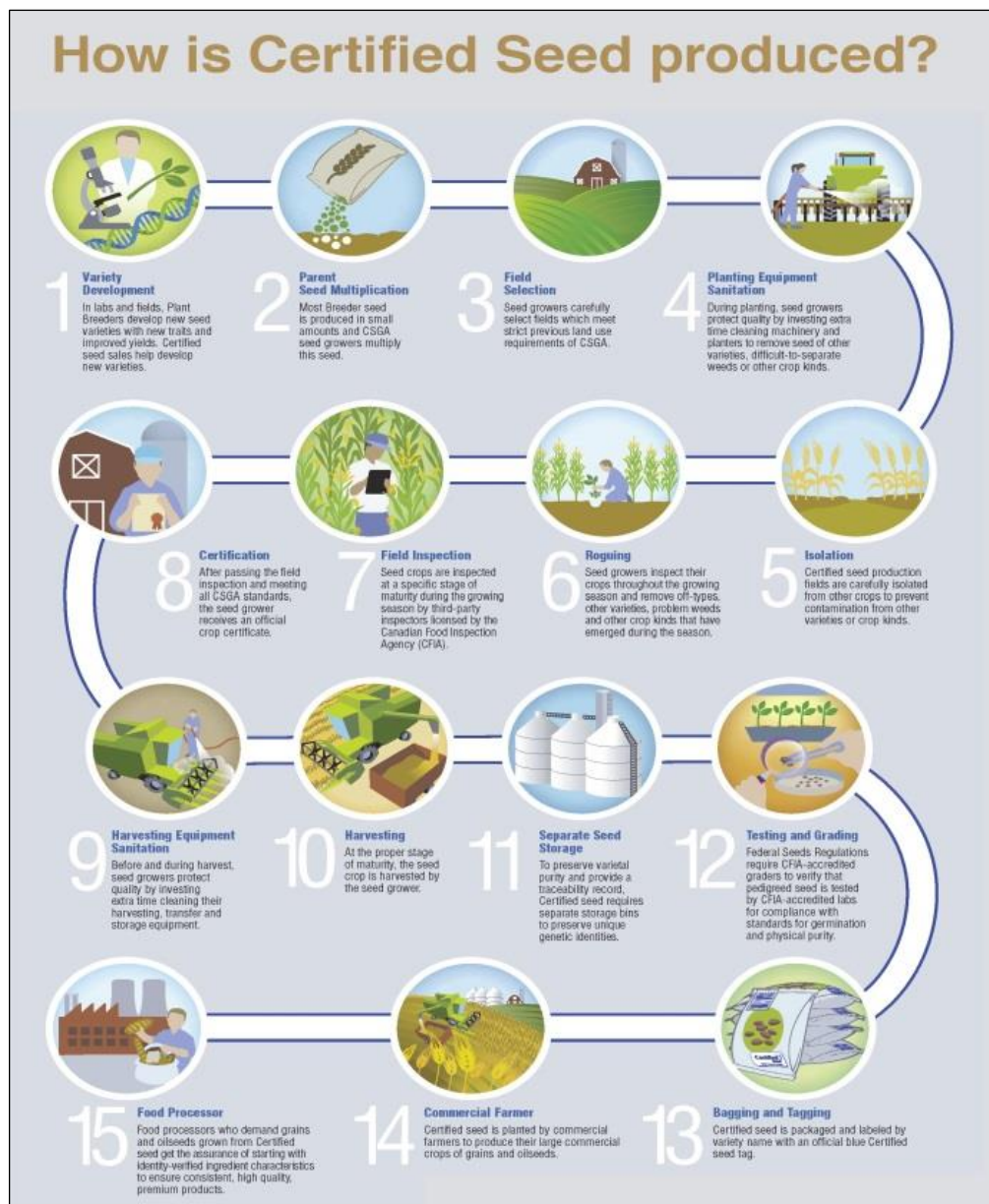
Canadian Agricultural Human Resource Council (CAHRC) Labour Market Information reports that the crop sector, which includes seed, was unable to fill 5,700 jobs in 2014, which cost it \$569 million^{iv}. According to this same research, it is difficult to find Canadians for seed farms due to depopulation of rural areas, seasonal fluctuations in labour demand, access to foreign workers is limited through the current Temporary Foreign Worker Program, competition for the same pool of workers is intense and there is a very high rate of retirement in the sector which is eroding the workforce even further^v.

SEED SECTOR'S LABOUR INTENSIVE REQUIREMENTS

These overall issues affecting crop farmers' access to labour, are being felt even more intensely by seed growers due to the labour intensive activities that are required on seed operations. Even though seed farms make maximum use of innovation and new technology, many processes still require a large amount of manual labour. Seed production is the most labour intensive segment of the crop value chain. Extra labour is needed to complete the activities that take place on seed growing operations. Besides working with heavy machinery such as tractors and combines, seed farm operations also have manual, labour intensive jobs such as roguing (removal by hand of off-type and other kinds of crop plants and weeds required to meet varietal purity standards set by the CSGA), corn detasseling, as well as, seed cleaning, conditioning, processing, sampling, packaging and labelling operations. These labour intensive activities are unique to seed growing operations and this manual labour is necessary to ensure seed quality and purity (genetic purity) which is certified and regulated through the *Seeds Act* and *Seeds Regulations*. Seed certification protects a Plant Breeder's investment and creation of a new innovative variety from the research stage to the commercialization phase.

CERTIFIED SEED PRODUCTION PROCESSES

The Canadian Seed Growers Association (CSGA) is responsible for certifying 1 million acres of seed grown in Canada each year. This is overseen by the Canadian Federal Inspection Agency (CFIA), ensuring Canadian seed purity and conformity grown for Canadian farmers and other farmers around the world. If the work does not get done at the right time due to a shortage of workers, the seed crop will not pass field inspection. This means a total loss of crop for an individual seed grower which is a devastating farm gate loss - a year's worth of work and investment by individual seed growers and also the companies.



Certified Seed involves primary agriculture processes: steps 4 to 10 are conducted by seed growers' and are primary agriculture activities demonstrating the special skills and intensive labour required to grow seed.

NEW SEED SECTOR AGRIWORKFORCE RESEARCH

A **new survey** was conducted by the Canadian Agricultural Human Resource Council for the **CSGA** in the summer of 2017. The research provides important labour market intelligence regarding the workforce requirements of seed growers. A survey of 24 of Canada's top seed growers across Canada collected vacancy and wage research and a training needs assessment was also conducted. Seed growers in the following provinces participated in the survey: British Columbia, Alberta, Saskatchewan, Manitoba, Ontario, and New Brunswick. The responses from this survey are also consistent with the focus group feedback received at the Saskatchewan Seed Growers Inter-provincial Meeting in November 2015.

NEW LABOUR MARKET INFORMATION: VACANCIES AND WAGES

Seed as a Primary Crop: In the new research conducted by CAHRC seed was the primary crop of 88% of the respondents while 12% also grow commercial cash crops that include grain, oilseeds and soybeans.

Vacancies: Although a labour shortage exists (approximately 1 in 4 producers had vacancies in 2016/17), seed growers work hard to reduce turnover and retain workers by maintaining year-round permanent positions. Respondents indicated that 29% were unable to find the workers they needed for 2016-17. Workforce vacancies stem from a lack of local workers and second, a lack of job seekers to fill skilled positions. The General Farm Worker role was the position identified as the most needed to fill vacancies (36%). Managerial (18%), harvesting (18%) and seed packaging (18%) positions were also important roles that growers' are trying to fill.

Seed Growers Hire Canadians First: Survey respondents indicated that on average seed farms employ close to 16 Canadian workers including farm owner-operators and their families, paid employees, and contractors. Seed growers expend significant effort to recruit Canadian employees reporting recruitment strategies that include: advertisement, recruitment agencies, career fairs, working with colleges and university graduates through job postings on university and college job boards, usage of agencies, and "word of mouth". Many growers continue to look for new ways to expand their recruitment strategies. If Canadians are not available, seed grower respondents report that 47% would use the Seasonal Agriculture Worker Program if they were able to access it.

Access to Government Programming to Help Fill Vacancies: Currently, only Pedigreed Seed Canola is listed on the National Commodity List^{vi} allowing access to the Seasonal Agriculture Worker Program or the Agricultural Stream. Currently, two-thirds of seed crop producers do not use/or do not have access to international workers to fill vacant positions not filled by local workers. One-third of seed growers that do use government programming to help fill vacancies use the Temporary Foreign Worker Program's Seasonal Agriculture Worker Program (for seed canola). Seed growers also use immigration programming including the Provincial Nominee Program in provinces such as Saskatchewan which allow the General Farm Worker or the farm supervisor National Occupation Classification (NOC) code. The federal immigration program called the International Experience Canada (IEC) program is utilized by seed growers to access agricultural students from abroad. This program is very popular as most seed growers do not have access to TFWP agricultural programming. The IEC is a historic program that allows international students from Great Britain, France, New Zealand, Australia and other countries to work for Canadian farmers and learn about Canadian production and similarly, Canadian agricultural students also have the same opportunity to travel abroad and learn production practices in other countries.

Wages: Seed growers recognize the skilled labour and production knowledge of their workforce by paying a quality living wage in rural Canada.

- Seasonal: Seed Farm workers are paid between \$12.00/hr and \$28/hr
- Permanent, Year-Round: Seed Farm workers are paid between \$15.00/hr and \$35.00/hr

Permanent and Seasonal: Although family-run businesses are common within the seed industry, non-family members are employed in high numbers and fill a demand for skilled labour. Respondents indicated that there are 43% seasonal positions on their farms but also indicated that 57% of the positions they are trying to fill are actually permanent, year-round jobs. This indicates that seasonal workers are an important part of the seed crop workforce but a greater demand exists for workers to fill permanent year-round positions due to the nature of the industry (i.e. spring seeding, summer crop production, fall harvest, winter seed cleaning, treatment, packaging, and retail) which means that more immigration options for seed workers is another solution that should be explored.

DEVELOPMENT OF TRAINING



Working with the Canadian Agricultural Human Resource Council (CAHRC), the Canadian Seed Growers' Association (CSGA) is investing in on-farm training required by seed growers. A training needs assessment has been conducted and a National Occupation Standard (NOS) for seed will be developed in the future. A NOS is a national benchmark that defines the knowledge and competencies required for job success. E-learning training programs are one of the many offerings under CAHRC's AgriSkills program which can be customized for commodities such as seed. Traditional training can disrupt farmers' and employees' work schedules by requiring them to attend classes off-site, e-learning programs, however, are combination of self-guided work activities that are self-paced and can be completed while continuing to support work on the farm. The training is developed with industry experts and is based on real-world best practices used on a seed farm.

PEDIGREED SEED CORN

- 1) **Urgent Priority:** Resumed access for seed corn to the Seasonal Agriculture Worker Program, which can be achieved through clarifying interpretation of current rules with Service Canada, to enable SAWP access for the 2018 crop season.



Service Canada Interpretation: Prior the 2014 TFWP changes, seed corn growers would receive positive Labour Market Impact Assessments (LMIAs) when they included “seed corn” on their application along with the other vegetable commodities they grow on their farms such as cucumbers, asparagus, lettuce. When they received the positive LMIA that included seed corn then their SAWP employees were able to assist with detasseling their corn for the required 2 week period. The seed sector is seeking a return to this pre-2014 LMIA process that included seed corn for the upcoming 2018 crop season.

Canadian Farmers Rely on Seed Corn: In 2017 13.6 million tonnes of corn was grown on 3.5 million acres in Canada. This is an anticipated production increase of 7% for this year alone^{vii}. While corn is the third largest crop in Canada (after wheat and canola), it ranks as the number one crop in Ontario in terms of production and farm cash receipts^{viii}. Farmers rely on Seed Corn growers to produce this corn seed for their commercial corn operations.

Seed Corn Economic Impact: In 2012 it is estimated that seed corn sales were \$48 million which generated about \$93.5 million in economic impact (this does not include seed corn primary processing activities).



Seed Corn Location: Seed corn is a **national** seed crop grown in isolation in southern Ontario, in order to ensure seed purity. Southern Ontario’s climate, weather and fertile soil also provide the optimal growing conditions that seed corn requires.

Workforce Requirements: The Seed Corn hybridization process entails cross pollinating male and female seed corn plants in the field with a 4:1 hybridization ratio which requires intensive work including the detasseling process. **Over 4,000 workers are needed in southern Ontario, where 95% of Canada’s seed corn is grown, for a short 2 to 3 week time period in to detassel seed corn for 400 seed corn growers.**

There is an extremely limited pool of labour to draw on. Currently, teams of youth, who are contracted from the Chatham, Ontario area, participate in the detasseling process, which entails pulling the top of the female corn plants. **Youth in the area are fully employed for the detasseling process in the Simcoe and Chatham areas, but more workers are still needed.** There is also the potential risk related to the changing child labour laws and the changing Ontario labour regulations as well as corporate child labour rules. Innovation and technology are utilized with special machines that detassel the seed corn, however, some plants are missed and there are also “hot spots” that need to be detasseled manually to achieve high production value and purity. Roguing and irrigation rotation of equipment are also required. If the work does not get done, then the seed crop will not pass regulated inspection, which means a total loss of crop for seed corn growers. Worker shortage impacts affecting seed corn growers and the seed sector are clarified in an **addendum infographic** and **pictures of the seed corn processes** are provided on the following page.



Male seed corn tassels, 4 female rows of seed corn to 1 male row is the general rule



Female plant needs to be de-tassled (the tops removed) in a short 2 week period.



Ron Meulemeester holds a growing ear of female seed corn.



Male seed corn tassel pollinates the female seed corn silk that Ron is holding.

PEDIGREED SEED CANOLA

2) **Ongoing Priority:** Retained access for seed canola to the SAWP and its place on the National Commodity List^{ix}.

Seed canola was reinstated on the National Commodity List in 2015. It is imperative that seed canola retain access to the Seasonal Agriculture Worker Program and its place on the NCL.



Canadian Farmers Rely on Seed Canola: Canadian canola farmers grew 18.2 million tonnes of commercial canola in 2017^x. **43,000 farmers** grow canola, mostly in the western provinces of Alberta, Saskatchewan and Manitoba, British Columbia. Ontario and Quebec also grow a substantial amount of the crop^{xi}. Commercial canola farmers rely on seed canola growers to provide the seed for this valuable cash crop.

Seed Canola Economic Impact: Canola generates one quarter of all farm cash receipts for Canadian farmers. A study released in 2017 shows Canadian-grown canola contributes \$26.7 billion to the Canadian economy each year, including more than 250,000 Canadian jobs through the canola value chain and \$11.2 billion in wages. Acreage continues to increase because of the profitability and resilience of the crop. New varieties are pushing the boundaries of where canola is grown.^{xii}

Seed Canola Location: Seed canola is a **national** seed crop grown in isolation in British Columbia the Kootenay region because commercial canola is not grown in the area, making it an ideal isolated seed location for the canola seed breeding processes that take place in the field. Some test seed canola plots are also located in the Lethbridge, Alberta region. Production of parent canola seed requires very strict quality assurance measures to ensure purity.

Workforce Requirements: Since 2005, seed companies have consistently received positive Labour Market Impact Assessment as the result of the clear shortage of available local workers. According to WorkBC, less than 0.1% of BC's agricultural jobs are found in the Kootenay region. Qualified local employees are in high demand and are able to find year round employment. The labour pool that does exist there typically is not interested in outdoor work, exposure to the weather and potential insects. Nor is there interest in the physical nature of the work required which includes pulling weeds and removal of off type canola plants. Canola parent seed production is seasonal with the cropping season from April to October. The highly specialized nature of canola parent seed production necessitates a great deal of on-the-job training. The experience of SAWP returning Mexican workers for more than 10 years has been invaluable to the success of Canada's seed canola program. Special skills are needed, including the ability to recognize plants that are not uniform and remove these rogue plants.

The ability to bring these same, well trained workers to work in canola parent seed production over the long term is one of the most valuable features of the SAWP.

Photos of the seed canola workforce illustrating the parent seed production processes such as preparation, cultivating, planting, roguing, irrigating, harvesting, cleaning which are done in the production of canola parent seed, showing the agricultural nature of the work.



ACCESS TO TFWP AGRICULTURAL PROGRAMMING FOR ALL SEED GROWERS

- 3) **Immediate Priority:** Broaden access to the TFWP's agricultural workforce programming (SAWP and Agricultural Stream) for all seed growers' primary agriculture processes, for the 2018 crop season.

The National Commodity List is limiting access to labour for the seed sector that supplies seed for over 50 principal crops to farmers across Canada and also exports seed to farmers around the world^{xiii}. Currently, only Pedigreed Seed Canola^{xiv} is included on the National Commodity List. Seed sector stakeholders raise concerns with the limited scope of the National Commodities List that governs access to both the Seasonal Agricultural Worker Program and the Agricultural Stream of the TFWP. When Canadian workers cannot be found, seed growers outside of canola need to apply through the low-wage stream of the TFWP. This adds unnecessary complexity to the process that producers face when determining how to apply for international workers and also limits many producers from accessing the full range of tools intended for the industry. Some of the obstacles the NCL is creating for growers includes: limiting diversification of farmers into seed crops, limiting expansion of seed operations, and also limiting environmental biodiversity and crop rotation production options. These obstacles are restricting innovation and growth.

To have a commodity included on the National Commodity List is an awkward, confusing process that lacks transparency. In many cases, the requests that commodities make to be added to the NCL can take many years to be resolved. Commodities such as Pedigreed Seed Canola have been removed without consultation which causes a lot of frustration and anxiety to both workers and farmers as their access to the SAWP and the Agricultural Stream are driven by what appears on the NCL web page.

Seed should be included generally on the National Commodity List or another solution could be to use the already existing definition of primary agriculture within the **Immigration and Refugee Protections Regulations, section 315.2^{xv}**, *instead* of the National Commodity List.

The primary agriculture definition in section 315.2 already provides adequate boundaries to the definition of what is and is not considered primary agricultural work making the NCL redundant yet intrusive. Under this section, primary agriculture is defined as “work that is performed within the boundaries of a farm, nursery or greenhouse and involves: the operation of agricultural machinery; the boarding, care, breeding, sanitation or other handling of animals, other than fish, for the purpose of obtaining animal products for market, or activities relating to the collection, handling and assessment of those products; or the planting, care, harvesting or preparation of crops, trees, sod or other plants for market.”

Excluded activities under 315.2 include: “the activities of agronomists or agricultural economists; landscape architecture; the preparation of vegetable fibres for textile use; activities related to commercial hunting and trapping; or veterinary activities.”

CONCLUDING RECOMMENDATIONS

The seed sector is confident that the seed grower activities highlighted in this research paper fall well within the Immigration and Refugee Protections Regulations definition of primary agriculture. The National Commodity List is putting the sector at risk affecting seed growers' ability to access workers. We recommend the following:

- 1. Urgent Priority:** Resumed access for seed corn to the Seasonal Agriculture Worker Program, which can be achieved through clarifying interpretation of current rules with Service Canada, to enable SAWP access for the 2018 crop season (seed growers used SAWP with approved LMIA's prior to 2014 TFWP changes);
- 2. Ongoing Priority:** Retained access for seed canola to the SAWP and its place on the National Commodity List; and
- 3. Immediate Priority:** Broaden access to the TFWP's agricultural workforce programming (SAWP and Agricultural Stream) for all seed growers' primary agriculture processes, for the 2018 crop season.

RESEARCH ADDENDUM: WORKER SHORTAGE IMPACTS AFFECTING SEED CORN GROWERS

Ag Worker Shortage What This Means

Seed Corn Growers of Ontario
Canadian Ag & Agri-Food Workforce Action Plan
A Future for Farmers & Food Production



Canada's Agriculture and Agri-Food Sector

Employs 2.3 M Cdns 6.6 % of GDP
\$108.2 B GDP \$56.4 B in exports - 5th largest

Seed Growers

It all starts with seed:
starting point for growing
crops producing food, feed
& bio-products

Access to seasonal workers needed:

- seeding & harvest
- roguing, cleaning, conditioning,
- processing operations & **corn detasseling**

Worker shortages are not an option

Seed Corn Growers

Corn Detasseling:
In a short 2-3 week period
over 4,000 workers are
needed in S. Ontario
where 95% of Canada's
seed corn is grown

How do we grow the AgriWorkforce?

- Hire Canadians first
- Lots of jobs and opportunities
- Competitive wages & benefits



Did you know?

International ag workers create Canadian jobs

- Every seasonal ag worker → 2 additional Cdn Agri-Food jobs
- Every beef sector worker → 4.2 additional Cdn jobs
- Every de-boner butcher → 6 additional Cdn trimmer jobs

Agri-Retail



Seed Sector

- \$450 M exports
- 57,420 jobs & \$1.67 B wages
- \$81.9 million tax revenue
- \$5.61 B economic impact to

Processing & Seed Distribution



Canadian Farmers rely on Canadian Seed Growers

Agriculture Worker Shortage

- Less Cdn seed producers able to run sustainable farms
- Less varieties available to Cdn farmers & higher prices

Worker shortages are not an option



Export & Free Trade Deals



Cdn seed companies and plant breeders are involved in germplasm exchange, global research and development programs, contract production for export & marketing new varieties imported into Canada that farmers need to remain competitive.

Ag & Agri-Food Worker Shortages

- Lost wages & jobs for Canadian workers
- Lost export opportunities and farm gate returns
- Hollowing out & economically suffocating rural communities



What worker shortages mean:

- Less Canadian product availability
- Higher food prices for Canadian consumers



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ⁱ Canadian Seed Sector Profile, July 2014

ⁱⁱ *ibid*

ⁱⁱⁱ *ibid*

^{iv} http://www.cahrc-ccrha.ca/sites/default/files/files/Labour-Employment/factsheet_Grains_Oilseeds_E.pdf

^v http://www.cahrc-ccrha.ca/sites/default/files/files/Labour-Employment/factsheet_Grains_Oilseeds_E.pdf

^{vi} <https://www.canada.ca/en/employment-social-development/services/foreign-workers/agricultural/seasonal-agricultural.html>

^{vii} <http://www.statcan.gc.ca/daily-quotidien/170831/dq170831c-eng.htm>

^{viii} <http://www.statcan.gc.ca/pub/96-325-x/2014001/article/11913-eng.htm>

^{ix} <https://www.canada.ca/en/employment-social-development/services/foreign-workers/agricultural/seasonal-agricultural.html>

^x <http://www.statcan.gc.ca/daily-quotidien/170831/dq170831c-eng.htm>

^{xi} <http://www.canolacouncil.org/markets-stats/industry-overview/economic-impact-of-the-canola-industry/>

^{xii} <http://www.canolacouncil.org/markets-stats/industry-overview/economic-impact-of-the-canola-industry/>

^{xiii} Canadian Seed Sector Profile, July 2014, page 7

^{xiv} <https://www.canada.ca/en/employment-social-development/services/foreign-workers/agricultural/seasonal-agricultural.html>

^{xv} <http://laws-lois.justice.gc.ca/eng/regulations/sor-2002-227/page-58.html>