



How Labour Challenges Will Shape the Future of the 'Apiculture' Industry:

Agriculture Forecast to 2029



Canada's agriculture sector faces unique labour market challenges in the coming years, and so will the 'apiculture' industry. This report explores some of the workplace trends and realities that will shape this industry between now and 2029.



Industry Overview

'Apiculture'* has experienced healthy growth over the past decade, and beekeepers predict a strong growth outlook. However, the industry's considerable labour shortage could impede its ability to reach full potential.

The beekeeping industry includes operations that are primarily engaged in raising bees, collecting and gathering honey, and performing other beekeeping activities.

While the number of apiaries has declined, the average size has grown, with the net result that the industry's workforce has grown since 2013.

The industry is primarily located in the Prairies. Together, Alberta, Manitoba, and Saskatchewan account for 57% of apiaries and two-thirds of all product sales.

Beekeeping industry at a glance

In 2018:

- 369 businesses with employees
- 46% could not fill all open jobs
- 12 million in lost sales due to labour shortages

Honey production has seen strong growth over the past decade, increasing by an average of 4.1% per year. The 'apiculture' industry also has a very strong outlook for future growth. However, the industry's significant labour shortages could prevent it from reaching its production targets and achieving its full growth potential.



*The Labour Market Information data classifies Canada's agriculture sector into 11 commodity areas: 1) 'apiculture'; 2) 'aquaculture'; 3) 'beef'; 4) 'dairy'; 5) 'field fruit and vegetable'; 6) 'grain and oilseed'; 7) 'greenhouse, nursery, and floriculture'; 8) 'poultry and egg'; 9) 'sheep and goat'; 10) 'swine'; and 11) 'tree fruit and vine'.



Production Trends

While the number of apiaries has declined, the industry's workforce and profitability have grown. Over the last five years, the number of apiaries has fallen by 2%; currently, there are 369 industry businesses with employees. However, the average size of each business has increased in recent years.

In 2013, 22% of all apiaries employed more than 10 workers; by 2018, that number had risen to 28%. More than half of the industry's businesses are located in the Prairies, with 23% in Alberta, 18% in Manitoba, and 17% in Saskatchewan. The Prairies also account for two-thirds of the industry's honey sales.

Honey production has seen strong growth over the past decade, increasing from 65 million pounds of honey in 2008 to 93 million pounds in 2018, which is an average increase of 4.1% per year. While production has been strong, higher honey prices have resulted in industry sales growing by an average of 7.1% per year between 2008 and 2018.

RESEARCH HIGHLIGHTS

- **46%** of beekeepers were not able to find all the workers they needed in 2018, compared to 47% for all agriculture.
- **57%** of beekeepers expect employment at their farm to rise over the next five years, while only 17% expect to see a decline.



Labour Shortages

A lack of workers affects the industry's production capacity and growth potential.

Labour shortages were a significant factor for beekeepers in 2018, with nearly half of the 54 surveyed 'apiculture' operations (46%) reporting that they were not able to find all the workers they needed, which is slightly below the average of 47% for the entire agriculture sector.

A key result of difficulties filling positions is that the industry depended on foreign workers. Of the combined 940 workers employed by the 54 surveyed beekeepers, roughly 380, or 41%, were foreign workers.

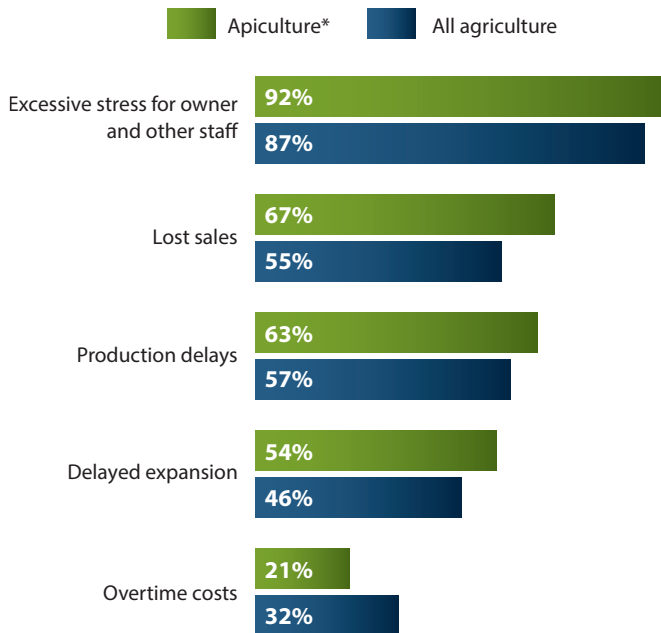
Survey respondents from the 'apiculture' industry reported a number of issues caused by labour shortages. Of producers who reported labour shortages, 92% reported excessive stress for owner and other staff, while just under two in three (63%) reported production delays.

Labour shortages don't just impact the industry today, they also limit its future growth by preventing or delaying expansion plans. Over half (54%) of 'apiculture' producers that experienced labour shortages reported delaying expansion as a result.

Labour shortages are estimated to have cost the industry \$12 million in 2018, or 6.0% of sales, which is higher than the sector average of 4.7% in lost sales.



Impacts of Labour Shortages



*Based on responses of 24 beekeepers who reported not having access to all needed workers.

Labour Challenges

Beekeepers face specific challenges in recruiting and retaining enough workers.

The ability of beekeepers to find and retain enough workers is impeded by rural operations, the high seasonality and variability in hours, and the physical work involved.

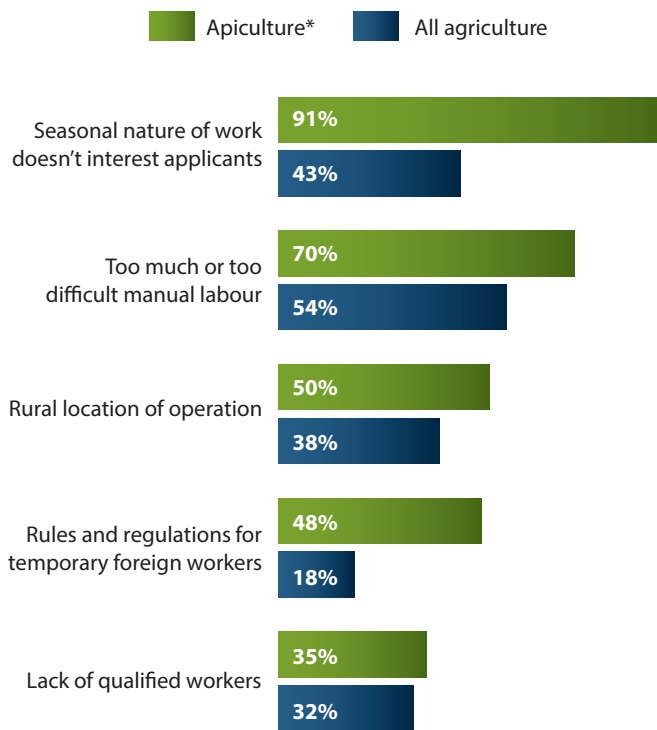
Recruiting Workers

When it comes to recruiting workers, beekeepers are challenged by the rural location of their operations; 50% of beekeepers cited this as a problem, compared to 38% of all agricultural employers. Employers in this industry also noted that declining populations in rural areas were an issue.

However, the industry was slightly less affected by the issue of finding workers with essential skills (e.g. problem-solving, teamwork) than others in agriculture: 4% of beekeepers reported this as an issue compared to 13% across the sector.



Challenges in Recruiting Workers



*Based on responses of 54 beekeepers.



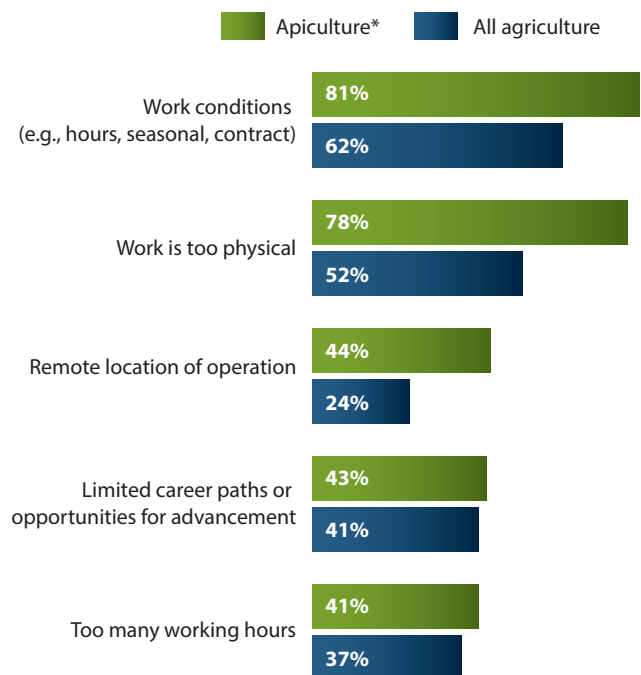
Retaining Workers

The 'apiculture' industry has difficulties retaining workers. While the industry has an above-average involuntary turnover rate (3.8% versus the national sector average of 2.5%), it has one of the highest voluntary turnover rates among agricultural industries, at 19.8%, which is well above the national sector average of 10.3%.

When it comes to retaining workers, the industry faces unique challenges. Work conditions, including the number of hours and the seasonality of the work, affected retention for 81% of beekeepers, compared to 62% of employers across the sector. The physical nature of the work also tended to be a bigger issue for the industry.

On a positive note, insufficient compensation was less of an issue, with only 31% of industry employers suggesting it was a retention barrier, compared to a sector average of 45%.

Challenges in Retaining Workers



*Based on responses of 54 beekeepers.



Conclusion

With a strong growth outlook, the beekeeping industry's significant labour shortages could hamper its growth potential in the coming years. The industry has experienced strong growth over the past decade, and beekeepers remain positive about the industry's outlook. At the same time, almost half of beekeepers report that they are experiencing labour shortages and that those shortages impact their plans for growth. If more workers can't be found to support the industry, it may not be able to fully capitalize on its strong growth potential.

The beekeeping industry faces a number of labour challenges:

- ➔ Apiaries tend to be more remote, making declining populations in rural areas more of a challenge.
- ➔ Beekeepers are more likely to report that physically strenuous work and highly variable hours contribute to recruitment and retention problems.
- ➔ Seasonal fluctuations at apiaries are much higher than the agriculture sector average.
- ➔ The industry has high voluntary turnover rates, which creates considerable cost and strain for employers.

Finding solutions to these challenges and increasing the pool of available domestic workers will ensure that this industry is better prepared to take advantage of an upcoming decade of growth.



About This Report

This report represents an update to the Labour Market Information (LMI) study that the Canadian Agricultural Human Resource Council (CAHRC) undertook between 2014 and 2016. The purpose is to re-assess the labour market, project supply and demand for agricultural workers from 2018 until 2029, and recommend potential solutions to labour issues.

The Conference Board of Canada, commissioned by CAHRC, constructed an economic model that forecasts agricultural labour demand and supply for each province, for 11 different commodity groups, and for 25 occupational groups.

The economic model was validated through several industry consultation activities conducted Canada-wide, including:

- **A large-scale survey** of 1,316 employers, 278 workers, and 110 industry stakeholders.
- **Eight webinars** focused on specific commodity groups, with 160 participants in total.
- An Advisory Group presentation.

This data was used to produce the following reports:

Commodity-specific reports and fact sheets

Apiculture ■ Aquaculture ■ Beef ■ Dairy ■ Field Fruit and Vegetable ■ Grain and Oilseed ■ Greenhouse, Nursery, and Floriculture ■ Poultry and Egg ■ Sheep and Goat ■ Swine ■ Tree Fruit and Vine

Regional reports and fact sheets

National ■ British Columbia ■ Alberta ■ Saskatchewan ■ Manitoba ■ Ontario ■ Quebec ■ New Brunswick ■ Prince Edward Island ■ Nova Scotia ■ Newfoundland and Labrador

For more information on the research, and to access additional commodity-specific, national, and provincial reports, please visit the CAHRC website at www.AgriLMI.ca.

About CAHRC

The Canadian Agricultural Human Resources Council (CAHRC) is a national, nonprofit organization focused on addressing human resource issues faced by agricultural businesses across Canada. CAHRC conducts industry research and develops products and services designed to help agricultural employers attract, retain, and develop the workforce they need to succeed.

For more information about the Council and its products and services for Canada's agriculture sector, please visit www.cahrc-ccrha.ca.





Acknowledgements

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