



Agriculture Forecast to 2029

How Labour Challenges Will Shape the Future of Agriculture in Quebec

Canada's second-largest agricultural employer, Quebec, faces increasing labour challenges in this sector over the coming decade.

Provincial Overview

In 2017, Quebec was the second-largest agriculture sector employer in Canada, employing 70,500 people, or 20% of the nation's agricultural workforce. Only Ontario accounted for a higher share, at 28%.

In terms of the province's national agricultural profile, Quebec is Canada's largest employer of 'dairy'* workers, with nearly half of the industry's workers (48%) employed in this province. It is also the largest employer of 'swine' industry workers, accounting for 22% of the national industry's workforce.

Within the province, the 'dairy' industry is the largest agricultural employer, accounting for nearly one in four agricultural workers (22%). The 'greenhouse, nursery, and floriculture' industry is also a significant employer in Quebec, accounting for 9% of the agricultural workforce.

Foreign workers account for 19% of the agricultural workforce in Quebec, which is slightly higher than the sector average across Canada (17%).

Even with help from the foreign labour force, the province's agriculture sector was still unable to fill 2,700 jobs in 2017, a shortfall that cost the industry \$362 million.

* 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'.

In 2017, Quebec's agriculture sector employed 70,515 people.

The province was unable to fill **2,700 jobs**, which cost the industry **\$362 million**, or **4.1%** of sales.

By 2029, the province will have **19,900** more jobs than the domestic labour force can fill.

Between now and 2029, Quebec's need for agricultural labour will remain flat, mostly due to limited market demand for 'dairy' products. However, because the labour pool is shrinking, the province is expected to experience greater labour shortages over the next decade. Unless additional sources of domestic or foreign labour can be found, this labour gap will prevent the province's vital agriculture sector from reaching its full potential.

Labour Forecast

While the demand for labour in Quebec will remain flat, the supply of domestic workers will shrink, widening the province's labour gap.

With Quebec's 'dairy' industry entering a period of slower market growth, the demand for agricultural workers in Quebec is expected to level off. The number of workers required to support the agriculture sector in Quebec will average 73,200 workers over the forecast period.

While the demand for labour will remain flat, the supply of domestic workers is predicted to shrink, with 6,500 fewer Canadian residents available to work in Quebec's agriculture sector by 2029.



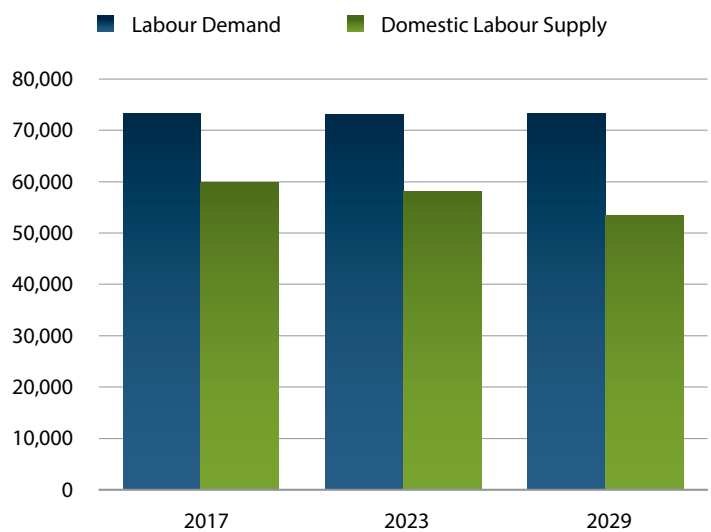
This means that between 2017 and 2029, the number of jobs that can't be filled with domestic labour will increase by 3.4% per year, rising from 13,300 to 19,900. That number is equivalent to 27% of the total workforce required to support the industry. In other words, within 12 years, more than one in four jobs in this province will remain vacant unless more domestic or foreign workers can be found.

Quebec's 'greenhouse, nursery, and floriculture' industry is predicted to be hardest hit by labour shortages, with the number of jobs at risk rising from 2,100 today to 2,900 workers by 2029.

The 'dairy' industry, on the other hand, will see its current deficit of workers shrink over the forecast period. While there were 700 more 'dairy' jobs than domestic workers available to fill them in 2017, by 2029, there will be only 300 more available jobs than domestic workers willing to take them.

From an occupational perspective, Quebec's agriculture sector will have the most trouble filling managers in agriculture positions, which include both owner-operators and hired managers, and general farm worker positions. Indeed, by 2029, there will be 10,600 general farm worker jobs and 3,000 managers in agriculture jobs at risk of going unfilled.

The Labour Gap Widens for Quebec's Agriculture Sector



Based on our 2018 survey of the province's agricultural employers:

- 48% could not find enough workers
- 48% of employers who experienced labour shortages lost sales as a result
- 34% reported zero Canadian job applicants for job postings

Meeting the Challenge

Quebec's agriculture sector will have to navigate a future in which today's significant labour gap continues to widen. By 2029, 27% of the jobs required to support the sector could be at risk of going unfilled if more domestic and foreign workers can't be found.

Given that unfilled jobs resulted in lost sales of \$362 million in 2018, this reality could significantly impact the sector's profitability and growth potential.

To address its agricultural labour issues, the province will need to overcome a number of key challenges:

- Agricultural employers within the province were much more likely to cite perceptions of low wages in the sector as a barrier to recruitment.
- The sector has a strong reliance on foreign workers, leaving the industry at risk of policy changes, such as the reduction in numbers or elimination of the Temporary Foreign Worker Program (TFWP).
- The province is expected to see below-average rates of both international and interprovincial migration, which will limit the available labour supply for agriculture.



However, the province's agriculture sector also has strengths that it could leverage:

- Quebec's agricultural employers enjoy below-average voluntary and involuntary turnover rates.
- Agricultural operations in this province tend to be located closer to bigger cities with larger labour pools.
- The province has the youngest agricultural workforce in Canada, which will reduce the strain of retirements over the next ten years.
- Finding ways to communicate the benefits of agricultural work to a younger demographic could help to attract more young workers.

As the labour gap widens, Quebec will need to find ways to strengthen the domestic labour pool in order to avoid financial losses and reach its growth potential.

To read the accompanying report, or to access additional provincial, commodity, or national fact sheets and reports, please visit www.AgriLMI.ca.

About This Fact Sheet

The data cited in this fact sheet is based on an update to the Labour Market Information (LMI) study that the Canadian Agricultural Human Resource Council (CAHRC) undertook between 2014 and 2016. Information was collected by modelling labour demand and supply by province, commodity, and occupation; conducting a survey of more than 1,700 sector stakeholders; and validating the results through webinars as well as an advisory group presentation.

The study was initiated by the Canadian Agricultural Human Resources Council (CAHRC), a national, nonprofit organization focused on addressing human resource issues faced by agricultural businesses across Canada. For more information about the Council and its products and services for Canada's agriculture sector, please visit www.cahrc-ccrha.ca.

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