



POULTRY AND EGG

Labour market information and forecast 2023-2030



Key Findings

- Employers in the poultry and egg industry struggle with high turnover and ongoing job vacancies. These labour challenges are expected to continue as the domestic labour gap grows over the next decade.
- Foreign workers are expected to fill 88 per cent of this gap, leaving 290 positions still vacant in 2030.¹ Without proactive intervention, these persistent vacancies could impede the industry's growth.
- The domestic labour gap in the poultry and egg industry is projected to increase by 14 per cent over the next 8 years, reaching 2,420 workers during peak season in 2030.²
- The demographics of the workforce will change over the coming years as a wave of retirements will require many new workers to enter the industry. Ensuring these new workers have the skills they require will be key to sustaining productivity growth.

Current Workforce

- The poultry and egg industry employed 12,200 domestic workers at peak season in 2022, with nearly 40 per cent of these jobs located in Ontario.³
- The industry has three main occupations: managers in agriculture (including farm owner-operators), specialized livestock workers or farm machinery operators, and livestock labourers that together account for three-quarters of its domestic workforce.⁴
- The number of foreign workers in the industry has more than tripled since 2017, reaching 1,658 workers in 2022.⁵ Foreign workers now make up over 10 per cent of the workforce.
- The poultry and egg industry has one of the lowest job vacancy rates in agriculture at just 4.3 per cent, compared to the 7.4 per cent across all industries.⁶ This is due, in part, to its higher than average wages and less seasonal employment fluctuation.
- Nevertheless, it is estimated that 480 positions went unfilled at peak season in 2022.

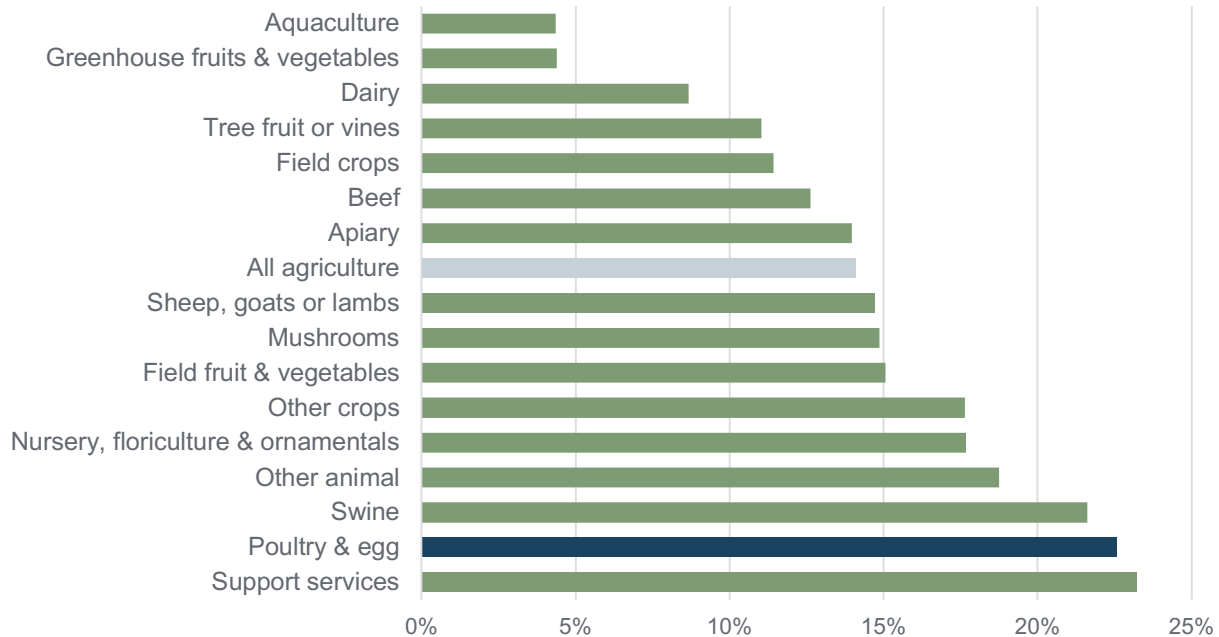
¹ Foreign workers include workers brought in through the Temporary Foreign Worker Program or Seasonal Agricultural Worker Program. Does not include immigrants or permanent residents. | ² Domestic labour gap is the difference between the total number of workers required and the number of domestic workers employed which equals foreign worker employment plus the number of vacancies. Estimated at peak to reflect maximum demand during seasonal peaks in agriculture | ³ Statistics Canada, Labour Force Survey (custom data); The Conference Board of Canada. | ⁴ Ibid. | ⁵ Statistics Canada, Table: 32-10-0218-01. | ⁶ Statistics Canada, Job Vacancy and Wage Survey (custom data).

Employer Survey Insights

- More than 25 per cent of employers were unable to find all the workers they needed in 2022.⁷
- Nearly 40 per cent of employers did not receive any domestic applications for their job postings and 27 per cent received just one or two applications.⁸
- As a result of job vacancies, 25 per cent of employers lost sales, 25 per cent delayed production, 25 per cent faced overtime costs, and 38 per cent cancelled or delayed expansion plans.⁹
- Almost half of employers in the industry cite a lack of awareness and understanding about careers in their industry as a key reason for their recruitment struggles, which is higher than the 27 per cent of employers across the agriculture sector.¹⁰
- The poultry and egg industry has some of the highest turnover of any industry in agriculture (Chart 1). Approximately one in four employees in this industry chose to leave their job in 2022.
- Human resource (HR) training and resources are underutilized in poultry and egg operations compared to other industries. For example, just 11 per cent of egg and poultry operations provided HR training to their staff in the past year, compared to 30 per cent across the broader agriculture sector.¹¹

Chart 1: The poultry and egg industry has the second-highest voluntary turnover rate.

Voluntary turnover rates,* per cent, 2022.



Source: Canadian Agricultural Human Resource Council Employer Survey 2023.

* The voluntary turnover rate is the number of voluntary departures as a share of the total number of workers in a year. Voluntary departures are comprised of workers who quit, including seasonal workers who leave before contract completion.

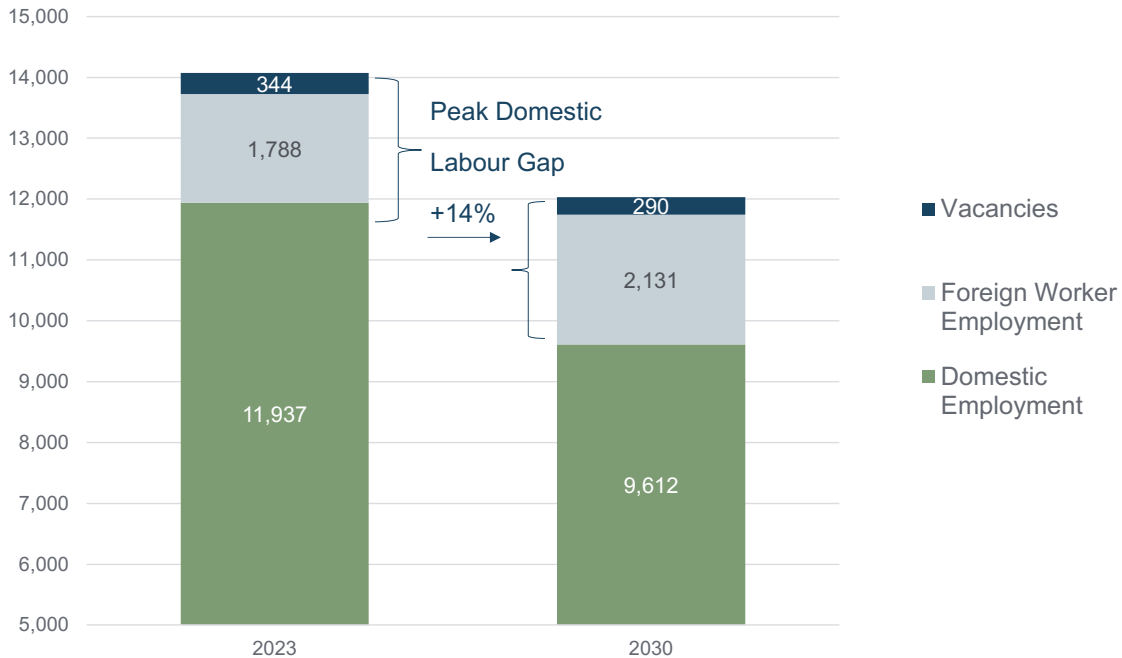
⁷ Canadian Agricultural Human Resource Council Employer Survey 2023 (n=34). | ⁸ Canadian Agricultural Human Resource Council Employer Survey 2023 (n=39). | ⁹ Canadian Agricultural Human Resource Council Employer Survey 2023 (n=8). | ¹⁰ Canadian Agricultural Human Resource Council Employer Survey 2023 (n=36). | ¹¹ Canadian Agricultural Human Resource Council Employer Survey 2023 (n=36, 706).

Labour Market Forecast

- Continued labour productivity growth and stable production will result in a 14 per cent decrease in peak labour demand over the next 8 years.¹²
- Driven by labour supply factors, the total number of Canadians employed in the poultry and egg industry is projected to decline by 19 per cent over the next 8 years (Chart 2).
- The industry is expected to see 2,730 workers retire between 2023 and 2030; meanwhile, 810 immigrants and 1,560 school leavers are projected to enter the workforce.¹³
- The peak domestic labour gap in the poultry and egg industry will increase by nearly 14 per cent over the next 8 years, from 2,130 in 2022 to 2,420 by 2030.
- The number of foreign workers employed is expected to increase almost 19 per cent over the next 8 years, filling 88 per cent of the peak domestic labour gap by 2030.¹⁴
- Despite the increase in foreign worker employment, 290 vacancies will remain by 2030. Almost 40 per cent of these vacancies will be specialized livestock workers or farm machinery operators, and 28 per cent will be livestock labourers.

Chart 2: The peak domestic labour gap grows despite declining total peak demand.

Number of workers required at peak season in the poultry and egg industry.



Source: The Conference Board of Canada's Model of Occupations, Skills and Technology.

Foreign workers include workers brought in through the Temporary Foreign Worker Program or Seasonal Agricultural Worker Program. Does not include immigrants or permanent residents.

¹² Peak labour demand is equal to the number of Canadians employed at peak: plus the number of foreign workers employed at peak: plus the number of vacancies at peak | ¹³ School leavers is the number of workers finished school (all levels of education) and entering the workforce | ¹⁴ Domestic labour gap is the difference between the total number of workers demanded and the number of domestic workers employed which equals foreign worker employment plus the number of vacancies. Estimated at peak to reflect the maximum demand during seasonal peaks in agriculture.

Building the Future Workforce

- The industry will experience a major change in their workforce over the next 8 years, with almost 30 per cent of their domestic workforce retiring, and an influx of new workers, including immigrants, school leavers and foreign workers. Ensuring these new workers have the skills and knowledge to replace the experienced workers will be crucial to maintaining productivity and growth.
- Improving human resources and management practices will be instrumental in reducing turnover and enhancing the industry's reputation as a desirable workplace.

About the Poultry and Egg Industry

This factsheet pertains to the 'poultry and egg' industry as defined by Statistics Canada as NAICS 1123, "establishments primarily engaged in breeding, hatching and raising poultry for meat or egg production." Animals grown include chickens, turkeys, ducks, geese, pheasants, partridges and pigeons.

Canada's poultry and egg industry is geographically concentrated, with Ontario and Quebec accounting for over half of the industry's employment.

About This Factsheet

The data cited in this factsheet is based on the Labour Market Information (LMI) study that took place between March and September 2023. This study involved modelling labour demand and supply by province, commodity and occupation; conducting a survey of more than 1,400 sector stakeholders; conducting five regional focus groups; and validating the results through webinars as well as an advisory group presentation. For more information about this LMI study, please see the National Report.

The study was initiated by the Canadian Agricultural Human Resource 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.

This research was conducted by The Conference Board of Canada, our country's foremost independent organization for applied research. Through the use of sophisticated data modelling, best-in-class forecasting and multi-method research approaches, they deliver research to help leaders take action.



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