



NEW BRUNSWICK

Agriculture labour market information and forecast 2023-2030



Key Findings

- Forty-three per cent of agriculture employers in New Brunswick were not able to hire all the workers required in 2022, leading to lost sales and production delays.
- Foreign worker employment in agriculture has been growing faster in New Brunswick than in any other province. Though still just 6 per cent of New Brunswick's agriculture workforce, foreign workers are becoming increasingly important to the sector.¹
- Job vacancies reached a historic peak at 490 in 2022. Growth in domestic labour supply and foreign worker employment is expected to reduce but not eliminate vacancies, with 320 vacancies projected in 2030.
- Limited exposure to career opportunities in the sector and declining populations in rural areas make recruitment more challenging for employers in New Brunswick compared to other provinces.

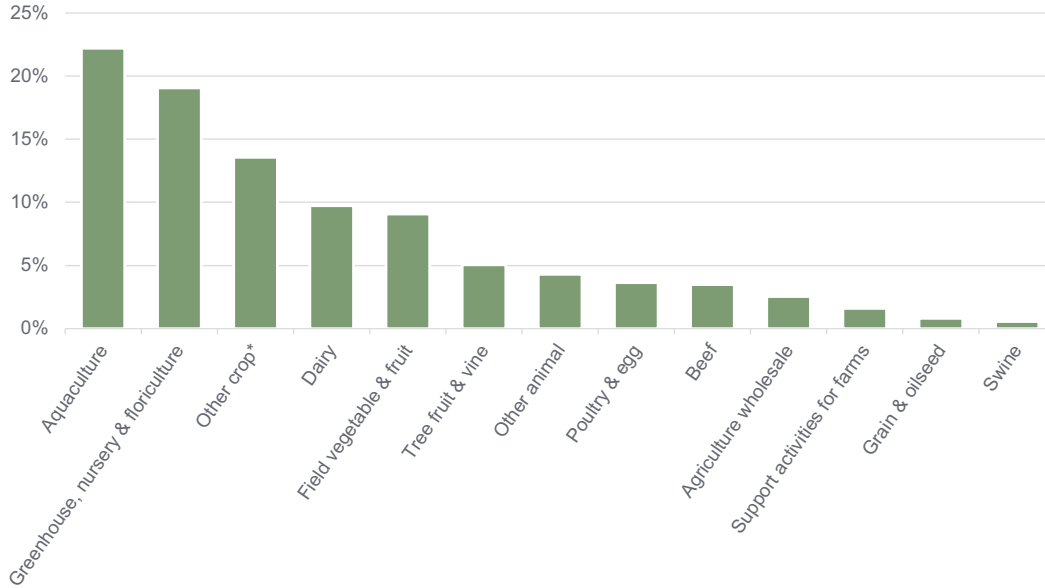
Current Workforce

- The agriculture sector in New Brunswick employed 8,190 domestic workers during peak season in 2022.²
- Aquaculture is the largest agricultural employer in the province, employing 22 per cent of the sector's workforce, followed by greenhouse, nursery and floriculture, which employs 19 per cent (Chart 1).
- The number of foreign workers in New Brunswick has more than tripled from 130 in 2017 to 450 in 2022, which is by far the fastest growth of any province.³
- Foreign workers now make up 6 per cent of the province's agriculture workforce. This is still a relatively small share compared to other provinces.
- The sector had approximately 490 positions that went unfilled at peak season in 2022.⁴
- The aquaculture industry has a lower vacancy rate compared to other agriculture industries, resulting in a slightly lower overall vacancy rate in New Brunswick. The estimated vacancy rate for this industry was 6.5 per cent, slightly lower than the national rate of 7.4 per cent.⁵

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 Statistics Canada; The Conference Board of Canada. | ³ Statistics Canada, Table: 32-10-0218-01. Includes workers from the Seasonal Agricultural Worker Program (SAWP). | ⁴ The Conference Board of Canada Model of Occupations, Skills and Technology. | ⁵ Statistics Canada, Job Vacancy and Wage Survey (custom data); The Conference Board of Canada Model of Occupations, Skills and Technology.

Chart 1: Aquaculture is the largest agriculture employer in New Brunswick.

Share of employment (domestic and foreign workers) at peak, 2022, New Brunswick.



Source: Statistics Canada; The Conference Board of Canada.

*Other crop is mainly maple syrup production.

Employer Survey Insights

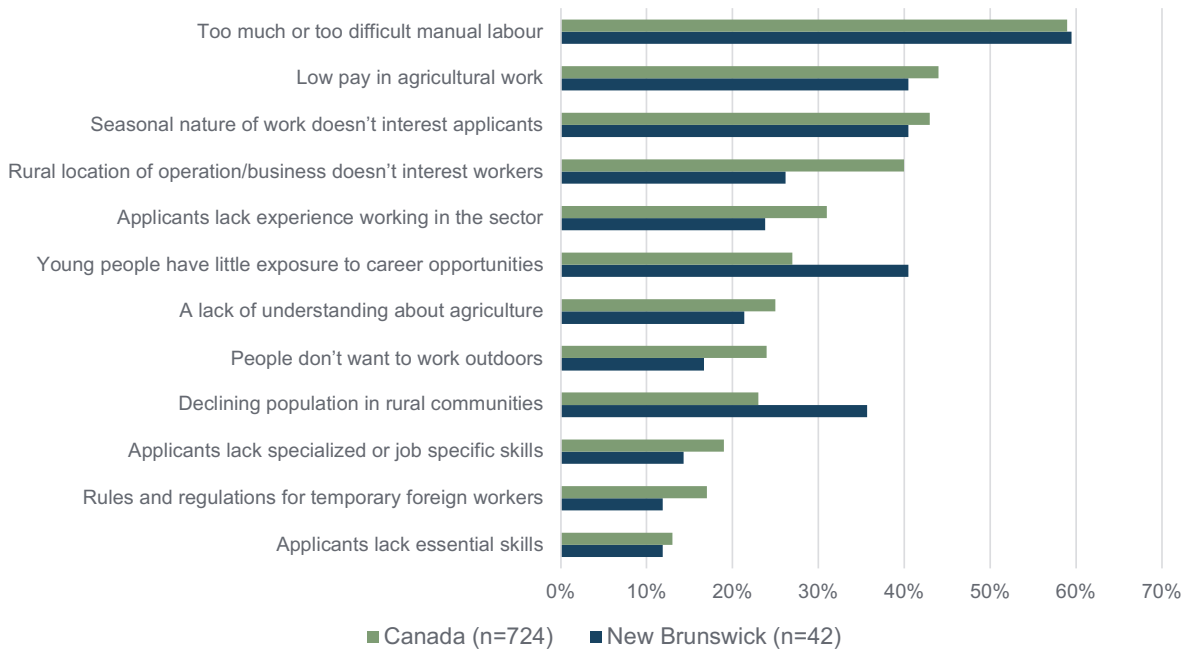
- Forty-three per cent of agriculture employers in New Brunswick were not able to find all the workers they needed in 2022.⁶
- Around 38 per cent of employers in New Brunswick received no domestic applicants for their job postings and 45 per cent received only one or two.⁷
- As a result of job vacancies, 59 per cent of employers said they had production delays, 29 per cent reported delayed or cancelled expansion plans, 41 per cent reported lost sales, and 88 per cent reported that these vacancies caused excessive stress for owners and staff.⁸
- Over 40 per cent of employers in New Brunswick cite young people having little exposure to career opportunities in the sector as a key factor making recruitment difficult, compared to only 27 per cent of employers across Canada (Chart 2).⁹
- New Brunswick had a turnover rate of 12 per cent, which is slightly lower than the 14 per cent for the sector across Canada. This is due to the concentration of aquaculture which reported less turnover.¹⁰
- Difficult manual labour, low pay compared to other sectors and limited career paths are the top factors making retention difficult for employers in New Brunswick.

⁶ Canadian Agricultural Human Resource Council Employer Survey (n=40). | ⁷ Canadian Agricultural Human Resource Council Employer Survey 2023 (n=42). | ⁸ Canadian Agricultural Human Resource Council Employer Survey 2023 (n=17). | ⁹ Canadian Agricultural Human Resource Council Employer Survey 2023 (n=42). | ¹⁰ 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. Turnover rate was calculated by industry and then weighted based on the industry share by province. Canadian Agricultural Human Resource Council Employer Survey 2023.

Chart 2: Lack of exposure to agriculture careers in New Brunswick.

Share of employers.

Q: What are the top five factors that make recruitment of workers at your agricultural operation more difficult?



Source: Canadian Agricultural Human Resource Council Employer Survey 2023.

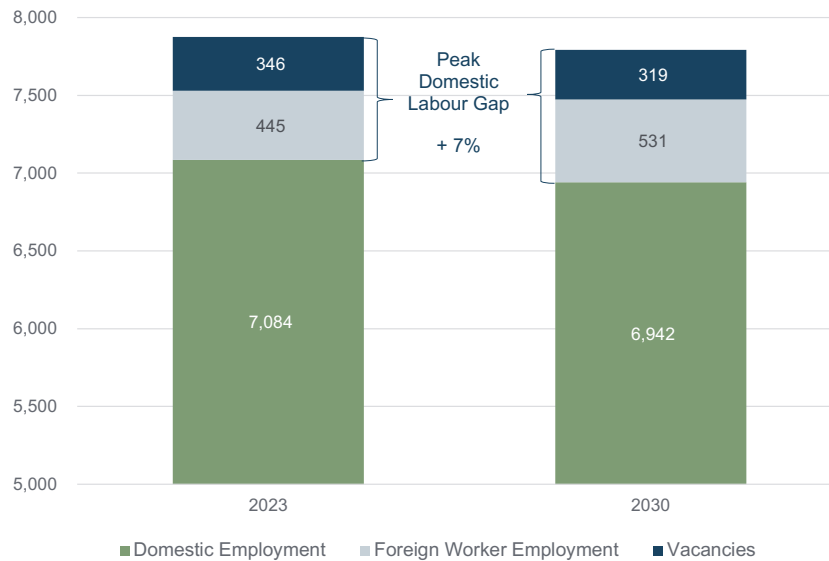


Labour Market Forecast

- After rebounding from effects of the COVID-19 pandemic in 2022, weaker economic growth will lead to less employment and fewer vacancies in the province in 2023.
- Agricultural production in the province is expected to grow by 14 per cent over the next 8 years, led by solid increases in aquaculture and greenhouse, nursery and floriculture industry output.¹¹
- Labour demand will remain constant over the forecast period as labour demand growth in industries such as aquaculture, and greenhouse, nursery and floriculture is offset by decreasing demand in the dairy, field fruit and vegetables, and other crops industries.
- The province will benefit from a growing labour supply, with 165 immigrants and 1,215 school leavers projected to enter the workforce over the next 8 years. Meanwhile, 1,240 workers will retire.¹²
- The total number of foreign workers employed is expected to increase from 540 in 2023 to 650 in 2030.¹³ As a result, the number of vacancies will decrease over the forecast period.
- Overall, the peak domestic labour gap will grow 7 per cent to over 850 positions in 2030 (Chart 3).¹⁴
- Almost 320 job vacancies will exist in 2030. Around 90 of these vacancies will be in the greenhouse and nursery industry, and 55 vacancies in other crop industries. Around 25 per cent of these vacancies will be for greenhouse and nursery labourers, 23 per cent for specialized livestock workers or farm machinery operators, and 17 per cent for livestock labourers.

Chart 3: The peak domestic labour gap is persistent over the forecast period.

Number of workers required at peak season in New Brunswick, forecast.



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. The peak number of foreign workers is less than the cumulative total employed over the year since not all workers will be employed simultaneously.

¹¹ The Conference Board of Canada. | ¹² School leavers is the number of workers finished school (all levels of education) and entering the workforce. | ¹³ Total foreign worker employment over the year is higher than foreign worker employment during peak season since not all foreign workers will be employed simultaneously (i.e., peak seasons differ). | ¹⁴ 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. Based on The Conference Board of Canada Model of Occupations, Skills and Technology (MOST).



Building the Future Workforce

- New Brunswick is expected to see many school leavers enter the agriculture sector. Training and retaining these individuals will be key.
- New Brunswick ranks as the second largest employer in aquaculture, following British Columbia. The aquaculture industry is positioned for strong growth, emphasizing the importance of providing the necessary workforce and resources to facilitate and support its expansion.
- Foreign workers have become an increasingly important segment of the agriculture workforce in this province. Ensuring employers have the access and tools they need to employ foreign workers and that foreign workers have the support they need will be important for the sector going forward.

Agriculture Sector Definition

CAHRC's definition of agriculture includes crop and animal production (NAICS 1111, 1112, 1113, 1114, 1119, 1121, 1122, 1123, 1124, 1125 and 1129), support services (NAICS 1151 and 1152) and agriculture wholesale industries (NAICS 4111 and 4183).

About This Factsheet

The data cited in this factsheet is based on a 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 agriculture LMI, please visit www.cahrc-ccrha.ca/programs/agri-lmi.

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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