



# BEEF

## Labour market information and forecast 2023-2030



### Key Findings

- The beef industry had over 1,300 job vacancies in 2022, mainly due to challenges stemming from the rural location of their operations and a lack of applicants with the necessary skills.
- The resulting influx of new domestic and foreign workers will require significant training and skills development to successfully integrate them into the industry's workforce.<sup>1</sup>
- These labour challenges are expected to continue and the domestic labour gap in the beef industry is projected to increase by 7 per cent over the next 8 years, reaching over 2,600 workers during peak season in 2030.<sup>2</sup>
- The industry's workforce will change dramatically over the next 8 years, as 35 per cent of the current domestic workers retire.

### Current Workforce

- The beef industry employed 33,200 domestic workers at peak season in 2022, with nearly 40 per cent of these jobs located in Alberta.<sup>3</sup>
- The industry has three main occupations: managers in agriculture, including owner-operators and hired managers (55 per cent of the domestic workforce); specialized livestock workers or farm machinery operators (19 per cent); and livestock labourers (14 per cent).
- The number of foreign workers in the industry has increased over 50 per cent since 2017 to around 1,500 workers in 2022. Foreign workers now make up over 4 per cent of the workforce.<sup>4</sup>
- Despite the increase in foreign workers, the industry had an estimated 1,300 job vacancies at peak season in 2022.
- The beef industry has one of the lowest job vacancy rates in agriculture at just 4.1 per cent compared to an average of 7.4 per cent across all industries.<sup>5</sup>

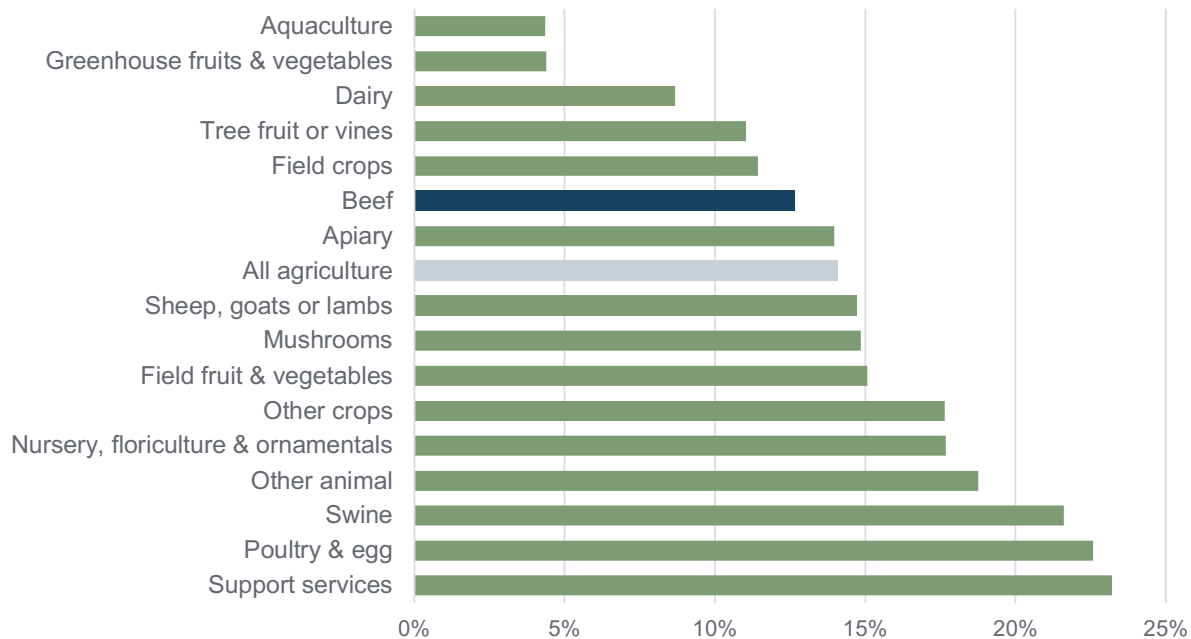
<sup>1</sup> Foreign workers include workers brought in through the Temporary Foreign Worker Program or Seasonal Agricultural Worker Program. Does not include immigrants or permanent residents. | <sup>2</sup> Domestic labour gap is the difference between the total number of workers required and the number 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. | <sup>3</sup> Statistics Canada; The Conference Board of Canada. | <sup>4</sup> Statistics Canada; The Conference Board of Canada. | <sup>5</sup> Statistics Canada, Job Vacancy and Wage Survey (custom data); The Conference Board of Canada. Does not include agriculture wholesale industries.

## Employer Survey Insights

- Half of employers in the beef industry were not able to find all the workers they needed in 2022.<sup>6</sup>
- One-third of employers did not receive any domestic applications for their job postings and 43 per cent received merely one or two applications.<sup>7</sup>
- As a result of job vacancies, 43 per cent of employers lost sales, 57 per cent delayed production, and 64 per cent cancelled or delayed expansion plans.<sup>8</sup>
- Forty-two per cent of beef employers cited lack of sector work experience as a top barrier for recruitment—higher than the agriculture sector’s average of 31 per cent.<sup>9</sup>
- The beef industry reported a voluntary turnover rate of 13 per cent, which is slightly below the overall average of 14 per cent seen across the entire agriculture sector (Chart 1).
- The rural location of beef farms continues to be a key barrier to both recruitment and retention, intensified by declining populations and inadequate transportation and housing in rural areas.

**Chart 1: Turnover rate in the beef industry is slightly below the agriculture average.**

Voluntary turnover rates\*, per cent, 2022.



Source: Canadian Agricultural Human Resource Council Employer Survey 2023.

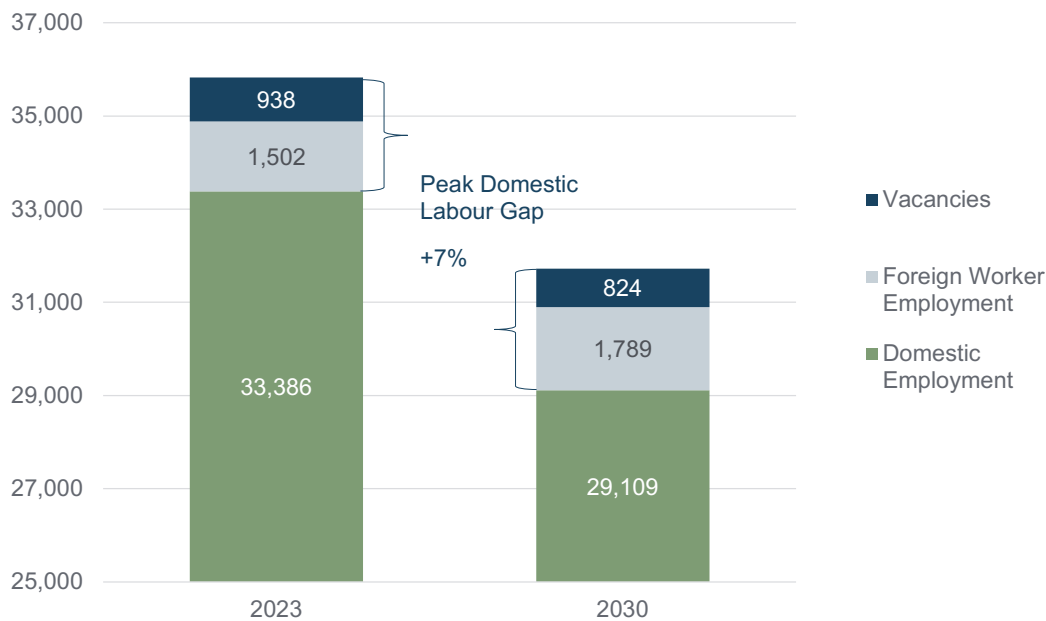
\* The voluntary turnover rate is the number of voluntary departures as a share of the total number of workers in a year. Voluntary departures are comprised of workers who quit, including seasonal workers who leave before contract completion.

<sup>6</sup> Canadian Agricultural Human Resource Council Employer Survey 2023 (n=30). | <sup>7</sup> Canadian Agricultural Human Resource Council Employer Survey 2023 (n=38). | <sup>8</sup> Canadian Agricultural Human Resource Council Employer Survey 2023 (n=14). | <sup>9</sup> Canadian Agricultural Human Resource Council Employer Survey 2023 (n=36).

## Labour Market Forecast

- Continued labour productivity gains and slower production growth will result in an 11 per cent decrease in peak labour demand over the next 8 years, reaching 31,700 in 2030.<sup>10</sup>
- The industry is expected to see 10,430 workers retire between 2023 and 2030; meanwhile, 2,430 immigrants and 5,020 school leavers are projected to enter the workforce.<sup>11</sup>
- Domestic employment is projected to decline by more than total employment demand, decreasing 13 per cent over the next 8 years, due to additional decreases in the supply of domestic labour.
- The peak domestic labour gap in the beef industry will increase by 7 per cent over the next 8 years, from 2,440 in 2023 to 2,610 by 2030.
- The number of foreign workers is projected to increase to around 1,800 by 2030. During peak season, foreign workers will fill 68 per cent of the domestic labour gap.
- Softer labour markets will result in fewer job vacancies in 2023, and as the industry shifts to more foreign workers, vacancies will continue to decrease gradually over the next 8 years. Nevertheless, around 820 vacancies will remain by 2030.
- Around 40 per cent of these vacancies will be for specialized livestock workers or farm machinery operators, and 30 per cent will be for livestock labourers.

**Chart 2: The peak domestic labour gap grows despite declining total peak demand.**  
 Number of workers required at peak season in the beef industry, 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.

<sup>10</sup> 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. | <sup>11</sup> School leavers is the number of workers finished school (all levels of education) and entering the workforce.



## Building the Future Workforce

- Finding workers with the right skills and experience will continue to be a challenge for beef employers, with the largest share of vacancies being for specialized livestock workers or farm machinery operators. In turn, training programs for in-demand occupations could be beneficial.
- With 35 per cent of the current domestic workforce expected to retire in the next 8 years, attracting new workers to the beef industry is vital. However, the rural location of beef farms poses a barrier. Overcoming this challenge involves supporting relocation and ensuring sufficient infrastructure, including transportation and housing.

## About the Beef Industry

This factsheet pertains to the ‘beef’ industry as defined by Statistics Canada as NAICS 1121, “establishments primarily engaged in raising and fattening cattle.” The raising of cattle for dairy herd replacements is also included in this industry.

Canada’s beef industry is geographically concentrated, with the Prairies accounting for around two-thirds of the industry’s employment.

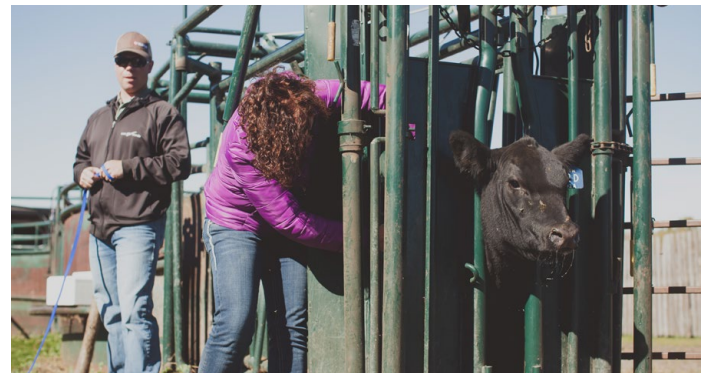
Gathering data on the beef industry is challenging since Statistics Canada only reports at the four-digit NAICS in sources like the Labour Force Survey, Job Vacancy and Wage Survey, and Agriculture Taxation Data Program. Since NAICS 1121, “Cattle ranching and farming,” includes both beef and dairy, custom analysis is necessary to extract separate figures for these industries. We relied on data from Statistics Canada Business Counts (with and without employees) and from the CAHRC 2023 Employer Survey to create separate analyses for this study.

## 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; 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](http://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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