



FRUIT AND VEGETABLE

Labour market information and forecast 2023-2030



Key Findings

- During peak season in 2022, over 6,300 positions went unfilled in the fruit and vegetable industry, which includes field vegetable and melon farming, and tree fruit and vine farming. This led to over \$260 million in lost sales.¹
- The fruit and vegetable industry had the highest ratio of vacancies to total demand at 11 per cent, compared to 6 per cent across the entire sector. This meant that more than one in 10 jobs remained vacant at peak season in 2022.²
- Foreign workers are a vital part of the industry, accounting for almost half of the workforce.³ The number of foreign workers will continue to grow as fruit and vegetable employers struggle to find domestic workers over the coming years.
- The peak domestic labour gap is projected to grow 17 per cent, from 30,100 in 2023 to 35,300 in 2030.⁴ While 85 per cent of this gap is expected to be filled by foreign workers, over 5,100 vacancies will still exist in 2030.

Current Workforce

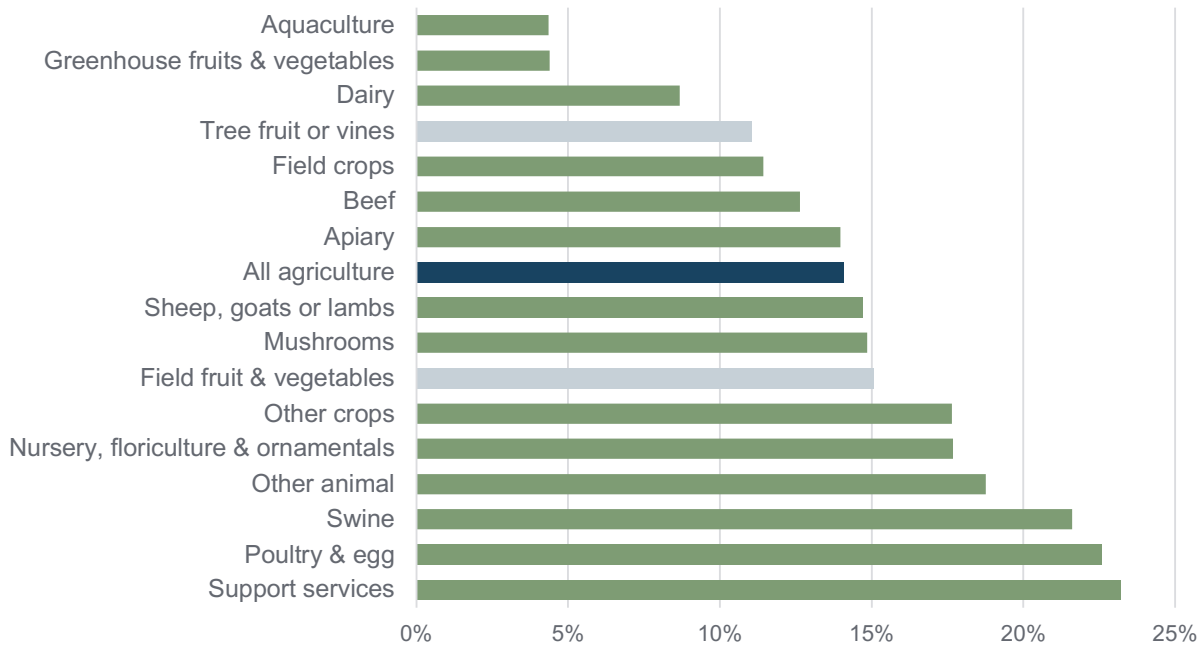
- The fruit and vegetable industry employed over 30,070 domestic workers in 2022, which included 14,750 in field vegetable and fruit, and 15,320 in tree fruit and vine. This accounts for 9 per cent of domestic employment in the agriculture sector.⁵
- Ontario has 36 per cent of domestic employment in this industry, Quebec has 27 per cent and British Columbia has 18 per cent.⁶
- This industry is extremely seasonal, with 80 per cent of employees in tree fruit and vine, and 74 per cent in field vegetable and fruit employed on a seasonal basis.⁷
- Almost 28,000 foreign workers were employed in the fruit and vegetable industry throughout the year in 2022, which amounts to 40 per cent of all foreign workers in the agriculture sector.⁸
- Thirty per cent of the workforce are farm machinery operators, 25 per cent are managers in agriculture (including owner-operators), and 23 per cent are harvesting labourers.
- The industry experienced a peak vacancy rate of 12 per cent in 2022, which was considerably higher than the 7.4 per cent across the entire agriculture sector.⁹

¹ Statistics Canada; Canadian Agricultural Human Resource Council Employer Survey 2023; The Conference Board of Canada. | ² Statistics Canada; The Conference Board of Canada. | ³ Foreign workers include workers brought in through the Temporary Foreign Worker Program or Seasonal Agricultural Worker Program. Does not include immigrants or permanent residents. | ⁴ 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). | ⁵ Statistics Canada; The Conference Board of Canada. | ⁶ Ibid. | ⁷ Statistics Canada, Table: 32-10-0215-01. Only includes payroll employees. | ⁸ Statistics Canada, Table: 32-10-0218-01. | ⁹ Statistics Canada, Job Vacancy and Wage Survey (custom data). Does not include agriculture wholesale industries.

Employer Survey Insights

- In 2022, 45 per cent of employers in the fruit and vegetable industry were unable to find all the workers they needed and 60 per cent lost sales as a result.¹⁰
- In value terms, lost sales due to labour shortages were estimated to be over \$260 million in 2022.
- Forty-three per cent of employers reported that they received no domestic applicants for their job postings, and 29 per cent received only one or two applicants.¹¹
- Difficult manual labour, low pay and seasonal job uncertainty continue to be the top factors that impede employee recruitment in the fruit and vegetable industry.¹²
- Over 70 per cent of employers reported using the Temporary Foreign Worker Program (including the Seasonal Agricultural Worker Program) as a recruitment method in 2022.¹³
- The voluntary turnover rate reported by tree fruit and vine employers was 11 per cent while the rate reported by field vegetable and fruit employers was 15 per cent (Chart 1).
- Forty-five per cent of employers in tree fruit and vine reported low pay as a barrier to retention, compared to 62 per cent of employers in field vegetable and fruit.¹⁴

Chart 1: The field vegetable and fruit industry has a relatively average voluntary turnover rate.
 Voluntary turnover rates,* per cent, 2022.



Source: Canadian Agricultural Human Resource Council Employer Survey 2023.

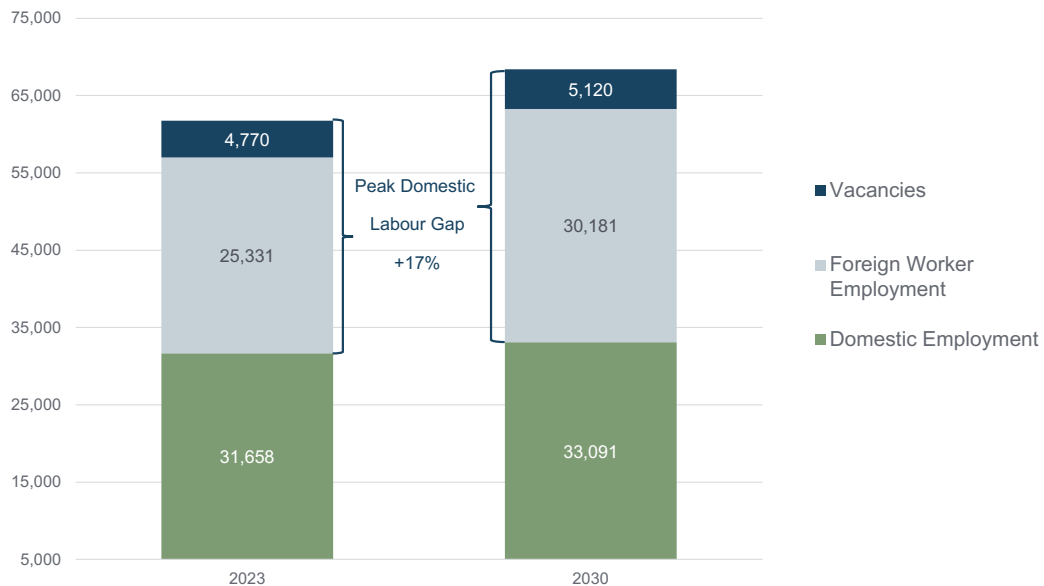
* The voluntary turnover rate is the number of voluntary departures as a share of the total number of workers in a year. Voluntary departures are comprised of workers who quit, including seasonal workers who leave before contract completion.

¹⁰ Canadian Agricultural Human Resource Council Employer Survey 2023 (n=173, 77). | ¹¹ Canadian Agricultural Human Resource Council Employer Survey 2023 (n=176). | ¹² Canadian Agricultural Human Resource Council Employer Survey 2023 (n=172). | ¹³ Canadian Agricultural Human Resource Council Employer Survey 2023 (n=172). | ¹⁴ Canadian Agricultural Human Resource Council Employer Survey 2023 (n=58,113).

Labour Market Forecast

- The fruit and vegetable industry will need more workers in order to grow production. Peak labour demand is projected to increase 11 per cent, from 61,760 in 2023 to 68,390 in 2030.
- Domestic employment is not expected to keep up with demand, increasing only 5 per cent over the next 8 years and reaching 33,100 workers in 2030 (Chart 2).
- With over 6,800 retirees leaving the workforce, and only 4,000 school leavers and 2,400 immigrants entering the industry, domestic employment will be restrained by labour supply factors.
- The peak domestic labour gap is expected to increase by 17 per cent between 2023 and 2030, reaching 35,302.
- This gap will largely be filled by foreign workers, reaching 37,400 in 2030.¹⁵
- Following the historically high level of vacancies in 2022, there will be fewer vacancies in 2023 as labour markets adjust and more foreign workers are employed. However, vacancy growth is expected to resume over the forecast period as domestic and foreign employment will not keep up with labour demand.
- Over 5,100 vacancies are projected during peak season in 2030, which represents a 7 per cent increase over 2023 levels.
- Forty-two per cent of these vacancies will be for farm machinery operators and 32 per cent will be for harvesting labourers.

Chart 2: Over 5,100 vacancies remain in 2030 despite a rise in foreign employment.
 Number of workers required at peak season in the fruit and vegetable 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.

¹⁵ Total (cumulative) 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).



Building the Future Workforce

- Manual labour is the top factor making recruitment and retention difficult in this industry. Providing the right tools and training to support workers in labour-intensive roles will be key.
- The success of this industry depends on foreign workers, especially at peak planting and harvesting times. Ensuring employers continue to have the tools they require to employ foreign workers and foreign workers have the support they need will be important for the industry going forward.

About the Fruit and Vegetable Industry

The fruit and vegetable industry includes vegetable and melon farming (NAICS 1112) and fruit and tree nut farming (NAICS 1113). Vegetable and melon farming covers the planting and harvesting of vegetables such as potatoes, sweet corn, peas, carrots, beans, peppers, pumpkins, asparagus and tomatoes. Fruit and tree nut farming includes fruit grown in orchards and vineyards, such as apples, pears and grapes, and includes all berries and tree nuts. Work in this industry involves tasks such as planting and tending to crops, managing orchards and vineyards, as well as ensuring the quality and supply of fresh produce to markets and consumers.

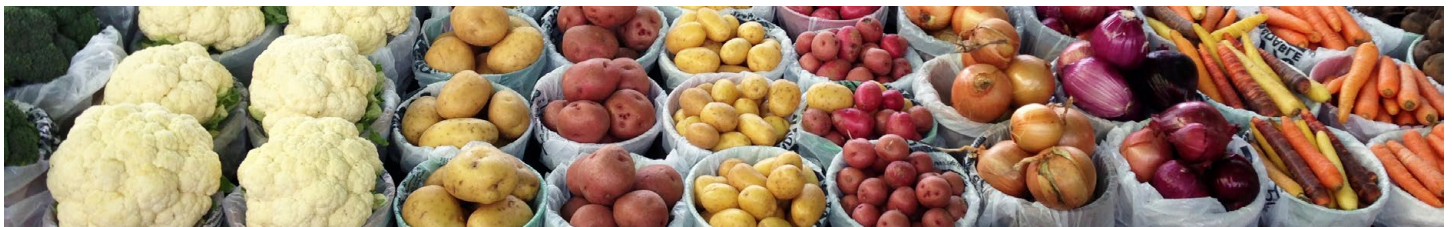
Operations in the industry are concentrated in Ontario, Quebec and British Columbia.

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.

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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Canadian Agricultural Human Resource Council

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T: 613.745.7457 | E: info@cahrc-ccrha.ca



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