



# GREENHOUSE, NURSERY AND FLORICULTURE

## Labour market information and forecast 2023-2030



### Key Findings

- An estimated 4,300 positions went unfilled in the greenhouse, nursery and floriculture industry during peak season in 2022, resulting in over \$500 million in lost sales.<sup>1</sup>
- Foreign workers<sup>2</sup> are a critical part of the workforce that will continue to grow, reaching over 35,000 workers in 2030 and filling 82 per cent of the domestic labour gap during peak season.<sup>3</sup>
- As production in this industry remains strong, labour demand will continue to grow. Domestic and foreign employment will not be able to keep up, resulting in an increasing number of vacancies over the next 8 years.
- The largest share of vacancies will be for greenhouse and nursery labourers.

### Current Workforce

- The greenhouse, nursery and floriculture industry employed 51,300 domestic workers at peak season in 2022, accounting for 15 per cent of domestic employment in agriculture.<sup>4</sup>
- In 2022, one-third of the workforce (26,200 workers) were foreign workers, accounting for almost 40 per cent of all foreign workers employed in the agriculture sector.<sup>5</sup>
- The workforce in this industry has increased over 50 per cent since 2017, due to the introduction of cannabis and the expansion of greenhouse fruit and vegetable production.
- The industry has three main occupations: farm labourers (51 per cent of the workforce), specialized livestock workers or farm machinery operators (9 per cent), and managers, including owner-operators and hired managers (9 per cent).<sup>6</sup>
- The industry experienced a peak vacancy rate of 8.2 per cent in 2022, which was higher than the 7.4 per cent across the entire agriculture sector.<sup>7</sup>
- It is estimated that over 4,300 positions went unfilled at peak season in 2022.<sup>8</sup>

<sup>1</sup> Canadian Agricultural Human Resource Council Employer Survey 2023; The Conference Board of Canada. | <sup>2</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>3</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>4</sup> Statistics Canada; The Conference Board of Canada. | <sup>5</sup> Statistics Canada, Table: 32-10-0218-01. | <sup>6</sup> Farm labourers are predominantly nursery and greenhouse labourers, but also includes harvesting labourers and livestock labourers. Managers include managers in horticulture and managers in agriculture. Statistics Canada; The Conference Board of Canada. | <sup>7</sup> Statistics Canada, Job Vacancy and Wage Survey (custom data). Does not include agriculture wholesale industries. | <sup>8</sup> Statistics Canada; The Conference Board of Canada Model of Occupations, Skills and Technology.



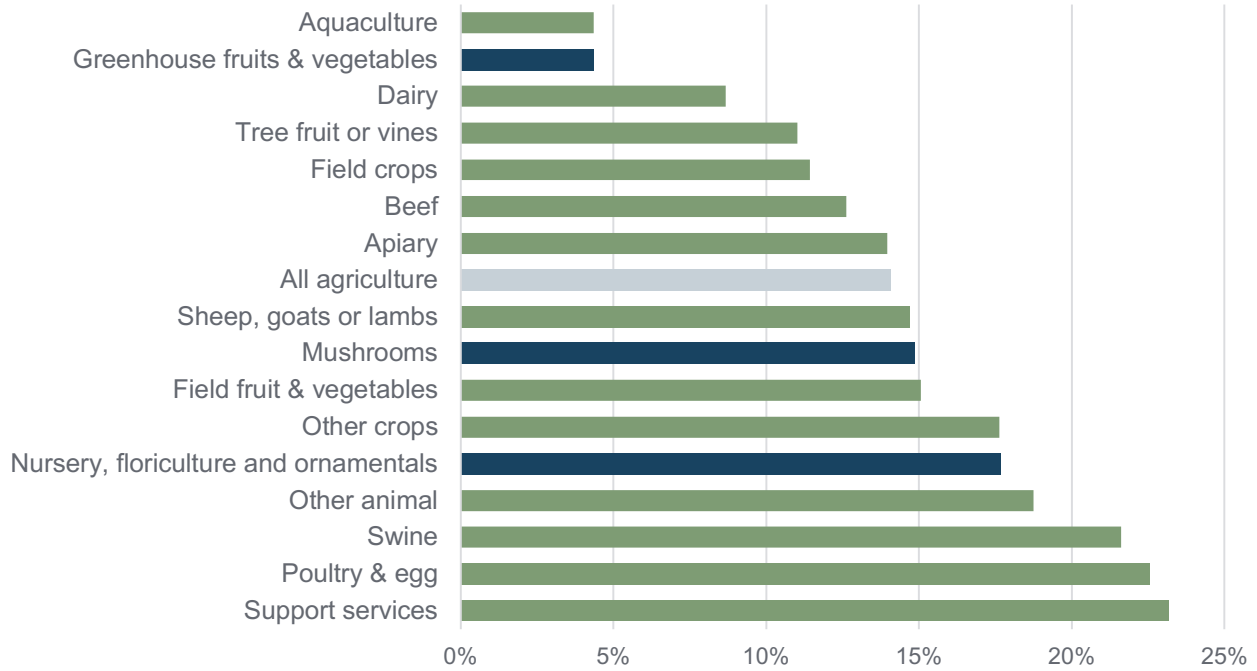
## Employer Survey Insights

- Half of employers in the greenhouse, nursery and floriculture industry were unable to find all the workers required in 2022.<sup>9</sup> This was even higher for the greenhouse fruits and vegetables (including mushrooms) sub-industry at 58 per cent, but lower for the nursery, floriculture and ornamentals sub-industry at 45 per cent.<sup>10</sup>
- Worker shortages cost the industry an estimated \$500 million in lost sales in 2022.<sup>11</sup>
- The greenhouse fruits and vegetables (including mushrooms) sub-industry had a higher number of applicants. Forty-two per cent of employers received more than 5 applicants compared to only 18 per cent across the sector.<sup>12</sup>
- Eighty-three per cent of employers in the greenhouse fruits and vegetables (including mushrooms) sub-industry and 68 per cent in the nursery, floriculture and ornamentals sub-industry reported using the Temporary Foreign Worker Program or Seasonal Agricultural Worker Program to recruit workers in 2022.<sup>13</sup>
- Sixty-seven per cent of mushroom employers cited the regulations for temporary foreign workers as a top recruitment barrier, compared to only 17 per cent across the agriculture sector.<sup>14</sup>
- Overall, difficult manual labour, low pay and seasonality continue to be the top factors that impede recruitment in the greenhouse, nursery and floriculture industry.
- The industry had an overall turnover rate of 13 per cent, which varied by commodity. Greenhouse fruit and vegetable growers had a much lower turnover rate of 4 per cent compared to mushrooms at 15 per cent, and nursery, floriculture and ornamentals at 18 per cent (Chart 1).<sup>15</sup>
- Over 70 per cent of employers in the nursery, floriculture and ornamentals sub-industry reported manual labour as the main factor causing turnover, compared to 57 per cent of employers in the entire agriculture sector.<sup>16</sup>



<sup>9</sup> Canadian Agricultural Human Resource Council Employer Survey 2023 (n=38, 58). | <sup>10</sup> Canadian Agricultural Human Resource Council Employer Survey 2023 (n=38, 58). | <sup>11</sup> Canadian Agricultural Human Resource Council Employer Survey 2023 (n=10). Total sales from Statistics Canada, Table 32-10-0045-01. | <sup>12</sup> Canadian Agricultural Human Resource Council Employer Survey 2023 (n=38, 763). | <sup>13</sup> Canadian Agricultural Human Resource Council Employer Survey 2023 (n=96). | <sup>14</sup> Canadian Agricultural Human Resource Council Employer Survey 2023 (n=10). | <sup>15</sup> Canadian Agricultural Human Resource Council Employer Survey 2023. | <sup>16</sup> Canadian Agricultural Human Resource Council Employer Survey 2023 (n=58, 721).

**Chart 1: Turnover is very high in the nursery, floriculture and ornamentals commodity.**  
 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.

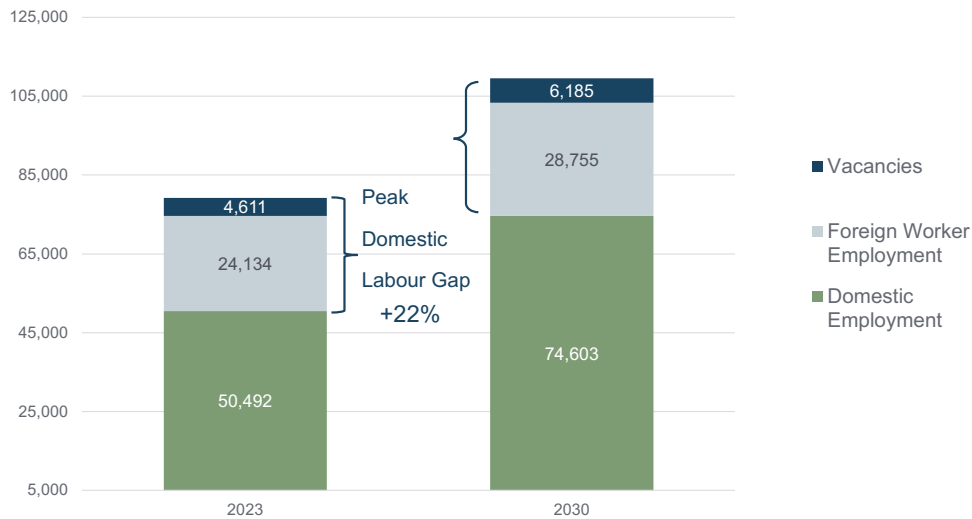


## Labour Market Forecast

- The greenhouse and nursery industry has seen rapid growth over the past 5 years, due in large part to the introduction and growth of cannabis production. Peak labour demand increased over 50 per cent between 2017 and 2022.<sup>17</sup>
- Over the next 8 years, continued production growth will increase labour demand by 38 per cent, reaching over 109,500 positions during peak season in 2030.
- This industry will benefit from an increasing supply of domestic labour. Between 2023 and 2030, 9,800 workers are expected to retire and will be replaced by the 4,300 immigrants and 8,600 school leavers who are projected to enter the industry's workforce.<sup>18</sup>
- As a result, the number of domestic workers employed during peak season is expected to increase from 50,500 in 2023 to over 74,600 workers in 2030 (Chart 2).
- Foreign workers will continue to be a vital source of labour, with over 35,000 workers expected to be employed throughout the year by 2030.<sup>19</sup>
- However, increasing domestic and foreign workers will not be enough to keep up with labour demand. As a result, vacancies are expected to increase 34 per cent over the next 8 years, reaching almost 6,200 unfilled positions in 2030.
- Almost three-quarters of these vacancies will be for farm labourers, mainly greenhouse and nursery labourers, but also some harvesting and livestock labourers.

### Chart 2: Vacancies increase 34 per cent over the next 8 years.

Number of workers required at peak season in the greenhouse, nursery and floriculture 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>17</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>18</sup> School leavers is the number of workers finished school (all levels of education) and entering the workforce. | <sup>19</sup> Total employment over the year is higher than employment during peak



## Building the Future Workforce

- Anticipated growth in greenhouse vegetable and cannabis production will increase labour demand over the next decade leading to a rise in job vacancies, especially for labour-intensive positions.
- 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.
- High turnover will continue to burden employers as many new domestic workers enter the industry. Ensuring good management practices and a positive work environment could help keep workers in the industry.

## About the Greenhouse, Nursery and Floriculture Industry

The 'greenhouse, nursery and floriculture' industry (NAICS 1114) includes both fruits and vegetables grown under cover (including mushrooms), cannabis grown under cover, and nursery, floriculture and ornamental products grown under cover or in fields. Nursery, floriculture and ornamental products include potted plants, cut flowers, shrubbery and Christmas trees.

Canada's greenhouse, nursery and floriculture industry is geographically concentrated, with Ontario and Quebec accounting for over 60 per cent of the industry's domestic employment.



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## 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.