



# NOVA SCOTIA

## Agriculture labour market information and forecast 2023-2030



### Key Findings

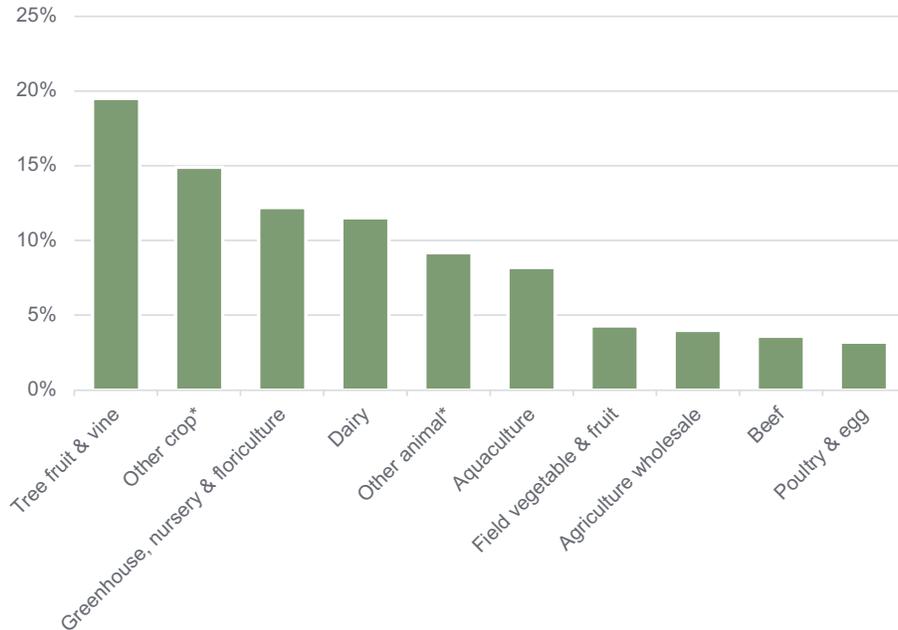
- Almost half of agriculture employers in Nova Scotia were unable to hire all the workers required in 2022, causing production delays and lost sales.
- Despite a forecasted increase in the number of foreign workers employed in the agriculture sector, over 600 positions are expected to be vacant in 2030.<sup>1</sup>
- Labour challenges in the province are expected to continue with the peak domestic labour gap increasing 20 per cent to over 2,400 positions by 2030.<sup>2</sup>
- Nova Scotia has one of the oldest average populations. Thirty-six per cent of the current domestic workforce is expected to retire between 2023 and 2030, creating a need for experienced workers.
- An expected influx of immigrants presents an opportunity for the agricultural sector. Finding ways to attract these newcomers to careers in agriculture will be key to reducing future labour gaps.

### Current Workforce

- Nova Scotia employed 7,250 domestic workers during peak season in 2022, accounting for around 2 per cent of Canada's domestic agriculture workforce.
- The sector employed around 1,650 foreign workers in 2022 with more than half working in the tree fruit and vine industry.<sup>3</sup>
- The province has a high proportion of foreign workers, making up 19 per cent of its agriculture workforce. This is the fourth highest concentration of all the provinces.<sup>4</sup>
- The sector had approximately 715 positions that went unfilled at peak season in 2022.<sup>5</sup>
- The estimated vacancy rate for the sector was 9.6 per cent, which is higher than 7.4 per cent across Canada due to the concentration of the province's tree fruit and vine industry (Chart 1).<sup>6</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, Table: 32-10-0218-01. | <sup>4</sup>Below British Columbia (25%), Ontario (23%), and Quebec (22%). | <sup>5</sup>The Conference Board of Canada Model of Occupations, Skills and Technology. | <sup>6</sup>Statistics Canada; The Conference Board of Canada Model of Occupations, Skills and Technology.

**Chart 1: The tree fruit and vine industry is the largest agriculture employer in Nova Scotia.**  
 Share of employment (domestic and foreign) at peak, 2022, Nova Scotia.



Source: Agriculture and Agri-food Labour Statistics Program, Statistics Canada.

\*Other crop is primarily mixed fruit and vegetable farming and other combination crop farming. Other animal is primarily combination animal farming and fur-bearing animal and rabbit production.

## Employer Survey Insights

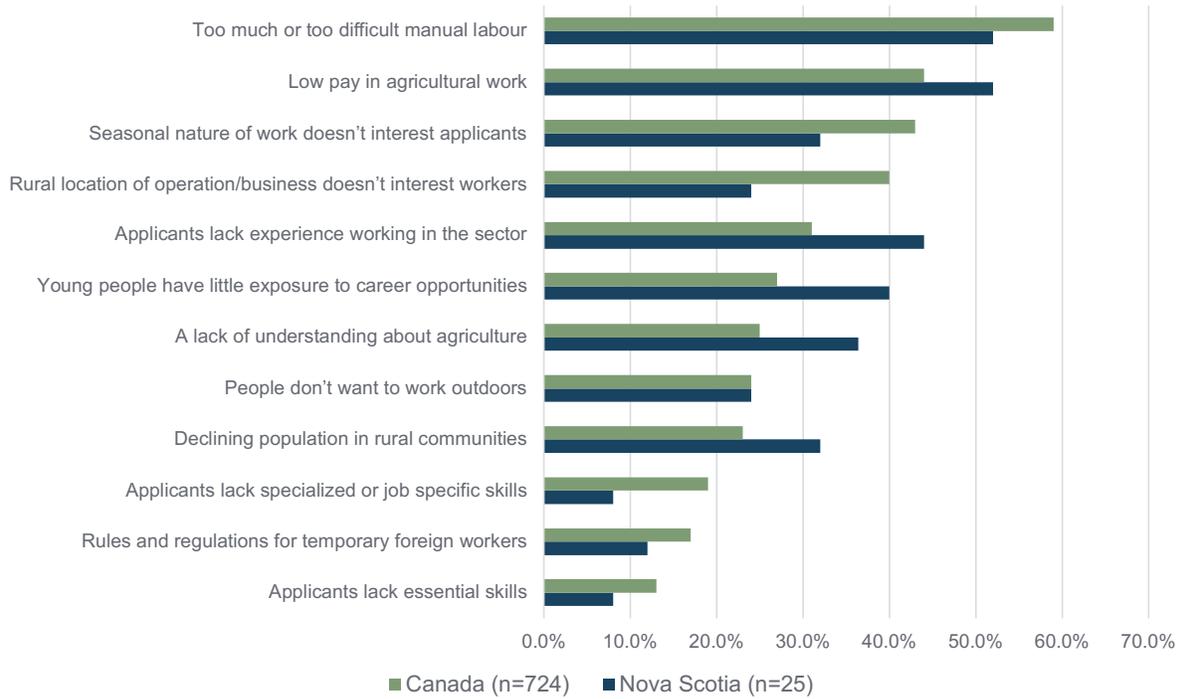
- Forty-eight per cent of agriculture employers in Nova Scotia were unable to find all the workers they needed in 2022, which is slightly above the 44 per cent share seen across Canada.<sup>7</sup>
- Almost 30 per cent of employers in Nova Scotia received no domestic applicants for their job postings and over half reported having received only one or two.<sup>8</sup>
- As a result of these labour shortages, 30 per cent of employers lost sales, while 50 per cent experienced delays in production.<sup>9</sup>
- Forty-four per cent of employers in Nova Scotia reported lack of applicants with experience working in the sector as a prominent factor hindering recruitment, which is well above the 31 per cent reported by employers across Canada (Chart 2).<sup>10</sup>
- Similarly, 40 per cent of employers cited young individuals having little exposure to career opportunities in the sector as a barrier to recruitment. In contrast, only 27 per cent of employers across Canada reported this challenge.<sup>11</sup>
- Nova Scotia's agriculture sector had a voluntary turnover rate of 13 per cent in 2022, which is well above the estimated 7.7 per cent turnover rate for all sectors in Canada.<sup>12</sup>

<sup>7</sup> Canadian Agricultural Human Resource Council Employer Survey 2023 (n=21, 285). | <sup>8</sup> Canadian Agricultural Human Resource Council Employer Survey 2023 (n=27). | <sup>9</sup> Canadian Agricultural Human Resource Council Employer Survey 2023 (n=10). | <sup>10</sup> Canadian Agricultural Human Resource Council Employer Survey 2023 (n=25). | <sup>11</sup> Canadian Agricultural Human Resource Council Employer Survey 2023 (n=25). | <sup>12</sup> 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; The Conference Board of Canada.

**Chart 2: Manual labour and low pay are the top barriers to recruitment.**

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.

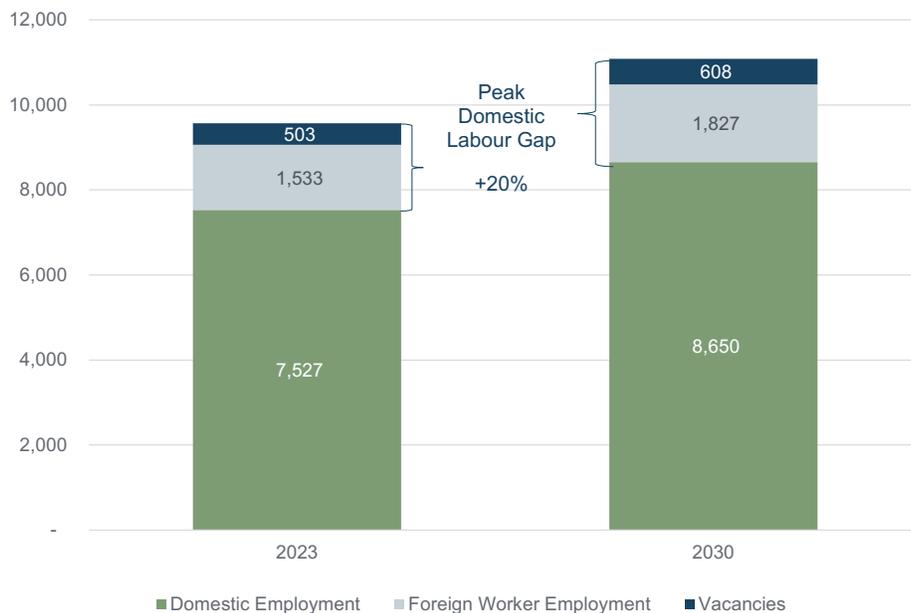


## Labour Market Forecast

- Labour demand is expected to increase 16 per cent over the next 8 years, from 9,600 in 2023 to 11,100 in 2030. The strongest growth will be in the tree fruit and vine, greenhouse and nursery, and aquaculture industries.
- Domestic employment in the sector fell 13 per cent from 2021 to 2022 due to the impacts of Hurricane Fiona. It is anticipated to recover over the next couple of years, reaching 8,500 workers by 2024, after which growth will slow, reaching only 8,650 in 2030 due to diminishing labour supply.
- Over one-third (2,100 workers) of the sector’s current domestic workforce is expected to retire between 2023 and 2030. These retirements will be partially offset by the 180 immigrants and 1,300 school leavers projected to enter the workforce by 2030.<sup>13</sup>
- The resulting domestic labour supply shortfall leads to a forecasted increase in the peak domestic labour gap of 20 per cent over the next 8 years, leaving over 2,400 positions unable to be filled domestically in 2030 (Chart 3).
- Foreign worker employment is expected to increase, but over 600 vacancies are expected in 2030. Over half of these will be in horticulture industries.
- Thirty-five per cent of vacancies will be livestock and harvesting labourers, 29 per cent for specialized livestock workers and farm machinery operators, and 18 per cent for greenhouse and nursery workers.

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

Number of workers required at peak season in Nova Scotia, 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>13</sup> School leavers is the number of workers finished school (all levels of education) and entering the workforce.



## Building the Future Workforce

- The population of 15 to 24 year olds in Nova Scotia is expected to fall 3 per cent over the next 8 years, while increasing 0.5 per cent in the rest of Canada. The province will heavily depend on international immigration to bolster its population over the coming years. In turn, attracting more immigrants to the agriculture sector will be key to sustaining the domestic labour force.
- Employers in the province already struggle to find workers with an understanding of or experience with the sector, especially among young individuals. Work-integrated learning, apprenticeships and other mentorship programs could help expose young people to career opportunities in agriculture.

## 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](http://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](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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PUBLISHED FEBRUARY 2024

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Funded by the Government  
of Canada's Sectoral Workforce  
Solutions Program



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