



## Impact of Access to Foreign Workers on the Agriculture Industry

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## Overview

### Economic Impacts of Labour Shortages

The Canadian agricultural workforce benefited from having 59,500 international workers through the Season Agricultural Worker Program (SAWP) and the Temporary Foreign Worker Program (TFWP) in 2017. Their participation limited devastating losses:

- unfilled vacancies went from 76,000 positions down to 16,500 positions that could not be filled on farms
- lost revenues were limited to \$2.9 billion due to job vacancies.

### Potential Impacts of SAWP and TFWP workers not arriving in Canada in Spring 2020

Based on this data, it can be anticipated that without the participation of SAWP or TFWP workers, job vacancies will be extensive, businesses will struggle to remain viable and the impacts on the Canadian food system and supply would be severe.

- Canadian food production and supply would be negatively impacted for the next 12 – 18 months, specifically fruits and vegetables.
- Stress, production delays, lost sales, and delays or cancellations for farm expansions or upgrades would exceed well beyond the reported figures of 2018 when 47% of agricultural producers reported these concerns.
- Without access to SAWP and TFWP workers producers will face:
  - job losses for Canadian workers, managers and business owners
  - business closures of farms
  - a negative impact on food processing abilities
  - animal welfare concerns
  - health and safety concerns
  - food safety and food security concerns

The following document provides data by province and commodity.

## Provincial Data

In most cases, the facts provided above remain the same at the provincial level.

### Alberta

- The agricultural industry employed 54,500\* people, or 16% of Canada's agricultural workforce in 2017
- 2,355 of agricultural workers are foreign workers\*\*
- 2,800 jobs went unfilled as a result of labour shortages.
- Those shortages resulted in production losses and delays, as well as \$821 million in lost sales. (2018)

## British Columbia

- The agricultural industry employed 46,300 people, or 13% of Canada's agricultural workforce\* in 2017.
- 10,627 or 23% of agricultural workers are foreign workers\*\*
- 3,100 jobs went unfilled as a result of labour shortages in 2017.
- Those shortages resulted in production losses and delays, as well as \$216 million in lost sales in 2018.

## Manitoba

- The agricultural industry employed 24,700\* people, or 7% of Canada's agricultural workforce\* in 2017.
- 704 agricultural workers are foreign workers\*.
- 1,100 jobs went unfilled as a result of labour shortages in 2017.
- Those shortages resulted in production losses and delays, as well as \$367 million in lost sales in 2018.

## New Brunswick

- The agricultural industry employed 5,200 workers in 2017.
- 195 agricultural workers or 4% of its workforce is foreign workers.
- Although domestic labour supply slightly exceeded demand in 2017, the province was still unable to fill 268 jobs, a number that is equivalent to 5.1% of the total required workforce.
- These shortages resulted in production losses and delays, as well as \$30 million in lost sales in 2018.

## Newfoundland and Labrador

- The agricultural industry employed 2,000 workers\*.
- There has not been a dependence on foreign workers to meet demand.
- In 2017, there were 70 jobs that were unable to be filled, resulting in \$4.3 million or 3.1% of sales.

## Nova Scotia

- The agricultural industry employed 4,700 workers in 2017.
- 1,885 agricultural workers or 29% of its workforce is foreign workers.
- The province is second only to Ontario on the high reliance on foreign workers.
- 250 jobs went unfilled as a result of labour shortages in 2017.
- These shortages resulted in production losses and delays, as well as \$33 million in lost sales in 2018.

## Ontario

- The agricultural industry employed 97,800 workers in 2017.
- 29,300 agricultural workers or 30% of its workforce (nearly 1 in 3) is foreign workers.
- The province is second only to Ontario on the high reliance on foreign workers.
- 4,400 jobs went unfilled as a result of labour shortages in 2017.

- These shortages resulted in production losses and delays, as well as \$591 million in lost sales in 2018.

### Prince Edward Island

- The agricultural industry employed 3,500 workers in 2017.
- There has not been a dependence on foreign workers to meet demand.
- In 2017 there were 190 jobs that were unable to be filled
- These shortages resulted in production losses and delays, as well as \$15 million lost sales.

### Quebec

- The agricultural industry employed 70,500 workers in 2017.
- 13,415 of agricultural workers or 19% of its workforce is foreign workers.
- 2,700 jobs went unfilled as a result of labour shortages in 2017.
- These shortages resulted in production losses and delays, as well as \$362 million lost sales.

### Saskatchewan

- The agricultural industry employed 37,500 workers in 2017.
- 617 of 36,900 agricultural workers are foreign workers
- 1,600 agricultural jobs went unfilled as a result of labour shortages in 2017.
- These shortages resulted in production losses and delays, as well as \$574 million lost in sales.

\* Includes farm business owners and family members

\*\*Includes Seasonal Agricultural Workers Program (SAWP) and Temporary Foreign Worker Program (TFWP) workers

## Commodities

There are specific commodities that are more greatly impacted from access to SAWP and TFWP workers than others. This section provides data regarding the commodities most impacted.

### Horticulture

Producing fruit and vegetables is labour intensive and Canada benefits from the participation of foreign workers through the Seasonal Agricultural Worker Program and the Temporary Foreign Worker Program. In fact, research clarifies that 50% of those involved in Canada's horticulture production are foreign workers and without their participation, all Canadian fruit and vegetable production would be extensively limited since they are integral to all aspects of production.

- The industry employed 75,300 people in 2017.
- More than two in five workers (44% of the workforce) are foreign workers\*.
- Two in three farms employ foreign workers.
- Even with a high percentage of foreign workers, 50% of farms were not able to find all of the workers that they needed in 2018.
- Those shortages resulted in production losses and delays, as well as \$622 million in lost sales.

### Field Fruit and Vegetable

- The industry employed 24,000 people, or roughly 7% of the total agricultural workforce\* in 2017.

- Foreign workers\* accounted for 43% of the industry's workforce in 2017.
- Even with a high percentage of foreign workers, the industry was unable to fill 1,500 jobs in 2017.
- Those shortages resulted in production losses and delays, as well as \$403 million in lost sales.

### Greenhouse, Nursery and Floriculture

- The industry employed 52,000 people, or roughly 15% of the total agricultural workforce\* in 2017.
- Jobs in this industry tend to be highly seasonal and labour intensive.
- As a result, this industry has one of the heaviest reliance on foreign workers of any industry in the agriculture sector.
- Foreign workers\* accounting for 40% of the industry's workforce.
- Even with a high percentage of foreign workers, the industry was unable to fill 2,800 jobs in 2017.
- Those shortages resulted in production losses and delays, as well as \$103 million in lost sales.

### Tree Fruit and Vine

- The industry employed 23,900 people and accounting for 7% of the total agricultural workforce\* in Canada in 2017.
- More than one in two workers (51% of the workforce) are foreign workers\*.
- This industry the most reliant on foreign workers of any agricultural industry.
- Even with a high percentage of foreign workers, the industry was unable to fill 900 jobs in 2017.
- Those shortages resulted in production losses and delays, as well as \$94 million in lost sales.

## Regional Data

### Atlantic Canada

- The agriculture labour market in Atlantic Canada relative to the rest of Canada is in balance. Domestic labour supply slightly exceeded labour demand in three provinces, PEI, New Brunswick and Newfoundland and Labrador, in 2017.
- Atlantic Canada had an agricultural workforce of 17,286\* in 2017
- The industry employed 2,486 foreign workers\*\* in 2017
- Even so, it had 779 unfilled vacancies in 2018 leading to 79 million in lost sales.

\* Includes farm business owners and family members

\*\*Includes Seasonal Agricultural Workers Program (SAWP) and Temporary Foreign Worker Program (TFWP) workers

## A Review of Foreign Worker Participation by Country of Citizenship, Province, and Commodity

- Statistics Canada has developed a Farm Population model by linking tax filer information to farm businesses.
- Data from the Temporary Foreign Worker Program were linked with data on agricultural operations from the 2016 Census of Agriculture using the business numbers of the agricultural operations that issued a Statement of Remuneration Paid (T4) to temporary foreign workers.
- Statistics Canada's data includes temporary foreign workers from all streams of the TFWP including SAWP. However, aquaculture or businesses that have activities in the secondary sector (transformation, packing, trucking, etc.) are not included.
- Some foreign workers may work on multiple farms during a season. Therefore, the number of jobs will differ from the number of workers.

### Half of temporary foreign agricultural workers are from Mexico

- In 2018, half of the temporary foreign workers in Canada came from Mexico, followed by Guatemala (20%) and Jamaica (18%).
- Nearly 90% of foreign workers in Canada came from one of these three countries in 2018.
- The share of foreign workers from Guatemala has been increasing during the past five years.

**Top 10 countries of citizenship for temporary foreign workers in the agricultural sector, 2018**

Rank	Country of citizenship	Number	Proportion (percent)
	<b>Total</b>	<b>49,622</b>	<b>100.0%</b>
1	Mexico	25,060	50.5%
2	Guatemala	9,819	19.8%
3	Jamaica	8,920	18.0%
4	Thailand	982	2.0%
5	Philippines	810	1.6%
6	Trinidad and Tobago	771	1.6%
7	India	764	1.5%
8	Honduras	450	0.9%
9	Saint Vincent and the Grenadines	290	0.6%
10	Nicaragua	288	0.6%
11 to 93	Other countries	1,468	3.0%

Source : Statistics Canada, Temporary Foreign Workers file, 2018

## Ontario has the Most Jobs for Foreign Agriculture Workers

- Ontario has nearly half of jobs filled by foreign workers, followed by Quebec (27%) and British Columbia (17%), in 2018.
- Together these three provinces account for just over 90% of all jobs for temporary foreign workers in Canada in 2018.

### Jobs filled by temporary foreign workers in the agriculture sector, and agricultural operations with at least one temporary foreign worker, by province, 2016 to 2018

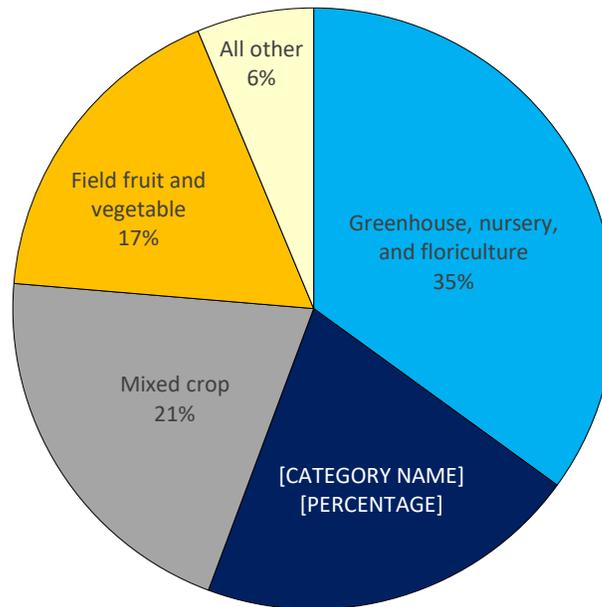
Province	Jobs filled by temporary foreign workers (number)			Agricultural operations with at least one temporary foreign worker (number)		
	2016	2017	2018	2016	2017	2018
<b>Total</b>	<b>48,585</b>	<b>50,641</b>	<b>54,734</b>	<b>3,630</b>	<b>3,634</b>	<b>3,846</b>
Newfoundland and Labrador	48	22	34	15	7	7
Prince Edward Island	265	277	285	39	34	35
Nova Scotia	1,563	1,665	1,566	74	71	73
New Brunswick	116	108	145	19	15	15
Quebec	11,472	12,896	14,653	869	993	1,259
Ontario	24,001	24,342	25,611	1,366	1,373	1,328
Manitoba	741	644	579	90	61	67
Saskatchewan	610	515	447	198	147	103
Alberta	2,361	2,027	1,900	395	311	252
British Columbia	7,408	8,145	9,514	565	622	707

Note: Agricultural operations in the territories were excluded.

Source : Statistics Canada, Temporary Foreign Workers file, 2016 to 2018

## Horticulture Accounts for Most of the Foreign Workers Employed in Agriculture

Share of foreign workers in agriculture by commodity, 2017



Sources: Statistics Canada; Canadian Agricultural Human Resource Council.

- Most temporary foreign workers worked in the horticulture sector.
- Specifically, three in five jobs filled by temporary foreign workers were in horticulture (NAICS 1112, 1113, and 1114).
- Mixed Crops (Other Crop Farming NAICS 1119) refers to mixed farming including vegetable farms with other commodities. These
- In the livestock subsector, temporary foreign workers fill 6% of all agricultural jobs.

**Jobs filled by temporary foreign workers in the agriculture sector, and agricultural operations with at least one temporary foreign worker, by industry, 2016 to 2018**

Industry	Jobs filled by temporary foreign workers (number)			Agricultural operations with at least one temporary foreign worker (number)		
	2016	2017	2018	2016	2017	2018
<b>Total</b>	<b>48,585</b>	<b>50,641</b>	<b>54,734</b>	<b>3,630</b>	<b>3,634</b>	<b>3,846</b>
Cattle and ranch farming [1121]	1,179	1 041	1,548	383	377	501
Hog and pig farming [1122]	625	484	496	135	133	134
Poultry and egg production [1123]	365	344	446	71	73	83
Other animal production <sup>1</sup>	806	806	784	142	145	133
Oilseed and grain farming [1111]	1,395	1 329	1,089	303	238	220
Vegetable and melon farming [1112]	12,707	13 067	13,210	720	710	693
Fruit and tree nut farming [1113]	12,609	13 636	14,848	858	938	1,021
Greenhouse, nursery and floriculture production [1114]	15,426	16 648	18,389	650	679	679
Other crop farming [1119]	3,473	3 286	3,924	368	341	382

Note: Agricultural operations in the territories were excluded.

1. Includes NAICS "Sheep and goat farming [1124]" and "Other animal production [1129]"

Source : Statistics Canada, Temporary Foreign Workers file, 2016 to 2018