



Apiculture Industry

Labour Market Forecast





Canada's agriculture sector faces unique labour market challenges in the coming years, and so will the beekeeping industry. This report explores some of the workplace trends and realities that will shape the industry between now and 2025.



Industry Overview

'Apiculture'* has experienced modest growth over the past decade, and beekeepers predict a strong growth outlook. However, the industry's considerable labour shortage could impede its ability to reach full potential.

The beekeeping industry includes operations that are primarily engaged in raising bees, collecting and gathering honey, and performing other beekeeping activities.

While the number of apiaries has shrunk, the average size has grown, with the net result that the industry's workforce has grown since 2011.

The industry is primarily located in the Prairies. Together, Alberta, Manitoba, and Saskatchewan account for 60% of apiaries and three-quarters of all product sales.

While honey production has seen limited growth over the past decade, the 'apiculture' industry has a very strong outlook for future growth. However, the industry's significant labour shortages could prevent it from reaching its production targets and achieving its full growth potential.

* The Labour Market Information data classifies Canada's agriculture sector into 11 commodity areas: 1) 'apiculture'; 2) 'aquaculture'; 3) 'beef'; 4) 'dairy'; 5) 'field fruit and vegetable'; 6) 'grain and oilseed'; 7) 'greenhouse, nursery, and floriculture'; 8) 'poultry and egg'; 9) 'sheep and goat'; 10) 'swine'; and 11) 'tree fruit and vine'.

Beekeeping industry at a glance

In 2014:

- 336 businesses with employees
- 63% could not fill all open jobs
- \$7 million in lost sales due to labour shortages



Production Trends

While the number of apiaries has declined, the industry's workforce and profitability have grown.

Over the last three years, the number of apiaries has fallen by 7%; currently, there are 336 industry businesses with employees. However, the average size of each business has increased in recent years. In 2011, 16% of all apiaries employed more than 10 workers; by 2015, that number had risen to 23%. More than half of the industry's businesses are located in the Prairies, with 25% in Alberta, 18% in Manitoba, and 17% in Saskatchewan. The Prairies also account for three-quarters of the industry's honey sales.

Honey production has seen limited growth over the past decade, increasing from 75 million pounds of honey in 2004 to 82 million pounds in 2014, which is an average increase of 0.8% per year. While production has been relatively stable, higher honey prices have resulted in industry sales growing by an average of 3.6% per year between 2004 and 2014.

RESEARCH HIGHLIGHTS

- **94%** of beekeepers expect employment at their farm to rise over the next five years; none expect it to decline.



Labour Shortages

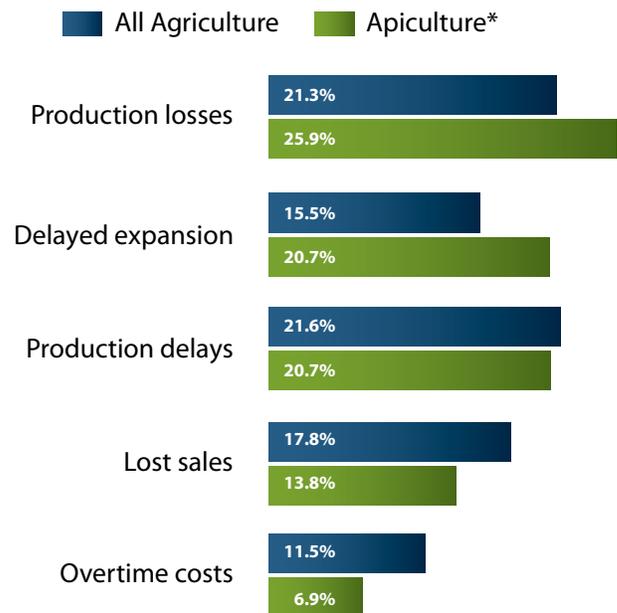
Beekeepers face major labour shortages that affect the industry's production capacity and growth potential.

Labour shortages were a significant factor for beekeepers in 2014, with nearly two-thirds of operations (63%) reporting that they were not able to find all the workers they needed. This is much higher than the sector average of 41%.

Beekeepers were also much more likely to report delaying or cancelling expansion plans as a direct result of not having enough workers. Labour shortages are estimated to have cost the industry \$7 million in 2014, or 4% of sales, which is higher than the sector average of 2.7% in lost sales.

With 21% of respondents citing production delays due to labour shortages, this was the third most common issue among beekeepers.

Percentage of Survey Respondents Impacted by Labour Shortages



*Based on the responses of 23 beekeepers



Labour Challenges

While finding and keeping more workers is key to the industry's success, rural operations and declining populations in these areas make the task more difficult.

When it comes to recruiting workers, beekeepers are challenged by the rural location of their operations; 39% of beekeepers cited this as a problem, compared to 31% of all agricultural employers. Employers in this industry also noted that declining populations in rural areas were an issue.

However, the industry was slightly less affected by the issue of finding workers with sufficient skills and experience than others in agriculture: 35% of beekeepers reported this as an issue compared to 37% across the sector.

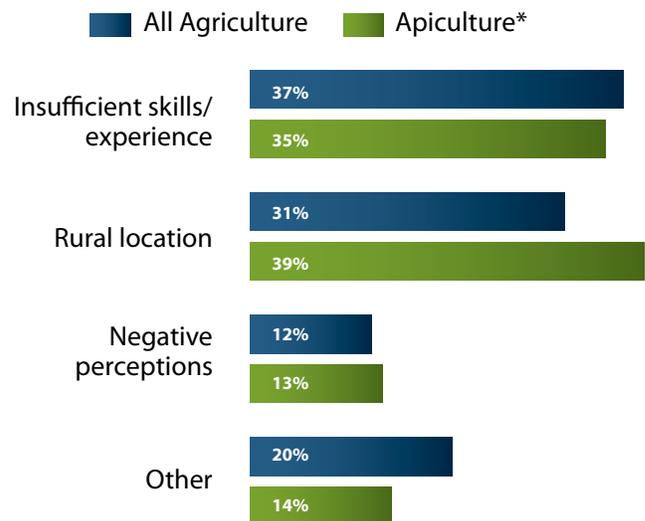
While voluntary and involuntary turnover rates for the industry are below the sector average for agriculture, they are still high compared to those of industries outside of agriculture.

When it comes to retaining workers, the industry faces unique challenges. Work conditions, including the number of hours and the seasonality of the work, affected retention for 29% of beekeepers, compared to just 18% of employers across the sector. The physical nature of the work also tended to be a bigger issue for the industry.

On a positive note, insufficient compensation was less of an issue, with only 10% of industry employers suggesting it was a retention barrier, compared to a sector average of 18%.



Challenges in Recruiting Workers



*Based on the responses of 36 beekeepers



Conclusion

With a strong growth outlook, the beekeeping industry's significant labour shortages could hamper its growth potential in the coming years.

The industry has experienced modest growth over the past decade, but beekeepers are very positive about the industry's outlook. At the same time, they are much more likely than other agricultural employers to report that they are experiencing labour shortages and that those shortages impact their plans for growth. If more workers can't be found to support the industry, it may not be able to fully capitalize on its strong growth potential.

The beekeeping industry faces a number of labour challenges:

- Apiaries tend to be more remote, making declining populations in rural areas more of a challenge.
- Beekeepers are more likely to report that physically strenuous work and highly variable hours contribute to recruitment and retention problems.
- Seasonal fluctuations at apiaries are much higher than the agriculture sector average.

Finding solutions to these challenges and increasing the pool of available domestic workers will ensure that this industry is better prepared to take advantage of an upcoming decade of growth.



About This Report

This report features data collected during a three-year research project to examine Canada's labour market situation for primary-production agricultural businesses. The project was led by the Canadian Agricultural Human Resources Council (CAHRC) and was launched in response to the unique workforce challenges faced by the agriculture sector.

The purpose was to assess the current labour market, project supply and demand for agricultural workers from 2015 until 2025, and recommend potential solutions to labour issues.

The Conference Board of Canada, commissioned by CAHRC, constructed an economic model that forecasts agricultural labour demand and supply for each province, for 11 different commodity groups, and for 25 occupational groups.

The economic model was validated through a number of industry consultation activities conducted Canada-wide, including:

- **A large-scale survey** of 813 employers, 132 workers, and 89 industry stakeholders
- **Phone interviews** with 80 industry stakeholders
- **Six focus groups** with 100 participants in total, including employers, workers, and other stakeholders
- **Seven webinars** focused on specific commodity groups, with 100 participants in total

This data was used to produce the following reports:

Commodity-specific reports and fact sheets

Apiculture ■ Aquaculture ■ Beef ■ Dairy ■ Field Fruit and Vegetable ■ Grain and Oilseed ■ Greenhouse, Nursery, and Floriculture ■ Poultry and Egg ■ Sheep and Goat ■ Swine ■ Tree Fruit and Vine

Regional reports and fact sheets

National ■ British Columbia ■ Alberta ■ Saskatchewan ■ Manitoba ■ Ontario ■ Quebec ■ New Brunswick ■ Prince Edward Island ■ Nova Scotia ■ Newfoundland and Labrador

For more information on the research, and to access additional commodity-specific, national, and provincial reports, please visit the CAHRC website at www.AgriLMI.ca.

About CAHRC

The Canadian Agricultural Human Resources Council (CAHRC) is a national, nonprofit organization focused on addressing human resource issues faced by agricultural businesses across Canada. CAHRC conducts industry research and develops products and services designed to help agricultural employers attract, retain, and develop the workforce they need to succeed.

For more information about the Council and its products and services for Canada's agriculture sector, please visit www.cahrc-ccrha.ca.



Acknowledgements:

The Canadian Agricultural Human Resource Council (CAHRC) acknowledges the support and guidance of volunteers, the Advisory Group, the Provincial LMI Panel, and the Strategic Steering Committee.

LMI Advisory Group

Chair: Newfoundland and Labrador Federation of Agriculture, Merv Wiseman
AGRIcarrières: Robert Ouellet
Agricultural Alliance of New Brunswick: Marc Ouellet
Alberta Agriculture and Forestry: Alan Dooley
British Columbia Agricultural Council: David Geen and Ken Denbok
Canadian Association of Diploma in Agriculture Programs: Peter Enright
Canadian Aquaculture Industry Alliance: Marilyn Hutchinson
Canadian Herb Spice and Natural Health Products Coalition: Connie Kehler
Canadian Federation of Agriculture: Jack Greydanus
Canadian Young Farmers Forum: Pierre-Luc Lacoste
Farm Credit Canada: Jean-Philippe (JP) Gervais
Farm Management Canada: Heather (Ferrier) Oakley and Heather Watson
Flowers Canada Growers: Ken Lington
Canadian Nursery and Landscape Association: Sally Harvey
Manitoba Agriculture: Stephanie Cruickshanks
Nova Scotia Federation of Agriculture: Lloyd Dyck
Ontario Federation of Agriculture: Peter Sykanda
Ontario Ministry of Agriculture and Food and Rural Affairs: Barb Alves; Gail Gimpelj; Michael Weber; Rob Gamble and Nathan Stevens
Prince Edward Island Agriculture Sector Council: Basil Attwood
Saskatchewan Agriculture: Bob Wiens
Sunterra Farms: Mark Chambers

Provincial LMI Panel

Chair: Newfoundland and Labrador Federation of Agriculture, Merv Wiseman
British Columbia: B.C. Agriculture, Heather Anderson, B.C. Jobs, Tourism and Skills Training, Yu Li
Alberta: Alberta Agriculture and Forestry, Gerard Bos
Saskatchewan: Saskatchewan Agriculture, Bob Wiens, Ministry of the Economy, Leah Goodwin
Manitoba: Manitoba Agriculture, Food and Rural Development, Stephanie Cruickshanks, Manitoba Jobs and the Economy, Mona Pandey, Stacy Quinn and Matthias Rust
Ontario: Ontario Ministry of Agriculture and Food & Rural Affairs, Barb Alves, Gail Gimpelj, Michael Weber, Rob Gamble and Nathan Stevens
Nova Scotia: Nova Scotia Agriculture, Bettina Brown
Quebec: AGRIcarrières, Robert Ouellet
New Brunswick: New Brunswick Post-Secondary Education, Training and Labour, Meghann Douglas
Prince Edward Island: Prince Edward Island Department of Agriculture and Forestry: Colleen Younie and Chris Jordan
Newfoundland and Labrador: Advanced Education, Skills and Labour, Government of Newfoundland and Labrador, Derrick Barrett
Agriculture and Agri-Food Canada: Li Xue

The use of any part of this publication, whether it is reproduced, stored in a retrieval system, or transmitted in any form or by any means (including electronic, mechanical, photographic, photocopying or recording), without the prior written permission of CAHRC is an infringement of copyright law.

Canadian Agricultural Human Resource Council

Published May 2016

T: 613.745.7457

E: info@cahrc-ccrha.ca

This document may be downloaded from www.cahrc-ccrha.ca

All rights reserved. © 2016 CAHRC

Photo credits: Kevin Nixon, Rod Scarlett, Lydia Schouten, David Tharle, Lee Townsend