



Poultry and Egg Industry Forecast to 2025

While the 'poultry and egg'* industry has one of the most balanced labour markets in agriculture, a decline in the number of domestic workers will make it harder for this industry to fill available jobs over the next 10 years.

Industry Overview

The 'poultry and egg' industry includes farm operations that primarily engage in breeding, hatching, and raising poultry for meat or egg production. Animals grown include chickens and turkeys, but also all other types of birds such as ducks, geese, pheasants, partridges, and pigeons.

More than half the industry's workforce is employed in Ontario and Quebec, with Ontario alone accounting for 36% of Canada's 'poultry and egg' workers.

* 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'.

In 2014, the industry employed 15,600 people, including self-employed, paid labour, and foreign workers. This number is equivalent to just 4% of the total agricultural workforce, making it one of the smaller employers in this sector. With production levels that don't fluctuate seasonally, the industry relies primarily on domestic workers, with foreign workers making up just 1.3% of its workforce.

While slowing market demand for 'poultry and egg' products and improved industry productivity will limit the demand for labour, a shrinking supply of domestic labour will widen the industry's labour gap over the next 10 years.

In 2014, the 'poultry and egg' industry employed 15,600 people.

The industry was unable to fill 250 jobs, which cost the industry \$6 million.

By 2025, the industry may be unable to fill 1,100 jobs with the available pool of domestic workers.

Labour Trends 2004–2014

The 'poultry and egg' industry has one of the most balanced labour markets in the agriculture sector. Of all the agricultural industries, it is the least affected by labour shortages and lost sales due to labour challenges.

Since 2004, rising production and an increase in the number of 'poultry and egg' farms have supported a 16% growth in the industry's workforce.

The availability of domestic workers has largely kept pace with the demand. Only 17% of 'poultry and egg' operators reported a shortage of workers, a significantly smaller share than the average of 41% across all commodities.

The ability to attract workers appears to be easier for this industry than others in the agriculture sector, with 12% of 'poultry and egg' operators saying they face no barriers to recruitment, compared to 2% across all commodities.



In 2014, labour shortages cost the 'poultry and egg' industry an estimated \$6 million, or 0.2% of sales.

Our industry survey revealed that:

- **17%** of farms reported a shortage of workers
- **12%** of farms face no barriers to recruitment
- **13%** of farms face retention issues

However, the industry faces greater-than-average retention challenges, with nearly twice as many operators in this industry citing retention as an issue than the average across all commodities.

Industry Forecast to 2025

The 'poultry and egg' industry faces a saturated domestic market and limited exposure to faster-growing foreign markets. This will weaken the industry's growth going forward, with average output growth estimated at 1.3% per year over the next 10 years—less than the average across all commodities of 2.2%.

Slow market growth, combined with the industry's recent productivity gains, will limit the number of workers needed over the next decade.

However, the supply of domestic labour available is expected to decline by 0.7% per year over the same time period, which will widen the gap between the number of domestic workers available and the number of jobs the industry needs to fill. By 2025, the number of domestic workers available in this industry will decrease from 15,900 to 14,800, widening the labour gap to 1,100 workers. While this number represents just 7% of the total labour force required, it's enough to hinder the industry's ability to meet the market demand for its products.

Meeting the Challenge

The 'poultry and egg' industry faces relatively few labour challenges compared to other industries in the agriculture sector. Currently, it has one of the most balanced labour markets within the sector, and while the labour gap is predicted to widen over the next 10 years, it will remain small relative to the labour gaps other agricultural commodities will face during this time.

However, the widening gap still has the potential to limit the industry's ability to grow and meet the market demand for its products. To maintain a stable and balanced workforce, the 'poultry and egg' industry will need to address these issues:

- The industry has above-average retention issues, with limited advancement opportunities being a factor. Finding more dynamic career paths for workers will be key.
- The industry has involuntary turnover rates that are nearly double the sector average (13% compared to 7%). Improving workers' essential skills could help.
- The industry's labour shortages will be concentrated in certain provinces, with Ontario and Nova Scotia needing to prepare for the most significant shortages.



- Labour shortages will affect certain occupations more heavily, including agricultural managers and general farm workers. Training and retention efforts may help to mitigate the impact.

For more information on production trends and labour market challenges for the 'poultry and egg' industry, please refer to the accompanying report available at www.AgriLMI.ca.

About This Fact Sheet

The data cited in this fact sheet is based on the results of a three-year study that examined the labour market in Canada's agriculture sector. Information was collected by modelling labour demand and supply by province, commodity, and occupation; conducting a survey of and interviews with more than 1,000 sector stakeholders; and validating the results through focus groups and webinars. To read the accompanying report, or to access additional provincial, commodity, or national fact sheets and reports, please visit www.AgriLMI.ca.

The study was initiated by the Canadian Agricultural Human Resources 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.

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