



Quebec Agricultural Labour Market Forecast to 2025

Canada's second-largest agricultural employer, Quebec will face increasing labour challenges in this sector over the next 10 years.

Provincial Overview

In 2014, Quebec was the second-largest agriculture sector employer in Canada, employing 73,500 people, or 20% of the nation's agricultural workforce. Only Ontario accounted for a higher share, at 27%.

In terms of the province's national agricultural profile, Quebec is Canada's largest employer of 'dairy'* workers, with nearly half of the industry's workers (45%) employed in this province. It is also the second-largest employer of 'swine' industry workers, accounting for more than 22% of the industry's workforce.

Within the province, the 'dairy' industry is the largest agricultural employer, accounting for nearly one in four agricultural workers (24%).

* 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'.

The 'greenhouse, nursery, and floriculture' industry and the 'grain and oilseed' industry are also significant employers in Quebec, accounting for 18% and 13% of the agricultural workforce, respectively.

The province has a younger-than-average agricultural workforce. In 2011, only 55% of this workforce was 45 years of age or older compared to 60% of the agricultural workforce nationwide.

Foreign workers account for 12% of the agricultural workforce in Quebec, which is on par with the sector average across Canada.

Even with help from the foreign labour force, the province's agriculture sector was still unable to fill 3,300 jobs in 2014, a shortfall that cost the industry \$116 million.

Between now and 2025, Quebec's need for agricultural labour will decrease, mostly due to limited market demand for 'dairy' products.

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By 2025, the province will have 10,600 more jobs than the domestic labour force can fill.



However, because the labour pool is shrinking even more rapidly, the province is expected to experience greater labour shortages over the next decade. Unless additional sources of domestic or foreign labour can be found, this labour gap will prevent the province's vital agriculture sector from reaching its full potential.

Labour Trends 2004–2014

Over the past 10 years, Quebec's demand for agricultural labour stayed fairly flat, with a higher demand for labour in some industries, such as crop production, offsetting a lower demand within animal-based industries such as 'dairy' and 'swine'.

Despite a relatively stable demand for labour, Quebec was unable to find enough workers to meet the needs of its agriculture sector. In 2014, 3,300 jobs went unfilled, which is equivalent to 4% of the total workforce required. While this is a relatively small percentage, the shortfall resulted in \$116 million in lost sales.

Quebec's agricultural employers report a number of challenges in finding and keeping workers. Finding workers with the appropriate skills and experience, including essential skills such as reading and problem solving, is the top recruiting concern for Quebec's agricultural employers. In addition, nearly one in four agricultural employers (24%) say that working conditions affect their ability to retain the workers they hire.

Turnover rates are also an issue in Quebec. Voluntary and involuntary turnover rates are above the national average, at 23% and 12%, respectively.



In 2014, labour shortages cost Quebec's agriculture sector an estimated \$116 million, or 1.4% of sales.

Based on our survey of the province's agricultural employers:

- **34%** could not find enough workers
- **34%** were impacted by overtime costs
- **19%** experienced production losses

Finally, a rising number of retirements and a shrinking number of young people who can fill the places of older agricultural workers will also impact the labour pool. Quebec is expected to see nearly one in four farm workers (23%) retire by 2025, while the number of school graduates entering the agricultural workforce will shrink by 11%.

Industry Forecast to 2025

Between now and 2025, increased productivity for the 'dairy' industry is expected to reduce the demand for labour in this province. While the demand for labour in Canada's agricultural sector is expected to grow by 0.5% per year over the next 10 years, the demand for agricultural labour in Quebec will fall by 0.4% per year.

However, the reduced demand for labour will not ease the province's agricultural labour challenges, because the domestic workforce is expected to shrink even faster. A relatively high rate of retirement and the limited number of young people entering the agricultural workforce will cause the available labour force to decline by 0.7% per year over the next decade. As a result, the gap between the number of workers needed by the sector and the number of domestic workers available to work will widen, with an additional 1,900 jobs potentially going unfilled by 2025. In total, as many as 10,600 jobs, which is equivalent to 14% of the total workforce needed, are at risk of going unfilled due to a lack of foreign or domestic labour. The majority of these jobs (approximately 6,900) will be for "managers in agriculture," including both owner-operators and hired managers, and "general farm workers."



Meeting the Challenge

Quebec's agriculture sector will have to navigate a future in which today's moderate labour gap continues to widen. By 2025, 15% of the jobs required to support the sector could be at risk of going unfilled if more domestic and foreign workers can't be found.

Given that a gap equivalent to just 4% resulted in lost sales of \$116 million in 2014, this reality could significantly impact the sector's profitability and growth potential in this province.

To address its agricultural labour issues, the province will need to overcome a number of key challenges:

- In 2014, nearly three quarters of agricultural operations reported difficulties in attracting young workers.
- A shortage of qualified workers affected more than three-quarters of agricultural operations (77%), with Quebec's agricultural producers being much more likely to cite a lack of essential skills as a problem.
- Quebec's agricultural employers cite worker retention as a key factor affecting their operations.
- Considerable reliance on foreign workers to fill Quebec's agricultural jobs makes the sector vulnerable to policy changes that could limit or remove access to this labour source.



However, the province's agriculture sector also has strengths that it could leverage:

- Agricultural operations in this province tend to be located closer to bigger cities with larger labour pools.
- The province has the youngest agricultural workforce in Canada, with below-average retirement rates predicted over the next 10 years.
- Finding ways to communicate the benefits of agricultural work to a younger demographic could help to attract more young workers.

As the labour gap widens, Quebec will need to find ways to strengthen the domestic labour pool in order to avoid financial losses and reach its growth potential.

For more information on production trends and labour market challenges for Quebec's agriculture sector, 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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