



# BRITISH COLUMBIA

## Agriculture labour market information and forecast 2023-2030



### Key Findings

- British Columbia's agriculture sector had the highest vacancy rate of any province at 12 per cent, with over 4,800 positions estimated to have gone unfilled in 2022.
- The concentration of horticulture in the province makes employment extremely seasonal. As a result, the province has the largest share of foreign workers.<sup>1</sup>
- British Columbia (BC) attracts a large share of immigrants who provide a growing source of labour for the sector.
- However, labour demand is growing faster than domestic labour supply, resulting in a growing domestic labour gap.<sup>2</sup> Over 17,700 positions are expected to be unfilled domestically by 2030.

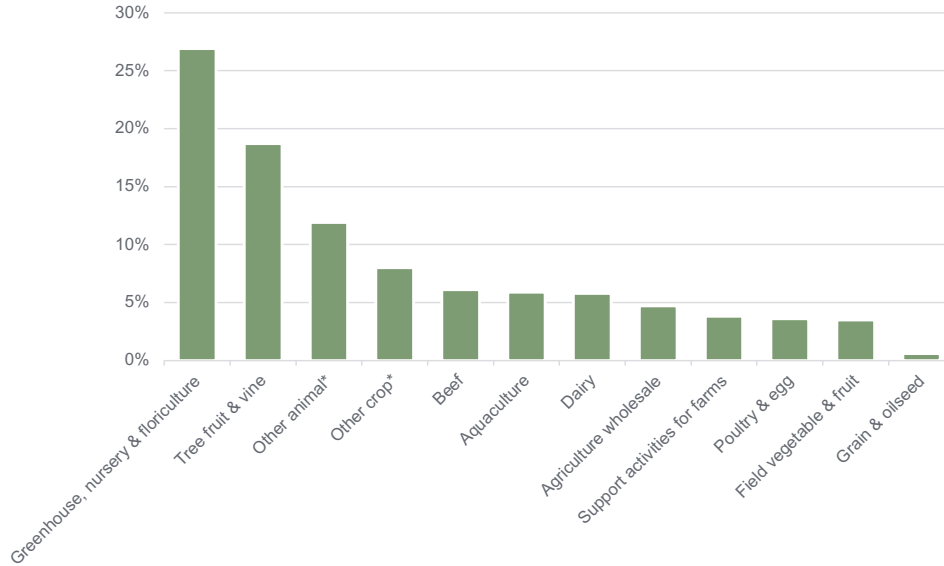
### Current Workforce

- The greenhouse and nursery industry accounts for more than 25 per cent of all agriculture employment in British Columbia (Chart 1).
- British Columbia's agriculture sector employed around 35,800 domestic workers at peak season in 2022, equating to around 10 per cent of the sector's national domestic workforce.<sup>3</sup>
- Over 11,800 foreign workers were employed in the sector in 2022, accounting for 25 per cent of the province's agriculture workforce.<sup>4</sup>
- Over 40 per cent of foreign workers are employed in the tree fruit and vine industry, and another 40 per cent in the greenhouse and nursery industry.
- Despite the prevalence of foreign workers, the sector still had around 4,800 positions that went unfilled at peak season in 2022.<sup>5</sup>
- The estimated vacancy rate for the province was 12 per cent, well above the 7.4 per cent average for agriculture across Canada.<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, The Conference Board of Canada. | <sup>4</sup>Statistics Canada, Table: 32-10-0218-01. Does not include support services or agriculture wholesale. | <sup>5</sup>The Conference Board of Canada Model of Occupations, Skills and Technology. | <sup>6</sup>Statistics Canada; The Conference Board of Canada.

**Chart 1: The greenhouse and nursery industry accounts for more than 25% of all agriculture employment in BC.**

Share of employment (domestic and foreign workers) at peak, 2022, BC.



Source: Statistics Canada; The Conference Board of Canada.

\*Other crop is primarily mixed crop farming and combination fruit and vegetable farming. Other animal is primarily horse and other equine production, mixed animal farming, and apiculture.

**Employer Survey Insights**

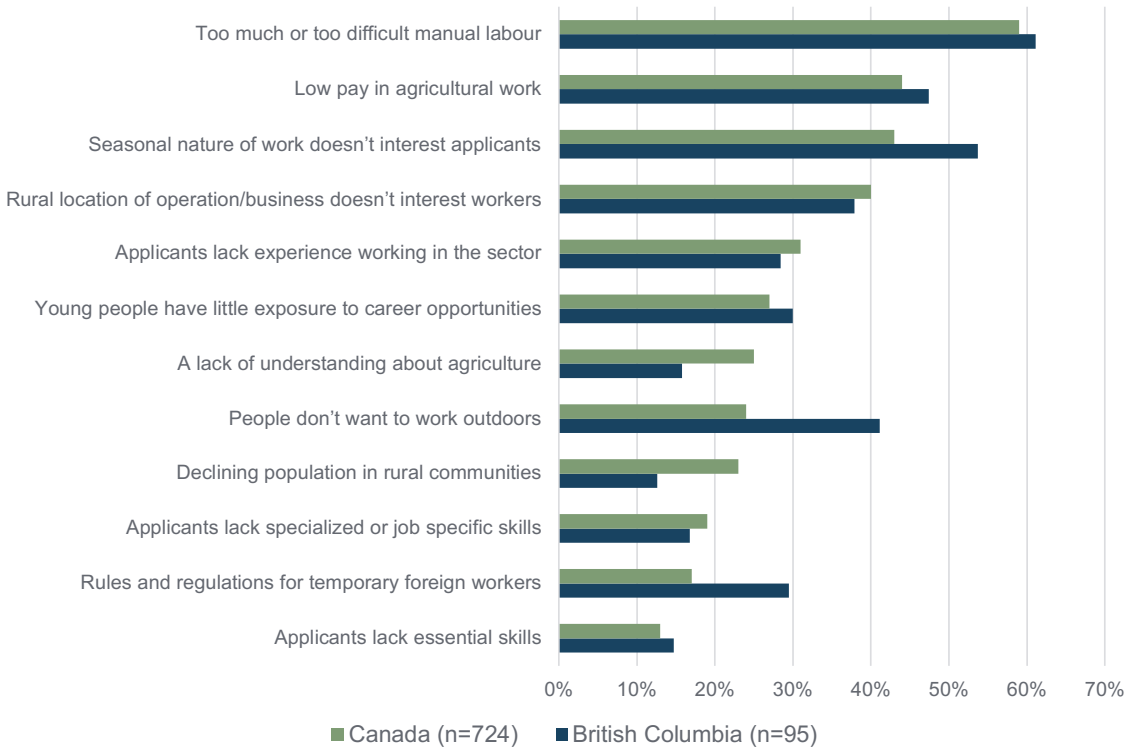
- Forty-two per cent of agriculture employers in BC were unable to find all the workers required in 2022.<sup>7</sup>
- Close to one-third (30 per cent) of employers in BC received no domestic applicants for their job postings, and 22 per cent received only one or two.<sup>8</sup>
- As a result of job vacancies, 54 per cent of employers said they delayed or cancelled expansion plans, 62 per cent reported lost sales, and 87 per cent reported that these vacancies caused excessive stress for owners and staff.<sup>9</sup>
- Close to two-thirds of employers (61 per cent) in BC cite manual labour requirements as the main cause of their struggle to find workers.<sup>10</sup> Seasonality and outdoor work also makes recruitment challenging in British Columbia (Chart 2).
- The majority (69 per cent) of surveyed employers in the province relied on the Temporary Foreign Worker Program, including the Seasonal Agricultural Worker Program, to recruit workers in 2022.<sup>11</sup>
- Thirty per cent of employers cited the rules and regulations for foreign workers as a top factor impeding recruitment. This is notably higher than the 17 per cent across all provinces (Chart 2).<sup>12</sup>
- BC’s agriculture sector had a voluntary turnover rate of 13 per cent in 2022, which was well above the estimated 7.7 per cent turnover rate for all sectors in Canada.<sup>13</sup>

7 Canadian Agricultural Human Resource Council Employer Survey 2023 (n=93). | 8 Canadian Agricultural Human Resource Council Employer Survey 2023 (n=99). | 9 Canadian Agricultural Human Resource Council Employer Survey 2023 (n=39). | 10 Canadian Agricultural Human Resource Council Employer Survey 2023 (n=95). | 11 Canadian Agricultural Human Resource Council Employer Survey 2023 (n=96). | 12 Canadian Agricultural Human Resource Council Employer Survey 2023 (n=95). | 13 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: Requirement for manual work and the seasonal nature of work impedes 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.

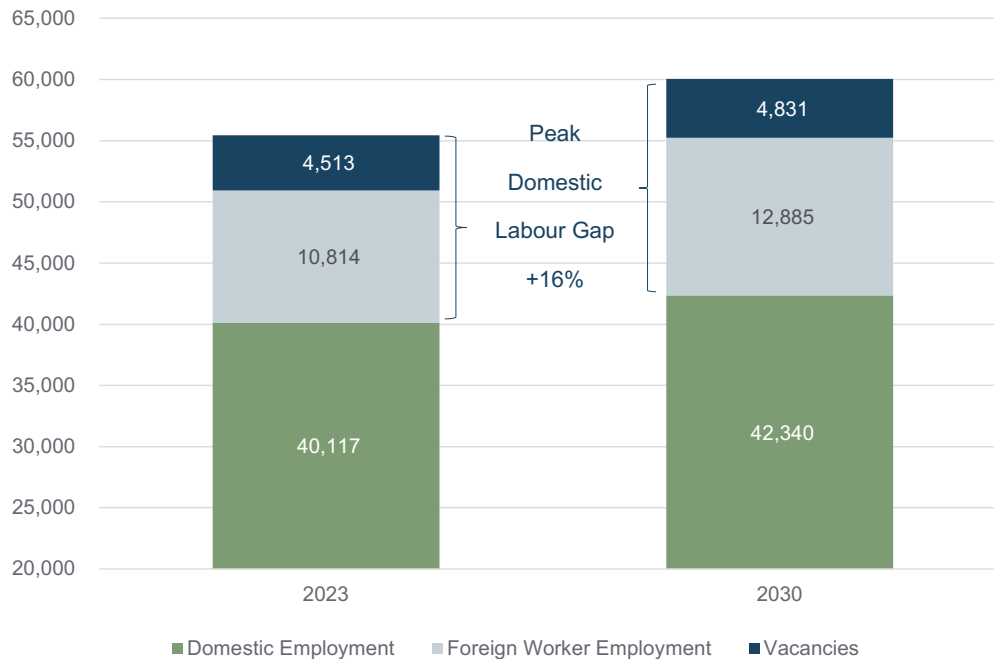


## Labour Market Forecast

- Domestic employment fell significantly in 2021, due to extreme weather events; however, it has been recovering, reaching over 40,100 in 2023.
- Over the long term, domestic employment is expected to increase 6 per cent over the forecast period, reaching 42,300 in 2030. This is supported by increasing labour supply.
- Steady gains in agriculture output in BC will support an 8 per cent increase in the sector’s overall labour demand from 55,400 jobs in 2023 to 60,100 in 2030.
- The sector is expected to see one-third (9,500 workers) of its current domestic workforce retire between 2023 and 2030, while approximately 9,000 immigrants and 5,300 school leavers are projected to enter BC’s agriculture workforce.
- Still, peak labour demand is expected to outpace labour supply, leading to a 16 per cent increase in the peak domestic labour gap over the next 8 years (Chart 3).
- Foreign workers are expected to fill 73 per cent of the labour gap at peak season, but over 4,800 vacancies are anticipated to remain by 2030.
- One-third of these vacancies will be in the province’s tree fruit and vine industry, and one-third will be in the greenhouse and nursery industry.
- Thirty-two per cent of these vacancies will be for livestock and harvesting labourers, 30 per cent for greenhouse and nursery labourers, and 20 per cent for specialized livestock workers and farm machinery operators.

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

Number of workers required at peak season in British Columbia, 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>14</sup> School leavers is the number of workers finishing school (at all levels of education) and entering the workforce.



## Building the Future Workforce

- British Columbia benefits from a large proportion of immigrants entering the agriculture sector. Ensuring these newcomers have the skills and training required will be important for the sector.
- The high number of foreign workers in British Columbia's agriculture sector leaves the province vulnerable to policy changes and global events. It is essential for the province to support agriculture employers in accessing this vital labour source.

## 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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