



SASKATCHEWAN

Agriculture labour market information and forecast 2023-2030



Key Findings

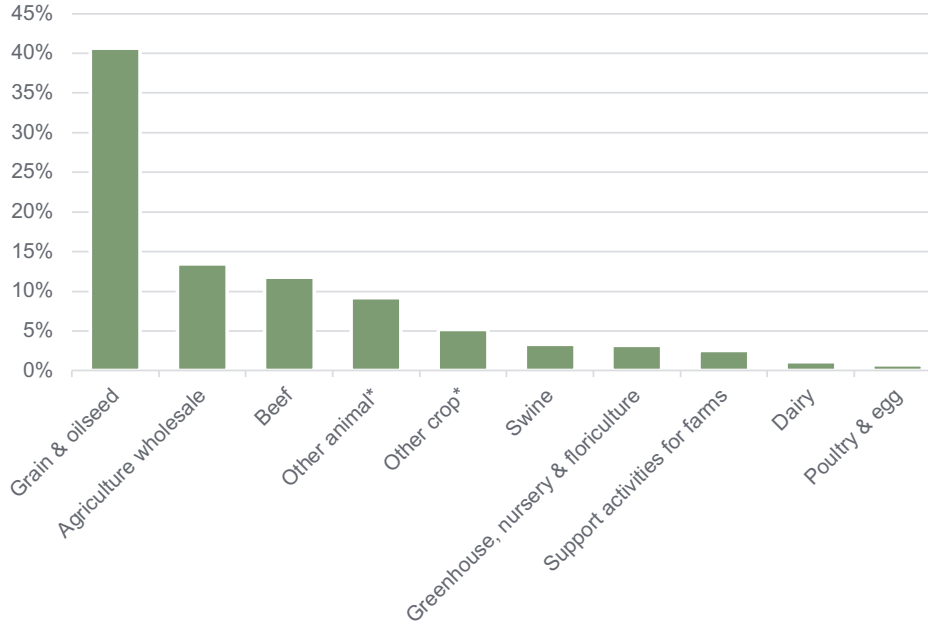
- Over half of Saskatchewan's agriculture employers were unable to hire all the workers they needed in 2022, causing production delays and lost sales.
- Around 860 foreign workers were employed in the sector, representing just 2 per cent of the province's agriculture workforce,¹ well below the nation as a whole where foreign workers make up 17 per cent of the agriculture workforce.²
- Over 35 per cent of the current domestic workforce is expected to retire between 2023 and 2030, creating a substantial need for new workers.
- Labour challenges in the province are expected to continue, with the peak domestic labour gap increasing by 44 per cent to over 2,300 positions by 2030.
- Despite projected productivity gains in the grain and oilseed industry, job vacancies will increase over the forecast period, reaching over 1,300 unfilled positions in 2030.³
- Strong population growth in the province, especially among young people and immigrants, could be advantageous for the sector. Finding ways to attract these populations to careers in agriculture will be key to reducing future labour gaps.

Current Workforce

- Saskatchewan employed 35,100 domestic workers during peak season in 2022, accounting for around 10 per cent of the domestic agriculture workforce in Canada.
- Over 40 per cent of agriculture workers in the province are employed in the grain and oilseed industry (Chart 1).
- The sector had approximately 1,450 positions that went unfilled at peak season in 2022.⁴
- The grain and oilseed, wholesale, and beef industries in Saskatchewan have lower vacancy rates compared to other industries in agriculture, resulting in a lower overall vacancy rate. The estimated vacancy rate for the sector was 4.6 per cent, which is notably lower than 7.4 per cent across Canada.⁵

¹ Statistics Canada, Table: 32-10-0218-01. Includes workers from the Temporary Foreign Worker Program and the Seasonal Agricultural Worker Program (SAWP). Does not include immigrants or permanent residents. | ² Foreign workers include workers brought in through the Temporary Foreign Worker Program or Seasonal Agricultural Worker Program. Does not include immigrants or permanent residents. | ³ 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. | ⁴ The Conference Board of Canada Model of Occupations, Skills and Technology. | ⁵ Statistics Canada, Job Vacancy and Wage Survey (custom data); The Conference Board of Canada Model of Occupations, Skills and Technology.

Chart 1: The grain and oilseed industry employs the majority of workers.
 Share of employment (domestic and foreign) at peak in 2022, Saskatchewan.



Source: Agriculture and Agri-food Labour Statistics Program, Statistics Canada.

*Other crop is primarily mixed crop farming and hay farming. Other animal is primarily mixed livestock farming and horse and other equine production.

Employer Survey Insights

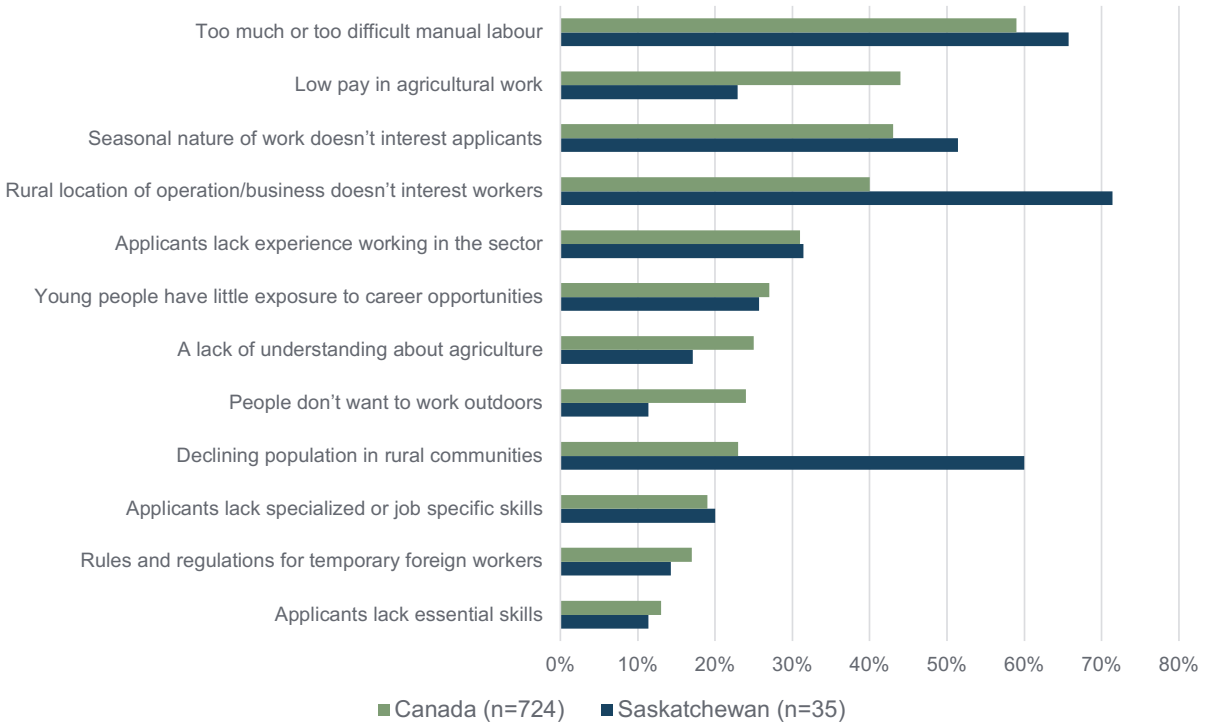
- Saskatchewan had the highest share of employers unable to find workers at 53 per cent, surpassing the 44 per cent share seen across Canada.⁶
- As a result of these shortages, 35 per cent of employers lost sales, 53 per cent cancelled expansion plans, 82 per cent delayed production, and 94 per cent reported excessive stress and hours for owners and other staff.⁷
- 60 per cent of employers surveyed identified declining population in rural areas as a significant barrier to recruitment in Saskatchewan. By comparison, only 23 per cent of employers across Canada had this issue (Chart 2).⁸
- Saskatchewan had a voluntary turnover rate of 13 per cent in 2022, close to the national average of 14 per cent.⁹
- Wages in the grain and oilseed industry are higher than in other agriculture industries, making low pay less of an issue for Saskatchewan employers. Instead, long hours, manual labour and rural location are the top retention challenges.

⁶ Canadian Agricultural Human Resource Council Employer Survey 2023 (n=32). | ⁷ Canadian Agricultural Human Resource Council Employer Survey 2023 (n=17). | ⁸ Canadian Agricultural Human Resource Council Employer Survey 2023 (n=35). | ⁹ 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.

Chart 2: Rural location is the biggest barrier to recruitment.

Share of employers.

Q: What are the top five factors that make recruitment of workers at your agricultural operation more difficult?



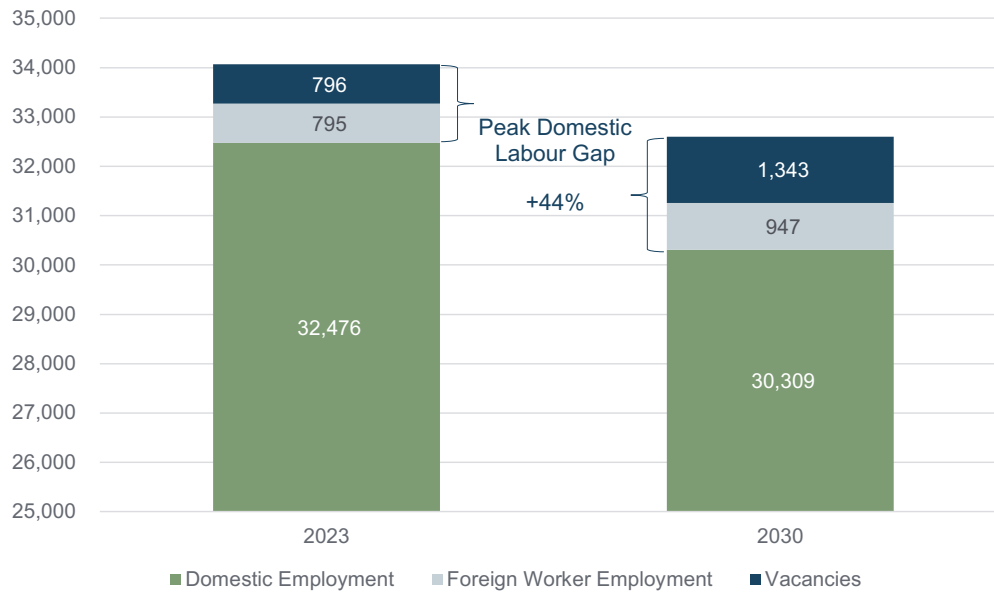
Source: Canadian Agricultural Human Resource Council Employer Survey 2023.



Labour Market Forecast

- In the short term, a weaker economy and poor weather conditions will restrict growth in the agriculture sector, resulting in less labour demand and fewer vacancies in 2023 compared to 2022.
- Over the long term, steady production and labour productivity gains will support a 4.5 per cent decrease in labour demand from 34,000 jobs in 2023 to 32,600 in 2030.
- A declining labour supply, mainly driven by retirements, will cause the sector’s seasonal peak domestic employment to decrease 7 per cent between 2023 and 2030, reaching 30,300 workers.
- As a result, the peak domestic labour gap is expected to increase 44 per cent over the next 8 years, leaving 2,300 positions unable to be filled domestically in 2030 (Chart 3).
- The sector is expected to see 35 per cent (10,550 workers) of its current domestic workforce retire between 2023 and 2030, and 65 per cent of these retirees will be managers in agriculture, including farm owner-operators and hired managers.
- Over the next 8 years, around 1,900 immigrants and 5,500 school leavers are projected to enter the agriculture workforce in Saskatchewan.¹⁰
- Despite foreign worker employment increasing 19 per cent over the next 8 years, 1,300 vacancies are expected to remain by 2030. Over 40 per cent of these vacancies will be in the province’s grain and oilseed industry.

Chart 3: The peak domestic labour gap grows over the forecast period.
 Number of workers required at peak season in Saskatchewan, 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.

¹⁰ School leavers is the number of workers finished school (all levels of education) and entering the workforce.



Building the Future Workforce

- Saskatchewan will have some of the largest population growth compared to other provinces, particularly in the 15-24 age group. This age group is projected to increase 13 per cent between 2023 and 2030, while remaining unchanged in the rest of Canada. Immigration continues to be a major driver of this growth.¹¹
- Around 24 per cent of the population aged 15 to 24 in Saskatchewan identify as Indigenous, compared to only 7 per cent across Canada.¹² This highlights the need for the sector to be engaging with Indigenous youth in the province.
- The rural location of most agriculture operations is a barrier to bringing young workers and immigrants into the sector. Offering support for workers to relocate to rural areas and creating appealing, sustainable rural communities for workers and their families could help overcome this hurdle.

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).

¹¹ Statistics Canada; The Conference Board of Canada. | ¹² Statistics Canada, Table: 98-10-0265-01.



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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.

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.

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.