



APICULTURE

Labour market information and forecast 2023-2030



Key Findings

- Despite reduced production, higher prices have sustained the apiculture industry over the past couple of years.
- The apiculture industry is positioned for solid growth if it can secure an adequate workforce.
- Employers struggle to find workers due to the physical nature of the work, seasonality and rural location.
- Many employers in apiculture rely on foreign workers.¹ Unfortunately, one-third of the surveyed employers reported rules and regulations for temporary foreign workers as a top barrier to recruitment, higher than the 17 per cent across the entire agriculture sector.²

Production Outlook

- The apiculture industry has had a challenging couple of years with COVID-19 disrupting the industry in 2020 and 2021, along with varroa mite infestations and poor queen quality negatively impacting many producers in 2022.
- Honey production saw substantial gains (23 per cent increase) in 2023 after seeing a drop in production in 2022.
- Higher prices have increased the value of honey over the past few years (Chart 1). These high prices will continue to support growth in the apiculture industry.
- Two-thirds of employers in apiculture expect production at their operations to increase over the next 5 years.³

¹ Foreign workers include workers brought in through the Temporary Foreign Worker Program or Seasonal Agricultural Worker Program. Does not include immigrants or permanent residents. | ² Canadian Agricultural Human Resource Council Employer Survey 2023 (n=15, 724). | ³ Canadian Agricultural Human Resource Council Employer Survey 2023 (n=15).

Chart 1: Higher prices increase the value of honey despite lower production levels.
 Natural honey, thousands.



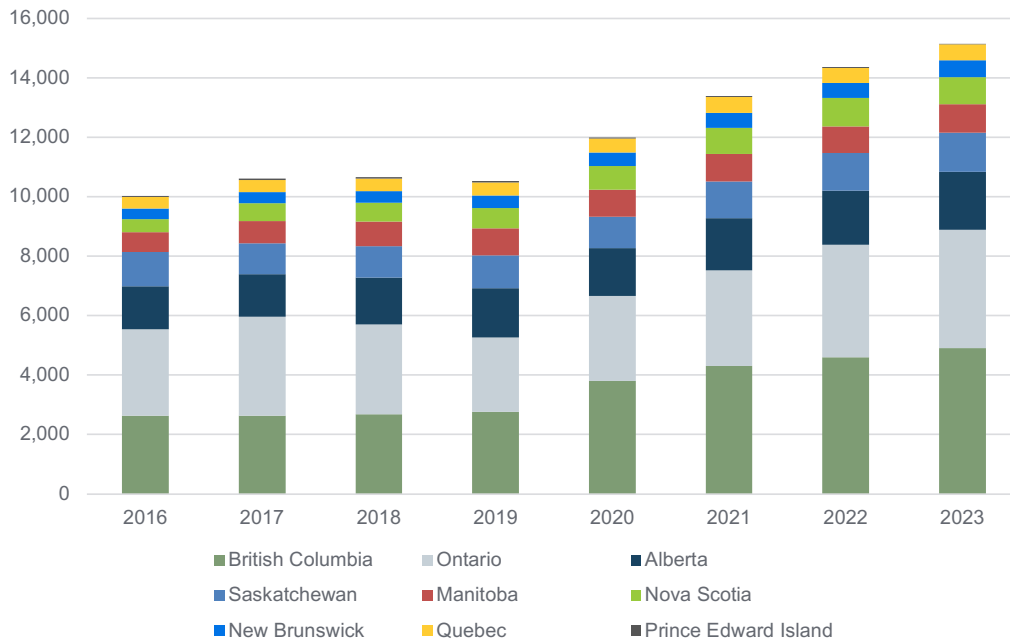
Source: Statistics Canada, Table: 32-10-0353-01.

Current Workforce

- Unlike many other industries in agriculture, the number of apiaries has been increasing over the past two decades. There were 2,206 apiaries in 2021 compared to 2,075 in 2016, which represents a 6 per cent increase.⁴
- The number of beekeepers has been steadily increasing over the same period of time. There were over 15,100 beekeepers in 2023, up 5 per cent from 2016 (Chart 2).⁵
- At the same time, the number of colonies and production per beekeeper has been decreasing, indicating the industry is being composed of more smaller operations and hobby beekeepers.
- There were 388 businesses with employees in apiculture in 2022. Seventy-three per cent of these businesses had less than 10 employees.⁶
- Additionally, there were 760 businesses in apiculture without employees.⁷
- There were approximately 4,900 domestic workers, including business owners with and without employees, at peak season in 2022. Twenty-nine per cent were in Alberta, 19 per cent in Quebec and 16 per cent in Saskatchewan.⁸
- According to the survey respondents, 38 per cent of employees in apiculture were foreign workers.⁹ This equates to approximately 1,400 foreign workers in 2022.¹⁰
- To keep up with production growth, employment will need to increase. Two-thirds of employers in apiculture expect worker counts at their operations to increase over the next 5 years.¹¹

⁴Statistics Canada, Table: 32-10-0166-01. | ⁵Statistics Canada, Table: 32-10-0353-01. | ⁶Statistics Canada, Table: 33-10-0568-01. | ⁷Statistics Canada, Table: 33-10-0569-01. | ⁸Estimated based on business counts by employment size in apiculture. Statistics Canada; The Conference Board of Canada. | ⁹Canadian Agricultural Human Resource Council Employer Survey 2023 (n=19). | ¹⁰This estimate does not include foreign workers employed in 'other food processing' NAICS 31199 which includes honey processing. | ¹¹Canadian Agricultural Human Resource Council Employer Survey 2023 (n=15).

Chart 2: The number of beekeepers has been steadily increasing.
 Number of beekeepers by province.



Source: Statistics Canada, Table: 32-10-0353-01.

Labour Challenges

- Almost one-third (31 per cent) of the surveyed employers in apiculture were unable to find all the workers they needed in 2022, leading to lost sales and canceled expansion plans.¹²
- Almost one-third (31 per cent) of employers reported receiving no applicants for their job postings, and another 19 per cent received only one or two.¹³
- Difficult manual labour, seasonal work and rural locations were the top barriers to recruitment for employers in apiculture.
- Seventy-nine per cent of surveyed employers in apiculture reported using the Temporary Foreign Worker Program, including the Seasonal Agricultural Worker Program, to recruit workers in 2022.¹⁴
- One-third of employers reported rules and regulations for temporary foreign workers as a top barrier to recruitment, compared to only 17 per cent of employers across all agriculture industries.¹⁵
- Employers in the industry reported a voluntary turnover rate of 14 per cent, which is on par with the average across agriculture (Chart 1).¹⁶
- Top factors contributing to turnover in apiculture include work being too physical (73 per cent), long working hours (47 per cent), and the remote location of work (47 per cent).¹⁷
- Only 27 per cent of employers in apiculture reported low pay as a top factor contributing to turnover, much less than the 50 per cent of employers in the overall sector.¹⁸

¹² Canadian Agricultural Human Resource Council Employer Survey 2023 (n=16). | ¹³ Ibid. | ¹⁴ Canadian Agricultural Human Resource Council Employer Survey 2023 (n=14). | ¹⁵ Canadian Agricultural Human Resource Council Employer Survey 2023 (n=15, 724). | ¹⁶ Canadian Agricultural Human Resource Council Employer Survey 2023. | ¹⁷ Canadian Agricultural Human Resource Council Employer Survey 2023 (n=15). | ¹⁸ Canadian Agricultural Human Resource Council Employer Survey 2023 (n=15, 721).



Building the Future Workforce

- Foreign workers are an essential part of the apiculture workforce. Ensuring employers have access to this source of labour will continue to be vital for the industry.
- Manual labour is the top factor making recruitment and retention difficult in this industry. Providing the right tools and training to support workers in labour-intensive roles will be key to ensuring an adequate workforce in the future.

About the Apiculture Industry

This factsheet pertains to the apiculture industry as defined by Statistics Canada as NAICS 11291, which includes operations engaged in raising bees, collecting and gathering honey, and performing other apiculture activities, like pollination services.

Canada's apiculture industry is geographically concentrated in the Prairies with over 25 per cent of employment in Alberta.

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; and validating the results through webinars as well as an advisory group presentation. For more information about this LMI study, please see the National Report.

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.



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