



SHEEP AND GOAT

Labour market information and forecast 2023-2030



Key Findings

- The sheep and goat industry faces both a higher vacancy rate and more turnover compared to most other animal production industries.
- These labour challenges are expected to ease somewhat in the coming years due to reduced labour demand and increased hiring of foreign workers.¹ However, almost 140 vacancies are projected to persist in 2030, accounting for 4 per cent of labour demand.²
- Employers cited difficult manual labour, long working hours and low pay compared to other sectors as the primary causes of their recruitment and retention difficulties.

Current Workforce

- The sheep and goat industry employed 3,380 domestic workers at peak season in 2022, with 40 per cent of these jobs located in Quebec and 35 per cent in Ontario.³
- The industry has three main occupations: managers in agriculture, including farm owner-operators (43 per cent of the workforce); specialized livestock workers or farm machiner operators (19 per cent); and livestock labourers (14 per cent).⁴
- The industry employed around 80 foreign workers in 2022, accounting for just 2 per cent of their workforce.⁵
- It is estimated that 210 positions went unfilled at peak season in 2022, resulting in an 8.6 per cent job vacancy rate, which is higher than the 7.4 per cent for all agriculture.⁶

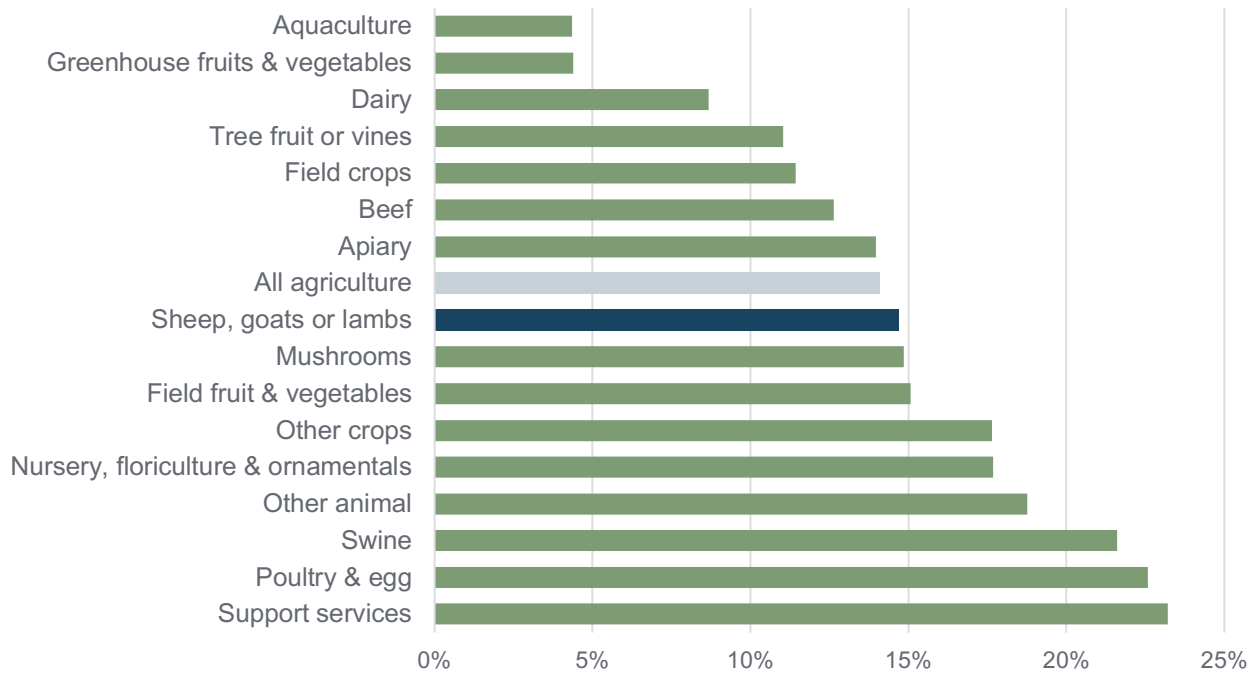
¹ Foreign workers include workers brought in through the Temporary Foreign Worker Program or Seasonal Agricultural Worker Program. Does not include immigrants or permanent residents. | ² Domestic labour gap is the difference between the total number of workers required and the number of domestic workers employed which equals foreign workers employment plus the number of vacancies. Estimated at peak to reflect maximum demand during seasonal peaks in agriculture. | ³ Statistics Canada; The Conference Board of Canada. | ⁴ Ibid. | ⁵ Statistics Canada; Employment and Social Development Canada; The Conference Board of Canada. | ⁶ Statistics Canada; The Conference Board of Canada. Does not include agriculture wholesale industries.

Employer Survey Insights

- Over 40 per cent of employers in the sheep and goat industry were unable to find all the workers required. Seventy-five per cent lost sales as a result.⁷
- Employers in the sheep and goat industry had more job applicants with 44 per cent of employers receiving more than five Canadian applicants per posting, compared to just 18 per cent for the entire agriculture sector.⁸
- The sheep and goat industry had a voluntary turnover rate of 15 per cent in 2022, which was slightly higher than the sector average at 14 per cent (Chart 1).
- Employers reported manual labour requirements, long working hours and low pay compared to other sectors as the main reasons for their recruitment and retention challenges.

Chart 1: The sheep and goat turnover rate is near the agriculture average.

Voluntary turnover rates,* per cent, 2022.



Source: Canadian Agricultural Human Resource Council Employer Survey 2023.

* 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.

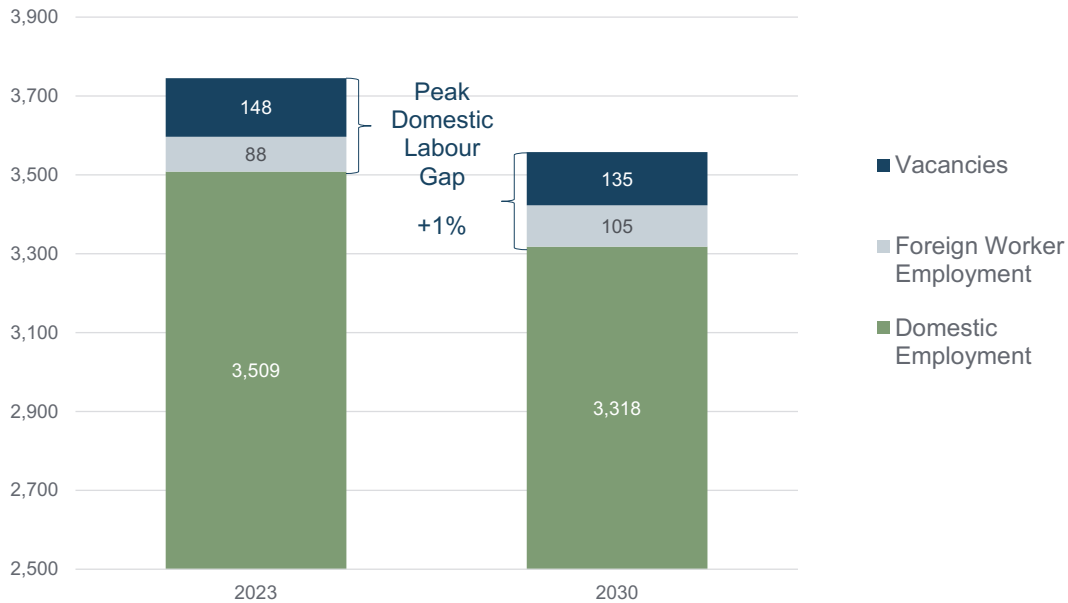
⁷ Canadian Agricultural Human Resource Council Employer Survey 2023 (n=9). | ⁸ Canadian Agricultural Human Resource Council Employer Survey 2023 (n=11, 763).

Labour Market Forecast

- Low labour productivity growth and stable production will result in a 5 per cent decrease in peak labour demand over the next 8 years, reaching 3,560 in 2030.⁹
- The industry is expected to see 670 workers retire between 2023 and 2030, while 160 immigrants and 400 school leavers are projected to enter the workforce during this time.¹⁰
- Domestic employment will fall at the same rate as demand, decreasing 5 per cent between 2023 and 2030.
- The peak domestic labour gap will remain relatively unchanged, staying around 240 over the next 8 years.¹¹
- The number of foreign workers employed is expected to increase over the next 8 years, filling 44 per cent of the peak domestic labour gap by 2030.
- Despite the increase in foreign worker employment, 135 vacancies will remain by 2030. Thirty-four per cent of these vacancies will be for specialized livestock workers or farm machinery operators, and 25 per cent will be for livestock labourers.

Chart 2: The peak domestic labour gap grows despite declining total peak demand.

Number of workers required at peak season in the sheep and goat industry.



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.

⁹ Peak labour demand is equal to the number of Canadians employed at peak, plus the number of Temporary Foreign Workers (TFW) employed at peak, plus the number of vacancies at peak. | ¹⁰ School leavers is the number of workers finished school (all levels of education) and entering the workforce. | ¹¹ Domestic labour gap is the difference between the total number of workers demanded and the number of domestic workers employed which equals TFW employment plus the number of vacancies. Estimated at peak to reflect the maximum demand during seasonal peaks in agriculture.



Building the Future Workforce

- With 31 per cent of the current domestic workforce expected to retire in the next 8 years, attracting new workers to the sheep and goat industry is key. However, the manual labour required for most jobs poses the largest barrier to recruitment. Overcoming this challenge involves ensuring workers have the right training and tools, as well as promoting the benefits of physical outdoor work.
- Improving management practices and promoting career opportunities could also help decrease turnover in the industry.

About the Sheep and Goat Industry

This factsheet pertains to the ‘sheep and goat’ industry as defined by Statistics Canada as NAICS 1124, “establishments primarily engaged in raising sheep and goats and feeding or fattening lambs.”

Results from the employer survey should be interpreted with caution since there was a limited number of survey responses from sheep and goat employers (13 in total), which may impact the reliability of the findings.

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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PUBLISHED FEBRUARY 2024

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Funded by the Government
of Canada’s Sectoral Workforce
Solutions Program



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