



SWINE

Labour market information and forecast 2023-2030



Key Findings

- Foreign workers¹ will be increasingly employed in this industry, making up almost 25 per cent of the workforce by 2030 and filling over 80 per cent of the domestic labour gap.²
- The swine industry faces significant labour challenges, marked by both a higher vacancy rate and more turnover compared to most other animal production industries. These labour challenges are expected to continue as the domestic labour gap grows over the next decade.
- The domestic labour gap in the swine industry is projected to increase by 16 per cent over the next 8 years, reaching 3,080 workers during peak season in 2030.
- Swine employers struggle to find workers with relevant skills and experience. This challenge will continue as one-third of the current domestic workforce retires over the next 8 years.

Current Workforce

- The swine industry employed 10,100 domestic workers at peak season in 2022, with nearly 30 per cent of these workers in Quebec.³
- The industry has three main occupations: managers in agriculture (farm owner-operators), specialized livestock workers or farm machinery operators, and livestock labourers that together account for almost 80 per cent of its domestic workforce.⁴
- The number of foreign workers in the industry has more than doubled since 2017, reaching 1,970 workers in 2022.⁵ Foreign workers now make up over 16 per cent of the workforce.
- The swine industry experienced a peak vacancy rate of 7.1 per cent in 2022, which was one of the highest vacancy rates among animal production industries.⁶
- It is estimated that 750 positions went unfilled at peak season in 2022.⁷

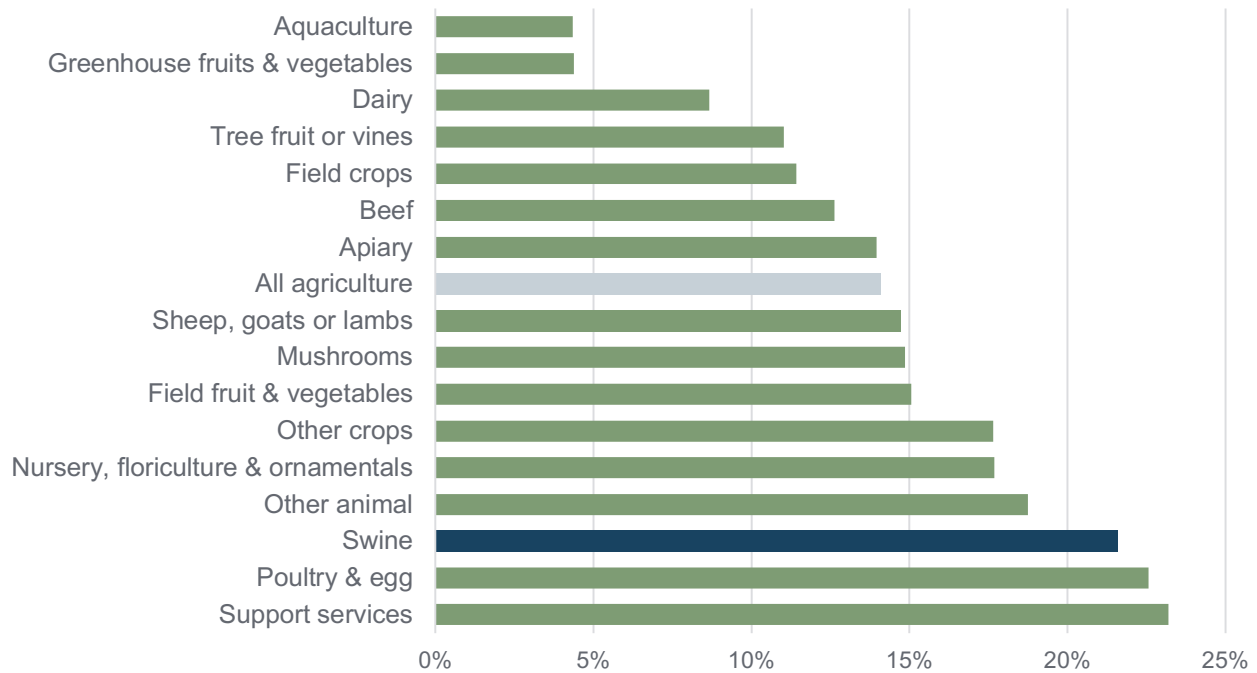
¹ Foreign workers include workers brought in through the Temporary Foreign Worker Program or Seasonal Agricultural Worker Program. Does not include immigrants or permanent residents. | ² Domestic labour gap is the difference between the total number of workers required and the number of domestic workers employed which equals foreign worker 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, Table: 32-10-0218-01. Total number of foreign workers employed in the year. | ⁶ Statistics Canada, Job Vacancy and Wage Survey (custom data). | ⁷ Statistics Canada; The Conference Board of Canada Model of Occupations, Skills and Technology.

Employer Survey Insights

- Over half of swine employers said they were unable to find all the workers they needed in 2022.⁸
- More than 30 per cent of employers reported that they received no domestic applicants for their job postings and 50 per cent received only one or two applicants.⁹
- Over half (54 per cent) of swine employers cited lack of experience working in the sector as a top barrier for recruitment, which was considerably higher than the agriculture sector’s average of 31 per cent.¹⁰
- As a result of job vacancies, 30 per cent of employers lost sales, 40 per cent delayed production, 50 per cent faced overtime costs, and 30 per cent cancelled or delayed expansion plans.¹¹
- The swine industry’s voluntary turnover rate of 22 per cent is one of the highest in the sector (Chart 1).¹² This turnover puts additional strain on employers, impacting both finances and time.
- Employers reported manual labour, low pay relative to other sectors and remote locations as the top factors making retention difficult.

Chart 1: The swine industry has one of the highest turnover rates.

Voluntary turnover rates, * per cent, 2022.



Source: Canadian Agricultural Human Resource Council Employer Survey 2023.

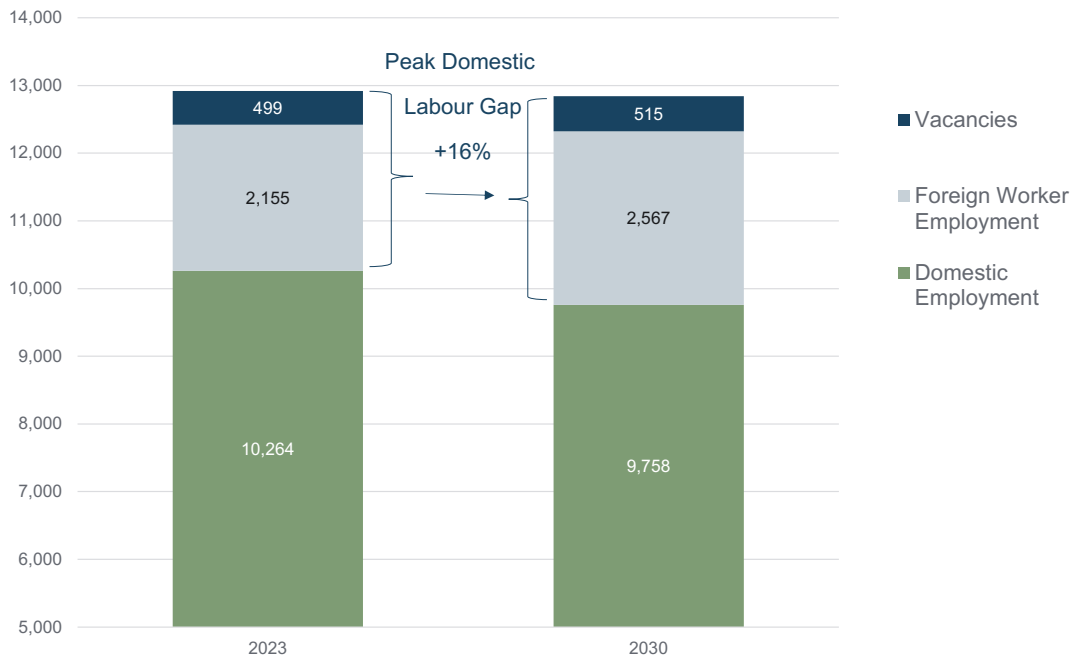
* The voluntary turnover rate is the number of voluntary departures as a share of the total number of workers in a year. Voluntary departures are comprised of workers who quit, including seasonal workers who leave before contract completion.

⁸ Canadian Agricultural Human Resource Council Employer Survey 2023 (n=34). | ⁹ Canadian Agricultural Human Resource Council Employer Survey 2023 (n=26). | ¹⁰ Canadian Agricultural Human Resource Council Employer Survey 2023 (n=24, 724). | ¹¹ Canadian Agricultural Human Resource Council Employer Survey 2023 (n=10). | ¹² Canadian Agricultural Human Resource Council Employer Survey 2023 (n=38).

Labour Market Forecast

- Labour demand is projected to stay stable for the swine industry, decreasing by just 1 per cent over the next 8 years and reaching 12,800 in 2030.¹³
- The industry is expected to see 2,530 workers retire between 2023 and 2030; meanwhile, 540 immigrants and 1,540 school leavers are projected to enter the workforce.¹⁴
- The total number of Canadians employed in the swine industry is projected to decline by 5 per cent over the next 8 years (Chart 2) due to the decrease in labour supply.
- The peak domestic labour gap in the swine industry will increase by nearly 16 per cent over the next 8 years, from 2,650 in 2022 to 3,080 by 2030.¹⁵
- The total number of foreign workers employed throughout the year is projected to increase to around 2,640 by 2030. During peak season, foreign workers will fill over 80 per cent of the domestic labour gap.
- Given softening labour markets, the level of vacancies is expected to ease in 2023, and then remain persistent throughout the forecast period. Around 520 vacancies will remain in 2030. Forty per cent of these vacancies will be for specialized livestock workers or farm machinery operators, and 29 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 swine industry, 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.

¹³ The total peak demand is equal to the number of Canadians employed at peak, plus the number of foreign workers employed at peak plus the number of vacancies at peak. | ¹⁴ School leavers is the number of workers finished school (all levels of education) and entering the workforce. | ¹⁵ 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.



Building the Future Workforce

- Finding workers with the right skills and experience will continue to be a challenge for swine employers, with the largest share of vacancies being for specialized livestock workers or farm machinery operators. In turn, training programs for in-demand occupations could be beneficial.
- It will be essential for employers to have access to foreign workers and for these workers to have the support necessary to be successful.

About the Swine Industry

This factsheet pertains to the 'swine' industry as defined by Statistics Canada as NAICS 1122, "establishments primarily engaged in raising hogs and pigs."

Canada's swine industry is geographically concentrated in Ontario, Quebec and the Prairies.

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 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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