



# MANITOBA

## Agriculture labour market information and forecast 2023-2030



### Key Findings

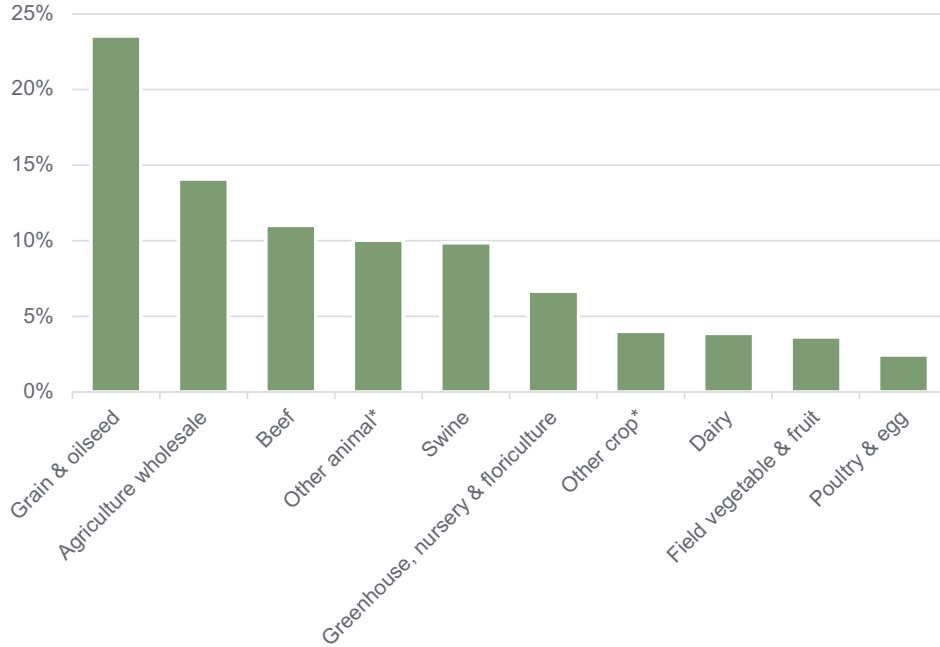
- Forty per cent of agriculture employers in Manitoba were unable to hire all the workers required in 2022, with over 60 per cent losing sales as a result.
- Only 4 per cent of the province's agriculture workforce (around 1,000 persons) are foreign workers, well below the 17 per cent across Canada.<sup>1</sup> Over one-third of these foreign workers are in the field fruit and vegetable industry.
- Labour challenges in Manitoba's agriculture sector are expected to continue as the domestic labour gap grows 13 per cent over the next 8 years, reaching over 1,900 by 2030.<sup>2</sup>
- Manitoba benefits from a relatively balanced labour market, with growing numbers of young people and immigrants. Attracting and training these new workers will be key for the sector.
- Manitoba's largest agriculture industry, grain and oilseed, requires technical expertise to ensure increased productivity. Training programs are essential to equip workers with the skills necessary to operate and maintain existing and emerging technologies.

### Current Workforce

- Manitoba's agriculture sector employed nearly 26,600 domestic workers during peak season in 2022, which is equivalent to 7.5 per cent of the country's domestic agriculture workforce.<sup>3</sup>
- The grain and oilseed industry is the largest agricultural employer in the province, employing 23 per cent of the sector's workforce, followed by agriculture wholesale at 14 per cent and beef at 10 per cent. (Chart 1).
- Manitoba's agriculture sector had approximately 1,300 positions that went unfilled at peak season in 2022.<sup>4</sup>
- The grain and oilseed, wholesale and beef industries have lower vacancy rates compared to other industries in agriculture, resulting in a lower overall vacancy rate in Manitoba. The estimated vacancy rate for the province's agriculture sector was 5.5 per cent, compared to 7.4 per cent across Canada.<sup>5</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. Statistics Canada, Table: 32-10-0218-01. Does not include support services or agriculture wholesale. | <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>The Conference Board of Canada Model of Occupations, Skills and Technology. | <sup>5</sup>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 is the largest agriculture employer in Manitoba.**  
 Share of employment (domestic and foreign) at peak in 2022, Manitoba.



Source: Statistics Canada; The Conference Board of Canada.

\*Other crop is primarily mixed crop farming and hay farming. Other animal is primarily mixed livestock farming and apiculture.

## Employer Survey Insights

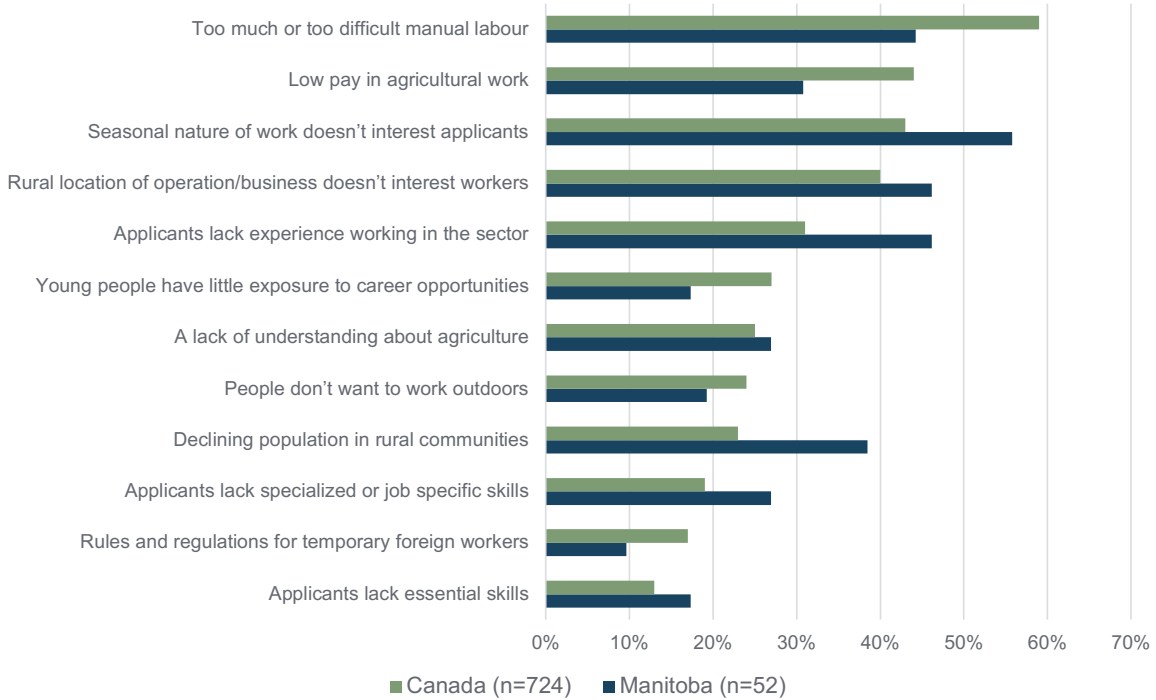
- Forty per cent of agriculture employers in Manitoba were unable to find all the workers required in 2022.<sup>6</sup>
- Almost half (48 per cent) of employers in Manitoba received no domestic applicants for their job postings and 30 per cent received only one or two.<sup>7</sup>
- Almost two-thirds (63 per cent) of employers said they lost sales and experienced production delays because of job vacancies.<sup>8</sup>
- Employers in Manitoba cite the seasonal nature of work and the rural location of their operations as the main reasons they struggle to find workers (Chart 2).<sup>9</sup>
- Almost half (46 per cent) of employers said applicants lack experience working in the sector and 27 per cent said applicants lack specialized or job specific skills. These factors challenged employers in Manitoba more than in other provinces.<sup>10</sup>
- Manitoba’s agriculture sector had a voluntary turnover rate of 14 per cent in 2022, which is well above the estimated 7.7 per cent turnover rate for all sectors in Canada.<sup>11</sup>

<sup>6</sup> Canadian Agricultural Human Resource Council Employer Survey 2023 (n=45). | <sup>7</sup> Canadian Agricultural Human Resource Council Employer Survey 2023 (n=55). | <sup>8</sup> Canadian Agricultural Human Resource Council Employer Survey 2023 (n=16). | <sup>9</sup> Canadian Agricultural Human Resource Council Employer Survey 2023 (n=44). | <sup>10</sup> Canadian Agricultural Human Resource Council Employer Survey 2023 (n=44). | <sup>11</sup> 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: Seasonality and rural location impede recruitment in agriculture.**

Share of employers.

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



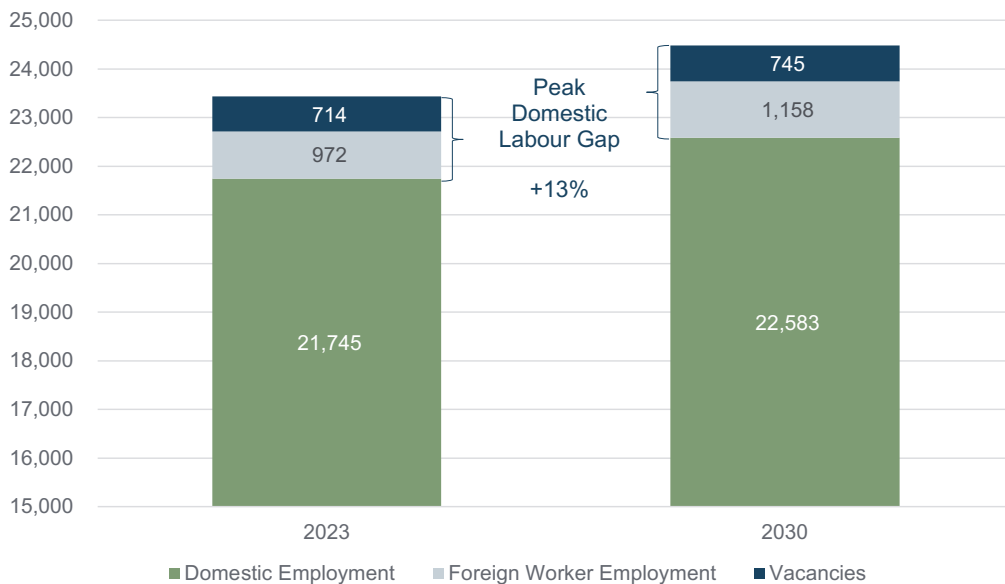
Source: Canadian Agricultural Human Resource Council Employer Survey 2023.



## Labour Market Forecast

- Over the short term, a weaker economy and poor weather conditions will hamper production in the agriculture sector, resulting in less labour demand and fewer vacancies in 2023 compared to 2022.
- Over the long term, total labour demand is expected to remain flat, increasing by only 4.5 per cent between 2023 and 2030, reaching 24,500 workers in peak season.
- The decline in domestic employment during 2022 and 2023 can be attributed, at least in part, to a significant number of retirements and the departure of young workers. These are the lingering consequences of the COVID-19 pandemic.
- Going forward, domestic employment is expected to recover slightly, increasing 3.9 per cent between 2023 and 2030, reaching 22,600 workers (Chart 3). However, it will remain well below levels seen before 2022.
- Manitoba is expected to benefit from solid population growth over the forecast which will increase their supply of domestic labour.
- Over 5,400 agriculture workers are expected to retire over the next 8 years, while 2,400 immigrants and 4,600 school leavers<sup>12</sup> are expected to enter the sector.
- Peak labour demand is expected to slightly outpace labour supply, leading to a 13 per cent increase in the peak domestic labour gap over the next 8 years.
- Despite foreign worker employment increasing, it is expected that 750 jobs will still be unfilled by 2030.
- Thirty per cent of these vacancies will be for specialized livestock workers and farm machinery operators, 20 per cent for livestock labourers, and 10 per cent for greenhouse and nursery labourers.

**Chart 3: The peak domestic labour gap grows over the forecast period.**  
 Number of workers required at peak season in Manitoba, 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>12</sup> School leavers is the number of workers finished school (all levels of education) and entering the workforce.





## Building the Future Workforce

- Lack of experience and lack of skills are key challenges for agriculture employers in Manitoba, especially in the grain and oilseed industry. Increased exposure to the agriculture sector and training programs will help attract and retain domestic workers.
- Eighteen per cent of the population in Manitoba are Indigenous, compared to only 5 per cent across Canada.<sup>13</sup> This highlights the need for employers and other stakeholders in the sector to be engaging with Indigenous communities in the province.

## 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.

<sup>13</sup> Statistics Canada, Table: 98-10-0264-01.



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