



QUEBEC

Agriculture labour market information and forecast 2023-2030



Key Findings

- Quebec's agriculture sector had one of the highest vacancy rates of any province at 9.4 per cent, resulting in overtime costs, lost sales and production delays.
- Quebec has a high concentration of foreign workers, particularly in horticulture industries, with an increasing number in animal farming, primarily in the dairy industry.¹
- Immigrants provide a valuable source of domestic labour; however, Quebec struggles to attract immigrants to the agriculture sector.
- Overall, labour demand is growing faster than domestic labour supply, resulting in a domestic labour gap that is expected to grow to over 29,300 positions by 2030.²

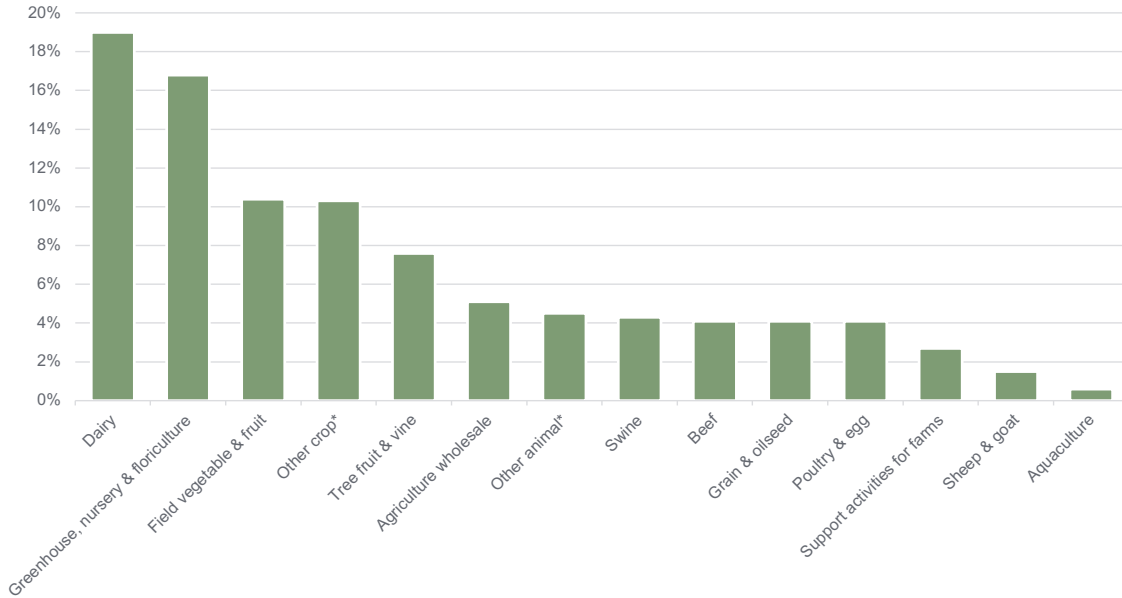
Current Workforce

- Quebec has the second largest agriculture sector in Canada, employing over 75,800 domestic workers during peak season in 2022. This is equivalent to 21 per cent of the country's domestic agriculture workforce.³
- Dairy is the largest agricultural employer in the province (Chart 1). Quebec employs almost half (48 per cent) of the dairy industry's domestic workforce in the country.
- Over 21,500 foreign workers were employed in Quebec's agriculture sector in 2022, accounting for around 22 per cent of the sector workforce.⁴ This is a relatively higher share than most other provinces.
- Despite their reliance on foreign workers, the sector still had an estimated 7,800 positions that went unfilled at peak season in 2022.⁵
- The estimated vacancy rate for the province was 9.4 per cent, well above the 7.4 per cent average for agriculture across Canada.⁶

¹Foreign workers include workers brought in through the Temporary Foreign Worker Program or Seasonal Agricultural Worker Program. Does not include immigrants or permanent residents. | ²Domestic 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 Statistics Canada, Table: 32-10-0218-01; The Conference Board of Canada. Does not include support services or agriculture wholesale industries. | ⁵ The Conference Board of Canada Model of Occupations, Skills and Technology. | ⁶ Statistics Canada; The Conference Board of Canada.

Chart 1: Dairy is the largest agriculture employer in Quebec.

Share of employment (domestic and foreign workers) at peak, 2022, Quebec.



Source: Statistics Canada; The Conference Board of Canada.

*Other crop is primarily maple syrup, combination fruit and vegetable farming, and mixed crop farming. Other animal is primarily mixed animal farming and apiculture.

Employer Survey Insights

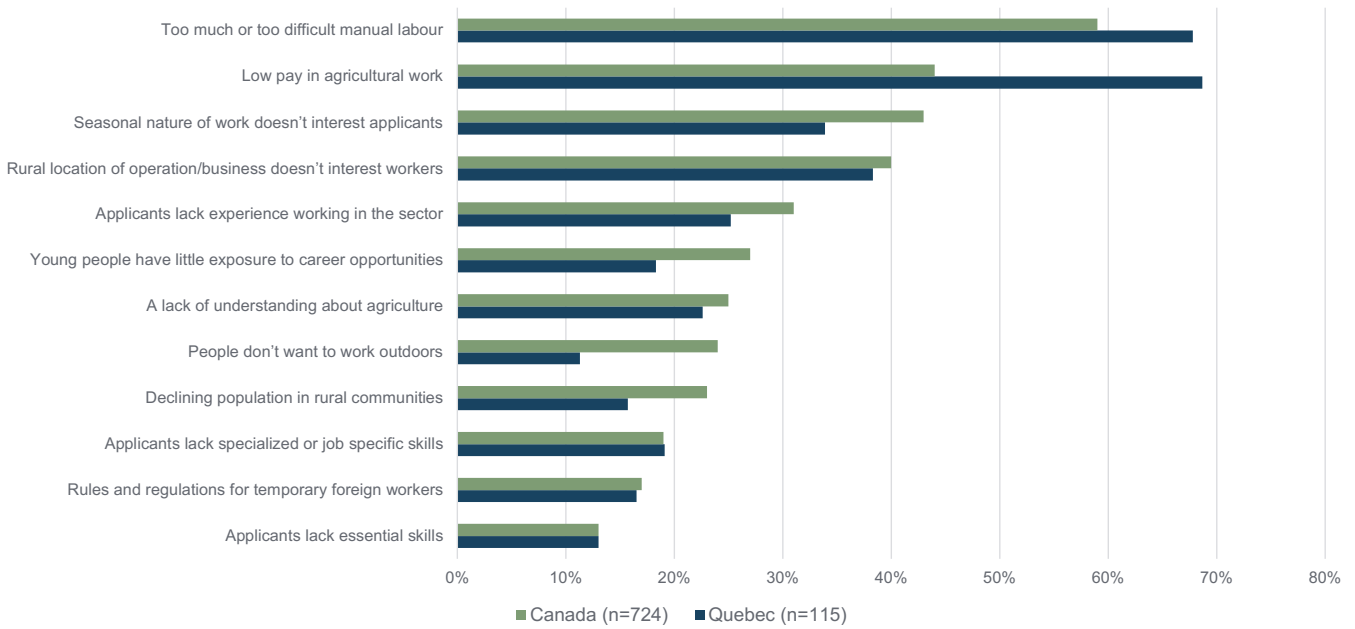
- Over one-third (36 per cent) of Quebec’s agriculture employers were not able to find all the workers required in 2022.⁷
- Almost half (47 per cent) of employers in Quebec received no domestic applicants for their job postings and 36 per cent received only one or two.⁸
- As a result of job vacancies, 42 per cent of employers said they delayed or cancelled expansion plans, 71 per cent experienced overtime costs, 45 per cent reported lost sales, and 92 per cent reported that these vacancies caused excessive stress for owners and staff.⁹
- Over two-thirds of employers in Quebec cite difficult manual labour and low pay in agriculture as the main cause of their struggle to find workers (Chart 2).¹⁰
- Employers in the dairy industry face particular challenges in finding workers who possess both an understanding of the industry and the specialized skills necessary for the job.
- Quebec’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.¹¹

⁷ Canadian Agricultural Human Resource Council Employer Survey 2023 (n=114). | ⁸ Canadian Agricultural Human Resource Council Employer Survey 2023 (n=124). | ⁹ Canadian Agricultural Human Resource Council Employer Survey 2023 (n=39). | ¹⁰ Canadian Agricultural Human Resource Council Employer Survey 2023 (n=115). | ¹¹ 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: Low pay and manual labour impede recruitment in Quebec.

Share of employers.

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



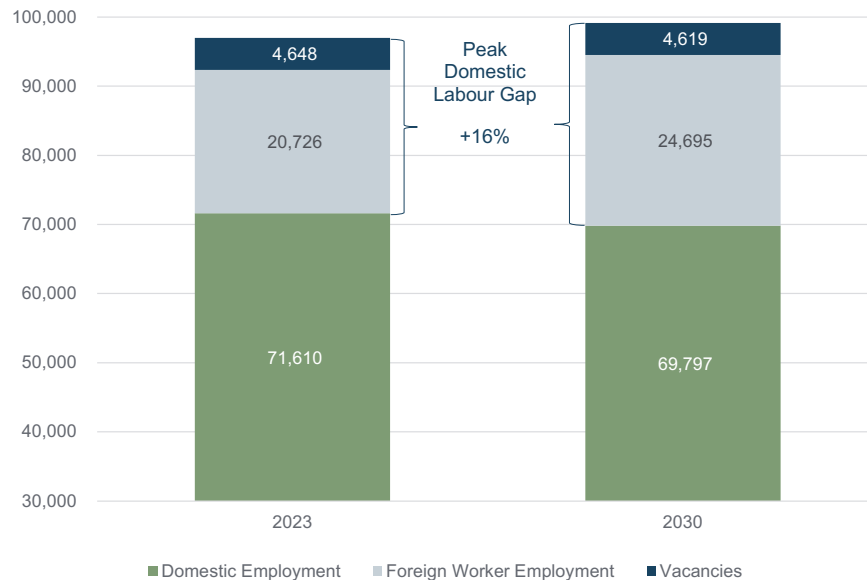
Source: Canadian Agricultural Human Resource Council Employer Survey 2023.



Labour Market Forecast

- Over the short term, a weaker economy will restrain growth 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 2 per cent between 2023 and 2030, reaching 99,100 workers in peak season.
- The sector is expected to see 21 per cent of its current domestic workforce retire between 2023 and 2030, amounting to 12,900 workers. At the same time, 2,400 immigrants and 9,000 school leavers are projected to enter the workforce over the next 8 years.¹²
- Domestic employment is expected to decrease 3 per cent over the next 8 years, reaching 69,800 in 2030 (Chart 3).
- As a result, the peak domestic labour gap will grow 16 per cent over the next 8 years, reaching over 29,300 positions in 2030.
- Despite foreign worker employment increasing 19 per cent, it is expected that 4,600 job vacancies will remain unfilled by 2030. Almost 1,400 of these vacancies will be in the fruit and vegetable industry, 900 in greenhouse and nursery, and 500 in dairy.
- Thirty per cent of vacancies will be for specialized livestock workers and farm machinery operators, 20 per cent for livestock labourers, 13 per cent for greenhouse and nursery labourers, and 11 per cent for harvesting labourers.

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

¹² School leavers is the number of workers finished school (all levels of education) and entering the workforce.



Building the Future Workforce

- Quebec benefits from lower retirement rates but has a lower proportion of immigrants entering the sector compared to other provinces. Targeted programs to help attract immigrants into the sector will be important to sustain the sector's domestic workforce in Quebec.
- The dairy industry in Quebec is embracing technology such as robotic milking. This will require training programs to equip workers with the skills needed to operate and maintain these technologies to ensure productivity gains.

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 see 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.



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