



## Impact of Access to Foreign Workers on the Agriculture Industry

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## Overview

### Economic Impacts of Labour Shortages

The Canadian agricultural workforce benefited from having 59,500 international workers through the Season Agricultural Worker Program (SAWP) and the Temporary Foreign Worker Program (TFWP) in 2017. Their participation limited devastating losses:

- unfilled vacancies went from 76,000 positions down to 16,500 positions that could not be filled on farms
- lost revenues were limited to \$2.9 billion due to job vacancies (might have been 4.5 x worse)

### Potential Impacts of SAWP and TFWP workers not arriving in Canada in Spring 2020

Based on this data, it can be anticipated that without the participation of SAWP or TFWP workers, job vacancies will be extensive, businesses will struggle to remain viable and the impacts on the Canadian food system and supply would be severe.

- Canadian food production and supply would be negatively impacted for the next 12 – 18 months, specifically fruits and vegetables.
- Stress, production delays, lost sales, and delays or cancellations for farm expansions or upgrades would exceed well beyond the reported figures of 2018 when 47% of agricultural producers reported these concerns.
- Without access to SAWP and TFWP workers producers will face:
  - job losses for Canadian workers, managers and business owners
  - business closures of farms
  - a negative impact on food processing abilities
  - animal welfare concerns
  - health and safety concerns
  - food safety and food security concerns

The following document provides data by province and commodity.

## Provincial Data

In most cases, the facts provided above remain the same at the provincial level.

### Alberta

- The agricultural industry employed 54,500\* people, or 16% of Canada's agricultural workforce in 2017
- 2,355 of agricultural workers are foreign workers\*\*
- 2,800 jobs went unfilled as a result of labour shortages.
- Those shortages resulted in production losses and delays, as well as \$821 million in lost sales. (2018)



## British Columbia

- The agricultural industry employed 46,300 people, or 13% of Canada's agricultural workforce\* in 2017.
- 10,627 or 23% of agricultural workers are foreign workers\*\*
- 3,100 jobs went unfilled as a result of labour shortages in 2017.
- Those shortages resulted in production losses and delays, as well as \$216 million in lost sales in 2018.

## Manitoba

- The agricultural industry employed 24,700\* people, or 7% of Canada's agricultural workforce\* in 2017.
- 704 agricultural workers are foreign workers\*.
- 1,100 jobs went unfilled as a result of labour shortages in 2017.
- Those shortages resulted in production losses and delays, as well as \$367 million in lost sales in 2018.

## New Brunswick

- The agricultural industry employed 5,200 workers in 2017.
- 195 agricultural workers or 4% of its workforce is foreign workers.
- Although domestic labour supply slightly exceeded demand in 2017, the province was still unable to fill 268 jobs, a number that is equivalent to 5.1% of the total required workforce.
- These shortages resulted in production losses and delays, as well as \$30 million in lost sales in 2018.

## Newfoundland and Labrador

- The agricultural industry employed 2,000 workers\*.
- There has not been a dependence on foreign workers to meet demand.
- In 2017 there were 70 jobs that were unable to be filled, resulting in \$4.3 million or 3.1% of sales.

## Nova Scotia

- The agricultural industry employed 4,700 workers in 2017.
- 1,885 agricultural workers or 29% of its workforce is foreign workers.
- The province is second only to Ontario on the high reliance on foreign workers.
- 250 jobs went unfilled as a result of labour shortages in 2017.
- These shortages resulted in production losses and delays, as well as \$33 million in lost sales in 2018.

## Ontario

- The agricultural industry employed 97,800 workers in 2017.
- 29,300 agricultural workers or 30% of its workforce (nearly 1 in 3) is foreign workers.
- The province is second only to Ontario on the high reliance on foreign workers.
- 4,400 jobs went unfilled as a result of labour shortages in 2017.

- These shortages resulted in production losses and delays, as well as \$591 million in lost sales in 2018.

### Prince Edward Island

- The agricultural industry employed 3,500 workers in 2017.
- There has not been a dependence on foreign workers to meet demand.
- In 2017 there were 190 jobs that were unable to be filled
- These shortages resulted in production losses and delays, as well as \$15 million lost sales.

### Quebec

- The agricultural industry employed 70,500 workers in 2017.
- 13,415 of agricultural workers or 19% of its workforce is foreign workers.
- 2,700 jobs went unfilled as a result of labour shortages in 2017.
- These shortages resulted in production losses and delays, as well as \$362 million lost sales.

### Saskatchewan

- The agricultural industry employed 37,500 workers in 2017.
- 617 of 36,900 agricultural workers are foreign workers
- 1,600 agricultural jobs went unfilled as a result of labour shortages in 2017.
- These shortages resulted in production losses and delays, as well as \$574 million lost in sales.

\* Includes farm business owners and family members

\*\*Includes Seasonal Agricultural Workers Program (SAWP) and Temporary Foreign Worker Program (TFWP) workers

## Commodities

There are specific commodities that are more greatly impacted from access to SAWP and TFWP workers than others. This section provides data regarding the commodities most impacted.

### Horticulture

Producing fruit and vegetables is labour intensive and Canada benefits from the participation of foreign workers through the Seasonal Agricultural Worker Program and the Temporary Foreign Worker Program. In fact, research clarifies that 50% of those involved in Canada's horticulture production are foreign workers and without their participation, all Canadian fruit and vegetable production would be extensively limited since they are integral to all aspects of production.

- The industry employed 75,300 people in 2017.
- More than two in five workers (44% of the workforce) are foreign workers\*.
- Two in three farms employ foreign workers.
- Even with a high percentage of foreign workers, 50% of farms were not able to find all of the workers that they needed in 2018.
- Those shortages resulted in production losses and delays, as well as \$622 million in lost sales.

### Field Fruit and Vegetable

- The industry employed 24,000 people, or roughly 7% of the total agricultural workforce\* in 2017.

- Foreign workers\* accounted for 43% of the industry's workforce in 2017.
- Even with a high percentage of foreign workers, the industry was unable to fill 1,500 jobs in 2017.
- Those shortages resulted in production losses and delays, as well as \$403 million in lost sales.

### Greenhouse, Nursery and Floriculture

- The industry employed 52,000 people, or roughly 15% of the total agricultural workforce\* in 2017.
- Jobs in this industry tend to be highly seasonal and labour intensive.
- As a result, this industry has one of the heaviest reliance on foreign workers of any industry in the agriculture sector.
- Foreign workers\* accounting for 40% of the industry's workforce.
- Even with a high percentage of foreign workers, the industry was unable to fill 2,800 jobs in 2017.
- Those shortages resulted in production losses and delays, as well as \$103 million in lost sales.

### Tree Fruit and Vine

- The industry employed 23,900 people and accounting for 7% of the total agricultural workforce\* in Canada in 2017.
- More than one in two workers (51% of the workforce) are foreign workers\*.
- This industry the most reliant on foreign workers of any agricultural industry.
- Even with a high percentage of foreign workers, the industry was unable to fill 900 jobs in 2017.
- Those shortages resulted in production losses and delays, as well as \$94 million in lost sales.

\* Includes farm business owners and family members

\*\*Includes Seasonal Agricultural Workers Program (SAWP) and Temporary Foreign Worker Program (TFWP) workers