

# Sector Profile

## Agriculture and Aquaculture

### Atlantic Region

2024

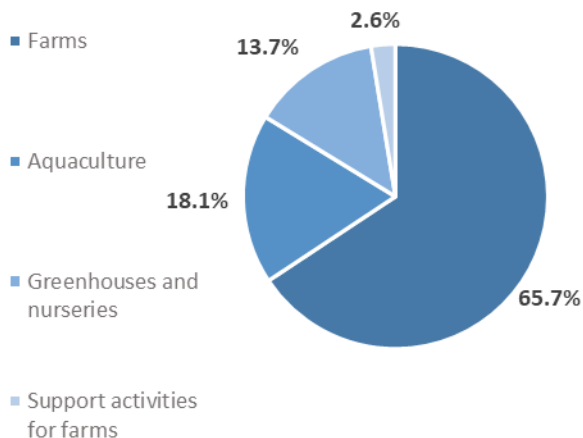


#### HIGHLIGHTS

- Agriculture and aquaculture operations are typically located in rural and coastal communities and are often the primary source of income for residents who reside in these communities.
- Nearly 30% of the Atlantic region's agriculture and aquaculture industry was 55 years or older in 2023, higher than the 23% average for all-industries in the region.
- Agriculture and aquaculture GDP fell by 3.5% in the Region on a year-over-year basis in 2023, due largely to a decline in aquaculture and non-cannabis crop production.
- A modest outlook for the Agriculture and aquaculture industry is forecast over the 2024-2026 forecast horizon, due in part to a limited labour supply.

#### ABOUT THE INDUSTRY

##### Employment Share by sub-industry



Source: Statistics Canada, Labour Force Survey 2023

##### Composition and Importance of the Sector

The Agriculture sector in Atlantic Canada is known for its production of potatoes, maple syrup, fruits, berries and various other crops and livestock. Aquaculture has also become important in recent years, particularly salmon and shell fish production. This industry's operations are typically located in rural and coastal communities and are often the primary source of income among inhabitants in these areas.

The distribution of employment is spread among five sub-industries, with the largest share concentrated in farm operations (66%), followed by Aquaculture (18%) and Greenhouses/nurseries (14%). Support activities for farms (2%) includes workers who provide support in growing crops and raising livestock. This includes activities such as grooming and caring for animals, planting seeds, etc.



## Geographic Distribution of Employment

Agriculture and Aquaculture accounts for over \$1.3B in economic activity for the Atlantic region and supports nearly 16,200 jobs. The latter figure has fallen in recent years due in large part to industry consolidation and automation. Labour shortages have also limited expansion opportunities leaving some companies struggling to fill vacancies.

The largest number of agriculture and aquaculture workers in the region (5,500) resides in New Brunswick (NB). The province also generates the most economic activity from the industry compared to the other Atlantic provinces, driven in large part to its growing cannabis operation. Nova Scotia (NS) led the Atlantic region in aquaculture and animal production in 2023 and was home to 5,300 total workers in agriculture and aquaculture.. With 4,100 employed in 2023, Prince Edward Island's (PEI) agriculture and aquaculture workforce accounted for 4.6% of total employment on the Island, by far the largest share in the region.. Newfoundland and Labrador (NL) has substantially lower levels of employment in this industry.

	Employed 2023	Industry Share (%)
Atlantic Canada	16,200	1.3%
Newfoundland and Labrador	1,300	0.5%
Prince Edward Island	4,100	4.6%
Nova Scotia	5,300	1.1%
New Brunswick	5,500	1.4%

Source: Statistics Canada, Labour Force Survey

## WORKFORCE

### Workforce Characteristics

Labour shortages are common in this industry and employers across all four Atlantic provinces tend to rely on temporary foreign workers (TFWs) to fill job vacancies. Seasonality, negative perceptions about the industry (eg. long hours, hard manual labour, etc.) and lower-than-average wages often make it difficult for employers to attract and retain workers. Initiatives such as NB's Seasonal Workforce Program, a program that matches farms with job seekers, and other government-funded recruitment activities also play a role in helping to attract new staff.

Nearly one-third of the Atlantic region's agriculture and aquaculture industry was 55 years or older in 2023, and this compares to 25% for all-industries, on average. While the overall gender composition of employment is near equal in the Atlantic workforce, only 36% of the regional agriculture and aquaculture jobs were held by a woman in 2023. Efforts to shrink this gap are highlighted by certain programs, such as the *Engaging and Advancing Women in Agriculture (EAWA)* project put on by the Canadian Federation of Agriculture. The project seeks to develop, pilot, and document a framework through which producer associations can systemically address the underrepresentation of women.

This industry also has a higher than average share of self-employment, with nearly one-third of those working in agriculture and aquaculture classified as self-employed. Workers in this field are more likely to have less than a high school education compared to the average Atlantic worker. Alternatively, only 20% had a post-secondary degree, compared to 30% of all employees in the region.

### Main Occupations

While careers in agriculture are quite diverse and require a variety of different skillsets, managers and labourers account for the bulk of the industry's workforce.

Managers in agriculture are typically the owners/operators of farming operations. Harvesting and livestock labourers, on the other hand, mostly carry out manual labour (in both skilled and unskilled positions). Specialized livestock workers provide more skilled forms of care for the animals, such as training horses, breeding animals and providing health-related care. This occupation can require a college certificate or other specialized training.

	Employed 2023	% Share of Industry
<b>Top 5 largest occupations</b>		
Managers in agriculture	4,000	24.8%
Harvesting labourers	2,000	12.3%
Livestock labourers	1,900	11.7%
Specialized livestock workers and farm machinery operators	1,425	8.8%
Aquaculture and marine harvest labourers	1,150	7.1%

Source: ESDC/Service Canada



## RECENT HISTORY

Overall there were 16,200 Atlantic Canadians employed in agriculture in 2023. Compared to 2022, this represents an increase of 5%. From a longer-term perspective, employment grew by an annual average of 0.1% over the last decade.

Despite the employment growth, agriculture and aquaculture GDP fell by 3.5% in the Region on a year-over-year basis in 2023. During the pandemic year of 2020, industry revenue across the region was down by 10% compared to 2019; however, revenues rebounded between 2020 and 2021 (+30%). Momentum continued to build in 2022 with large revenue increases attributed largely to cannabis production. In 2023, this industry struggled with declines in both non-cannabis crop and aquaculture production due in part to the impact of extreme weather in NS (wildfires and flooding), as well as the fallout from hurricane Fiona.

The highest revenue generating agricultural crops/commodities varies across provinces - the exception being dairy products, which are a top three revenue generator for each Atlantic province. Between 2019 and 2023 the average top three crops/commodities produced by province are:<sup>1</sup>

NL	PEI
Dairy (\$49M)	Potatoes (\$293M)
Eggs (\$21M)	Dairy (\$98M)
Floriculture/nursery/sod (\$9M)	Cattle and calves (\$37M)
NB	NS
Cannabis (\$272M)	Dairy (\$164M)
Potatoes (\$197M)	Fruit (\$79M)
Dairy (\$131M)	Eggs (\$49M)

The value of aquaculture in Atlantic Canada has been on the rise for most of the past decade, with particular exception to the pandemic year. Following the pandemic, the industry enjoyed a historical year in terms of revenue generation in 2021. Growth has since cooled, with year-over-year declines of 11% and 10% in 2022 and 2023 respectively. Post-tropical storm Fiona hit Atlantic Canada in late 2022, hampering the agriculture industry and significantly damaging aquaculture operations. It is estimated that Atlantic aquaculture operators suffered up to \$70M<sup>1</sup> in damages.

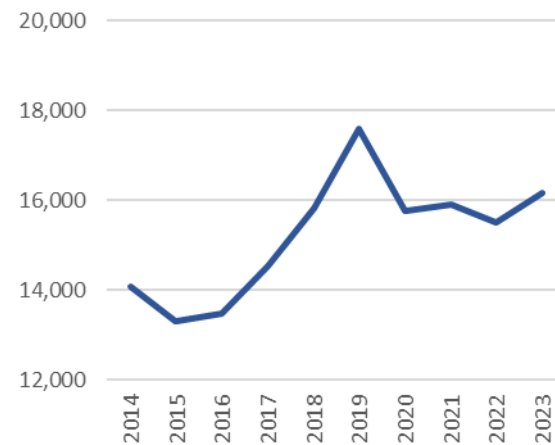
<sup>1</sup><https://agriculture.canada.ca/en/sector/overview>  
<sup>2</sup><https://www.cbc.ca/news/canada/prince-edward-island/fiona-agriculture-aquaculture-damage-government-1.6623637>

<sup>3</sup> Government of Canada. Aquaculture statistics. [Aquaculture statistics \(dfo-mpo.gc.ca\)](https://aquaculture-statistics.dfo-mpo.gc.ca/)

<sup>3</sup> University of Dalhousie, Fall 2020.

SIM student featured in National Post & The Star - School of Information Management - Dalhousie University

**Historical Employment Trend**  
Atlantic Canada



Source: Statistics Canada, Labour Force Survey

According to Fisheries and Oceans Canada<sup>2</sup>, aquaculture represents about 20% of Canada’s total seafood production and the Atlantic region accounts for roughly half of the nation’s output.

A major limiting factor to growth in this industry in recent years has been a lack of available labour, particularly in harvesting activities. Employers have largely relied on the Temporary Foreign Worker Program to support harvesting. Additionally, modernization and technological advancements in farming have led to a demand for skills not often associated with agriculture. For example, employers are recruiting from outside their industry to find employees with skills in data and IT management.

Another emerging trend affecting the industry is the growing demand from consumers to lessen the distance of their food from farm to table. This has led to more operators adopting a model that involves selling directly to consumers, mainly through online purchasing platforms, pick-up and home deliveries. Combined, this has generated an uptick in support for local producers of food and beverages. More than ever, Atlantic Canadians want to know where their food was grown and processed and further, want to continue to support the local food and beverages sector. In a Fall 2020 study, over half of the 10,000 Canadians surveyed indicated that they would pay more for locally grown foods<sup>3</sup>.



## OUTLOOK

The outlook for the Agriculture and aquaculture industry is tempered over the 2024-2026 forecast horizon. This industry is projected to lag behind the average growth rate for all industries during this time period.

Agriculture and aquaculture is inherently at risk for a number of environmental impacts that may pose threats to the safe development of crops and livestock. For example, in November 2021, the outbreak of potato wart in PEI resulted in the Canadian Food Inspection Agency banning potato shipments from PEI to the US. Exports for table potatoes resumed in April 2022, but seed potatoes, which made up roughly 10% of the Island's annual output that year, are still banned in the US. Additionally, PEI farmers were hit by hurricane Fiona in late 2022, causing severe damage to some operations that are still recovering today. Meanwhile, NS farmers have grappled with wildfires and flooding in recent years.

Across the Region output is expected to increase at a faster pace than employment driven by continued investment in automation. These changes could result in a gradual shift away from unskilled labour and an increasing share of workers will need to be trained in new technologies and methods. This modern era of 'digital farming' requires a variety of skills such as data management and analysis and operating new machinery.

Employment in the industry is expected to be buoyed by a growing appetite for local products. In addition, maturing trade deals between Canada and its trading partners will continue to improve access to foreign markets. In NL, efforts to improve food self-sufficiency have benefited the industry. NL exceeded its goal set in 2017 to reach a 20% level of food self-sufficiency when in 2022, the province achieved 21% self-sufficiency. NL is now fully self-sufficient in the production of milk, chicken and eggs, as well as beef and sheep production (which has more than doubled since 2016).<sup>1</sup> NB is expected to outpace all of the Atlantic provinces in agriculture/aquaculture growth, driven by its growing cannabis sector. NS has the lowest expected growth, as its likely to experience more negative effects from extreme weather over the forecasted period.

**Note:** In preparing this document, the authors have taken care to provide clients with labour market information that is timely and accurate at the time of publication. Since labour market conditions are dynamic, some of the information presented here may have changed since this document was published. Users are encouraged to also refer to other sources for additional information on the local economy and labour market. Information contained in this document does not necessarily reflect official policies of Employment and Social Development Canada.

The analysis in this report was finalized as of July 2024.

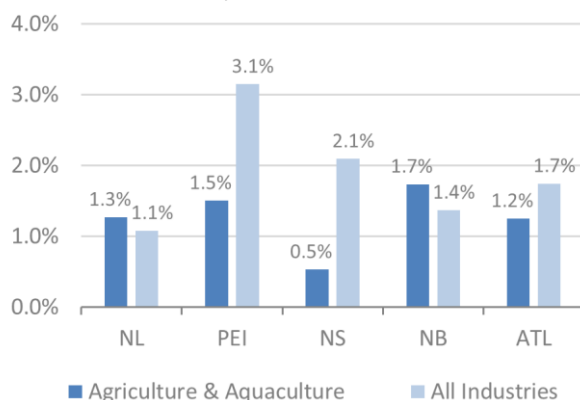
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### Projected Average Annual Employment Growth Rate (%),

Atlantic Provinces, 2024-2026



Source: ESDC/Service Canada

In PEI, farmers and aquaculture operations should be well recovered from Fiona during the forecast period. This will drive some growth, although the industry will still lag compared to the all-industry average.

While the Atlantic region, in general, is aging at a greater pace compared to the rest of the country, this is especially true for the agriculture and aquaculture industry. In the past 10 years, the share of older workers (those aged 55 and over) has grown from roughly one-quarter to nearly one-third. After inching up to 15% in 2022, the share of younger workers (aged 15 to 24 years) fell below 14% in 2023, which was near the 10-yr average.

The industry could see an improved growth rate if government and stakeholder initiatives are successful in attracting new workers to the industry, which would alleviate shortages. These efforts would include programs to bring more international workers, as well as incentivising more women and youth to seek employment in this field of work.

<sup>1</sup>Government of Canada. Aquaculture statistics. [Aquaculture statistics \(dfo-mpo.gc.ca\)](https://aquaculturestatistics.dfo-mpo.gc.ca)



## APPENDIX

## Real GDP (2023) and Employment (2023) for Atlantic Canada

	Agriculture and Aquaculture			All Industries		
	Number	Share of		Number	Share of	
		Total	AAGR*		Total	AAGR*
Real GDP (M\$)	\$1,331.5	100.0%	2.1%	\$114,774.4	100.0%	0.9%
Newfoundland and Labrador	\$87.7	6.6%	-2.1%	\$28,950.2	25.2%	-0.5%
Prince Edward Island	\$258.1	19.4%	0.8%	\$7,267.1	6.3%	2.5%
Nova Scotia	\$384.8	28.9%	1.5%	\$43,765.1	38.1%	1.5%
New Brunswick	\$600.9	45.1%	4.2%	\$34,792.0	30.3%	1.1%
Employment (000s)	16.1	100.0%	1.4%	1210.0	100.0%	0.8%
Male	10.3	64.0%	0.0%	613.0	50.7%	0.8%
Female	5.8	36.0%	4.5%	597.0	49.3%	0.8%
15-24 years old	2.2	13.5%	0.3%	161.8	13.4%	0.8%
25-54 years old	9.3	57.3%	2.5%	765.4	63.3%	0.5%
55 years and older	4.7	29.2%	-0.1%	282.7	23.4%	1.6%
Worked full-time	14.7	91.1%	2.3%	1015.6	83.9%	0.9%
Worked part-time	1.5	9.0%	-4.9%	194.4	16.1%	0.2%
Self-employed	4.2	26.1%	-2.1%	124.5	10.3%	-0.7%
Employees	11.9	73.9%	3.0%	1085.4	89.7%	1.0%
Permanent job	9.3	57.5%	6.7%	923.3	76.3%	1.4%
Temporary job	2.6	16.4%	-4.1%	162.1	13.4%	-1.1%
Less than high school	2.6	16.3%	-4.3%	92.1	7.6%	-2.6%
High school graduate	5.2	32.3%	2.1%	284.9	23.5%	-0.4%
Postsecondary cert. or diploma	5.2	32.0%	2.2%	465.0	38.4%	0.6%
University degree	3.2	19.6%	6.8%	367.9	30.4%	3.3%
Newfoundland and Labrador	1.3	7.9%	-0.5%	236.8	19.6%	-0.1%
Prince Edward Island	4.1	25.2%	1.4%	89.0	7.4%	2.0%
Nova Scotia	5.3	32.6%	-0.3%	497.8	41.1%	1.1%
New Brunswick	5.6	34.5%	3.9%	386.5	31.9%	0.8%

Source: Statistics Canada, Labour Force Survey - Custom Table; Table 36-10-0402-01

\*Average annual growth rate for last ten years of available data (GDP 2014-23 and Employment 2014-23)

