The Trajectory of Immigrants' Exposure to Labour Market Power in Canada

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This paper investigates the trajectory of labour market concentration among immigrants in the years following their arrival in Canada, using tax administrative data. We find that immigrants initially enter labour markets with higher concentrations of foreign-born workers. However, this concentration gradually declines over time, indicating a shift toward more competitive and diverse employment environments as immigrants integrate. These findings contribute to a broader understanding of immigrant labour market assimilation and highlight the role of labour market power in shaping their employment trajectories.

JEL Codes: J21, J31, J42

Keywords: Labour market concentration, Monopsony power, Immigrant assimilation.

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1 Introduction

This chapter examines how immigrants' exposure to labour market power evolves over time. We show that newly arrived immigrants enter labour markets where immigrant employment is highly concentrated among a few firms. Over time, immigrants progressively transition into less concentrated labour markets—indicating that employer power over immigrants diminishes as they integrate.

We use comprehensive Canadian administrative tax records from the Canadian Employer-Employee Dynamics Database (CEEDD), and the Longitudinal Immigration Database (IMDB). We define local labour markets as combinations of provinces and 2-digit NAICS [1] industries. We measure labour market power through labour market concentration, which reflects the degree of employer dominance in hiring. For each market, we compute concentration for foreign-born workers using the employment-based Herfindahl–Hirschman Index (HHI). We find that immigrants enter labour markets with higher employer concentration than natives, with an average HHI of 0.063 compared to 0.035 for native-born workers, indicating that immigrant employment is about 77 percent more concentrated across employers.

Using an event-study framework where the event is defined as an immigrant's landing in Canada, we find that immigrants' exposure to concentrated labour markets gradually declines over their first decade in Canada. Male economic immigrants experience the most rapid improvement in labour market concentration, with their HHI declining approximately 20% faster than male refugees over the same period. Female immigrants also experience declining concentration over time, though the relative patterns by admission category differ markedly from males. Female refugees see their labour market concentration decline approximately 48% faster than female economic immigrants.

Overall, within just one year of arrival, approximately 31% of immigrants have changed their initial market, and by year ten, about 75% have switched industries within their province —reflecting rapid early transitions and a progressive reduction in exposure to employer market power.

Related Literature Existing research linking immigration and monopsony power has predominantly focused on static framework between immigrants and natives. Dustmann

[1] North American Industry Classification System

and Schönberg (2024) analyse how migration affects wage determination under monopsony, documenting that the wage effects of immigration depend on firms' wage-setting power and the elasticity of labour supply. Stephentino (2025) links employer concentration to the immigrant–native pay gap, showing that monopsonistic firms capture a disproportionate share of productivity gains when hiring immigrants. Edo (2025) monopsony to market efficiency, showing how the regularization of undocumented migrants can mitigate employer power by expanding workers' outside options.

In contrast, a separate body of research examines how immigrants and natives are distributed across jobs and locations, focusing on how immigrants' careers develop over time without directly considering employer power. Using U.S. data, Chiswick et al. (2005) find that immigrants tend to move into better jobs as they gain experience in the host country, which supports the idea that they gradually assimilate into the labour market. Examining Latino immigrants in the United States, South et al. (2005) show that immigrants also move between neighbourhoods and regions as part of a process of spatial assimilation, although this movement is often limited by language skills, income, and nativity. However, these studies do not connect mobility patterns to the level of labour market concentration.

This chapter bridges these two literatures by jointly examining employer market power and immigrant mobility, analyzing how immigrants' transitions across employers, sectors, and locations over time mitigate the concentration of their employment. We thereby provide a dynamic perspective on immigrant labour market assimilation in the presence of imperfect competition.

The remainder of the paper is organized as follows. Section 2 introduces the data sources, outlines sample restrictions, and discusses Canadian immigration policy. Section 3 presents the event-study design and estimation strategy for tracking labour market concentration faced by immigrants since their entry. Section 4 presents the empirical findings and Section 5 presents the robustness checks. Finally, Section 6 summarizes our findings and provides a conclusion.

2 Immigration Context, Data and Measurement

This section describes how we measure labour market power faced by immigrants, outlines the data sources, and explains how local labour markets are defined for the analysis.

2.1 Immigration Policy in Canada

Since 1867, over 17 million immigrants have settled in Canada. The share of foreign-born individuals in Canada has increased from 14.7% in 1951 to 23.0% in 2021 (Statistics Canada).

Immigration to Canada is governed by the Immigration and Refugee Protection Act (IRPA) of 2002. The federal government oversees immigration policy and administration for most provinces, while Quebec exercises full control over its immigration policies under the Canada-Quebec Accord. Immigrants are categorized into two main groups: economic immigrants, and refugees. Figure 1 shows the composition of these admission categories from 1980 to 2022. Economic immigrants are those granted the right to live and work in Canada permanently, while refugee claimants are initially temporary residents whose protection status is determined by the Refugee Protection Division (RPD). These policy distinctions guide the classification of individuals in the Longitudinal Immigration Database (IMDB) used in this analysis.

Figure 1: "*Economic Categories*" and "*Refugees*" admitted as Share of the total Immigrants admitted by year from 1980 to 2021.

2.2 Measuring Labour Market Power faced by Immigrants

We capture labour market power using standard concentration indices that reflect how employment is distributed across employers within a given market.

We use the employment-based Herfindahl–Hirschman Index (HHI) to measure the labour concentration. For each market, we calculated seperately the labour concentration of each group $g \in \{\text{Immigrants, Natives}\}$, defined as:

$$\text{HHI}_m^g = \sum_j (share_{jm}^g)^2, \quad \text{where} \quad share_{jm}^g = \frac{n_{jm}^g}{\sum_j n_{jm}^g} \tag{1}$$

Here, n_{jm}^g is the number of workers from group $g \in \{\text{Immigrants, Natives}\}$ working in firm j of market m (defined as Province $\times$ Industry). A higher HHI_m^g indicates that group $g \in \{\text{Immigrants, Natives}\}$ is concentrated among fewer employers, implying fewer job alternatives and potentially stronger monopsony power over that group (Berger et al., 2022; Azar et al., 2022).

A market that appears relatively unconcentrated overall may still be highly concentrated from the perspective of immigrants if they are disproportionately employed by a small subset of firms. Measuring concentration separately by group is particularly important in the context of immigration, as two groups working in the same geographic and industrial environment can face very different competitive conditions.

2.3 Data Sources

2.3.1 Canadian Employer-Employee Dynamics Database

We use the Canadian Employer-Employee Dynamics Database (CEEDD), maintained by Statistics Canada (2019), which integrates three key data sources. First, individual-level data come from annual tax files covering 95 percent of Canadian residents, including demographic information (age, sex, number of children, geographic location) and employer linkages through T4 records. Second, firm-level characteristics come from the National Accounts Longitudinal Microdata File (NALMF), including 2-digit NAICS industry classification. Third, immigrant-specific information comes from the Longitudinal Immigration Database (IMDB), which records admission category (economic vs. refugee), education at arrival, destination city, and country of birth.

2.3.2 Sample Restriction

We restrict the sample to individuals aged 18 to 60, for both foreign-born and native populations. For inidividual with multiple jobs within a given year, we identify the main job as the one associated with the highest annual earnings. We focus on immigrants classified as principal applicants. Finally, to ensure that we capture meaningful labour market participation, we define the start of employment as the first year in which annual earnings exceed CAD 10,000. This threshold helps exclude part-time workers with marginal labour force attachment at the landing year.

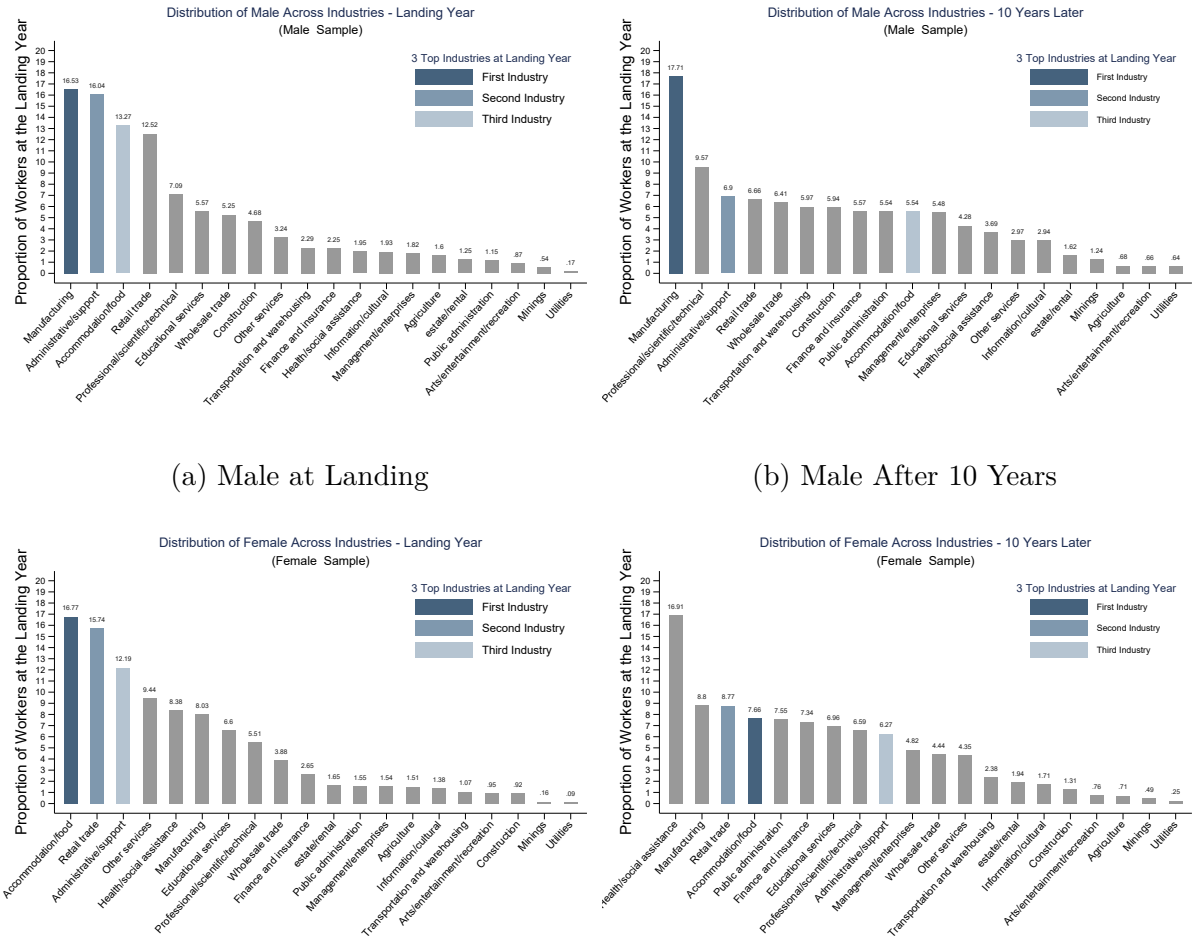
2.3.3 Summary Statistics

Figures 2 show the distribution of immigrant workers across industries at landing and ten years later, by gender. At landing, male immigrants concentrate in Manufacturing (16.53%), Administrative and Support Services, and Accommodation and Food Services, which together account for 45.84% of employment. Ten years later, the combined share of the top three industries declines to 34%. Economic immigrant women show similar patterns, with the top three industries' share declining from 36.77% to 24.94%.

A notable gender difference emerges in the Health industry. Among female immigrants, Health industry ranks consistently in the top five industries at both landing and ten years later, representing the only mid-to-high skill sector in the top five for women. In contrast, the Health industry remains marginal for male immigrants at both time periods, ranking among the lowest sectors.

This shift in the industry distribution provides early evidence of sectoral diversification over time.

Figure 2: Sectoral Distribution of Immigrants by Gender at Landing and After 10 Years



(a) Male at Landing

(b) Male After 10 Years

(c) Female at Landing

(d) Female After 10 Years

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Notes: The figure shows the proportion of immigrant workers employed in each industry at landing (left panels) and 10 years post-arrival (right panels). The top three industries at landing are highlighted for reference. Industries are ranked by employment share at landing.

Source: Authors' calculations using Business Employee Analytical Microdata (BEAM), 2001–2019.

3 Empirical Strategy

This section presents our empirical strategy to analyze how immigrants' exposure to labour market concentration evolves in Canada. We begin by describing the event-study framework that traces how this exposure changes over their first decade in the host coun-

try. We then present our method for summarizing how immigrant groups' labour market concentration evolves using slope-based indicators, which provides a measure for comparing patterns across groups.

3.1 Event Study Design

We employ an event-study methodology to analyze how immigrants' exposure to employer power evolves over time since arrival. The analysis allows us to trace how immigrant workers transition from concentrated initial employment to more competitive employment opportunities as they gain experience in the host country.

The empirical specification follows a standard event-study regression model:

$$HHI^{g}_{i,m,t} = \alpha + \sum_{\tau=0,\tau\neq 0}^{k} \beta_\tau D_{i,\tau} + X_{i,t}\gamma + \delta_p + \delta_s + \epsilon^{g}_{i,m,t} \tag{2}$$

where $HHI^{g}_{i,m,t}$ represents the HHI of group g in market m where the individual is working at time t. The event-time indicators $D_{i,\tau}$ equal one if the observation corresponds to τ years since landing for immigrant i, with the landing year ($\tau = 0$) serving as the omitted reference category.[2] The coefficients β_τ capture the dynamic effects of labour market concentration, measuring how an immigrant's exposure to labour market concentration changes relative to their baseline level in the landing year. Control variables $X_{i,t}$ include individual characteristics, while δ_p and δ_s represent province and sector fixed effects respectively.

3.2 Measuring the Speed of Deconcentration Using Relative Slopes

To compare how rapidly different immigrant cohorts reduce their exposure to employer concentration, we compute a relative slope indicator based on the estimated event-time coefficients from our event-study regression.

For any two cohorts A and B, the percentage relative slope is defined as:

$$Relative\ Slope(\%) = 100 \times \frac{Slope^A - Slope^B}{|Slope^B|}, \tag{3}$$

[2] τ is the number of years since landing in Canada, which is year of tax file t minus year of landing t_0

where *Slope* captures the average annual rate of decline in labour market concentration between the first and tenth years after landing.[3]

This measure expresses by how many percent cohort A disperses faster (or slower) than cohort B, enabling standardized comparisons of deconcentration speeds across immigrant subpopulations.

4 Results

This section presents empirical results on immigrant labour market dynamics in Canada, focusing on employment concentration and mobility patterns. We first document the initial concentration of immigrant employment relative to native-born workers. We then examine how immigrants change jobs and locations over time, and how this mobility contributes to a broadening of their employment across industries. Finally, we analyze how immigrants' exposure to employer concentration evolves over time, highlighting differences across admission categories and gender in the speed and extent of integration.

4.1 Immigrant vs. Native Labour Market Concentration

Figure 3 presents the distribution of labour concentration for Foreign-Born and Native markets between for the period 2001-2016, measured by the log of HHI. The density of markets using foreign-born individuals is noticeably shifted to the right, with a higher mean log HHI of 6.44 compared to 5.87 for natives. This suggests that immigrants are disproportionately employed in more concentrated labour markets—markets where a few employers account for a larger share of immigrants employment.

[3]Formally, $Slope = \frac{\hat{\beta}^{im}_{10} - \hat{\beta}^{im}_{1}}{9}$, where $\hat{\beta}^{im}_{\tau}$ denotes the estimated event-time coefficient τ years after arrival.

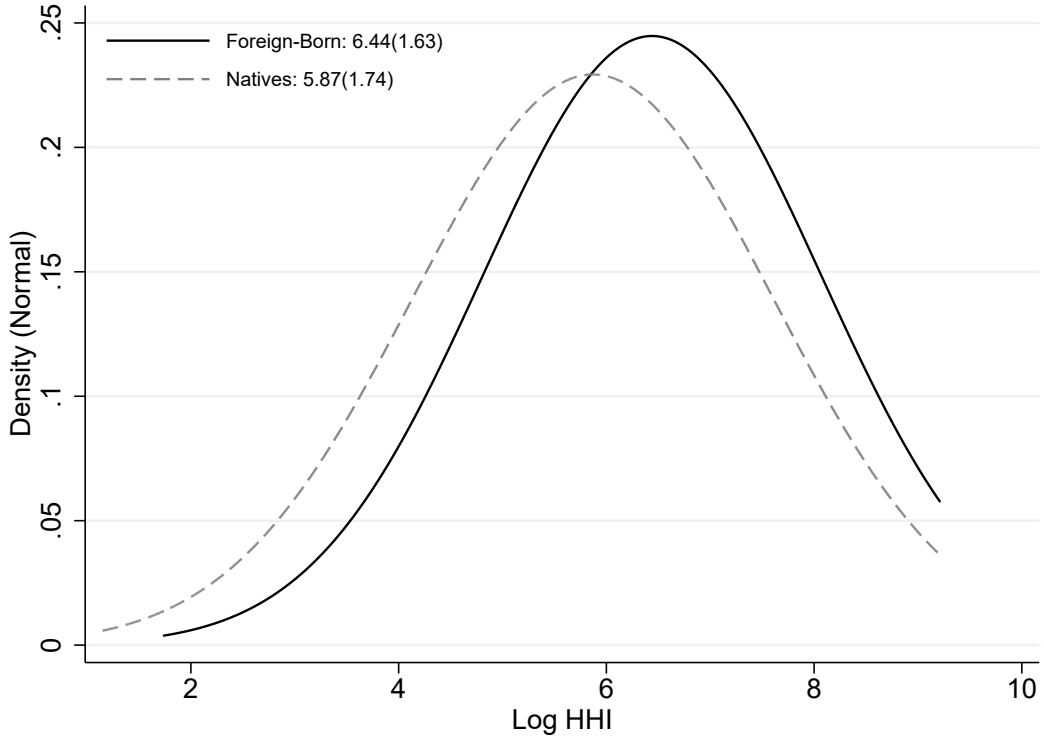

Figure 3: Distribution of labour Market Concentration: Foreign-Born vs. Natives

Notes: The figure shows kernel density estimates of log HHI (Herfindahl-Hirschman Index) for foreign-born and native workers. Higher HHI values indicate greater employment concentration across province-industry combinations.

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Source: Authors' calculations using Business Employee Analytical Microdata (BEAM), 2001–2019.

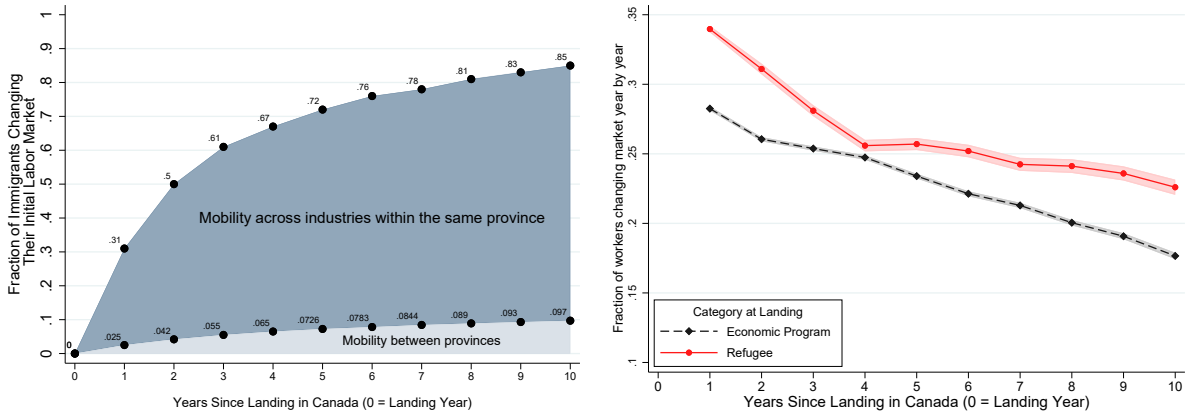
4.2 Immigrant Job Mobility and Transitions After Arrival

Figure 4 shows that immigrant mobility peaks in the first year after landing and gradually declines thereafter (controlling for age and calendar year). Within one year, about 31% of immigrants have changed their initial market, and by the second year roughly half have moved. This early adjustment phase is followed by a stabilization as immigrants find better job matches.

Most movements occur within provinces: by year 10, about 75% of immigrants have switched industries locally, while only around 10% have moved across provinces. Hence, mobility largely reflects sectoral rather than geographic transitions. However, this pattern

raises an important question. Language barriers and jurisdictional obligations to practice in a specific region limit immigrants' options, which in turn increases their exposure to local employer market power.

Figure 4: labour Market Mobility of Immigrants Over Time



(a) Cumulative Mobility Rates (b) Mobility by Immigration Category

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Notes: Panel (a) shows within-province and between-province mobility. Panel (b) compares economic immigrants and refugees.

Source: Authors' calculations using Business Employee Analytical Microdata (BEAM), 2001–2019.

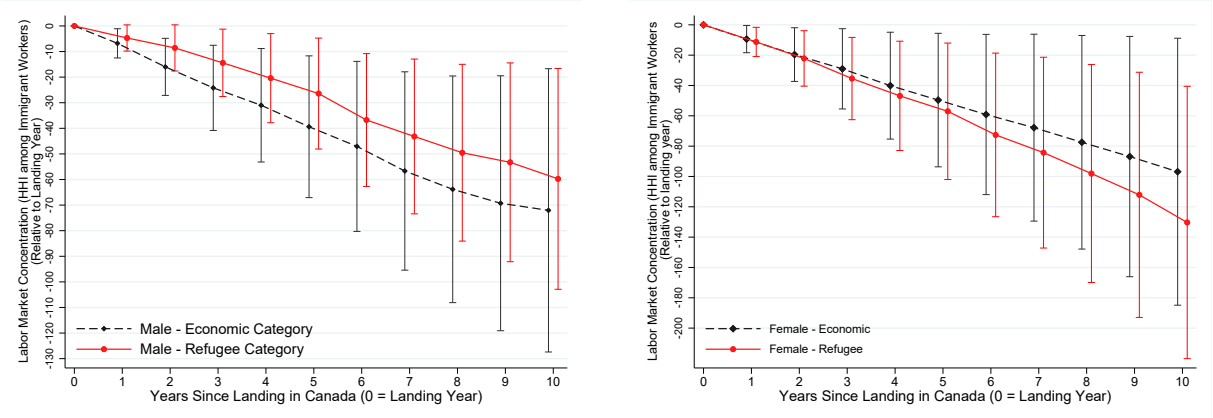
Figure 4 shows the annual probability of leaving the initial labour market by years since arrival, comparing economic immigrants and refugees. In the first year, about 34% of refugees and 28% of economic immigrants leave their initial job or industry. Mobility rates then decline steadily, falling to around 20% by year five and below 18% by year ten.

Throughout the decade, refugees consistently exhibit higher mobility, reflecting greater early labour market instability, whereas economic immigrants—selected partly for their employment prospects—show more stable trajectories from the outset.

4.3 Evolution of Immigrant Exposure to Employer Concentration

Figure 5 traces the evolution of labour market concentration for immigrants over the years since landing, using an event-study framework with separate estimates by admission category and gender. We observe a clear downward trend: immigrants' employment becomes markedly less concentrated as they spend more time in Canada. Focusing first on male immigrants, economic migrants experience a faster rate of diversification than refugees, with their labour market concentration declining approximately 20% more rapidly over time. This difference suggests that economic immigrants may benefit from better initial job matches or more targeted skill sets, facilitating movement into less concentrated markets. Female immigrants also experience declining concentration over time, though the relative patterns by admission category differ markedly from males. In stark contrast to the male pattern, refugee women diversify approximately 48% faster than female economic immigrants. This reversal suggests that the pathways to labour market integration differ substantially by both gender and admission category.

Figure 5: Event Study of labour Market Concentration by Years Since Landing



(a) Male workers: HHI Based on Foreign-born Workers

(b) Female workers: HHI Based on Foreign-born Workers

Note: This figure shows the event-time coefficients from Equation (2), relative to the landing year, separately for refugees and economic categories for each gender. Each point reflects the change in labour market concentration (HHI) among foreign-born workers at a given number of years since arrival in Canada. The y-axis shows changes relative to the landing year.

Explanatory Mechanisms. Over time, immigrants' employment becomes less concentrated across markets due to several adjustment mechanisms documented in the literature. At landing, many immigrants accept "survival jobs" in lower-tier occupations (Sweetman and Warman, 2014), driven by non-recognition of foreign credentials (Picot and Sweetman, 2012), limited valuation of prior work experience (Aydemir and Skuterud, 2005), language barriers (Hou and Coulombe, 2010), and licensing rules in regulated professions (Ferrer and Riddell, 2008). As these barriers ease through host-country experience and integration, immigrants diversify their employment across provinces, sectors, and employers, reducing concentration. This diversification process is particularly pronounced among refugees, who face greater initial barriers and were not selected based on specific economic needs.

The gender differences in diversification patterns, however, reflect sector-specific labour market dynamics rather than differential integration trajectories. Canada's severe health care worker shortages, particularly for elderly care, have prompted targeted recruitment through programs like Quebec's PEQ (Pandey and Townsend, 2011). This is reflected in immigrants' sectoral distribution at landing: health care ranks among the top industries for economic immigrant women, but among the least represented for men, who concentrate in manufacturing and other labour-intensive sectors. Economic immigrant women gradually transition into higher-skilled health care positions over time, but because they remain concentrated within this single sector during their upward mobility, their employment concentration decreases more slowly than refugee women, who engage in broader labour market exploration across multiple sectors and employers.

5 Robustness Checks

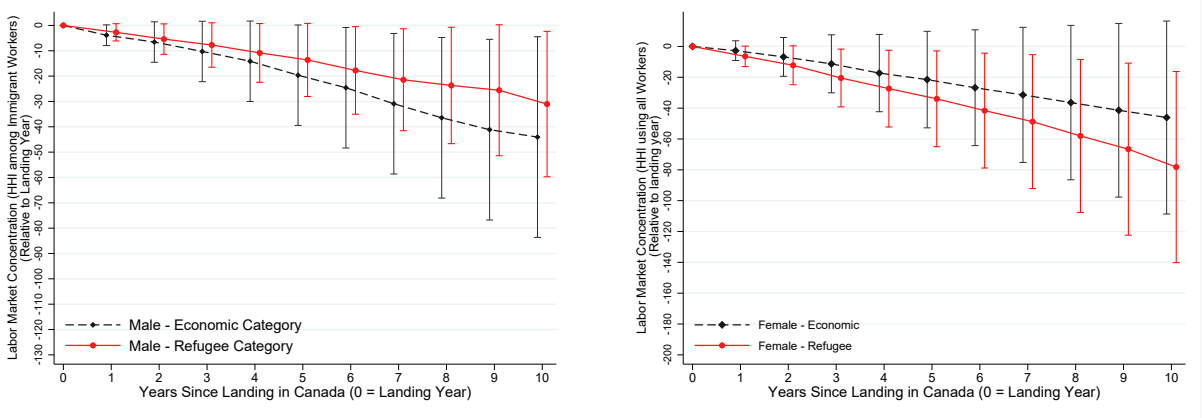
We assess the sensitivity of our main findings to alternative measurement approaches and model specifications.

5.1 Alternative HHI Measurement: All Workers

Our baseline HHI measures concentration among foreign-born workers, capturing the competitive environment specifically faced by immigrants. As a robustness check, we recalculate the HHI using all workers—both native and foreign-born—to assess whether

our results reflect overall market structure rather than immigrant-specific concentration patterns.

Figure 6 presents event-study estimates using this broader definition. The results closely mirror our main findings: immigrants experience declining concentration over time, with economic men diversifying steadily, refugee men at a slightly slower pace, and refugee women faster than economic women. This consistency confirms that our conclusions are robust to how labour market concentration is measured.



(a) Male workers

(b) Female workers

Figure 6: Event Study of labour Market Concentration by Years Since Landing

Notes: The figure shows the evolution of log HHI from landing to 10 years post-arrival for economic immigrants and refugees, separately by gender. Vertical bars represent 95% confidence intervals.

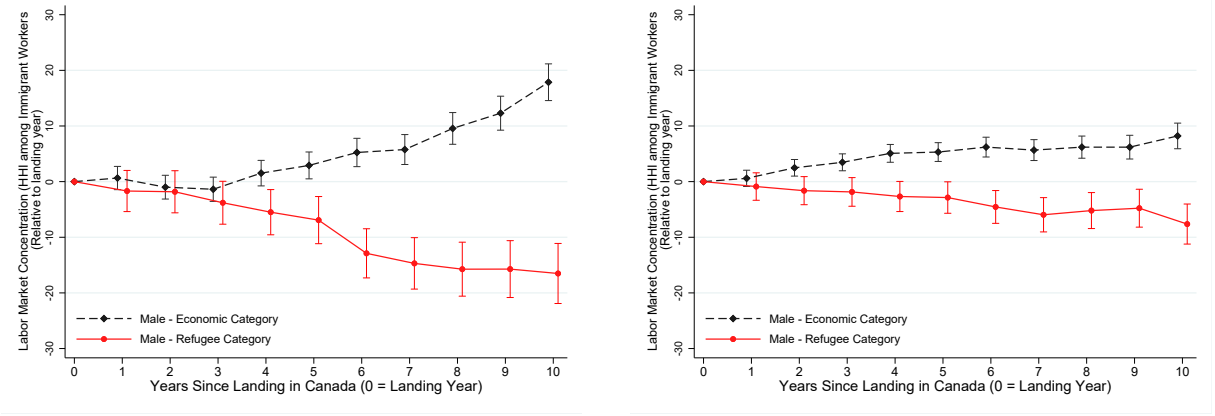
Source: Authors' calculations using Business Employee Analytical Microdata (BEAM), 2001–2019.

5.2 Specification Without Individual Fixed Effects

Our main specification includes individual fixed effects to isolate within-person trajectories from compositional changes across cohorts. We verify the importance of this choice by re-estimating the model without individual fixed effects.

Figures 7a and 7b reveal a striking divergence for male economic immigrants: without fixed effects, concentration appears to increase over time—the opposite of our main result. This reversal indicates that compositional shifts obscure individual trajectories. Later-arriving or higher-skilled immigrants may initially enter more concentrated markets, masking the fact that individuals progressively move toward less concentrated employ-

ment. For refugees and female immigrants, patterns remain qualitatively similar but with different magnitudes. These results validate our use of individual fixed effects to properly identify immigrant labour market integration dynamics.



(a) HHI: Immigrant workforce

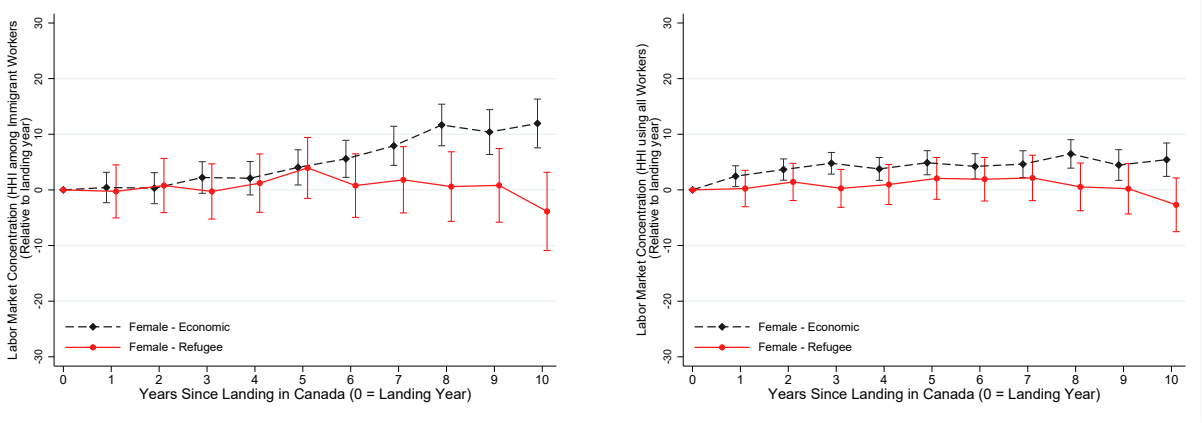
(b) HHI: All workers

Figure 7: Evolution of labour Market Concentration for Male Immigrants

1

Notes: Panel (a) measures HHI using only immigrant workers in each market. Panel (b) measures HHI using all workers. Estimates without individual fixed effects. Vertical bars represent 95% confidence intervals.

Source: Authors' calculations using Business Employee Analytical Microdata (BEAM), 2001–2019.



(a) HHI: Immigrant workforce

(b) HHI: All workers

Figure 8: Evolution of labour Market Concentration for Female Immigrants

1

Notes: Panel (a) measures HHI using only immigrant workers in each market. Panel (b) measures HHI using all workers. Estimates without individual fixed effects. Vertical bars represent 95% confidence intervals.

Source: Authors' calculations using Business Employee Analytical Microdata (BEAM), 2001–2019.

6 Conclusion

This paper examines the trajectory of labour market concentration of immigrants in Canada, using rich administrative data linked to the Longitudinal Immigration Database (IMDB). By measuring labour market concentration via the Herfindahl-Hirschman Index (HHI), we assess how immigrants' exposure to employer concentration evolves over time since landing.

Our results show that immigrants initially enter highly concentrated labour markets, often dominated by a small number of firms. However, labour market concentration declines steadily over the years, indicating that immigrants gradually move into less concentrated—and likely more competitive—employment environments. This trend suggests growing integration in the host country, improved job matching, and more opportunities as immigrants gain experience in the host country.

We document important heterogeneity by gender and admission category. Refugees tend to remain in highly concentrated markets, longer than economic immigrants, espe-

cially in the early years after arrival. While both male and female immigrants follow a similar downward trend in concentration, the speed and magnitude of this decline varies across groups.

Overall, our findings underscore the importance of market structure in shaping the immigrant labour market experience. They suggest that policies aimed at reducing barriers to mobility, especially for more vulnerable immigrant groups, could facilitate faster integration into more competitive labour markets.

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A Workers Mobility

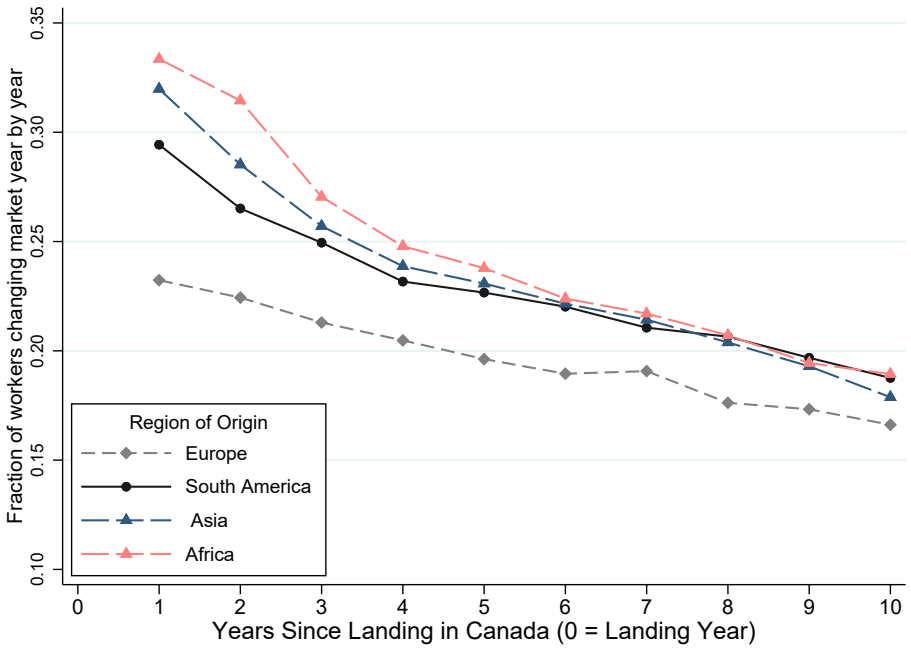

Figure 9: Probability of changing markets

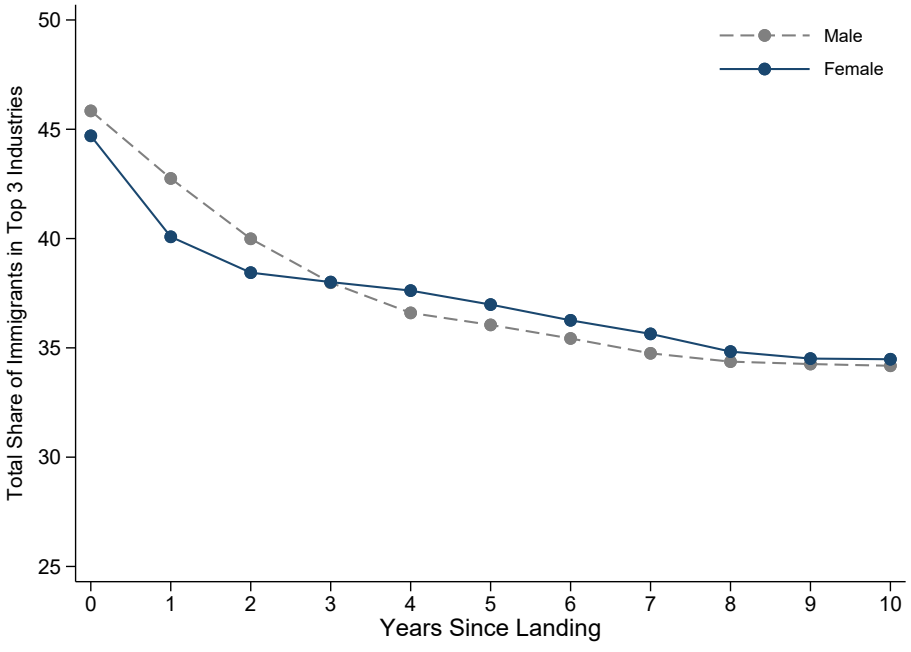

Figure 10: Total share of three top industries by years since landing

Table 1: Top Three Industries by Gender and Years Since Landing

Event time	Gender	Industry top1	Industry top2	Industry top3	Total share
0	female	Accommodation/food(16.77)	Retail trade(15.74)	Administrative/support(12.19)	44.7
1	female	Accommodation/food(15.31)	Retail trade(14.87)	Administrative/support(9.9)	40.08
2	female	Retail trade(13.76)	Accommodation/food(13.73)	Health/social assistance(10.95)	38.44
3	female	Retail trade(12.97)	Accommodation/food(12.83)	Health/social assistance(12.21)	38.01
4	female	Health/social assistance(13.6)	Retail trade(12.1)	Accommodation/food(11.92)	37.62
5	female	Health/social assistance(14.72)	Retail trade(11.31)	Accommodation/food(10.95)	36.98
6	female	Health/social assistance(15.45)	Retail trade(10.63)	Accommodation/food(10.18)	36.26
7	female	Health/social assistance(16.02)	Retail trade(10.01)	Accommodation/food(9.61)	35.64
8	female	Health/social assistance(16.36)	Retail trade(9.6)	Accommodation/food(8.87)	34.83
9	female	Health/social assistance(16.7)	Retail trade(9.15)	Manufacturing(8.66)	34.51
10	female	Health/social assistance(16.91)	Manufacturing(8.8)	Retail trade(8.77)	34.48
0	male	Manufacturing(16.53)	Administrative/support(16.04)	Accommodation/food(13.27)	45.84
1	male	Manufacturing(18.14)	Administrative/support(12.73)	Accommodation/food(11.88)	42.75
2	male	Manufacturing(18.31)	Administrative/support(11.14)	Accommodation/food(10.54)	39.99
3	male	Manufacturing(18.05)	Administrative/support(10.27)	Retail trade(9.66)	37.98
4	male	Manufacturing(18.33)	Administrative/support(9.34)	Retail trade(8.93)	36.6
5	male	Manufacturing(18.28)	Professional/scientific/technical(9.02)	Administrative/support(8.75)	36.05
6	male	Manufacturing(18.03)	Professional/scientific/technical(9.1)	Administrative/support(8.3)	35.43
7	male	Manufacturing(17.75)	Professional/scientific/technical(9.18)	Administrative/support(7.82)	34.75
8	male	Manufacturing(17.48)	Professional/scientific/technical(9.37)	Administrative/support(7.52)	34.37
9	male	Manufacturing(17.55)	Professional/scientific/technical(9.54)	Administrative/support(7.17)	34.26
10	male	Manufacturing(17.71)	Professional/scientific/technical(9.57)	Administrative/support(6.9)	34.18

A.1 NAICS

Table 2: NAICS 2-Digit Industry Classification

Code	**Sector**
11	Agriculture, forestry, fishing and hunting
21	Mining, quarrying, and oil and gas extraction
22	Utilities
23	Construction
31–33	Manufacturing
41	Wholesale trade
44–45	Retail trade
48–49	Transportation and warehousing
51	Information and cultural industries
52	Finance and insurance
53	Real estate and rental and leasing
54	Professional, scientific and technical services
55	Management of companies and enterprises
56	Administrative and support, waste management and remediation services
61	Educational services
62	Health care and social assistance
71	Arts, entertainment and recreation
72	Accommodation and food services
81	Other services (except public administration)
91	Public administration