

Rural Migration News

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Fresh Produce Industry Employment

The IFPP commissioned a study that estimated some 1.1 million US jobs were linked to the US fresh produce industry in 2021. The Specialty Crops Competitiveness Act of 2004 defines specialty crops as fruits and vegetables, tree nuts, dried fruits, and horticulture and nursery crops, including floriculture. The IFPP included these farm commodities and the industries that distribute them to consumers.

No single source provides data on employment in the fresh produce industry. The IFPP study estimated that average employment in fresh produce was 1.1 million in 2021, including 600,000 on farms.

The most current employment data are from the QCEW, which covers about 80 percent of on-farm employment. The QCEW reported that average employment in NAICS 1112 vegetables in 2021 was 84,000,

in fruits and nuts 1113 some 164,000, in nursery 1114 some 174,000, and of FLCs 115115 some 177,000, or a total of 599,000. If QCEW employment is 80 percent of total employment as BLS estimates, total on-farm employment in FVH commodities would be 750,000.

Agriculture is divided by the NAICS into 30+ subsectors. In 2020, five of these sectors accounted for three-fourths of total UI-covered farm wages paid of \$50 billion. Crop support includes FLCs but provides no information on the commodity where FLC employees are employed. Direct-hire fruit and nut, vegetable and melon, greenhouse and nursery, and dairy employment include only workers hired directly by farm operators in these NAICS codes.

Farm labor contractors employ more workers than any of the other Big 5; their average employment across the US was 172,000 in 2020. UI-covered crop employment averaged 900,000, including an average 550,000 workers who were hired directly and an average 350,000 who were brought to farms by crop support employ-

The Fresh Produce Industry Includes Farm and Nonfarm Businesses

NAICS Codes that Include Fresh Produce and Floral Supply Industry-relevant Employment

Wholesale and Retail			
42448	Fruit and vegetable wholesalers	44523	Fruit and vegetable markets
42493	Nursery stock and florists' supplies wholesalers	4452	Retail grocery stores (produce section)
Food Service			
71	Arts and entertainment (food service portion)	72	Accommodations, food services, and restaurants (food service portion)
Production			
1112	Vegetable production (farm)	1113	Fruit production (farm)
1114	Floriculture production and greenhouse nursery (farm)	115115	Support for crops (labor contractors/crew leaders)

600,000 of the Average 1.1 Million Fresh Produce Jobs were on Farms

Fresh Produce and Floral Supply Employment by IMPLAN Industries

	IMPLAN Industries	2019	2021 (most current)
Wholesale	Grocery And Related Product	100,149	91,464
	Floral Merchant	22,635	22,258
Retail	Grocers	314,927	320,330
Production	Vegetable And Melon Farming	143,416	139,773
	Fruit Farming	309,757	300,402
	Floriculture Production	41,827	41,024
	Farm Labor	127,606	123,898
Food Services	Entertainment, Museums, Etc.	2,805	2,278
	Restaurants, Accommodations	103,495	88,665
Total		1,166,616	1,130,092

ers. Since UI-covered employment includes only 80 percent of crop employment, total employment on crop farms averaged 1.1 million, and over two million unique workers were employed on crop farms due to seasonality and turnover.

The fresh produce commodity with the most direct-hire workers is apples, where average employment in 2020 was 33,000 or 20 percent of the average 165,000 workers who were hired directly by US fruit and nut farms. There were more unique workers employed on apple farms, perhaps 100,000, when accounting for seasonality and turnover and workers who were brought to apple farms by FLCs.

The IFPP Estimated Declining On-Farm, Wholesale, and Food Service Employment, and Rising Retail Employment



Not all the employment in FVH agriculture is in fresh produce; tree nuts and wine are generally considered non-perishable after harvest. Most of the two million average employment in NAICS 71, arts and entertainment, did not involve fresh produce, nor did much of the 12.2 million average employment in NAICS 72, accommodation and food services.

5 of the 30+ Ag Sectors Accounted for 3/4 of UI-Covered Farm Wages in 2020



The IFPP reported that California accounted for 35 percent of fresh produce industry employment, followed by WA, FL, TX, and NY. The top five states accounted for 60 percent of fresh produce industry employment.

FLCs Often Bring Workers to Farms to Perform Specific Seasonal Tasks Such as Harvesting Fruit

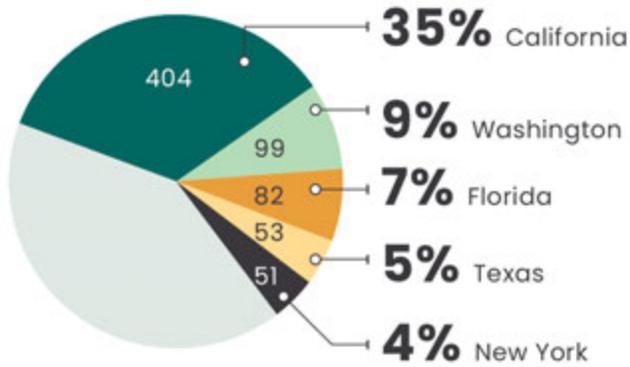


U.S. Apples had the Highest Average Employment Among Commodities at 33,000 in 2020



5 States Accounted for 50% of Fresh Produce Industry Employment

Distribution of Fresh Produce and Floral Supply Industry Employment by State (in thousands)



The IFPP Estimated that 55% of Employment in U.S. Fresh Produce is on Farms



Source: <https://www.freshproduce.com/resources/advocacy/us-economic-impact-fresh-produce-and-floral-industries/>

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