Employment in California agriculture (NAICS 11) averaged 404,000 in 2020, 10 percent more than average agricultural employment of 367,000 in 1990. Seasonality, as measured by the peak-trough ratio or peak-month employment divided by trough-month employment, fell 22 percent over three decades, from 1.8 in 1990 to 1.4 in 2020.

Rising farm employment, declining seasonality, and an aging and settled farm workforce have reduced farm worker migration and flexibility. Most farm workers have one farm employer a year, although that employer may be a labor contractor who moves workers from one farm to another. Mexican-born H-2A guest workers are the fresh blood in the farm workforce, and they are about a decade younger than the older and settled unauthorized Mexican-born workers who arrived in the 1990s and early 2000s.

**Data**

California requires all employers who pay $100 or more in wages to enroll in the state’s unemployment insurance system and pay taxes of 1.5 percent to 6.2 percent on the first $7,000 of each employee’s annual wages (from $105 to $434) to the Employment Development Department to cover the cost of UI benefits for laid off workers. Employers also report their total employment for the payroll period that includes the 12th of the month. These monthly employment numbers are summed and divided by 12 months to generate average employment and determine the peak and trough employment months for detailed industries such as strawberries and vegetables.

California’s agricultural employment (NAICS 11) ranged from a high of 465,000 in May to a low of 344,000 in March in 2020, generating a peak-trough ratio of 1.4. More than 465,000 workers are employed on California farms sometime during the year due to payroll periods that are typically weekly and worker turnover. Workers who are employed only in payroll periods that do not include the 12th of the month are excluded from average employment, such as those who work only during the first, third, or fourth weeks of the month. About 880,000 unique workers were reported by agricultural employers to EDD sometime in 2020, a ratio of 2.2 workers per average or year-round equivalent job.

**Trends**

California became the leading farm state by sales in 1949, when Los Angeles county led US counties in farm sales. The demand for California farm commodities rose as the state’s population doubled between 1950 and 1970, from 10 million to 20 million, and farm sales grew fastest in the San Joaquin Valley after water projects allowed more acres...
to be irrigated and suburbanization reduced the availability of farm land in southern California and coastal areas.

Three San Joaquin Valley counties, Fresno, Kern, and Tulare, accounted for 20 percent of California farm sales in 1949, a third in 2000, and almost half of the state’s farm sales in 2020.

New orchards and dairies in the San Joaquin and Sacramento Valleys were often larger and more efficient than the coastal farms they replaced, and their higher productivity was reflected in rising yields. Average yields of many fruits and vegetables doubled and tripled over the past three decades, as with bell peppers and cantaloupes, and rose over 50 percent to 33 tons an acre for strawberries.

The major change in California crop farming over the past half century has been the rising share of high-value fruits and nuts, vegetables and melons, and horticultural specialties such as flowers and plants in the state’s crop sales. In 1960, the value of FVH commodities was two-thirds of the total value of California crops. Since 2000, the value of FVH commodities has accounted for over 90 percent of the value of California crops, reflecting growing consumer demand for fresh produce and nursery plants.

Cotton was California’s most valuable crop in 1950. By 2000, cotton was the sixth most valuable crop, and by 2020 cotton was no longer among the state’s top 20 crops.

California’s farm sales were $17.8 billion in 1990, including $4.4 billion worth of fruits and nuts and $3.9 billion worth of vegetables. Farm sales were $49.1 billion in 2020, including $20.6 billion worth of fruits and nuts and $7.8 billion worth of vegetables, and $6.3 billion worth of greenhouse and nursery commodities. The nominal value of fruits and nuts quadrupled over three decades, while the value of vegetables doubled.

Many fruits and vegetables are labor intensive, so expanding production increased farm worker employment. Rather than hiring workers directly, many farmers turned to crop support service firms, nonfarm businesses that bring workers to farms to accomplish specific tasks. For example, farmers may rely on farm labor contractors to bring crews of workers to prune, thin, and harvest their crops, and these FLCs may be the sole employers of the workers they bring to farms or joint employers with the farms where their employees work.

Between 1990 and 2020, the share of farm workers who were hired directly fell while the share of workers brought to farms by crop support service firms rose. Combined crop and crop support employment accounts for over 90 percent of
California’s agricultural employment and, within crop support employment, the FLC share rose from 60 percent to 67 percent over three decades.

Four commodity groups account for three-fourths of California’s direct-hire crop employment: grapes, strawberries, other berries, and non-citrus tree fruits. Between 1990 and 2020, average direct-hire employment in grapes fell by almost half, strawberry employment doubled, employment in other berries such as blueberries and raspberries tripled, and average employment in non-citrus tree fruits such as peaches, nectarines and plums fell by a third.

Seasonality

Farming relies on biological production processes, and crops require the most labor during the summer months, making most crop work seasonal rather than year-round. However, the gaps between employment during the peak and trough months are shrinking. Between 1990 and 2000, average agricultural employment rose by almost 10 percent, from 367,000 to 400,000, and rose especially fast during the winter and spring months, reducing the statewide peak-trough ratio from 1.8 in 1990 to 1.6 in 2000.

Seasonality decreased more in the 21st century. Between 2000 and 2010, average employment fell from 400,000 to 380,000, and the peak-trough ratio remained at 1.6. Between 2010 and 2020, average employment rose above 400,000, but the peak-trough employment ratio fell to 1.4 as employment rose during the winter months and was stable during the peak summer months.

FLCs

Declining seasonality was accompanied by a rising share of workers brought to farms by crop support services, especially farm labor contractors. The FLC share of average agricultural employment rose from 20 percent to 35 percent between 1990 and 2020. The largest jump in the FLC share of agricultural employment occurred in the 1990s, when there was an influx of unauthorized Mexican workers seeking jobs at a time of low US unemployment.

The FLC share of California agricultural employment was stable between 2000 and 2010, but jumped again between 2010 and 2020. The FLC share of the state’s average agricultural employment is highest during the summer months of May through August.

Regions

Statewide trends are mirrored in the three regions account for over 90 percent of the state’s average agricultural employment: the San Joaquin Valley, the Central Coast region centered on Monterey, and the South Coast that includes Santa Barbara and Ventura counties.

The San Joaquin Valley from San Joaquin county in the north to Kern county in the south accounts for half of the state’s average agricultural employment. SJV average agricultural employment rose from 170,000 in 1990 to 200,000 in 2000, dipped to 185,000 in 2010, and was almost 200,000 in 2020.

Seasonality often increases in smaller geographic areas, but the peak-trough ratio fell more in the SJV than it did statewide. The SJV peak-trough ratio fell from 2.2 in 1990 to 1.4 in 2020, more than the drop in the California peak-trough ratio, which fell from 1.8 to 1.4 over these three decades.
The Central Coast region includes Monterey county, the US salad and berry bowl. Average employment in Central Coast agriculture rose from 54,000 in 1990 and 2000 to 70,000 by 2020 or a sixth of California’s agricultural employment, reflecting more strawberry acreage.

Seasonality is more pronounced in the Central Coast than in the SJV, peaking in July 2020 at 89,000 and reaching a low of 46,000 in January 2020 for a peak-trough ratio of 1.9, significantly higher than the 1.4 peak-trough ratio in the SJV.

The South Coast, which includes the six coastal counties from San Luis Obispo in the north to San Diego in the south, had average agricultural employment of 70,000 in 2020, the same as the Central Coast. Growth in average agricultural employment was slower in the South Coast than in the Central Coast over the past three decades, and seasonality declined as employment rose during the winter months.

Berries

Employment in strawberries (NAICS 111333) and other berries (NAICS 111334) increased with the expansion of production. California strawberries were worth $2 billion in 2020, raspberries $405 million, and blueberries $215 million, making total berry sales over $2.6 billion.

Average employment in berries more than doubled from 16,000 to 36,000 between 1990 and 2020, while seasonality declined from a peak-trough ratio of 5.9 to 2.5 over three decades. In 1990, berry employment was lowest at 5,000 in January and highest at 28,000 in May. In 2020, January was still the trough month with almost 20,000 workers employed, less than half of the 49,000 in June. Berry employment in January tripled between 1990 and 2020 and doubled in May and June.

Future

Over the past three decades, average employment in California agriculture (NAICS 11) rose by 10 percent to 404,000 and seasonality declined due to more employment during the winter months. The FLC share of California agricultural employment rose from 20 percent in 1990 to 35 percent in 2020.

The San Joaquin Valley accounts for half of California’s agricultural employment, and seasonality in the SJV declined faster than state-wide. The Central Coast centered on Monterey county accounts for a sixth of California’s agricultural employment, and its farm employment is more seasonal than in the SJV. The South Coast region has the same average employment as the Central Coast, about 70,000, and experienced less growth than the Central Coast between 1990 and 2020.

These trends, viz, stable average employment, decreasing seasonality, and more workers brought to farms by FLCs, are likely to continue.

References


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