

# Labor & Immigration in US Food/Ag

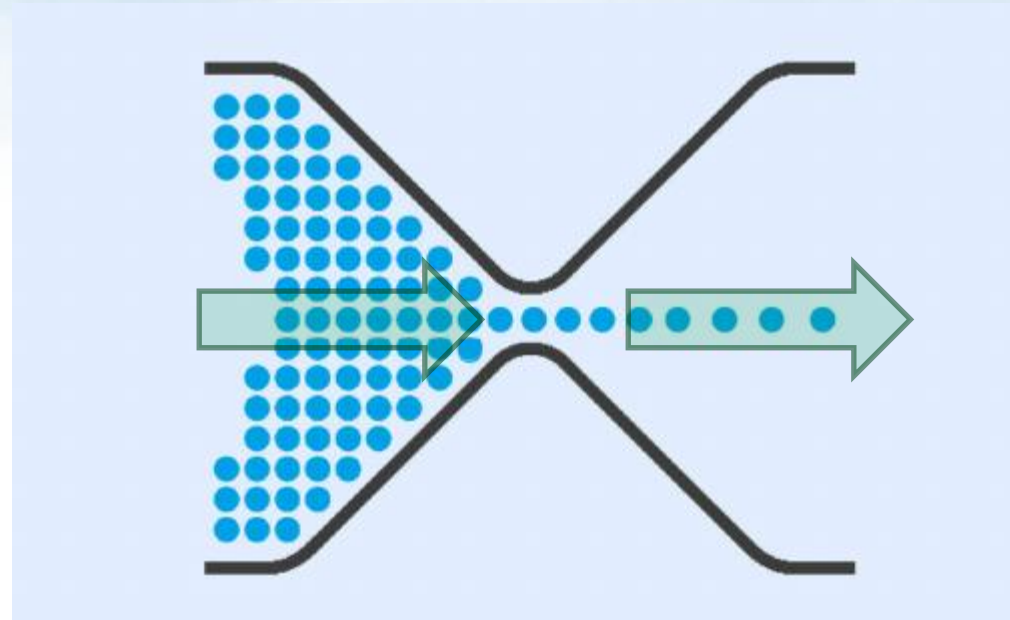
## October 2025



## Potentially Impacted Activities:

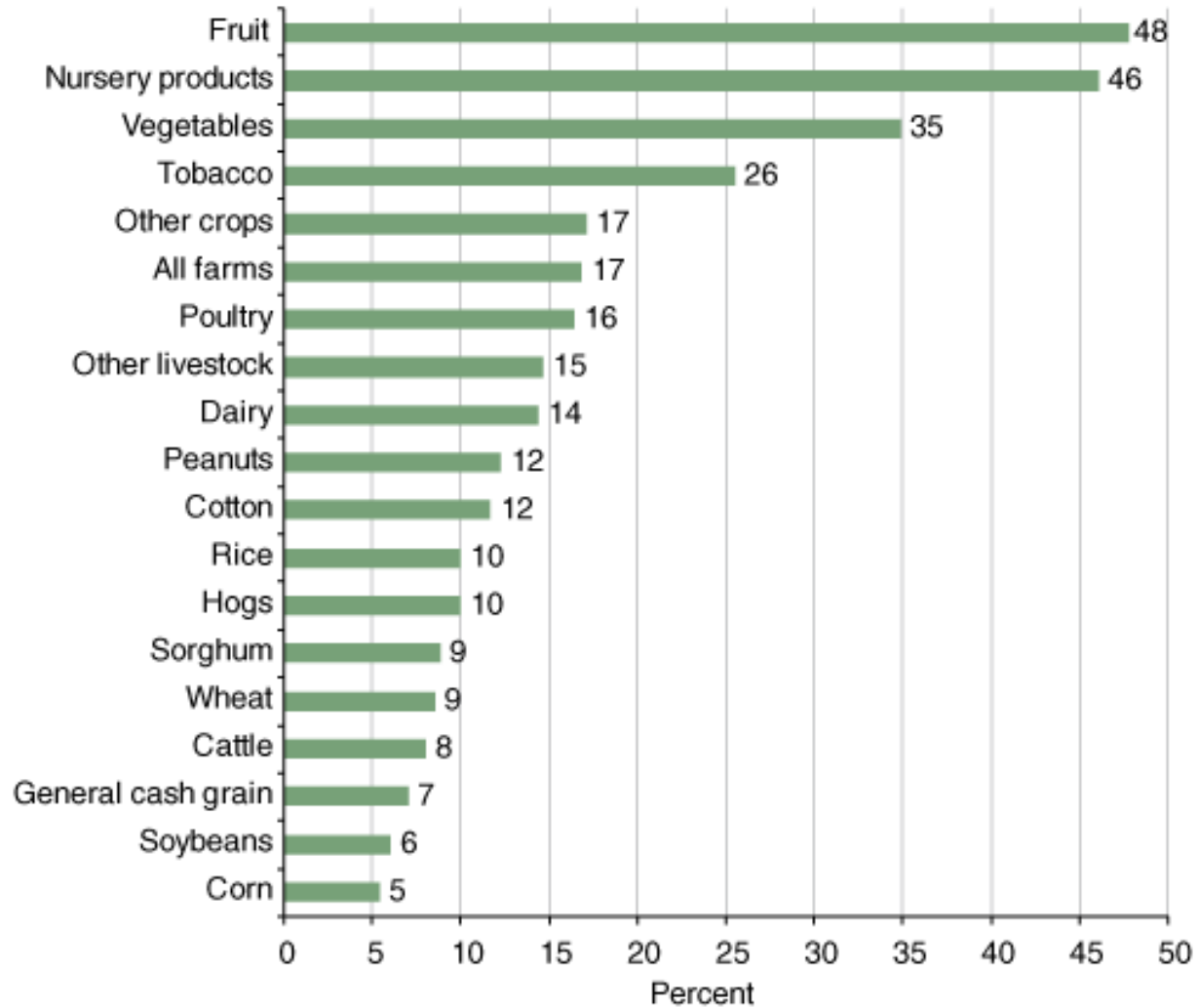
- Timely harvesting of fruits, vegetables and nursery products
- Daily livestock processing (beef, pork, chicken)
- Milking cows 3x/day
- Restaurant cooks and waitstaff

***- The labor bottleneck challenge has been festering for many years, but become exaggerated by labor disruptions due to Covid***



# Labor availability is critical for many aspects of farming

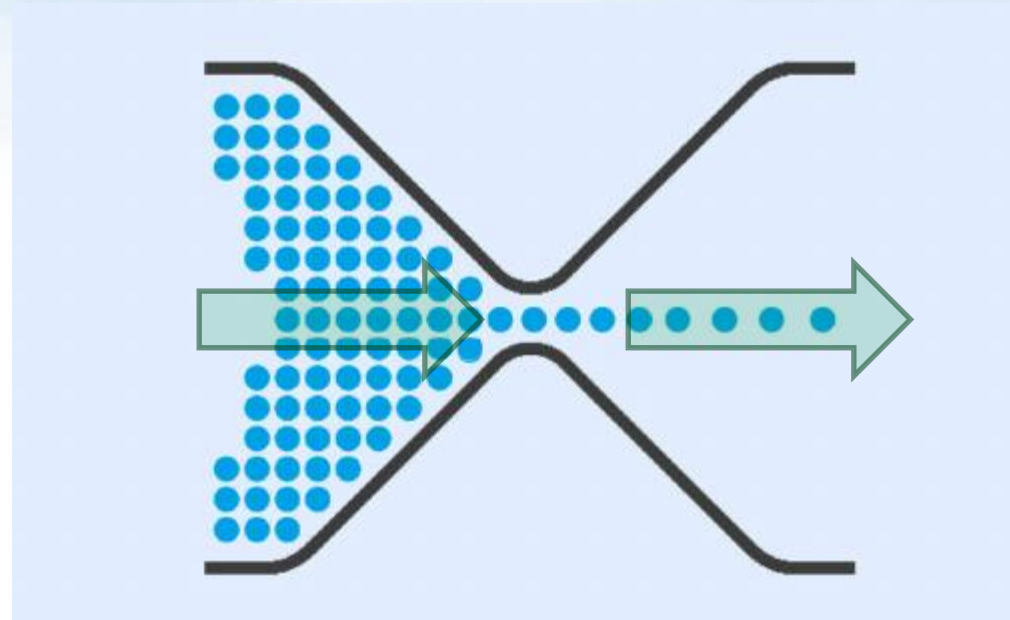
Hired labor accounts for a large share of production costs for some crops



Source: USDA, Economic Research Service using data from USDA's 2006-10 Agricultural Resource Management Survey.

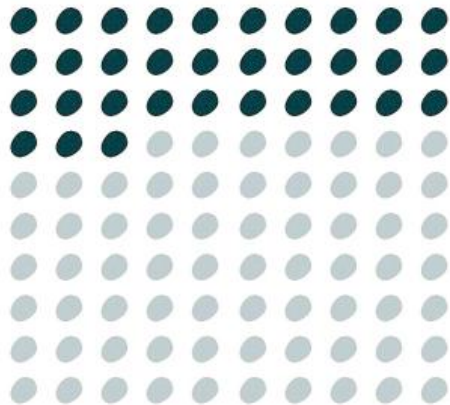
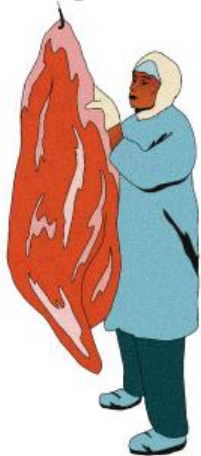
## Common Themes:

- **Lower wages paid**
- **... but industry expertise is often very valuable**
- **Higher rates of turnover**
- **High degree of dependence upon immigrant labor**
- **Large share of individuals with HS degree (or less)**

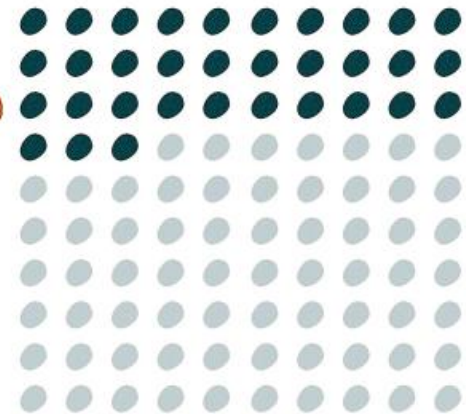


# Importance of Immigrants to the U.S. Food Chain (Source: National Restaurant Association survey)

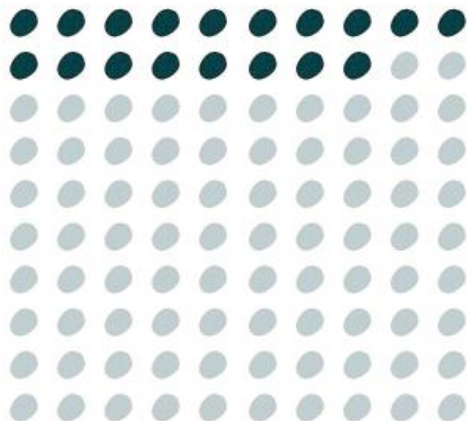
Immigrants comprise 33% of meat processing workers.



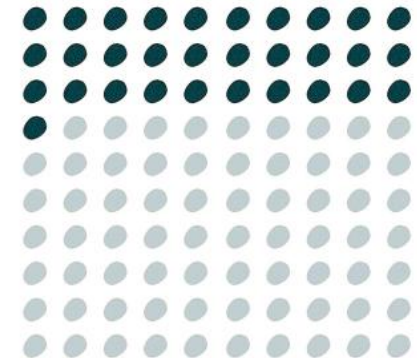
Migrants also make up more than one-third of the workforce in commercial bakeries.



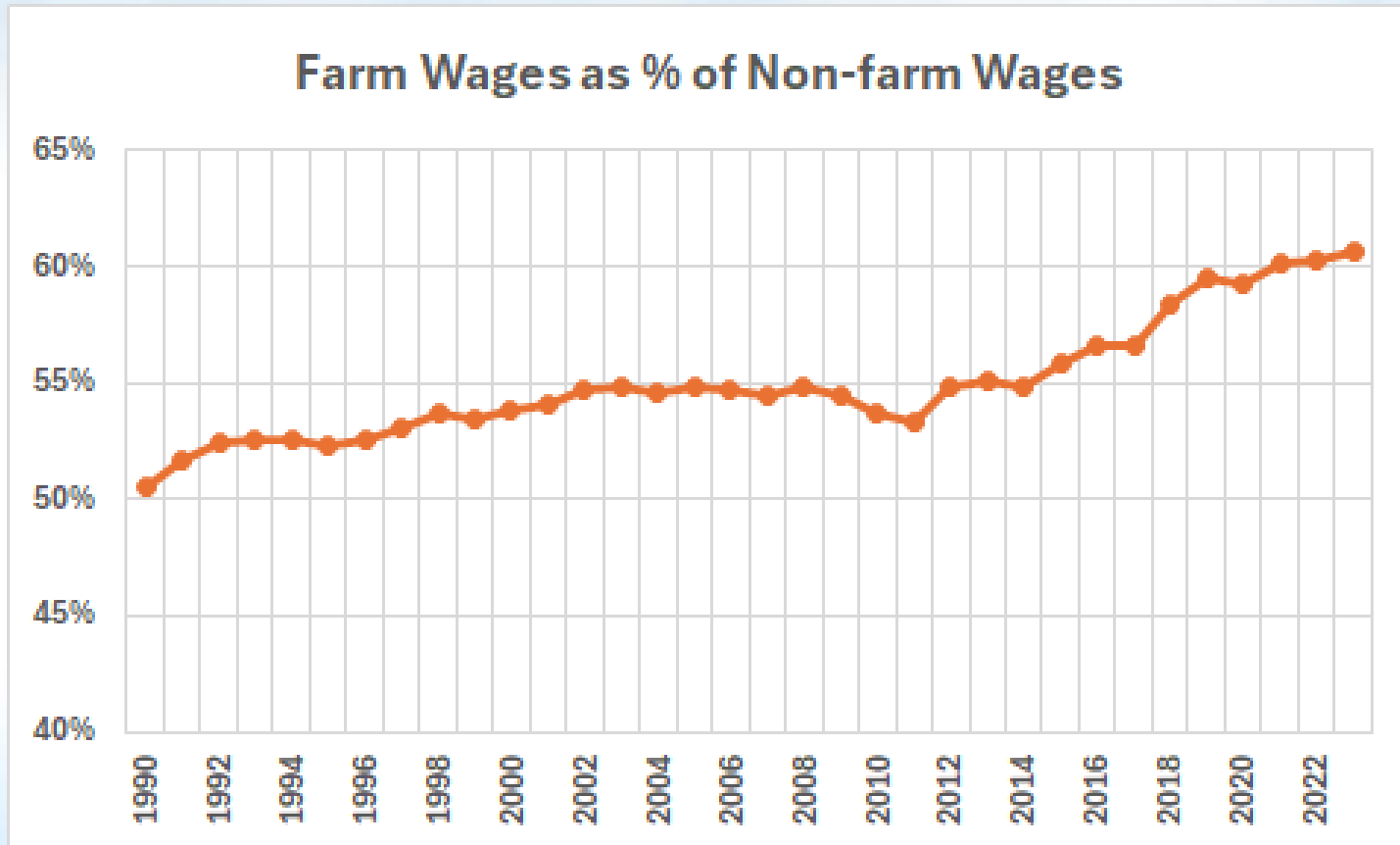
18% of waitstaff ...



including 31% of cooks ...



# Relatively Low Wages for Farm Jobs



# Labor Force Participation

- Typically less educated, majority non-US

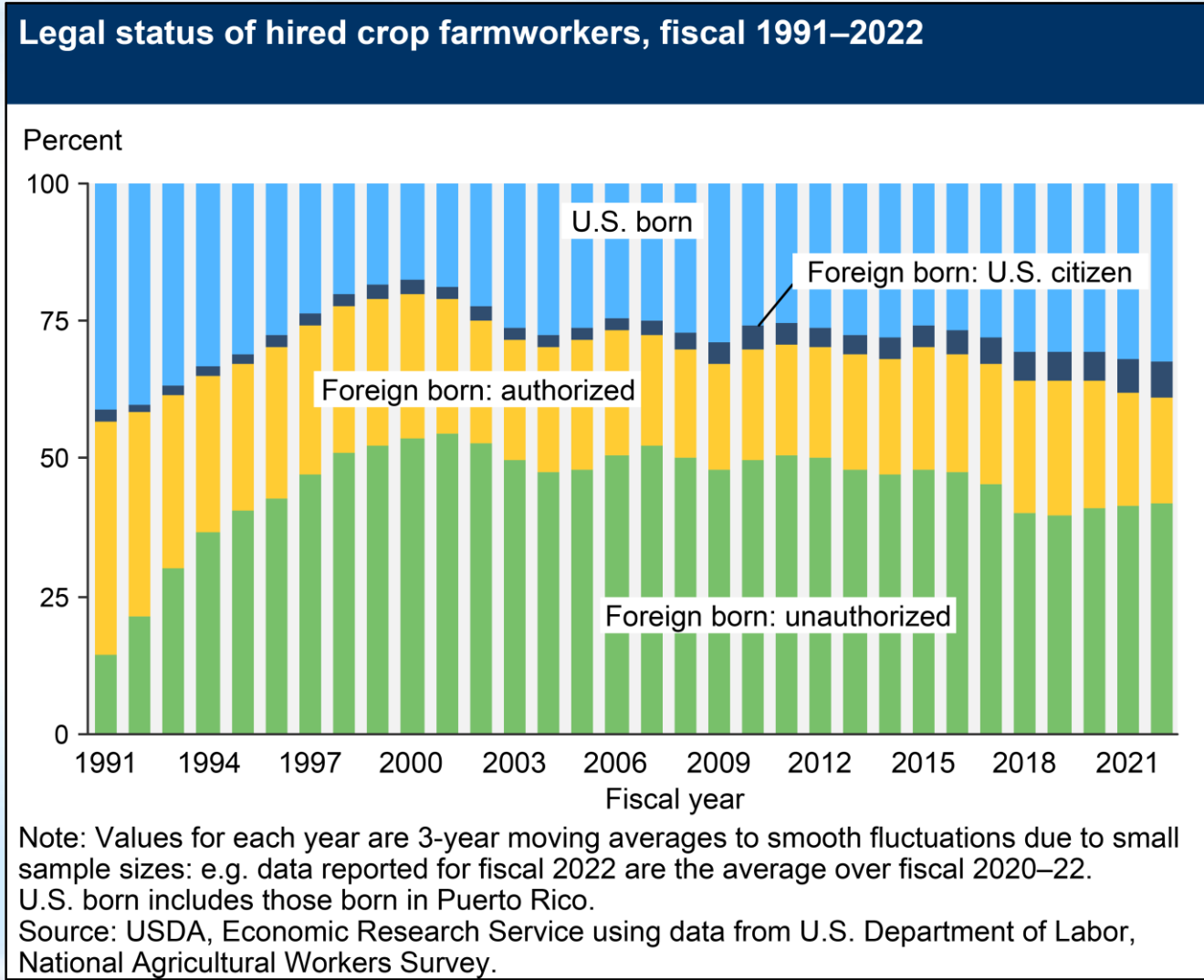
	All Workers	All Ag Jobs	Farm Laborers
<b>&lt; HS Degree</b>	<b>8%</b>	<b>31%</b>	<b>44%</b>
<b>Born Outside US</b>	<b>19%</b>	<b>39%</b>	<b>54%</b>
<b>Hispanic</b>	<b>20%</b>	<b>47%</b>	<b>63%</b>

**(Source: American Community Survey)**

# H-2A (Temporary Ag Workers Program)

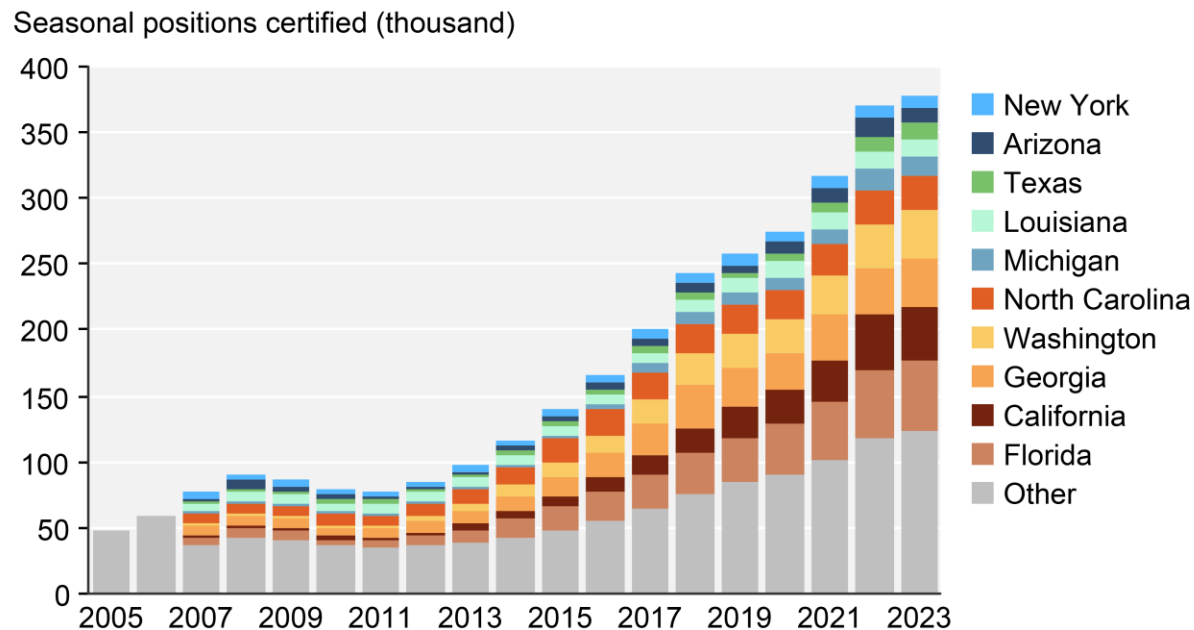
- **Valuable/important tool for US agriculture**
  - **Most notably: fruit and vegetable farms**
- **Size of Program (FY2024):**
  - **371K out of a total of 2.1 mm hired farm employees (17%)**
- **Employment must be temporary or seasonal**
  - **Limited to 10-month contracts, but may ask for extensions**
  - **Less than 2% over-stay their visas**
  - **Not a viable option for dairy farmers, meat packing plants**
- **Farmers using H-2A must prove inadequate availability of domestic workers, and no adverse impact wages**
  - **In 2024, the minimum “Adverse Effect Wage Rate” (AEWR) was \$17.50**
- **Fees for using the H-2A Program (“I-129 fees”) – as of April 2024:**
  - **Large employers: \$1130-1690**
  - **Small employers: \$760-845**

# (H-2A workers – included in “foreign born authorized”??)



# Growing Dependence Upon “H2-A” Program

## U.S. H-2A (temporary agricultural employment of foreign workers) positions certified by State, fiscal years 2005–23



Note: State-level data are not available for fiscal years 2005–06. Individual States identified in the chart were the top 10 in the number of H-2A jobs certified in fiscal 2023. About 80 percent of job certifications result in visas being issued to H-2A workers—some employers do not follow through to hire H-2A workers and some workers fill two certified jobs.  
Source: USDA, Economic Research Service using data from U.S. Department of Labor, Office of Foreign Labor Certification.

# Immigration & Labor Supply:

## - What are the key risks and challenges

- **Timeliness of consistent labor access remains critical**
- **Limited labor-saving technology/alternatives**
- **Slower US population growth is leading to a shrinking pool of labor**
  - **Especially for less technical jobs**
- **Adverse White House posture toward immigrants reduces potential labor pool**
- **Inelastic demand for key consumer staples**
  - **Milk, beef, pork, fruits, vegetables**

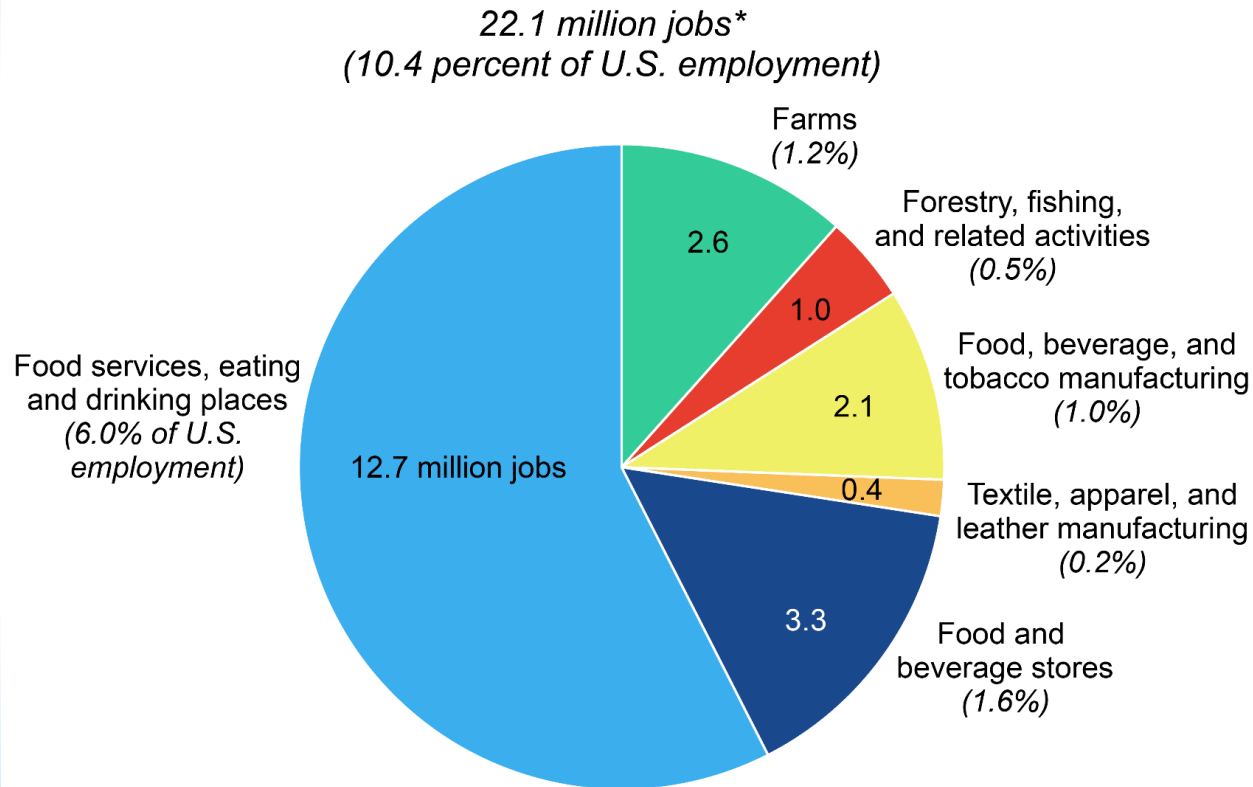
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## October 2025



# 10% of US Employed Work in Food/Agriculture

## U.S. employment in agriculture, food, and related industries, 2022



\*Full- and part-time jobs. Categories may not sum to totals because of rounding.  
Source: USDA, Economic Research Service using data from U.S. Department of Commerce, Bureau of Economic Analysis (SAEMP25N), as of September 29, 2023.

# Key findings about U.S. immigrants

- from the Pew Research Center

## **Pew Research Findings – as of June 2025:**

- **52 mm immigrants lived in the US (15% of all residents)**
  - **22% from Mexico**
- **Status of Foreign-born Population (as of 2023)**
  - **73% were lawful immigrants**
  - **27% were unauthorized immigrants**
- **Employment of Immigrants**
  - **19% of the US workforce was immigrants**
    - **13% lawful and 6% unauthorized**
- **Where Do Immigrants Live**
  - **Most in 4 states (CA, TX, FL and NY)**
- **Educational Attainment**
  - **46% have HS degree or less (vs. US-born 34%)**