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## **Manufacturing Risk: A Regional Analysis of Workplace Compliance in California's Meatpacking and Processing Industries<sup>1</sup>**

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### **SUMMARY**

California's meatpacking and processing industries exhibit major regional disparities in inspections per 1,000 workers and violations per inspections. In this brief, we examine US Census Bureau- American Community Survey 2015-2021 data and US Department of Labor- Occupational Safety and Health Administration (OSHA) 2015-2023 data. We find that the Central Valley has the state's second highest rates of inspections per 1,000 employees, and more than half of the state's unplanned (accident, complaint or whistleblower-based) inspections—but also the second-lowest rate of violations per inspection. We suggest that high unplanned inspections and low violations may indicate a lack of agency enforcement and business. We recommend policy reform that sets a standard for workplace health and safety standards across all regions.

### **FINDINGS**

The Central Valley has not only more animal slaughtering and processing industry jobs than any other California region—its higher rates of unplanned (e.g. accident, complaint and referral) investigations and low rates of violations-per-inspection suggest greater health and safety non-compliance.

We examined US Census Bureau- American Community Survey data from 2015-2021 to generate an estimate of the number of workers in California's animal slaughter and processing industry. For this we selected North American Industry Classification System (NAICS) code 3116, "animal slaughtering and processing," and weighted estimates for all persons employed in this industry. We also examined US Department of Labor- Occupational Safety and Health Administration (OSHA) records from January 1, 2015 to November 15, 2023. We drew upon "closed" cases from these OSHA records, not currently open, ongoing investigations.

Our estimates suggest that the Central Valley region had 42.9% of California's animal slaughtering and processing (AS&P) industry jobs—despite having only about 11% of the state's

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<sup>1</sup> Last updated November 20th, 2023.

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population (see table 1.1).<sup>3</sup> The Los Angeles County region had the next largest AS&P industry workforce, at 27.6% of the state's total followed by the Bay Area with 10.3% total. All other regions had less than 8% of the state's share of AS&P workers.

Central Valley animal slaughtering and processing industry firms accounted for an even higher share of the state's industry inspections: 47% (see table 1.2). Per capita, the Valley's rate of AS&P inspections was second highest among the state's ten regions. For every 1,000 employees in the AS&P industry, the valley had 11.2 inspections (see figure 1).

The vast majority of the valley's AS&P inspections were *unplanned*: accident, complaint or whistleblower-related. OSHA categorizes these inspections as those of highest risk and priority, suggesting higher worker health and safety non-compliance in the valley. In 2015-2023, while over one in five (21.2%) of the state's *planned* inspections in AS&P were carried out in the valley, more than half (56.2%) of the state's unplanned inspections were carried out in valley. The valley had more unplanned inspections than all other regions combined.

Lastly, the valley exhibited some of the lowest rates of industry enforcement in the state. Almost every other California region averaged two or more violations per inspection. However, the Central Valley averaged only 1.4 violations per inspection—second-lowest in the state (with the exception of the Sierra, which only had two inspections and violations) (see table 3.1). The Central Valley's average violations per inspection (1.4) was far lower than that of Los Angeles (4.2) and the Bay Area (2.0), the regions with the next largest numbers of industry employees in the state.

## IMPLICATIONS

It is important for state policy makers to consider the role of federal and state health and safety standards and enforcement. Animal slaughter and processing exhibits striking regional patterns in worker health and safety. The Central Valley has the largest share of animal slaughtering and processing industry employees in the state, more unplanned inspections than the rest of the state—but nearly the lowest rate of violations-per-inspection.

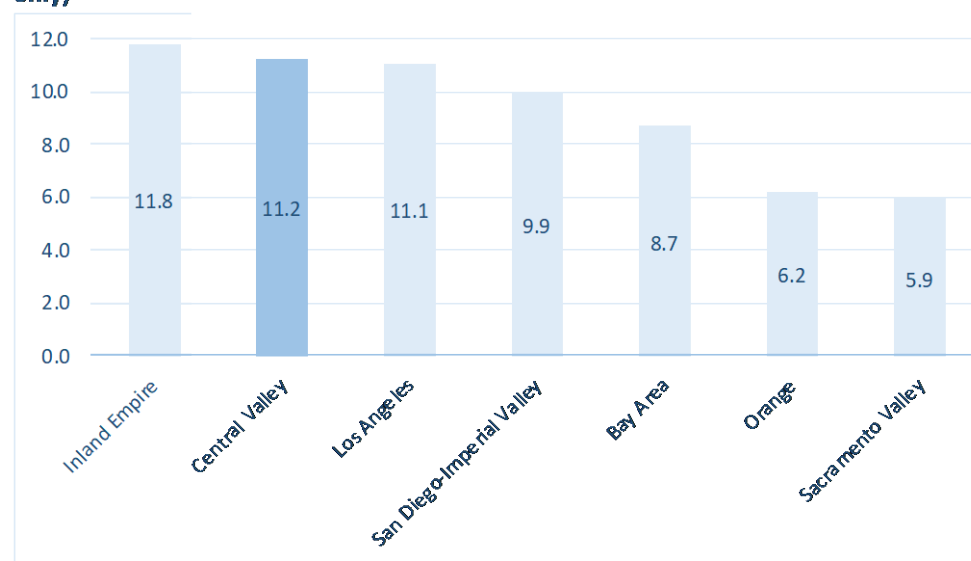
High-risk dynamics—the largest workforce, the highest rates of inspections associated with non-compliance, and the lowest rates of violations—are reflected in our data, suggesting that a large Central Valley workforce is at high risk of health and safety non-compliance and lack of enforcement.

Workplace health and safety standards reform should thus address working conditions in regions and workers that are among the most vulnerable, such as Central Valley animal slaughter and processing workers.

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<sup>3</sup> The Central Valley consists of the following eight counties: Kern, Kings, Tulare, Fresno, Madera, Merced, Stanislaus and San Joaquin. Central Valley's share of state population estimate is based on the State of California, Department of Finance, E-5 Population and Housing Estimates for Cities, Counties and the State — January 1, 2021-2023. Sacramento, California, May 2023

**Figure 1. Inspections per 1,000 Employees, Animal Slaughtering and Processing Industry (California only)**



Source: IPUMS-USA American Community Survey 2015-2021 Public Use Microdata Series (PUMS) data

**Table 1.1 Animal Slaughtering and Processing Employees, by California Region**

Region	Employees	
	Number	Percent
Central Valley	10556	42.9%
Los Angeles	6781	27.6%
Bay Area	2522	10.3%
Inland Empire	1435	5.8%
San Diego-Imperial Valley	905	3.7%
Sacramento Valley	846	3.4%
Orange	808	3.3%
Central Coast	578	2.4%
North Coast and State	*	*
Sierra	*	*
Total	24,595	100.0%

\*Percent reflected less than 2% of state total

Source: UC Merced Community and Labor Center analysis of IPUMS- USA American Community Survey 2015-2021 data

See:

<https://www.osha.gov/pls/imis/industry.html>

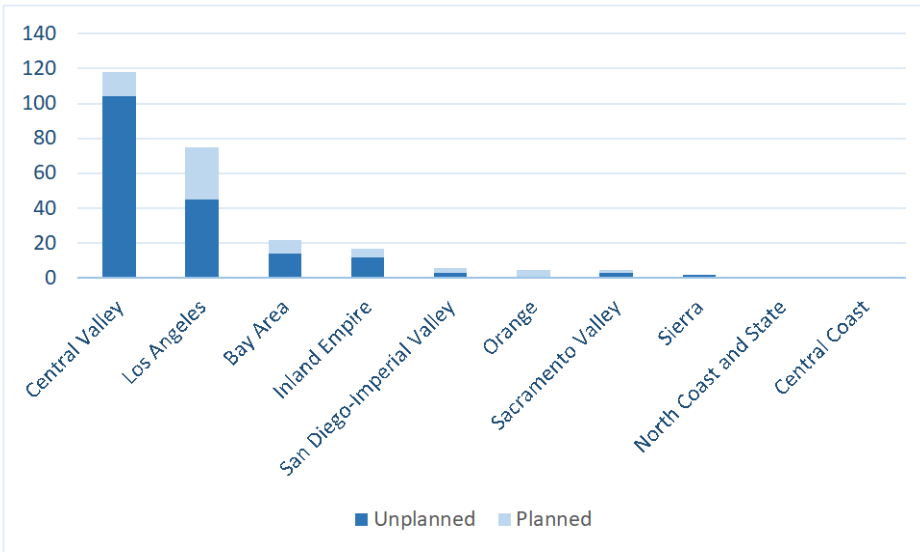
**Table 1.2 Animal Slaughtering and Processing Inspections, by California Region**

Region	Inspections	
	Number	Percent
Central Valley	118	47.0%
Los Angeles	75	29.9%
Bay Area	22	8.8%
Inland Empire	17	6.8%
San Diego-Imperial Valley	9	3.6%
Orange	5	2.0%
Sacramento Valley	5	2.0%
Sierra	2	0.8%
North Coast and State	1	0.4%
Central Coast	0	0.0%
Total	251	100.0%

Source: UC Merced Community and Labor Center analysis of US Department of Labor- Occupational Safety and Health Administration January 1, 2015- November 15, 2023 data

See: <https://www.osha.gov/pls/imis/industry.html>

**Figure 2. Unplanned versus Planned Inspections, Animal Slaughtering and Processing Industry (California only)**



Source: UC Merced Community and Labor Center analysis of US Department of Labor- Occupational Safety and Health Administration 2015-2023 data

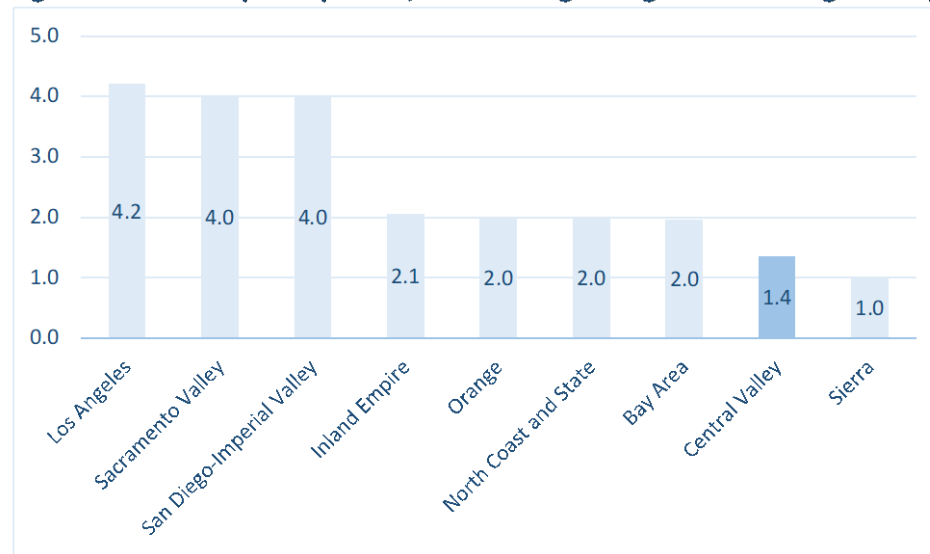
**Table 2.1 Animal Slaughtering and Processing Industry Inspections, Planned and Unplanned, by California Region**

Region	Planned		Unplanned	
	Number	Percent	Number	Percent
Central Valley	14	21.2%	104	56.2%
Los Angeles	30	45.5%	45	24.3%
Bay Area	8	12.1%	14	7.6%
Inland Empire	5	7.6%	12	6.5%
San Diego-Imperial Valley	3	4.5%	3	1.6%
Orange	4	6.1%	1	0.5%
Sacramento Valley	2	3.0%	3	1.6%
Sierra	0	0.0%	2	1.1%
North Coast and State	0	0.0%	1	0.5%
Central Coast	0	0.0%	0	0.0%
<b>Total</b>	<b>66</b>	<b>100.0%</b>	<b>185</b>	<b>100.0%</b>

Source: UC Merced Community and Labor Center analysis of US Department of Labor- Occupational Safety and Health Administration January 1, 2015- November 15, 2023 data

See: <https://www.osha.gov/pls/imis/industry.html>

**Figure 3. Violations per Inspection, Animal Slaughtering and Processing Industry (California only)**



Source: UC Merced Community and Labor Center analysis of US Department of Labor- Occupational Safety and Health Administration 2015-2023 data

**Table 3.1 Animal Slaughtering and Processing Industry Violations per Inspection, by California Region**

<i>Region</i>	<b>Violations</b>	<b>Inspections</b>	<b>Average</b>
Los Angeles	316	75	4.2
Sacramento Valley	20	5	4.0
San Diego-Imperial Valley	36	9	4.0
Inland Empire	35	17	2.1
Orange	10	5	2.0
North Coast and State	2	1	2.0
Bay Area	43	22	2.0
Central Valley	160	118	1.4
Sierra	2	2	1.0
Central Coast	0	0	0.0
<b>Total</b>	<b>624</b>	<b>251</b>	<b>2.5</b>

Source: UC Merced Community and Labor Center analysis of US Department of Labor- Occupational Safety and Health Administration January 1, 2015- November 15, 2023 data

See: <https://www.osha.gov/pls/imis/industry.html>