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EU labour in agricultural sector of the United Kingdom

Katarina Barathova *

Abstract

Today, many EU states face labour shortages in different sectors of economy, including agricultural sectors. Labour migration represents the solution which enables countries to cope with this problem. This is also the case of agricultural sector of the United Kingdom. After the EU enlargement, out of all old Member States only the United Kingdom alongside with Ireland and Sweden granted people from the Central and Eastern Europe countries free access to their labour markets. In case of the UK this was seen as strategic step, since the government recognized the important role of migrant workers in the growth of the UK's economy. Soon after enlargement, the UK became favourite destination of migrant workers from A-8 countries. In 2007, when another two countries – Bulgaria and Romania joined the EU, the economic situation was different and the UK decided to apply transitional arrangements. Despite this, there were a lot of migrants coming to the UK and most of them were working in agriculture, since for seasonal agricultural workers there was an exception. After the restrictions were removed in January, 2014, migration inflows from Bulgaria and Romania almost doubled. Before referendum in 2016, migration was an important issue and one of the main arguments of Leave campaign. Using available statistical data, the paper examines migration flows to the UK and describes key features of migration from EU with special focus on A-10 countries. The main objective is to evaluate the importance of migrant workers from these new Member States in the agriculture and food manufacturing industry of the UK and reveal possible implications associated with Brexit.

JEL: J61, F22, Q10

Introduction

On the 23rd of June 2016 the electorate of the United Kingdom opted to leave the European Union. The withdrawal of one of its largest member states represents unprecedented challenges for the EU as well as for the United Kingdom itself. Many sectors of the economy will be hardly influenced not only because of a future trade deal but also because of implications stemming from new conditions of labour movement. The UK belongs to countries that face increasing reliance upon low wage foreign workers who play very important role in functioning of many sectors and industries. But on the other hand, the large presence of migrant workers often lead to political and economic debate in host countries about economic and social consequences of migrants' influx. In the referendum debate about the UK's membership in EU, migration was the important issue, since the British economy experienced big migrant inflows from other EU countries during the last decade. The main argument of the Leave campaign was that Brexit

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would provide more control over the flows of immigrants to the UK from the rest of the EU. Most of the EU countries did not like this argument, but particularly the group of CEE countries. The main reason is that in recent years the immigration in the UK is mostly composed of migrants from these states and there are sectors whose surviving strongly depends on these workers. Agriculture is such an example.

Accession of A-10 countries to EU

The CEE countries (the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Slovakia and Slovenia) joined the EU on 1 May 2004, later on in 2007 Bulgaria and Romania joined as well. These countries are collectively known as A-10 countries (A8 + A2). By joining the EU, these countries acquired access to its single market and four freedoms related to it. One of them was freedom of movement of persons. It was agreed that after the enlargement there will be no restrictions on movements of persons such as those for purposes of study or residence.

However, a transition measures regarding the free movement of workers were agreed. Current EU members were free to apply national measures restricting CEEC nationals from working in their territories for the first two years after accession. After two years, member states must decide whether they wish to either grant free movement of workers, or continue to apply national measures for a further three year period. After that period, restrictions could be prolonged for a maximum of two more years. Those member states who permitted free movement of workers for CEEC nationals were free to impose or re-impose restrictions in the first two years after accession. For five years after that date, a member state could ask the European Commission to suspend free movement of workers if it experiences or anticipates serious disturbances to its labour market. There was also a “standstill clause” which ensured that rights to access the labour market of one of the current member states cannot be restricted further than those prevailing at the time of accession (Dustmann et al., 2003).

When the CEE states joined the EU, most of the EU member states decided to apply transitional arrangements. Restriction of labour migration was strongly supported by Austria and Germany, who were afraid of big migration inflows due to a set of factors like shared borders, economic, historic and cultural ties with CEE countries (Fihel et al., 2015). According to Jileva (2002) in many countries trade unions lobbied extensively for transitional arrangements as they argued that liberalizing labour migration would lead to a decrease in wages and it would increase the risk of unemployment. Moreover, higher social welfare provisions in old member states were another reason why these states could be possible ‘migration magnets’ (Kvist, 2004). According to Boeri and Brücker (2005) decisions made by Austria and Germany were carefully monitored and taken into account by other member states. There were only three EU members – Sweden, Ireland and the UK who adopted the most liberal approach and permitted citizens of new member states unrestricted access to their labour markets. According to Wright (2010) decision of the UK not to impose transitional restrictions was based on thoughtful economic considerations. The UK saw the Eastern enlargement of EU as new opportunity for trade and labour market flexibility and as a possibility of economic growth without risk of inflationary pressure resulting from insufficient labour supply. This viewpoint was also shared by the British Treasury. Fihel et al. (2015) explain that at the time of the 2004 EU enlargement, the economic prospects of the UK were very good and therefore the risks for the UK labour market were

perceived as minor when compared to other EU15 countries. In fact serious labour shortages were rather a concern. Thus, the potential migration inflows from CEEC would create a channel for free and important to say legal immigration to fill the gaps on the UK labour market. Of course there were also some concerns that migrants will misuse the social system in UK. Therefore eventually as a response to this concerns, the government decided that workers from A-8 countries coming to the UK would need to register in the Workers' Registration Scheme and, additionally access to welfare benefits was also restricted (access was prohibited during the first twelve months of employment).

Regarding the enlargement of EU towards Bulgaria and Romania, which joined the EU in January 2007, most of the EU members kept the restrictions on labour migration from those countries. Out of old member states (EU-15), notable exceptions were only Finland and Sweden who opened their labour market to Bulgaria and Romania from the day one. However, the UK changed its previous position and this time restricted nationals of these states from free access to its labour market. According to Drew and Sriskandarajah (2007) compared to reaction of the UK to EU enlargement in 2004, this change in policy was a clear consequence of previous migration stance as there were increasing social concerns which hampered the positive estimations of post-2004 immigration. The most important were labour displacement on the local level and too much pressure placed on public services, hospitals and schools. As a result the opinion that the economic advantages of the EU8 migration cannot compensate for the social costs associated with the inflow had become more dominant. Numbers also played important role in decision towards Bulgaria and Romania, because the actual inflows of A-8 migrants were indeed far higher than predicted by government. Therefore there was pressure to limit the migration inflows.

The British government imposed transitional controls restricting working rights in the UK for citizens of A-2 countries. These were initially set for a period of five years, but following advice from the UK's Migration Advisory Committee, after five years they were extended for a further two years. Nevertheless, certain routes for migration were possible since the migrants have been necessary for proper working of some sectors of British economy. As stated by Fairhurst (2007) the UK offered an unlimited quota for high-skilled and specialist workers and around 20 thousand vacancies for seasonal agricultural and food processing workers. The UK kept the restrictions for maximum 7 year period until January, 2014.

In 2004 when the UK opened its labour market to migrants from A-8 countries, it was considered as a good step since in many sectors there was a shortage of labour. Agriculture and food-processing industry have belonged to those sectors. In 2007, the fact that although the UK imposed restrictions on migrants from Bulgaria and Romania, migrant workers for agricultural and food-processing sectors were an exemption. Based on this attitude, it is reasonable to say, that the UK has always realized the importance of migration labour for agriculture and food-processing industry as well. The reason is simple. As explained by Triandafyllidou (2017) agriculture in several European countries, including the UK has been marked by a decreasing local or primary labour market and an increasing demand within a secondary labour market for temporary hard and low-pay work. Moreover, natives become more reluctant to work in agricultural sector, because of low earnings alongside with the low prestige and generally

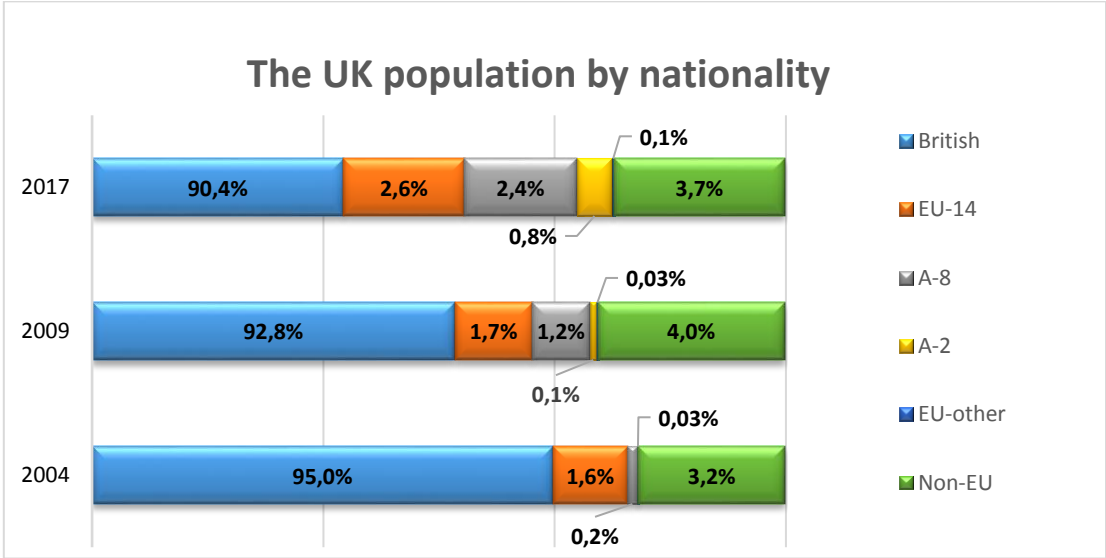
because of migration of natives to urban areas. This situation has opened up opportunities for migrant workers, both regular and irregular, who have found in agriculture a source of income for survival along with hope for later upward mobility to other sectors. It is also important to mention, that sometimes wages considered as low by locals may still be higher than wages in origin countries of incoming migrant workers, even in the case of CEE countries.

For the reasons mentioned above, maintaining the supply of migrant labour is an important factor influencing the competitiveness of the agricultural industry and the wider economy, especially in post-Brexit times. The objective of this paper is to look at volume and development of migration flows from EU countries with focus on A-10 countries.

EU labour in the United Kingdom

The main data source of migration flows is Office for National Statistics (ONS, 2018a). Before turning attention to agricultural sector, we take a look at the overall proportion of migration levels in the UK population. Figure 1 compares the UK population by nationality in 2004 (year of accession of A-8 countries), with state in 2009 and in 2017. In 2004, 95 % of the UK population were British, people from A-8 countries together represented only 0.2 %, in absolute terms 125,000 A-8 nationals. In 2009, people from A-10 countries represented 1.23 % of the UK population and in 2017 there were 2,080,000 nationals from A-10 countries representing 3.2 % of the UK population, which is significant increase.

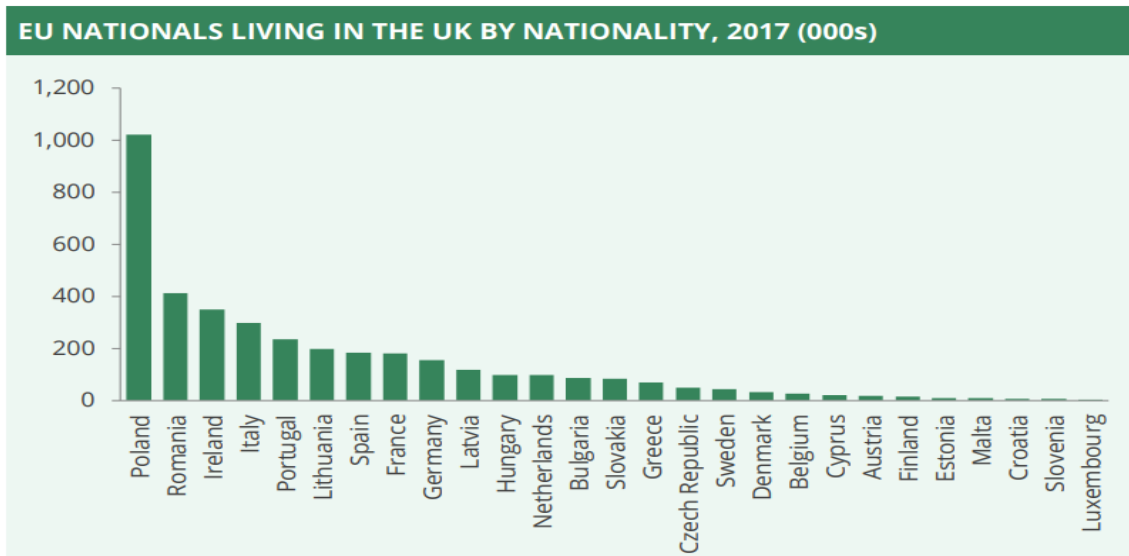
Figure 1 The UK population by nationality in 2004, 2009 and 2017



Source: Annual Population Survey (APS), Office for National Statistics (2018a)

Looking specifically at nationalities in 2017 the EU countries with the largest number of nationals living in the UK were Poland (1,021,000), Ireland (411,000), Romania (350,000), Italy (297,000), and Portugal (235,000).

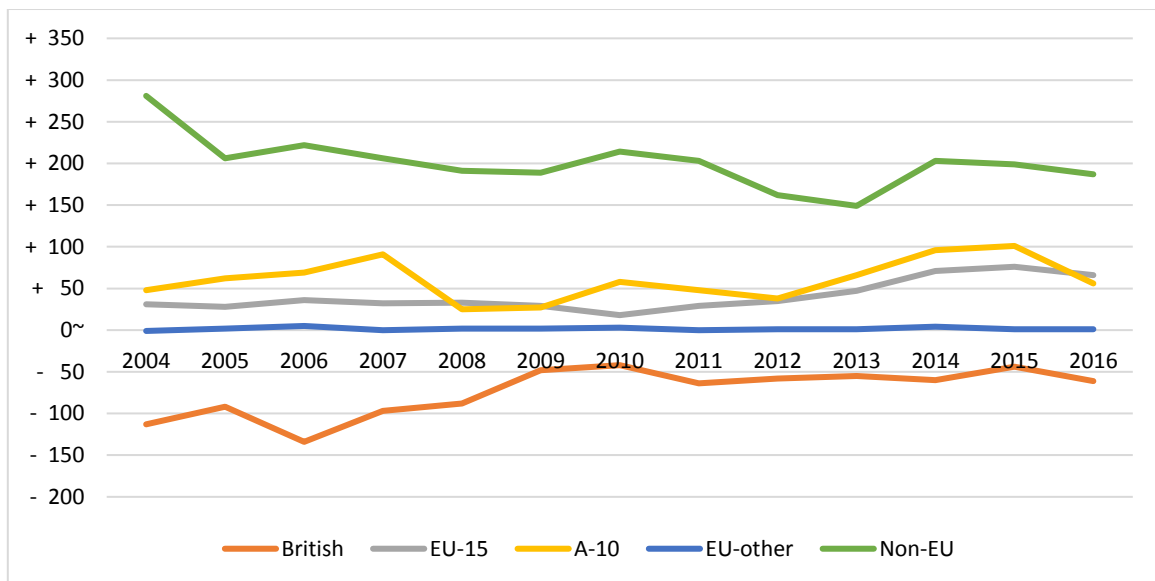
Figure 2 EU nationals living in the UK by nationality, 2017 (in thousands)



Source: Office for National Statistics (2018a). Population by country of nationality

Figure 2 offers data about long-term net migration to the UK over the last 14 years broken down by British, EU14, A-10, other EU (Malta, Cyprus and Croatia) and non-EU nationalities. Net migration represents difference between number of migrants coming to the UK and migrants leaving the UK. The biggest share of migrants come from non-EU countries, followed by migrants from CEEC (A-10 countries). Noteworthy fact from the graph below is drop in net migration of A-10 (EU-10) countries in 2008 a 2009. During these two years there was an increase in number of people leaving the UK, which was caused by crisis. The net migration from A-10 countries reached the peak in 2015 representing 101,000 people. However in 2016 and 2017 the net migration from A-10 countries was significantly lower.

Figure 3 Long-Term International Net Migration in the UK



Source: Office for National Statistics (2018b). Long-Term International Migration

Table 1 provides absolute numbers on migration inflows, outflows and net migration from EU-15, A-8 countries and A-2 countries to the UK. Overall, just over half of EU inflows in 2016 were from nationals of EU15 member countries (53%), in 2017 this number dropped to 49%. Looking specifically at A-10 countries, we may see that in 2004 when A-8 countries joined the EU, 52,000 immigrants from these states came to the UK and accounted for 42 % of total EU immigration. Next three years migration inflows were increasing and in 2007 hit the maximum of 112,000 people. Afterwards, the numbers dropped, in 2015 immigrants from A-8 countries accounted for 27 % of total EU migration, in 2016 it was even lower – only 46,000 immigrants from A-8 countries (19 % of total EU immigration).

Looking at A-2 countries in 2007, A-2 migrants represented only 8 % of total EU immigration, this was caused by transitional arrangements. These restrictions were kept until January 2014. Abolition of restrictions was reflected in significant increase of immigrants from Bulgaria and Romania - compared to previous year, the number of immigrants almost doubled (49 thousand in 2014). In 2016, 67,000 immigrants came from A-2 countries representing 28 % of total EU-migration to the UK. In 2017, this number was a little lower – 60,000 immigrants.

Net migration has always been positive, which means that immigration of EU-15 as well as A-10 citizens to the UK continues to be higher than emigration, meaning that more people from EU-15 and A-10 are coming to live in the UK than are leaving. However in last two years due to uncertainty brought by Brexit there was a significant increase in migration outflows from the UK. In 2016, 43 thousand migrants from A-8 countries left the UK and net migration represented only 5 thousand of people, in 2017 the outflow number was even higher – 46 thousand. In case of A-2 countries, the number of people coming back home increased as well but on the other hand the inflows are much higher resulting in high net migration.

Table 1 Migration to the UK from the EU (in thousands of people)

Year	Total EU			EU-15			A8 countries			A2 countries		
	Inflow	Outflow	Net Migration	Inflow	Outflow	Net Migration	Inflow	Outflow	Net Migration	Inflow	Outflow	Net Migration
2004	127	43	+ 84	76	39	+ 37	51	3	+ 47	z	z	z
2005	151	55	+ 96	72	40	+ 32	77	15	+ 62	z	z	z
2006	170	66	+ 104	74	44	+ 30	93	22	+ 71	z	z	z
2007	195	69	+ 127	77	41	+ 36	112	25	+ 87	5	0~	+ 4
2008	198	134	+ 63	90	54	+ 37	89	69	+ 20	15	12	+ 4
2009	167	109	+ 58	82	53	+ 29	68	52	+ 16	13	3	+ 11
2010	176	99	+ 77	76	58	+ 18	86	37	+ 49	10	2	+ 7
2011	174	92	+ 82	83	49	+ 34	77	37	+ 40	13	5	+ 8
2012	158	75	+ 82	85	41	+ 44	60	30	+ 30	11	3	+ 8
2013	201	78	+ 123	104	47	+ 58	70	26	+ 44	25	3	+ 21
2014	264	89	+ 174	129	51	+ 79	80	32	+ 48	49	5	+ 44
2015	269	86	+ 184	130	50	+ 80	73	27	+ 46	65	7	+ 58
2016	249	116	+ 133	132	59	+ 73	48	43	+ 5	67	13	+ 54
2017	240	139	+ 101	118	71	+ 46	52	46	+ 6	60	19	+ 40

Source: Office for National Statistics (2018b). Long-Term International Migration

Notes: "z" - not applicable, "0~" - Rounds to zero. Totals may not sum due to rounding.

CEEC labour within the UK agricultural and food industry

Given the migration numbers, there is a question where these migrants work in the UK and whether some industries are more or less dependent on these workers. As already stated the main area of the economy which is of our specific interest is agriculture and food industry.

Table 2 Industry distribution foreign-born and UK-born workers, 2017

	EU		Non-EU		UK-Born	
	Numbers	%	Numbers	%	Numbers	%
Agriculture, forestry and fishing	24,000	1	11,000	0.3	263,000	1.1
Energy and water	33,000	1.4	35,000	1.1	461,000	1.8
Manufacturing	339,000	14.5	191,000	6	2,305,000	9.2
Construction	206,000	8.8	127,000	4	1,912,000	7.6
Retail, hotels and restaurants	575,000	24.5	647,000	20.4	4,537,000	18.1
Transport and communication	235,000	10	407,000	12.8	2,130,000	8.5
Banking and finance	400,000	17	640,000	20.2	4,202,000	16.7
Public administration and education	420,000	17.9	946,000	29.9	7,792,000	31
Other services	114,000	4.9	165,000	5.2	1,512,000	6
Total	2,345,000	100	3,169,000	100	25,115,000	100

Source: Labour Force Survey 2017, Q1-Q4; retail category includes wholesale and repair of vehicles

Table 2 shows how many EU, non-EU and UK nationals work in different industries of the UK's economy. As may be seen the industries with the largest number of EU workers in 2017 were the retail, hotels and restaurants (575,000 EU nationals employed) and public administration and education (420,000). There were 24,000 workers from EU working in UK's agriculture. According to Labour Force Survey (2017) manufacturing industry employs 339,000 EU-nationals and if we look specifically at manufacturing of food products we may see that in 2017 it was the industry with the highest proportion of EU workers (31 %) – approximately one in three workers (100,000 people) were EU nationals.

However, these data provide the number of EU nationals working in specific sectors only generally, not broken down by states or groups. Another problem is that data are likely to underestimate the reliance of some sectors on EU workers, particularly sectors which use short-term or seasonal migrant labour. Such example is agriculture. It is because the Labour Force Survey does not survey people living in communal establishments (such as hostels or halls of residence) and is unlikely to pick up workers living in the UK for very short periods of time.

There are some industry-specific sources that suggest a higher number of EU nationals working in certain sectors than is recorded in the Labour Force Survey. The estimate of the Labour Force Survey (2017) says that there were 24,000 EU nationals working in agriculture in 2017, this number accounted for 8% of all people employed in the sector. Overall, the UK's agriculture employs only 298,000 workers. However McGuinness and Grimwood (2017) stress that during peak seasons, the agriculture sector is further dependent on a large temporary, seasonal

workforce – thought to be around 75,000 workers – to supplement regular, permanent staff in harvesting crops. It is estimated that 98% of this number are EU migrants. Seasonal workers are particularly important in horticulture.

The best estimate of the number of seasonal workers currently available comes from the Department for Environment, Food and Rural Affairs’ – DEFRA. For June 2016, the estimate of seasonal, casual and gang workers was 64,200 which represent 14 % of total labour force in agriculture. However again this data doesn’t provide estimate by nationality. According to DEFRA (2016) in 2016 total estimated number of workers in the agriculture was 466,200.

Table 3 Estimated number of workers in the agriculture of the UK in June 2016

Total number of workers in agriculture	466,200
Number of farmers, business partners, directors and spouses	289,900
...of which, full-time	138,900
...of which, part-time	151,000
Number of regular employees, salaried managers and casual workers	176,300
...of which, number of regular, full-time workers	71,400
...of which, number of regular, part-time workers	40,900
...of which, number of seasonal/casual/gang workers	64,200

Source: Department for Environment, Food and Rural Affairs June Survey of Agriculture and Horticulture

As may be noticed the data about total number of workers in agriculture in two tables above significantly differ. It is so because in DEFRA survey, farmers describe all workers in June, while ONS’s Labour Force Survey run throughout the year. Therefore, it may happen that someone who has a first job and helps family on a farm from time to time does not mention this in the ONS survey, but is included in the DEFRA survey. Because DEFRA Survey does not measure nationality of the workforce, again it is impossible to tell how many workers in agriculture come from A-10 countries. The estimate of seasonal, casual and gang workers is a point-in-time estimate. It means that this number would not reflect those who had worked only between January and May, or those who begin work after June (Office for National Statistics, 2018c). However, because June is the peak month for seasonal horticultural employment, and the average length of a seasonal workers’ employment is five months, the June Survey mainly reflects workers in horticulture. Horticulture is an agricultural sub-sector which represents growing of fruits, vegetables and flowers. Other sub-sectors of the agriculture industry employ very few seasonal workers, because the demand for dairy and meat is year-round.

Of all the different agriculture sub-sectors, horticulture is the most labour intensive and employs the most seasonal, casual and gang workers and therefore it is the most dependent sector on the EU migrants’ labour. National Farmers Union (NFU) established a labour monitoring tool to gather evidence on the supply and demand of seasonal workers in horticulture. This survey provides monthly information of seasonal labour recruitment experiences direct from recruitment agencies and labour providers. According to the latest statistics by NFU Labour Provider Survey (2017a) a minimum estimate of workers recruited by labour providers was

30,600 for 2017. But the estimates do not include those who are directly recruited through businesses and it is therefore likely that the true value for the number of positions is higher than the 30,600 estimated for 2017.

Moreover, NFU's Supply of Seasonal Labour data is the only data source that identifies the nationality of seasonal agricultural workers. Of the agency-sourced seasonal labour that the horticultural industry used in 2017, 99% were EU nationals. The December 2017 NFU's seasonal labour survey analysis estimates that over two-thirds (67%) of the seasonal labour force are EU-2 nationals (Romanians and Bulgarians). Nearly one-third (32%) are EU-8 nationals (Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Slovenia and Slovakia). UK citizens account for less than 1% of the horticultural seasonal workforce when employed through an agency or labour provider. It is likely that the true proportion recruited from the UK is slightly underestimated by this survey as labour providers predominantly recruit from Europe.

The implications of the EU referendum

The result of the EU referendum may drastically change the landscape for migration to and from the UK. The topic of immigration was one of the key issues driving the debate around the UK's membership of the EU and there were requirements to reduce immigration to the UK. However, according to volume of migration workers from EU, especially A-10, the agriculture could land in significant crisis. The end of the free movement of EU workers resulting from the UK leaving the Single Market will lead to labour shortages.

Although so far no restrictions were introduced from the UK's side the number of seasonal workers from A-10 countries in 2017, which is the first full year following Brexit, is much lower than in previous years. The UK suffered a shortfall of 12.5 percent in seasonal workers in 2017 (NFU, 2017a). The main reason which can be attributed to this development is definitely lack of clarity regarding the future UK-EU relationship. However there are also other factors – a weakened British pound which make the earnings for foreigners less attractive and also improving economic situation in countries of origin of EU migrants.

All these factors have caused that the UK is already facing the shortage of seasonal labour in agriculture. This can have serious impact especially in horticulture where the shortage is most serious. As stated by NFU (2017b) much of the debate is focused on the need to provide UK industry with access to “highly skilled workers”, without a clear definition of the term. The range of agricultural jobs that are often filled by non-UK workers at present is wide and varied – from skilled herd managers and semi-skilled assistants in the dairy sector, through specialised and labour intensive seasonal work in horticulture and poultry, and permanent lower skilled workers in the pig and poultry sectors. A future immigration system must ensure an adequate supply of both high and lower-skilled workers, in both permanent and seasonal positions.

The UK used to have a seasonal scheme called the Seasonal Agricultural Workers Scheme (SAWS) to allow European workers to fill demand on farms. But the government ended the scheme in 2013, arguing that since European countries had joined the EU it was no longer needed, and that they wanted to open up jobs for British workers. It ended SAWS despite warnings from the government's own Migration Advisory Committee and farming

organizations that this would lead to a labour shortage several years later. And according to available data and upcoming Brexit these fears proved to be right.

For these reasons it is very important for the UK government to set some system which would ensure the easy and sufficient inflow of European workers in order to fill demand on farms even after Brexit. Without any solutions, it can be expected that many agricultural businesses will collapse and the prices of fruits and vegetables will significantly rise.

Conclusion

Before the EU referendum in the United Kingdom, a major argument of Brexit supporters was that after leaving the EU, the UK could control the flows of immigrants from the rest of the EU. Immigration to the UK has grown a lot in the last 20 years and a significant fraction of this growth has been from other EU countries, especially after 2004 and the accession of eight East European countries and later by accession of Bulgaria and Romania. Between 1995 and 2017, the number of immigrants from other EU countries living in the UK tripled. The share of EU nationals grew to 3.2 % of the total population. The objective of this paper was to evaluate the importance of migrant workers from EU member states in the agriculture and food manufacturing industry of the UK with special focus on A-10 countries. The main problem is that neither data source is designed to measure migration and therefore the available data are limited. Further, official estimates undercount workers in the agricultural industry or do not provide information on characteristics such as nationality. According to LFS Survey, agriculture in the UK employs 24,000 EU workers. However, this data does not include seasonal workers. According to DEFRA, in 2017 there were 64,200 seasonal workers. Most of the seasonal workers work in horticulture. Precisely, the horticulture represents sector whose future is seriously threatened since 99 % of all seasonal workers in horticulture come from A-10 countries, majority of them come from A-2 countries. Due to unattractiveness of agricultural jobs, low wages and other factors, the UK farmers already face labour shortages and they heavily rely on EU migration. Therefore expected changes to immigration control, ending the free movement of EU workers to the UK, will exacerbate the problems and will make labour shortages even more acute, through the imposition of greater restrictions on the movement of unskilled labourers. For these reasons it is very important for the UK to establish a system which will provide the easy and sufficient inflow of EU workers in order to fill demand on farms even after Brexit. Without any solutions, it can be expected that many agricultural businesses will collapse and the prices of fruits and vegetables will significantly rise.

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