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REPORT



MEXICO'S FARM LABOR MARKET

MAY 2023



JORNALEROS EN
LA AGRICULTURA
DE EXPORTACIÓN



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México



Farmworkers in Mexico's Export Agriculture

Report 1
Mexico's Farm Labor Market
May 2023

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Report 1
Mexico's Farm Labor Market
May 2023

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This report offers a timely analysis of the farm labor market in Mexico, based on official employment data. It also describes the number of workers registered with the Mexican Social Security Institute (IMSS), and their reported incomes. In addition, it appraises the behavior of the entire agricultural labor market on the basis of quarterly statistics from the National Institute of Statistics and Geography (INEGI).

The Report Series has been made possible by a generous grant from the Walmart Foundation.

We are grateful to Elisa Alejandra Martínez Rubio, José Daniel Rodríguez Morales, Sarahí Lay Trigo, and Michelle Judd de la Luz for their input, their comments and their suggestions.

The findings, conclusions and recommendations presented in this report are those of the author(s) alone, and do not necessarily reflect the opinions of the institutions or the foundation.

2023



TABLE OF CONTENTS



| | |
|--|----|
| Executive Summary | 8 |
| Number of Agricultural Sector Workers Registered | |
| With IMSS | 10 |
| Reported Wages for IMSS Contributions and | |
| Income Data | 14 |
| Income Data From the National Survey on | |
| Occupation and Employment | 18 |
| Municipalities of Special Interest | 21 |

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LIST OF FIGURES



| | |
|--|----|
| Figure 1. Total Agricultural Sector Workers Registered with IMSS | 10 |
| Figure 2. Agricultural Sector Workers Registered with IMSS, by Sex | 11 |
| Figure 3. Temporary and Permanent Workers in the Agricultural Sector | 12 |
| Figure 4. Agricultural Workers Registered with IMSS, by State | 13 |
| Figure 5. Evolution of the Average Contribution Salary in the Agricultural Sector Over the Last Twelve Months, by Sex | 14 |
| Figure 6. Evolution of the Average Contribution Salary in the Agricultural Sector Over the Last Twelve Months, by Work Status | 15 |
| Figure 7. Base Wages for IMSS Contributions for Agricultural Sector Workers, by State Work Status | 16 |
| Figure 8. Evolution of the Average Contribution Salary in the Agricultural Sector Over the Last Twelve Months, by Group of States | 17 |
| Figure 9. Average Monthly Income. Agriculture, forestry, fisheries and hunting. Q1 2023 | 18 |
| Figure 10. Average Monthly Income, Agricultural, Livestock, Forestry, Hunting, and Fishing Sector by Employment Status and Sex as of Q1 2023 | 19 |
| Figure 11. Average Monthly Income, Agricultural, Livestock, Forestry, Hunting, and Fishing Sector by State Grouping as of 1Q 2023. | 20 |

EXECUTIVE SUMMARY

“Farmworkers in Mexico’s Export Agriculture” (Jornamex), a study sponsored by the Walmart Foundation and the Wilson Center’s Mexico Institute and carried out by the Centro de Investigación y Estudios Superiores en Antropología Social (CIESAS), has produced rigorous analyses of Mexico’s farm labor market in export agriculture. The first stratified, random survey of export produced workers showed export agriculture offers much better labor conditions than the rest of the sector, and that these conditions are comparable to those of workers in semi-skilled manufacturing jobs. It also offered municipal-level analyses of the entire Mexican territory, showing the main labor violations in agriculture. These and other analyses can be found at jornamex.com.

Jornamex has commissioned the NovaGob Mexico Foundation to produce short-term, timely diagnoses of affiliation and wages in IMSS affiliation and wage levels in Mexico’s agricultural sector, with a special emphasis on agricultural export states and municipalities. These figures serve to carry out national analyses and international comparisons, and can help target municipalities and areas in which improvements are urgently needed.

In the recent past, there were real improvements in Mexico’s agricultural jobs. Social-security jobs grew much faster than average. From 2015 to 2018, IMSS affiliation grew by 25%, or roughly 8% annually. Growth slowed in 2019 (3.2%), decelerated further in 2020 (2.2%), and recovered substantially in 2021 (9%). The affiliation of temporary workers grew faster than that of permanent workers. Growth differs among the main export states. Baja California, Guanajuato and Jalisco show the fastest growth, while Sinaloa and Michoacán grow quite little.

During the period covered by this report (may 2022 to may 2023), national growth in IMSS jobs was only 1.3%. It is worth asking whether this deceleration, which is taking place since 2019, is produced because total IMSS coverage of export workers is being reached, or whether significant gaps remain in this sector. Although exporting states and municipalities exhibit far better wages and working conditions, our 2020 maps show important export municipalities in which there are large amounts of workers under illegal conditions of employment.

In May, 2023, insured agricultural workers amount to 2.68% of all insured workers, or 587,561. Of the total, 68.2% are male, and only 31.8% female, although women are expanding steadily 326,814, or 66%, are permanent workers, while the rest are temporary. The states with the largest amounts of insured workers are Jalisco, Sinaloa, Michoacán, Guanajuato, Sonora and Veracruz, in that order.



On average, wages in export states are 45% above the rest. Formal agricultural workers earn 97% more than their informal counterparts (National Occupation and Employment Survey). IMSS-affiliated workers earn 348.9 MXN pesos daily or US \$21.0 dollars, or 353.4 (US \$21.34) among men and 339.1 (US \$20.48) among women. Temporary workers earn 342.5 MXN (US \$20.68), and permanent workers MXN 355.6 (US \$21.47).

Male wages reported by employers to IMSS rose by 11.1% annually, and women's 12.1%, for a modest narrowing of the gender gap. The raise among temporary workers was 15.7%, and only 7.3% among permanent workers. This also closed the gap between the most vulnerable workers and the rest.

Real wages, according to Mexico's National Consumer Price Index (INPC), rose 10.4% among men and 11.2% among women; 16% among temporary workers, and only 8% among permanent ones. Readers should keep in mind that the rise in basic basket prices was slightly higher than for the entire CPI.

States with the highest wages were Zacatecas, Baja California, Sonora and Querétaro. Those with the lowest wages were Oaxaca, Quintana Roo and Guerrero. Of the above, however, only Baja California, Veracruz and Sonora employ significant amounts of farm workers.

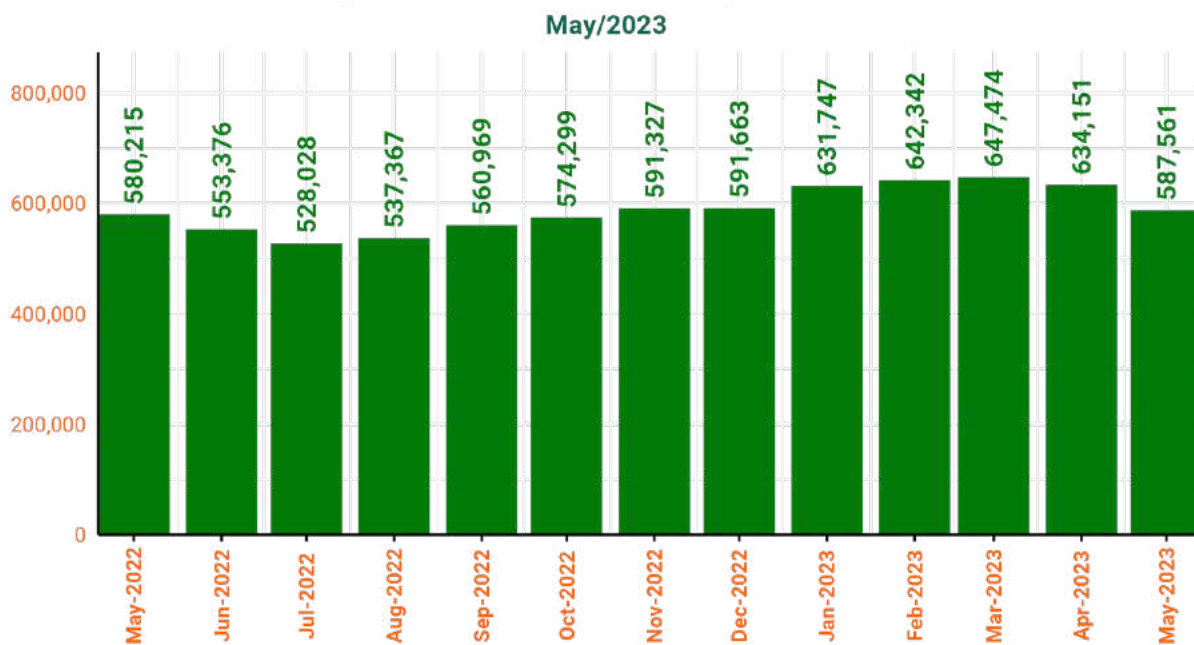
The second part of the bulletin explores levels and trends among Mexico's most significant export municipalities.



NUMBER OF AGRICULTURAL SECTOR WORKERS REGISTERED WITH IMSS

In May 2023, the Mexican labor market had a total of **21,862,909** workers registered with IMSS, of whom **587,561 (2.68%)** worked in the agricultural sector.¹ This figure represents an increase of **1.3%** over the same month in the previous year, and a decrease of **7.34%** from the previous month.

Figure 1. Total Agricultural Sector Workers Registered with IMSS



Source: Author's elaboration, based on IMSS employment statistics

¹ The IMSS classifies workers in the agricultural sector as those employed within a company, economic unit, or employer registry in Economic Sector 1, encompassing agriculture, livestock, forestry, fishing, and hunting, as well as in Economic Sector 2, which is agriculture. This classification is based on the registration variables of the data for IMSS insured workers..



In **May 2023**, **68.2%** of the workers registered with IMSS were men and **31.8%** were women. The number of women in the agricultural sector varies less than the number of men, which fluctuates over the agricultural cycle.

Figure 2. Agricultural Sector Workers Registered with IMSS, by Sex

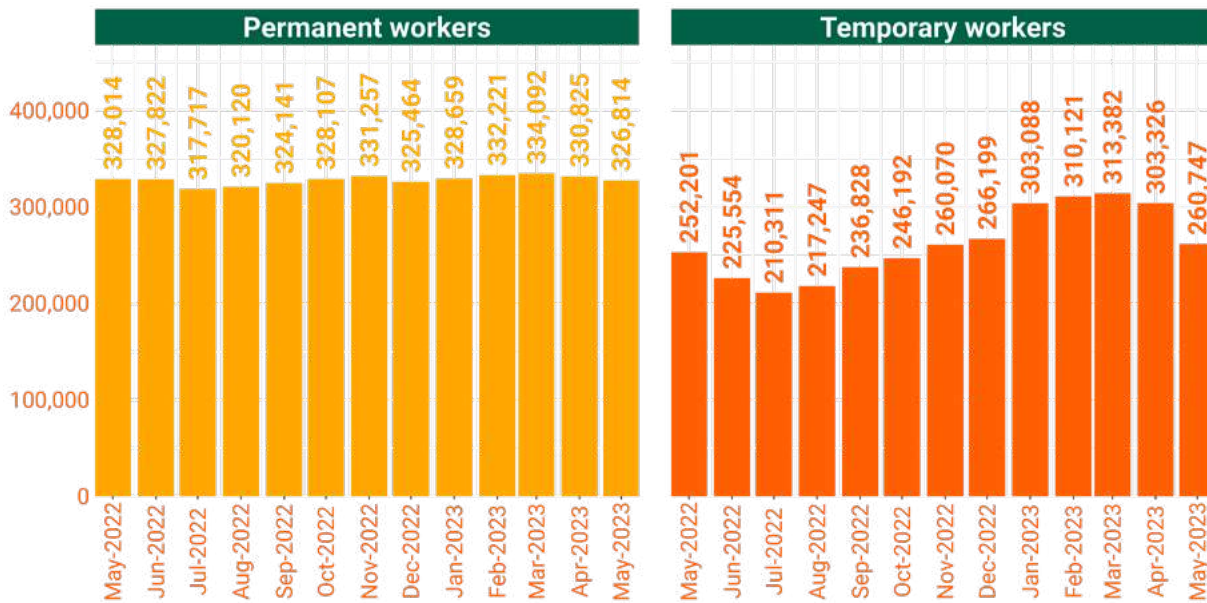


Source: Author's elaboration, based on IMSS employment statistics



In **May 2023** the number of temporary agricultural workers rose to **260,747**, while the number of permanent workers increased to **326,814**. Temporary jobs accounted for **44.4%** of the total number of agricultural sector jobs in **May 2023**.

Figure 3. Temporary and Permanent Workers in the Agricultural Sector

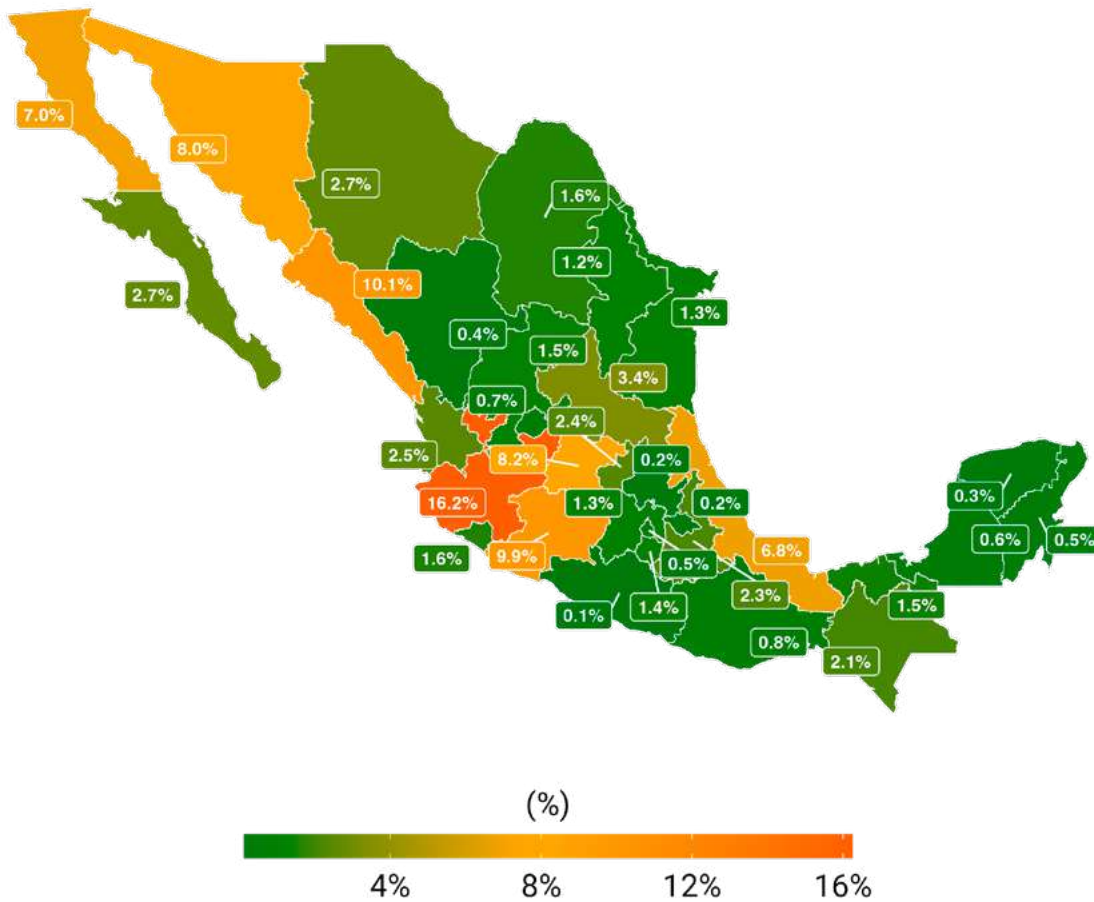


Source: Author's elaboration, based on IMSS employment statistics



The states with the largest numbers of registered workers are: **Jalisco (16.2%), Sinaloa (10.1%), Michoacan de Ocampo (9.9%), Guanajuato (8.2%), Sonora (8.0%) y Veracruz de Ignacio de La Llave (6.8%).**

Figure 4. Agricultural Workers Registered with IMSS, by State



Source: Author's elaboration, based on IMSS employment statistics

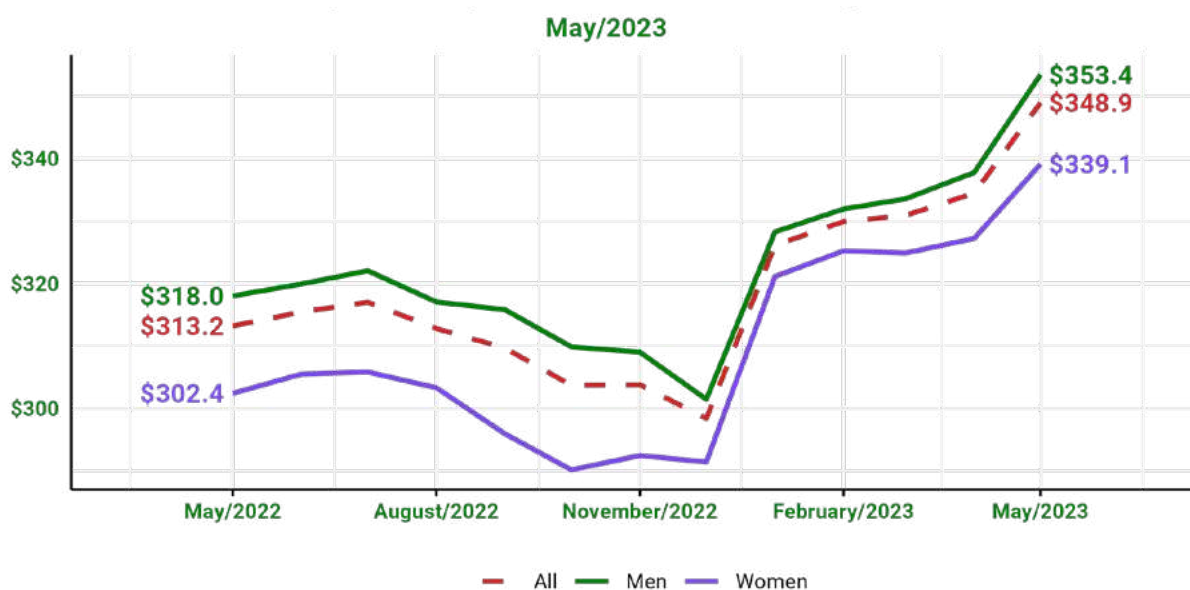


REPORTED WAGES FOR IMSS CONTRIBUTIONS AND INCOME DATA

“Reported wages” and “contribution salary” refer to the salary employers report to IMSS. Two aspects must be considered: some employers have tended to report smaller wages than actually paid. This lowers their total labor costs, although it also slows workers’ contributions to their pension funds. Second, wages reported to IMSS are an average for agricultural firms. This means they include many clerical and managerial workers and are higher than the average for actual farm workers.

The base wage for IMSS contributions for agricultural sector workers rose in **May 2023** to **\$348.9** pesos per day at the national level.² For men the figure was **\$353.4** and for women **\$339.1**; for permanent workers it was **\$355.6** and for temporary workers **\$342.5**.

Figure 5. Evolution of the Average Contribution Salary in the Agricultural Sector Over the Last Twelve Months, by Sex

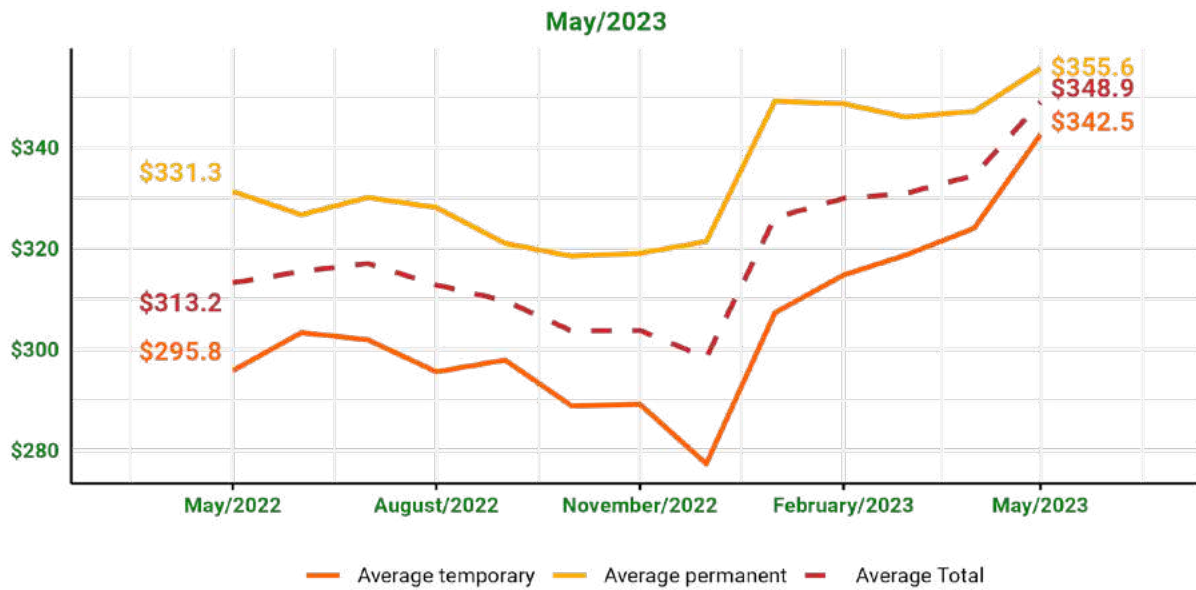


Source: Author’s elaboration, based on IMSS employment statistics

² All monetary values in this report have been adjusted for inflation and are presented in May 2023 Mexican pesos.



Figure 6. Evolution of the Average Contribution Salary in the Agricultural Sector Over the Last Twelve Months, by Work Status

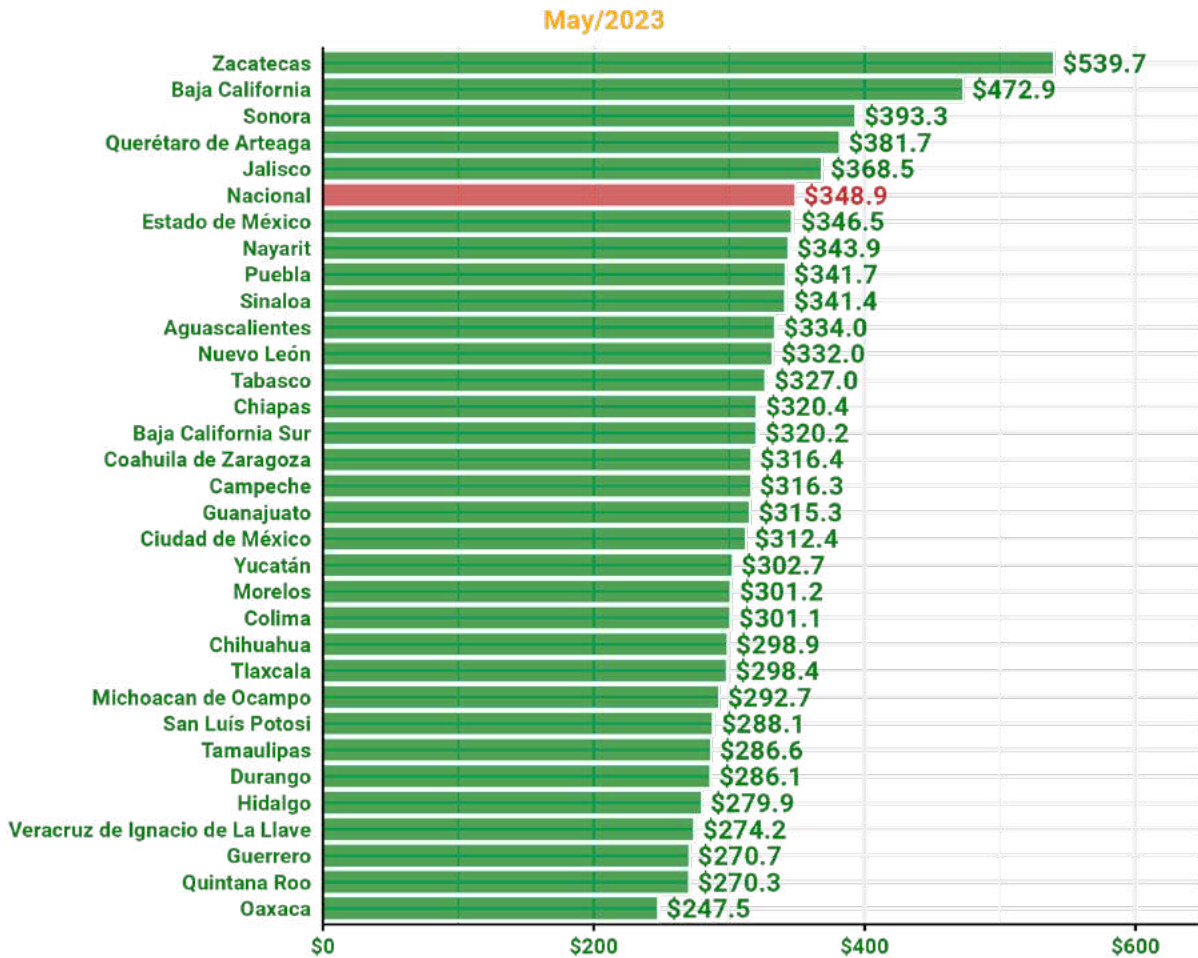


Source: Author’s elaboration, based on IMSS employment statistics

The states with the highest base wages for IMSS contributions in **May 2023** were: **Zacatecas (\$539.7), Baja California (\$472.9) and Sonora (\$393.3)**; those with the lowest were: **Oaxaca (\$247.5), Quintana Roo (\$270.3) and Guerrero (\$270.7)**.



Figure 7. Base Wages for IMSS Contributions for Agricultural Sector Workers, by State/Work Status

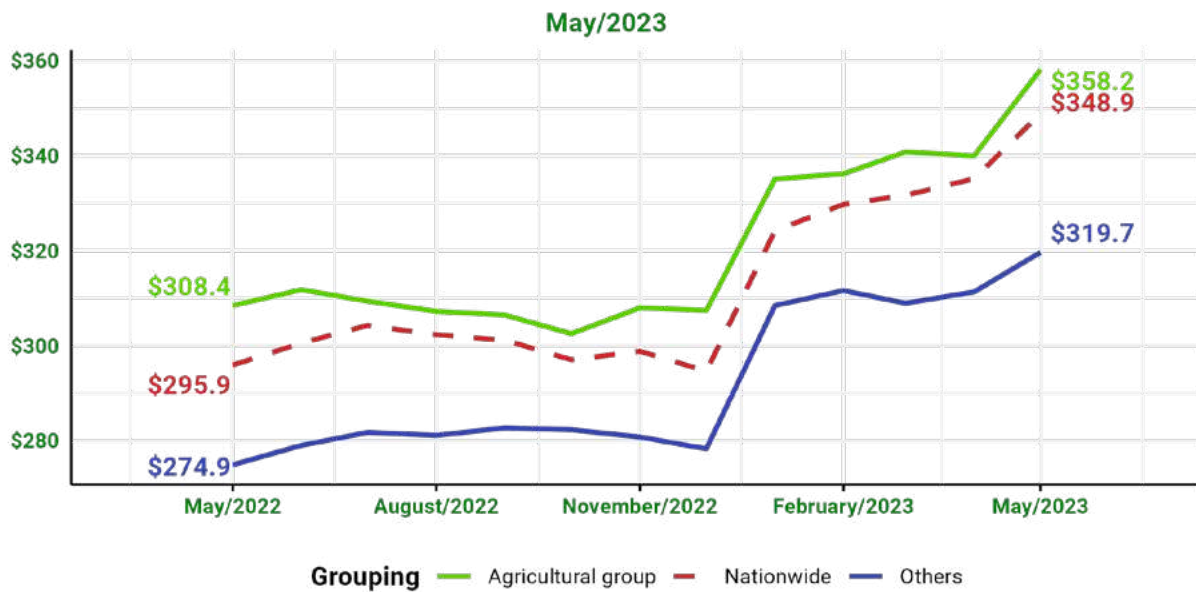


Source: Author's elaboration, based on IMSS employment statistics



Among the “agricultural group” (the main exporting states): Guanajuato, Michoacán, Jalisco, Sinaloa, and Baja California, the daily base wage for IMSS contributions reaches **\$358.2**, while in other states it reaches **\$319.7**.

Figure 8. Evolution of the Average Contribution Salary in the Agricultural Sector Over the Last Twelve Months, by Group of States



Source: Author’s elaboration, based on IMSS employment statistics



INCOME DATA FROM THE NATIONAL SURVEY ON OCCUPATION AND EMPLOYMENT

According to data from the National Occupation and Employment Survey for the first quarter of 2023,³ the Agricultural sector employs **11.21%** of the country's Economically Active Population. This makes agriculture the fourth largest sector in terms of employment, just below Commerce, Manufacturing Industry, and Services.

Figure 9. Average Monthly Income. Agriculture, forestry, fisheries and hunting. Q1 2023



Source: Author's elaboration with Data from the INEGI National Survey on Occupations and Employment (ENOE).

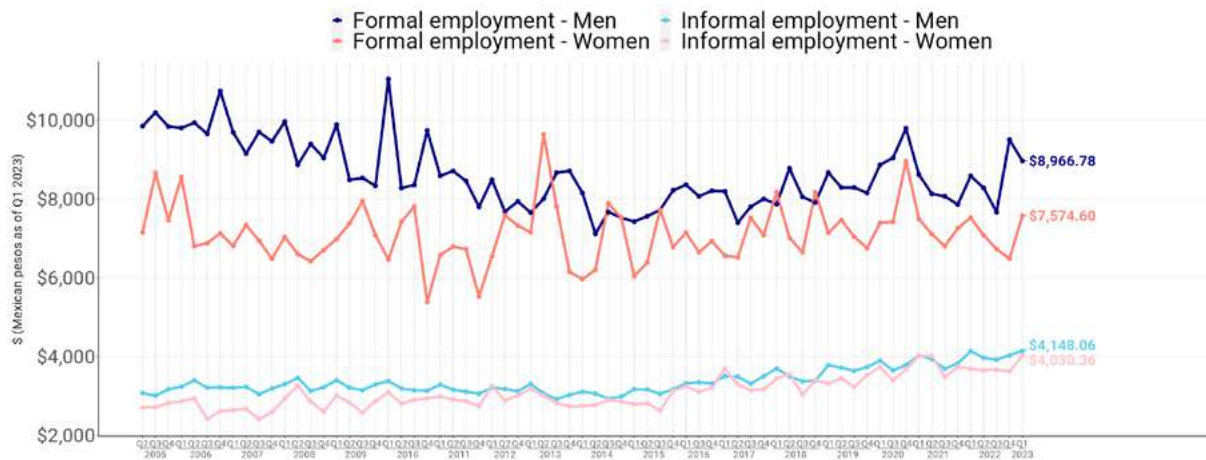
³ The activities considered part of the agricultural sector within the ENOE are those activities from the [SINCO](#) occupations catalogue that are mainly under the code 61 (Workers in agricultural and livestock activities) and 62 (Workers in fishing, forestry, hunting, and similar activities), as well as managers, scientists and technicians, agronomists, transporters, machinery operators, and agro-industrial workers.



The average monthly salary of all workers in the agricultural sector is \$4,910.25 Mexican pesos. Analysis of this survey shows that the average monthly income of a formal agricultural worker⁴ is **\$8,980.3** pesos (at 2023 Q1 prices), while that of an informal worker⁵ is **\$4,568.8** pesos (a difference of **\$4,411.5** pesos).

Men with formal employment in the agricultural sector earn an average of **\$8,966.78** pesos per month, while women earn **\$7,574.60**. Men in the informal agricultural sector earn an average of **\$4,148.06** pesos per month, while women working informally earn **\$4,030.36**.

Figure 10. Average Monthly Income, Agricultural, Livestock, Forestry, Hunting, and Fishing Sector by Employment Status and Sex as of Q1 2023



Source: Author's elaboration with Data from the INEGI National Survey on Occupations and Employment (ENOE).

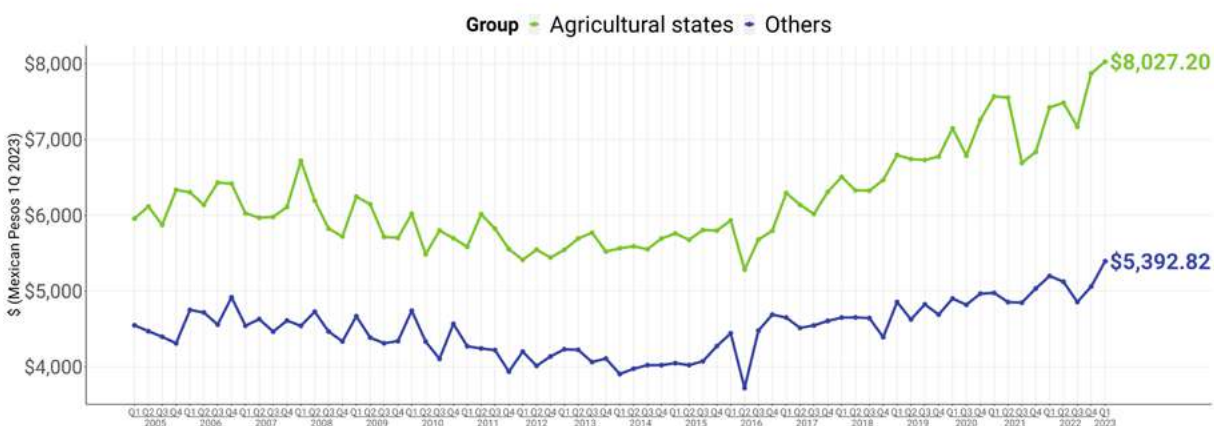
4 Formal employment in Mexico is characterized as a job where the employee is officially registered by their employer, complying with all labor regulations. This implies the payment of social security contributions, access to benefits such as sickness insurance, maternity, pensions, year-end bonuses, paid vacations, among others, and protection against unjustified dismissal. Furthermore, formal employment guarantees the regulation of working hours and compensation for overtime.

5 Informal employment is the employment status in which the worker is not officially registered, does not have a formal contract, and does not pay tax contributions. Informal workers do not have access to social security benefits or labor protections, which can result in greater economic vulnerability.



In states in the Agricultural Group (Guanajuato, Michoacán, Jalisco, Sinaloa, and Baja California), the average monthly income for workers in the agricultural sector is **\$8,027.20** pesos; in the other states the average is **\$5,392.82** pesos (a difference of **\$2,634.38** pesos).

Figure 11. Average Monthly Income, Agricultural, Livestock, Forestry, Hunting, and Fishing Sector by State Grouping as of 1Q 2023.



Source: Author's elaboration with Data from the INEGI National Survey on Occupations and Employment (ENOE).



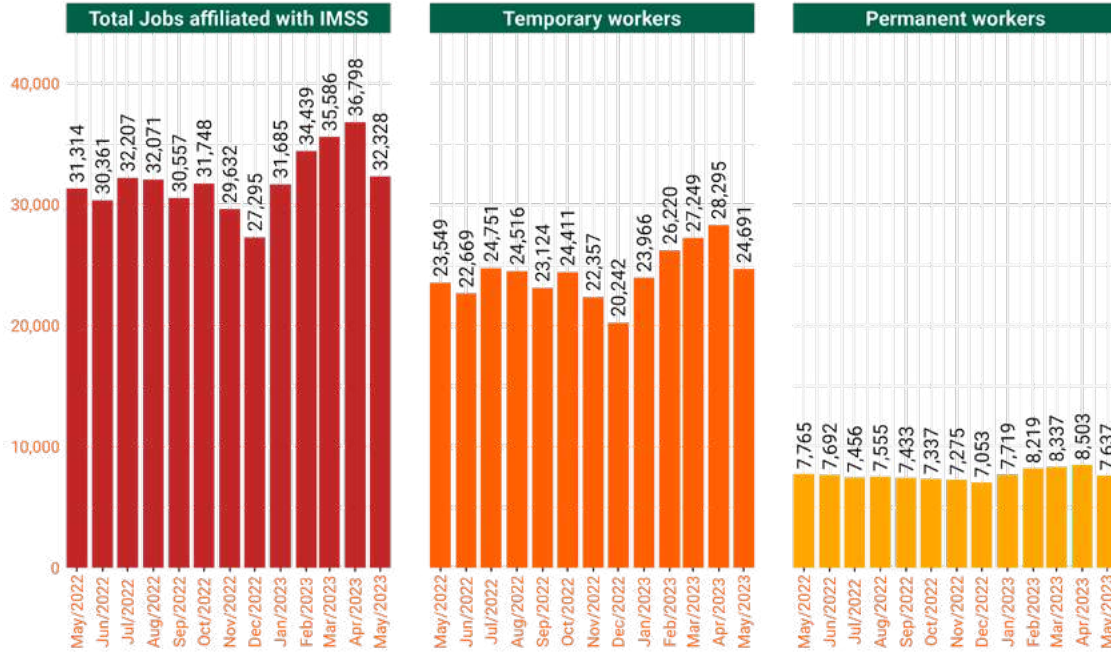
MUNICIPALITIES OF SPECIAL INTEREST

The following section presents results for municipalities of special interest, which include the following:

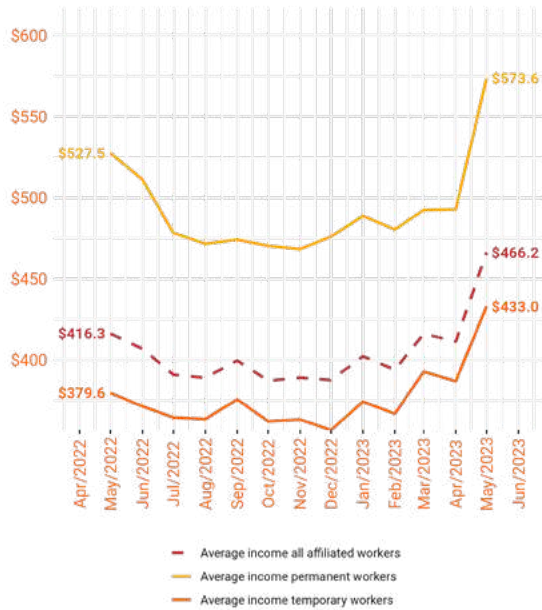
| Municipality | State | Main Crops |
|--|---------------------|--|
| Mexicali | Baja California | Vegetables, grapes, berries |
| Ensenada | Baja California | Vegetables, grapes, berries |
| San Quintín | Baja California | Vegetables, berries |
| Uruapan | Michoacán de Ocampo | Avocados |
| Tancítaro | Michoacán de Ocampo | Avocados |
| Zamora | Michoacán de Ocampo | Berries |
| Jacona | Michoacán de Ocampo | Berries |
| Zapotlán el Grande | Jalisco | Berries |
| Gómez Farías | Jalisco | Berries |
| Sayula | Jalisco | Berries |
| Amacueca | Jalisco | Berries |
| Jocotepec | Jalisco | Berries |
| Arandas | Jalisco | Tequila |
| Atotonilco el Alto | Jalisco | Tequila |
| Tequila | Jalisco | Tequila |
| Amatitán | Jalisco | Tequila |
| Culiacán | Sinaloa | Tomatoes and peppers |
| Navolato | Sinaloa | Tomatoes and peppers |
| Pénjamo | Guanajuato | Very diverse, vegetables, berries, agave, others |
| Abasolo | Guanajuato | Very diverse, vegetables, berries, agave, others |
| Irapuato | Guanajuato | Very diverse, vegetables, berries, agave, others |
| Romita | Guanajuato | Very diverse, vegetables, berries, agave, others |
| Valle de Santiago | Guanajuato | Very diverse, vegetables, berries, agave, others |
| Dolores Hidalgo Cuna de la Independencia | Guanajuato | Very diverse, vegetables, berries, agave, others |



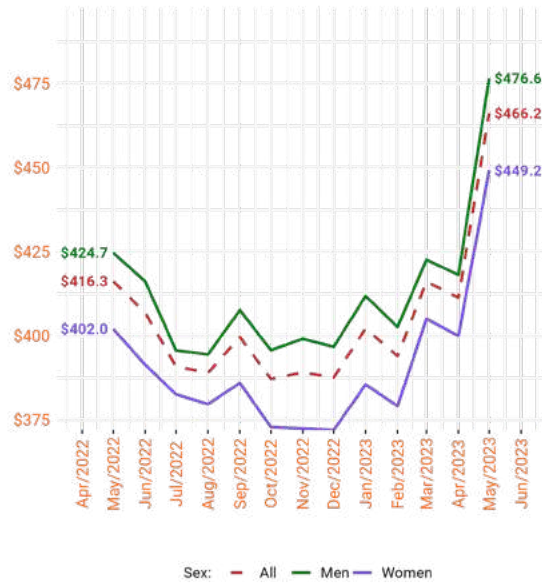
State: Baja California, Municipality: Ensenada
Total, Permanent, and Temporary Agricultural Sector Workers Registered with IMSS
 State: Baja California, Municipality: Ensenada



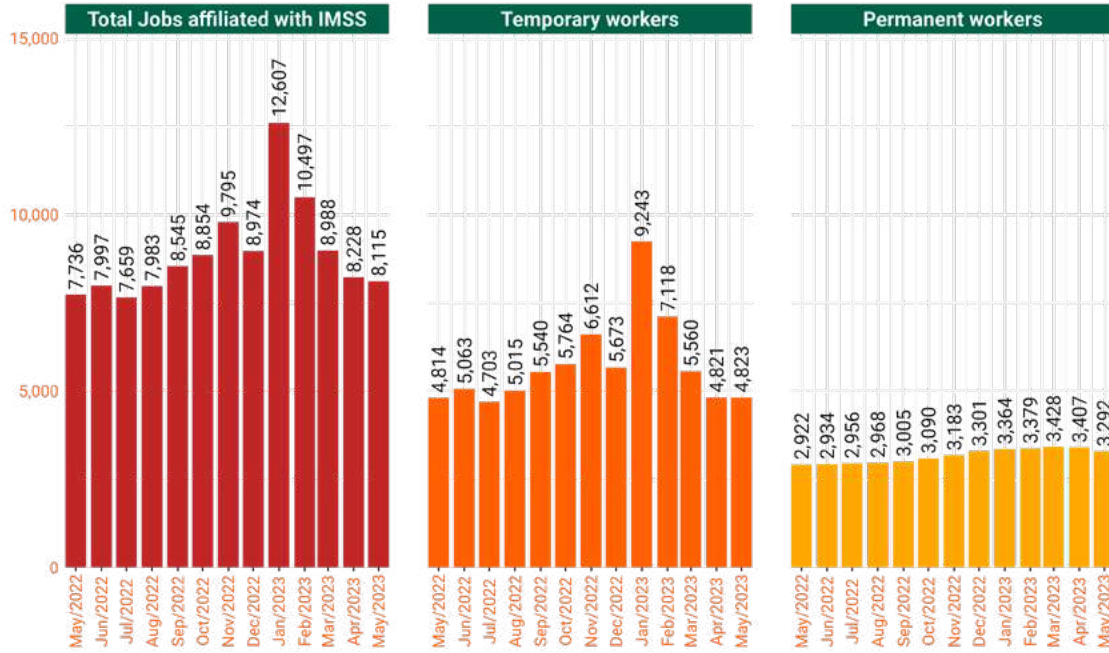
Base Wage for IMSS Contributions
for Temporary and Permanent Workers
 State: Baja California, Municipality: Ensenada



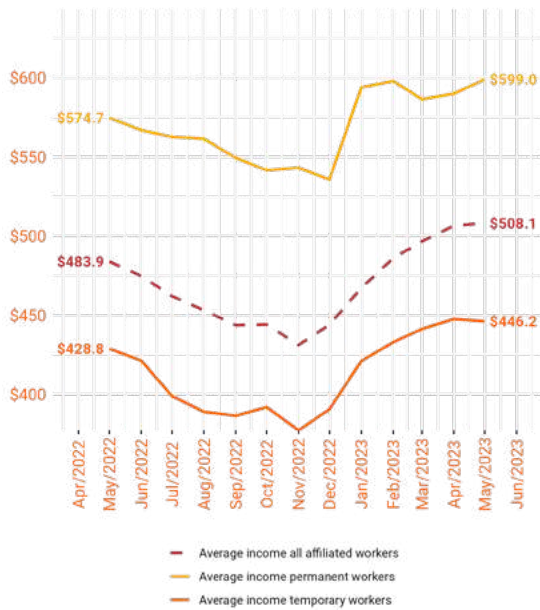
Average Base Wage for IMSS Contributions,
by Sex
 State: Baja California, Municipality: Ensenada



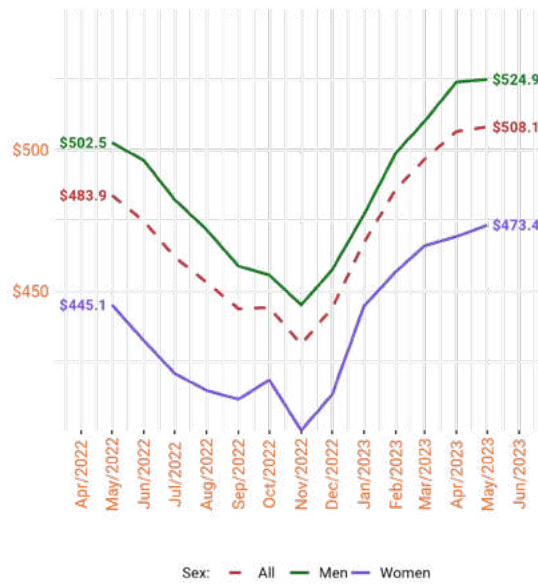
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Total, Permanent, and Temporary Agricultural Sector Workers Registered with IMSS
 State: Baja California, Municipality: Mexicali



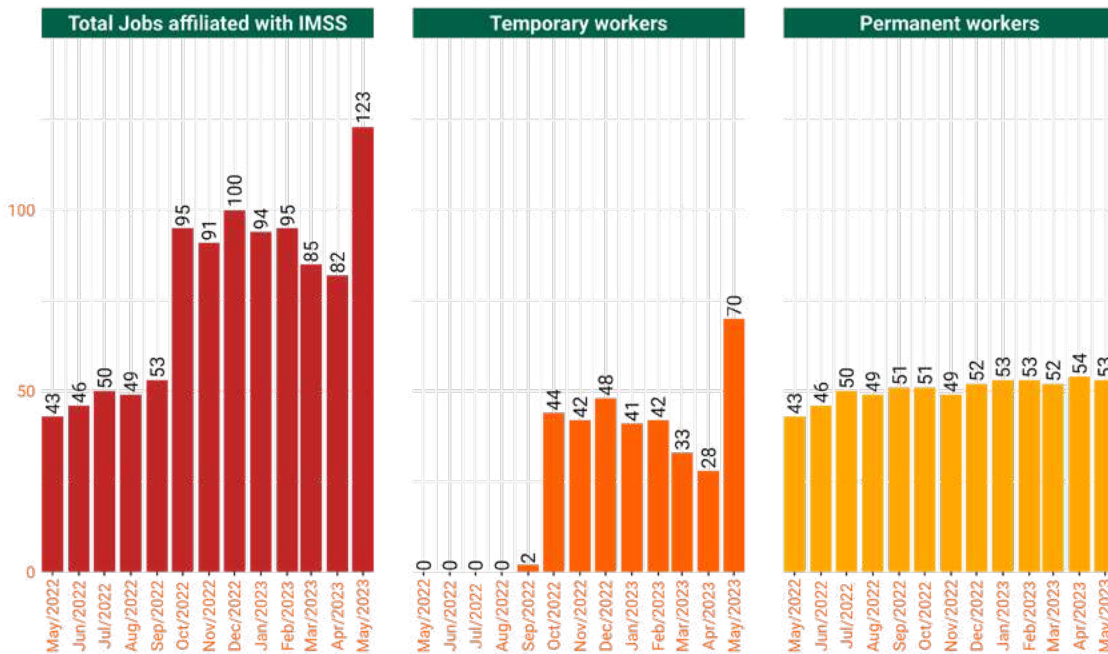
Base Wage for IMSS Contributions
for Temporary and Permanent Workers
 State: Baja California, Municipality: Mexicali



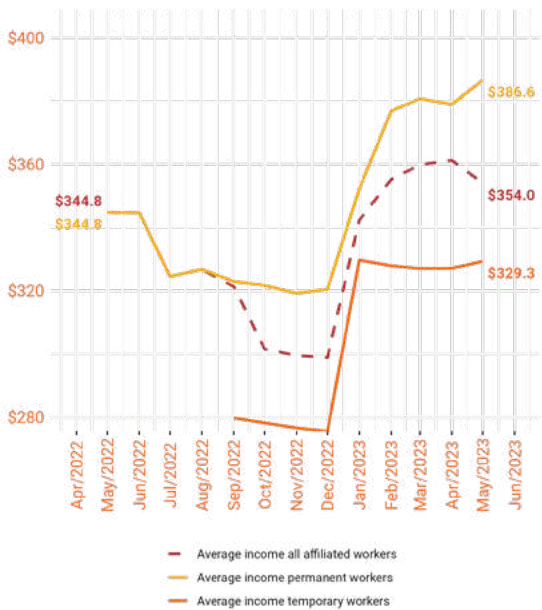
Average Base Wage for IMSS Contributions,
by Sex
 State: Baja California, Municipality: Mexicali



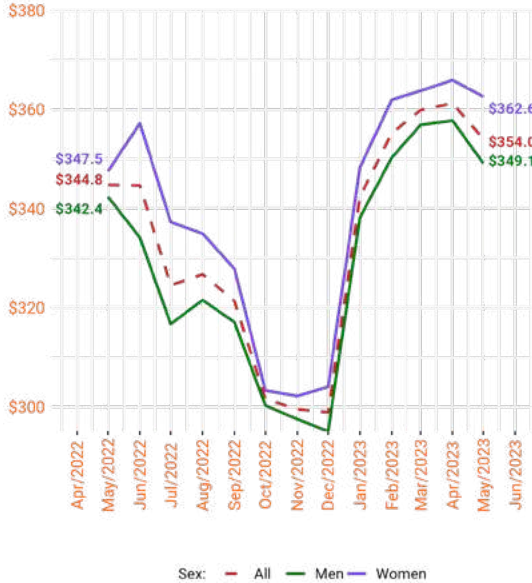
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Total, Permanent, and Temporary Agricultural Sector Workers Registered with IMSS
 State: Baja California, Municipality: San Quintín



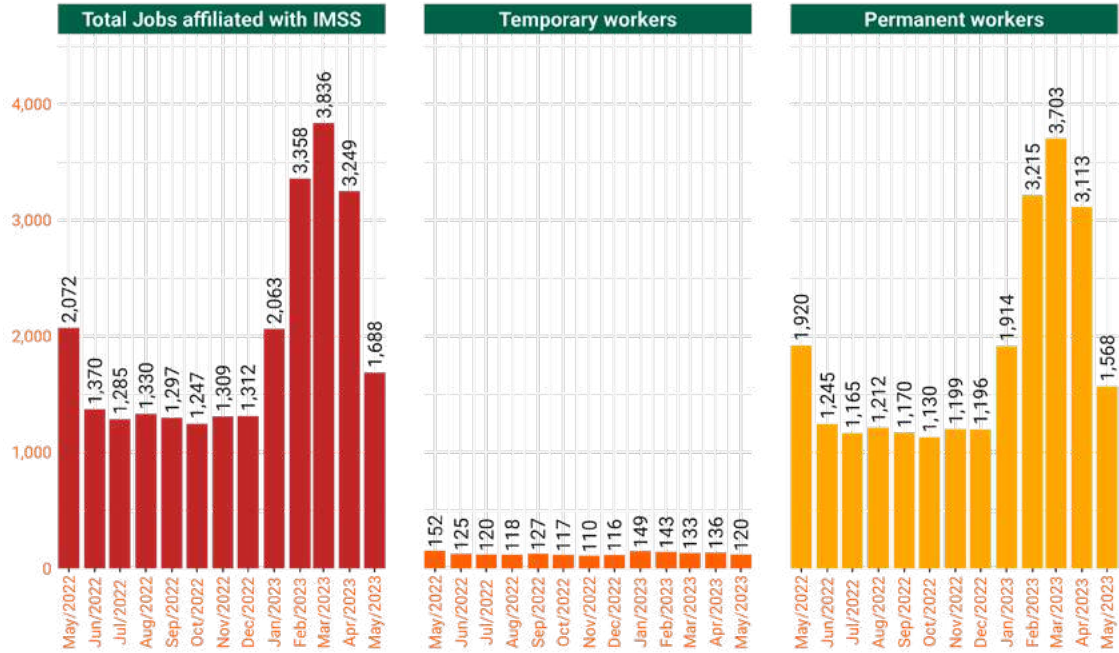
Base Wage for IMSS Contributions for Temporary and Permanent Workers
 State: Baja California, Municipality: San Quintín



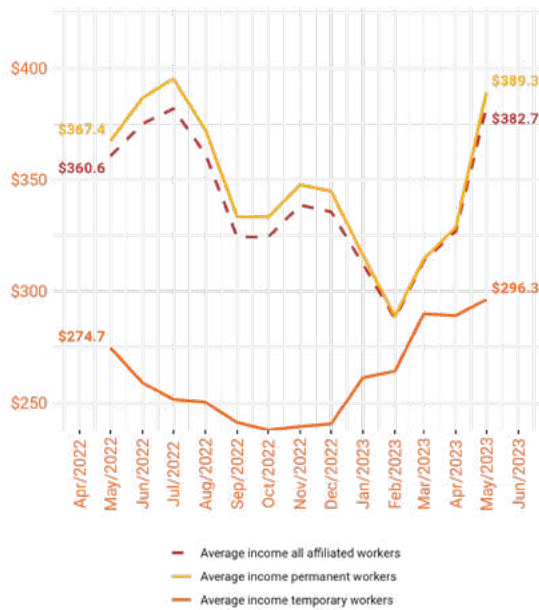
Average Base Wage for IMSS Contributions, by Sex
 State: Baja California, Municipality: San Quintín



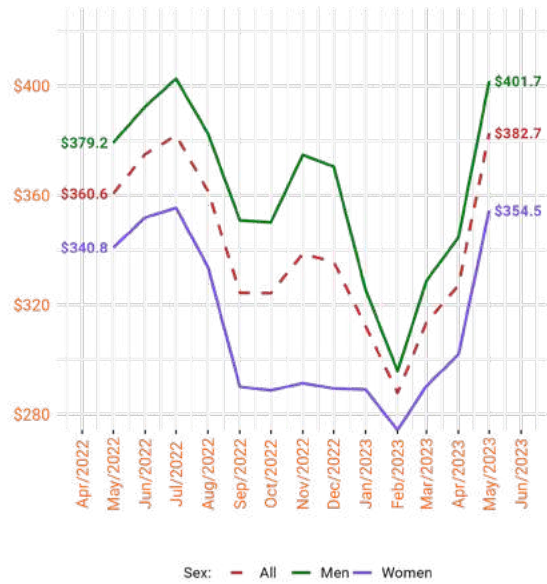
State: Guanajuato, Municipality: Abasolo
Total, Permanent, and Temporary Agricultural Sector Workers Registered with IMSS
 State: Guanajuato, Municipality: Abasolo



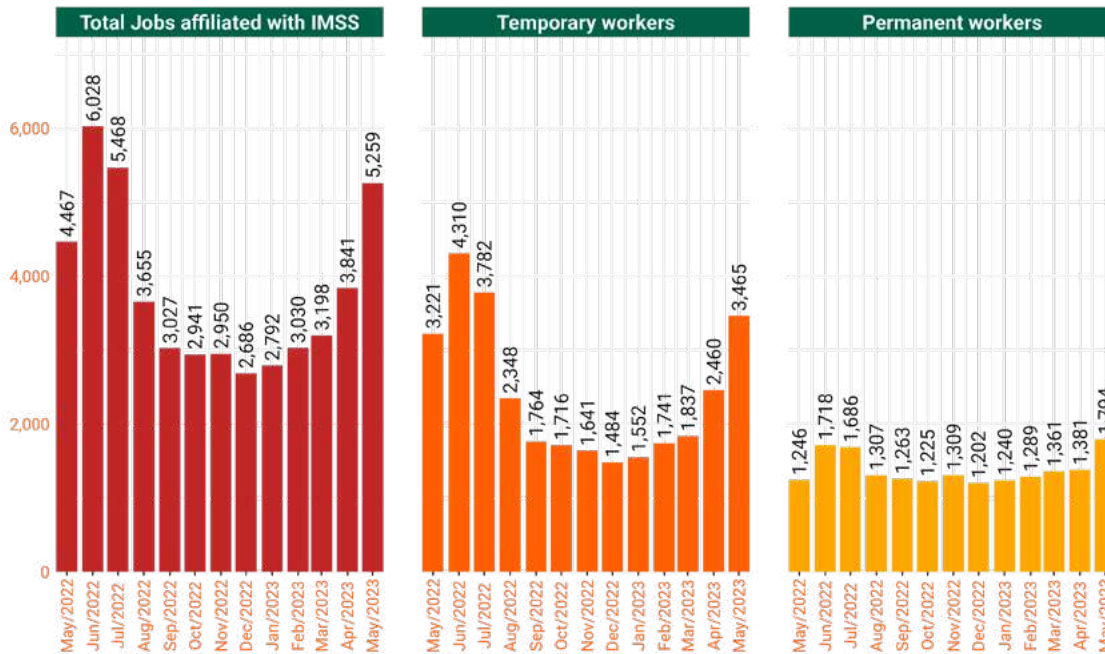
Base Wage for IMSS Contributions for Temporary and Permanent Workers
 State: Guanajuato, Municipality: Abasolo



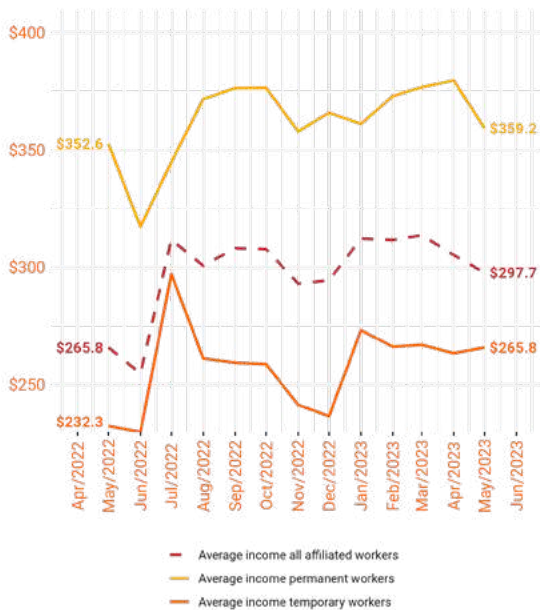
Average Base Wage for IMSS Contributions, by Sex
 State: Guanajuato, Municipality: Abasolo



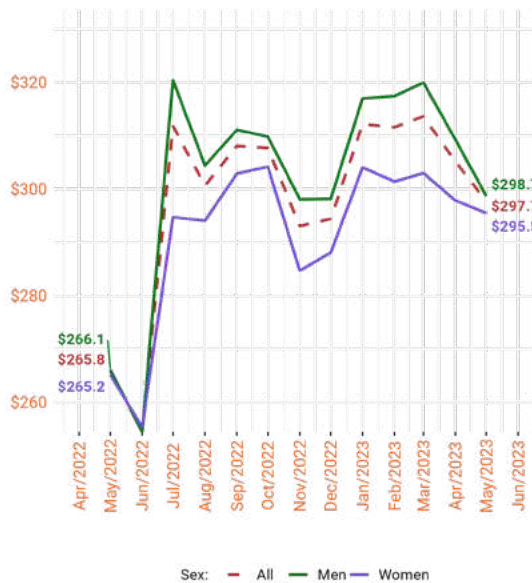
State: Guanajuato, Municipality: Dolores Hidalgo Cuna de la Independencia
Total, Permanent, and Temporary Agricultural Sector Workers Registered with IMSS
 State: Guanajuato, Municipality: Dolores Hidalgo



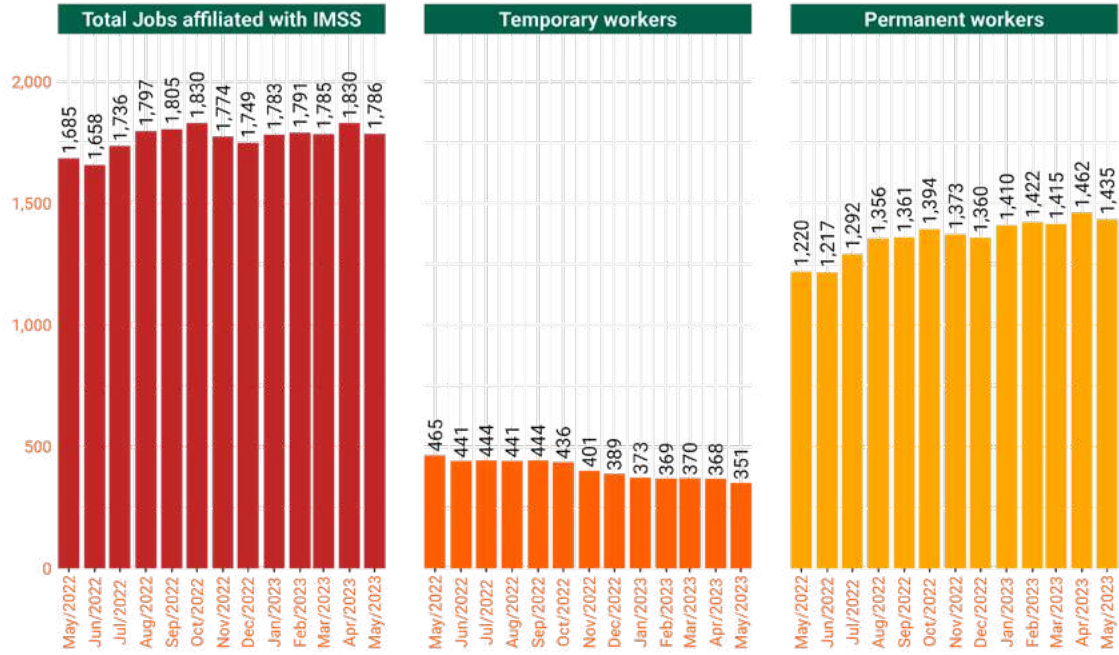
Base Wage for IMSS Contributions for Temporary and Permanent Workers
 State: Guanajuato, Municipality: Dolores Hidalgo



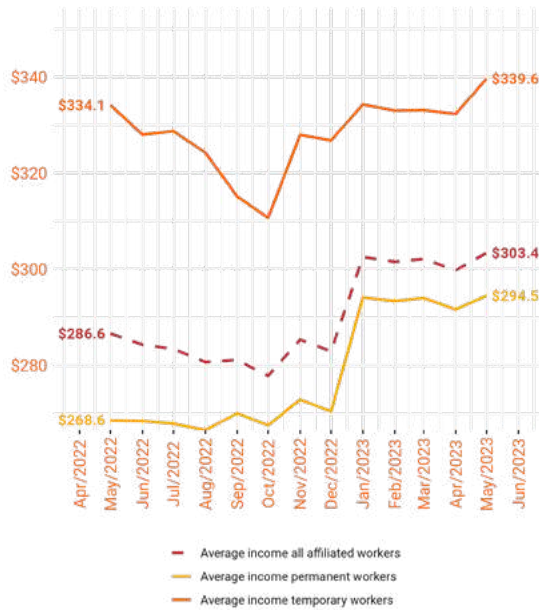
Average Base Wage for IMSS Contributions, by Sex
 State: Guanajuato, Municipality: Dolores Hidalgo



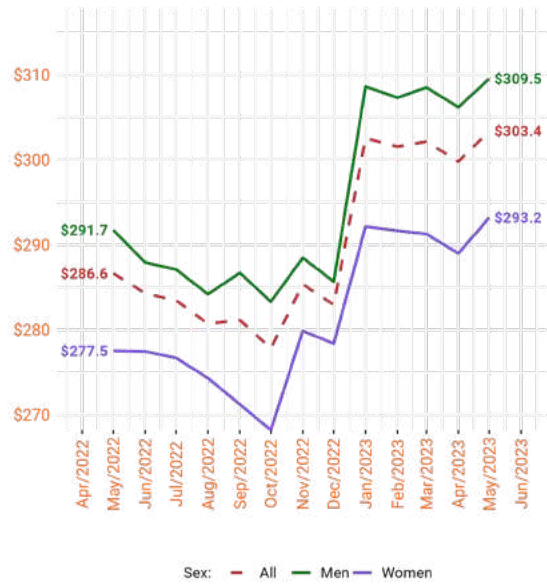
State: Guanajuato, Municipality: Irapuato
Total, Permanent, and Temporary Agricultural Sector Workers Registered with IMSS
 State: Guanajuato, Municipality: Irapuato



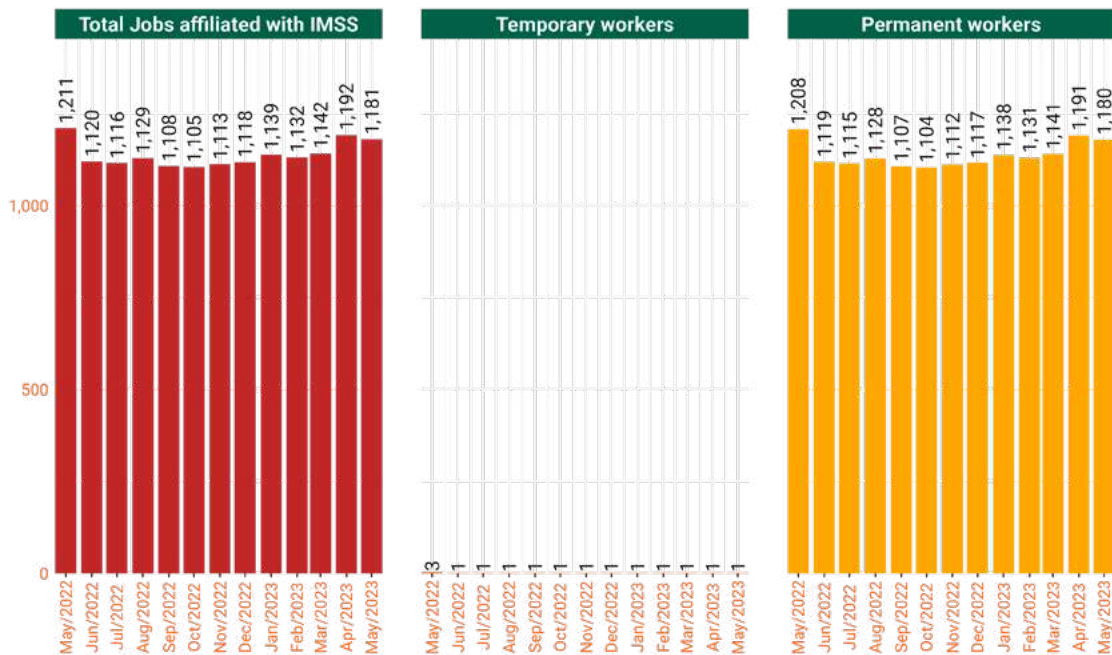
Base Wage for IMSS Contributions for Temporary and Permanent Workers
 State: Guanajuato, Municipality: Irapuato



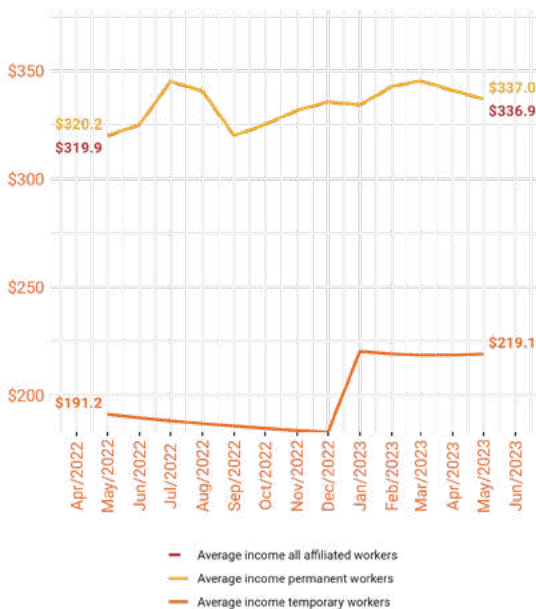
Average Base Wage for IMSS Contributions, by Sex
 State: Guanajuato, Municipality: Irapuato



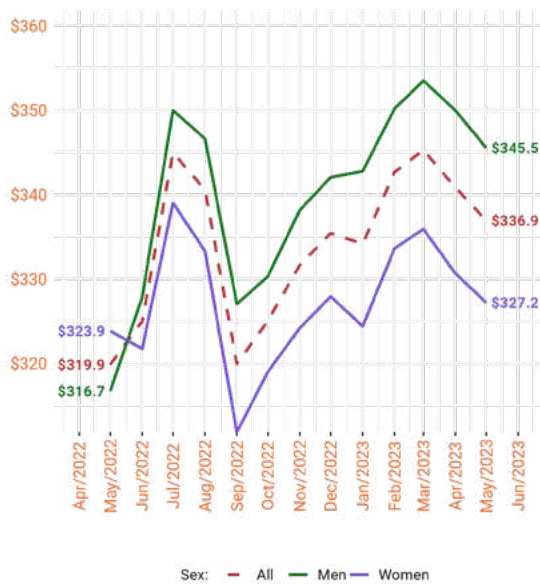
State: Guanajuato, Municipality: Pénjamo
Total, Permanent, and Temporary Agricultural Sector Workers Registered with IMSS
 State: Guanajuato, Municipality: Pénjamo



Base Wage for IMSS Contributions for Temporary and Permanent Workers
 State: Guanajuato, Municipality: Pénjamo



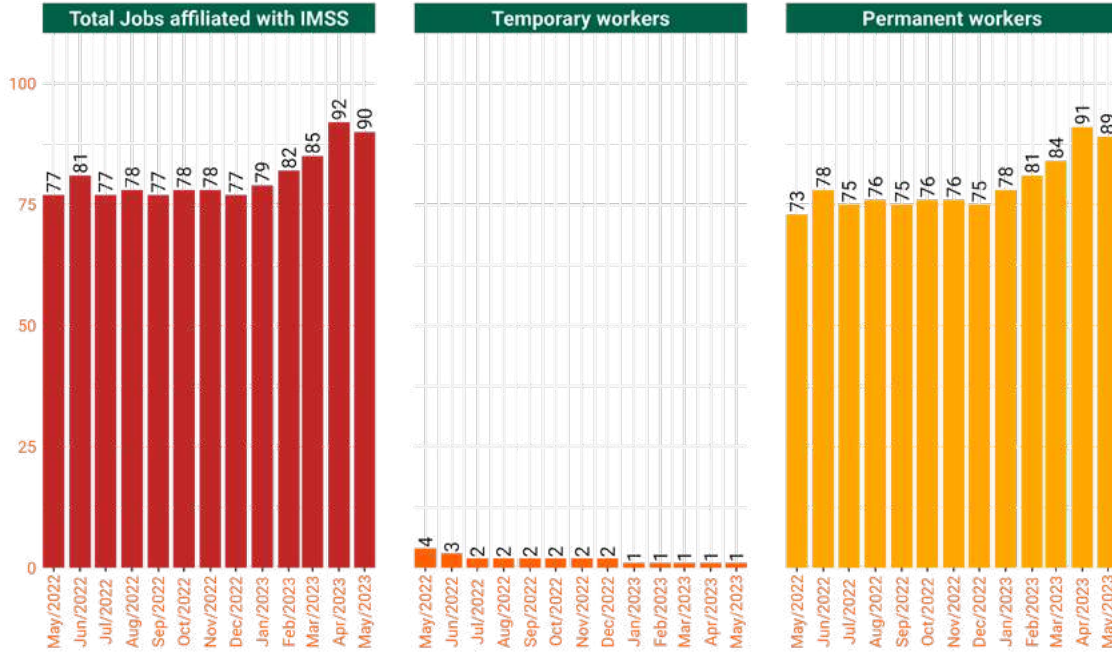
Average Base Wage for IMSS Contributions, by Sex
 State: Guanajuato, Municipality: Pénjamo



State: Guanajuato, Municipality: Romita

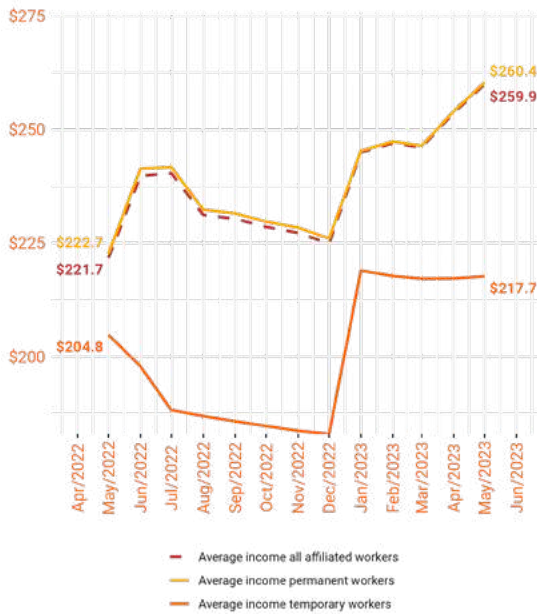
Total, Permanent, and Temporary Agricultural Sector Workers Registered with IMSS

State: Guanajuato, Municipality: Romita



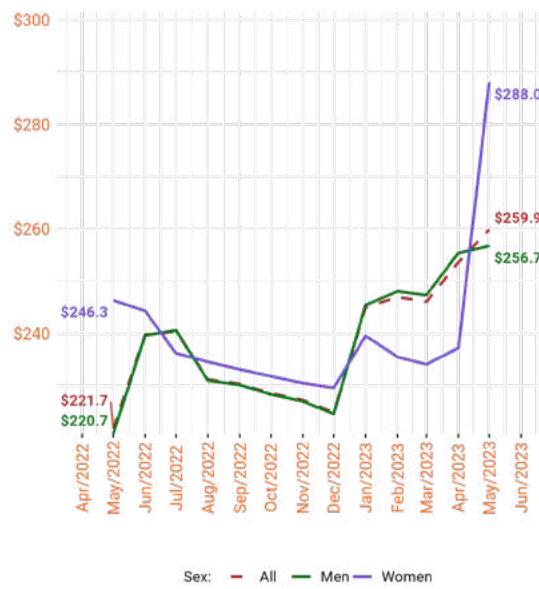
Base Wage for IMSS Contributions for Temporary and Permanent Workers

State: Guanajuato, Municipality: Romita

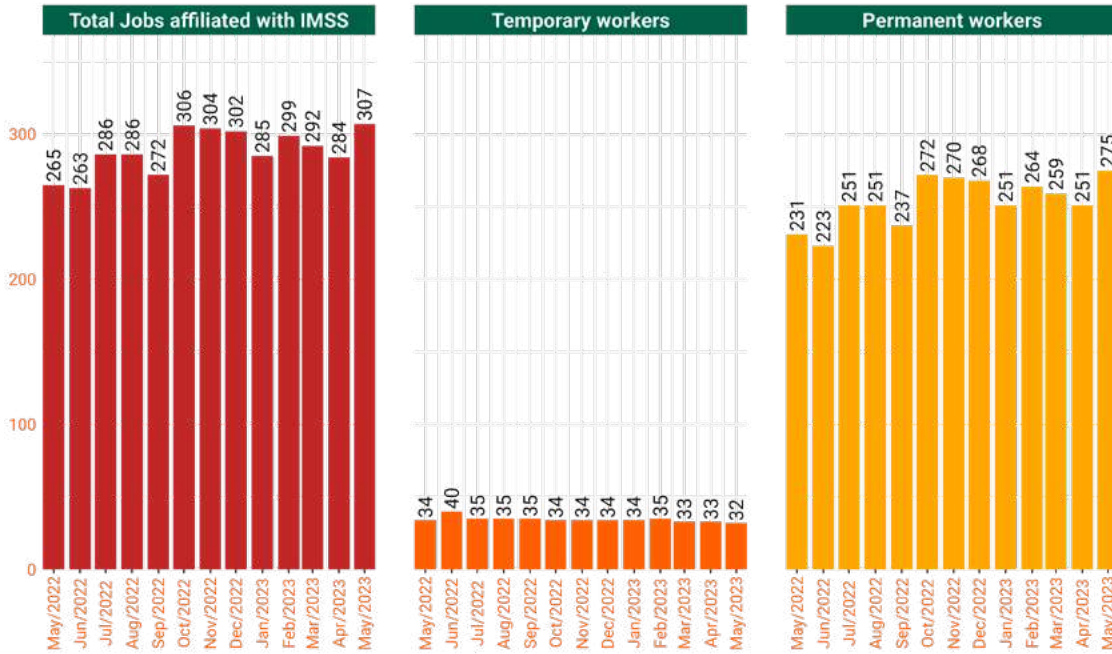


Average Base Wage for IMSS Contributions, by Sex

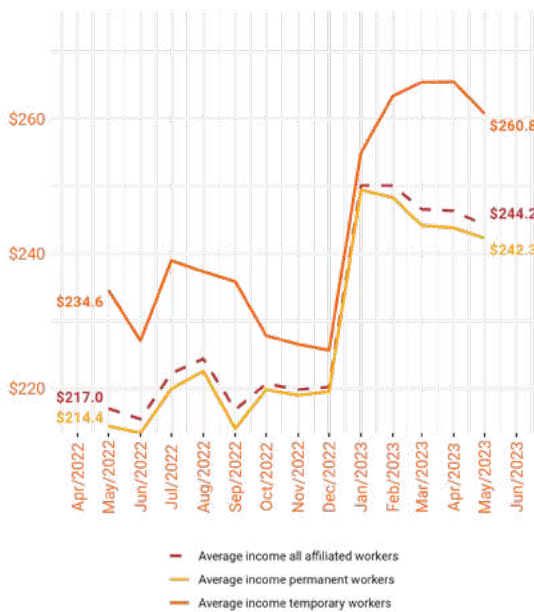
State: Guanajuato, Municipality: Romita



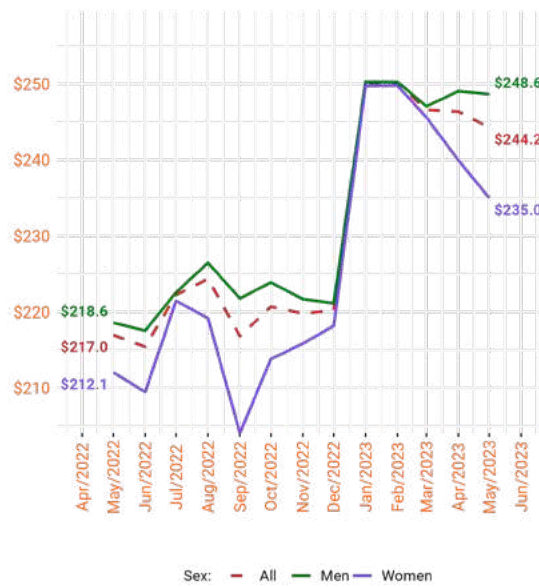
State: Guanajuato, Municipality: Valle de Santiago
Total, Permanent, and Temporary Agricultural Sector Workers Registered with IMSS
 State: Guanajuato, Municipality: Valle de Santiago



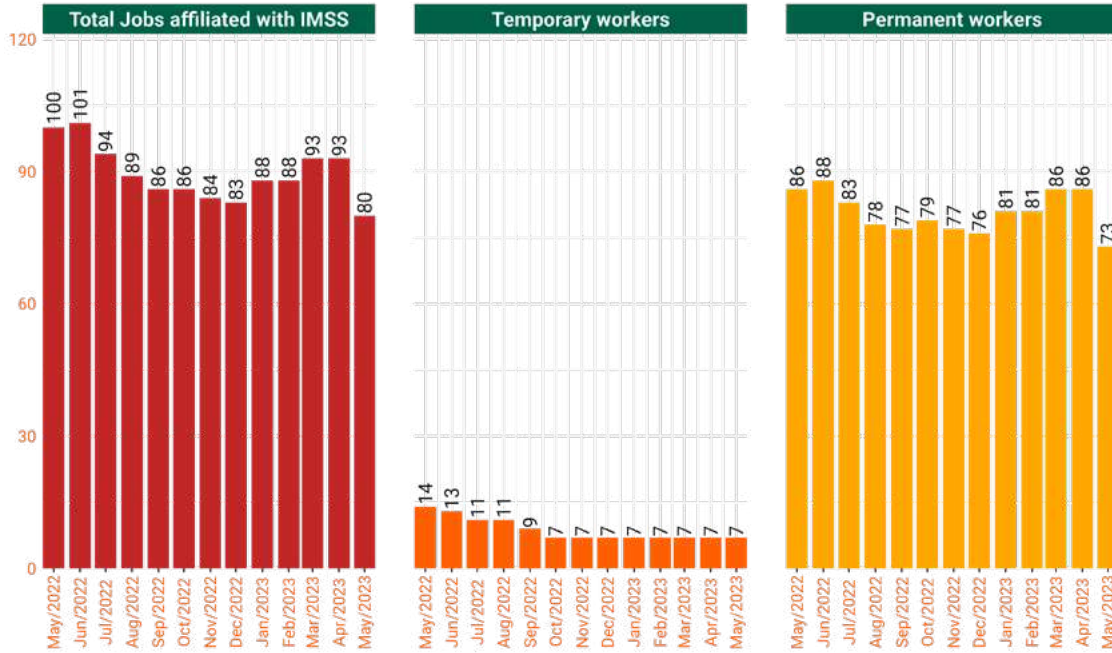
Base Wage for IMSS Contributions for Temporary and Permanent Workers
 State: Guanajuato, Municipality: Valle de Santiago



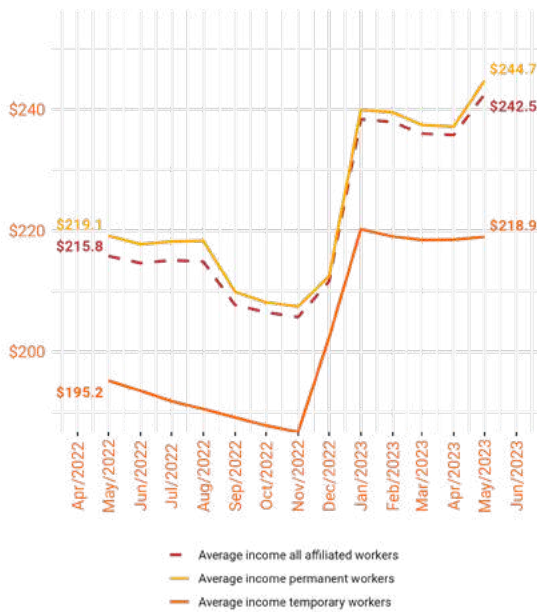
Average Base Wage for IMSS Contributions, by Sex
 State: Guanajuato, Municipality: Valle de Santiago



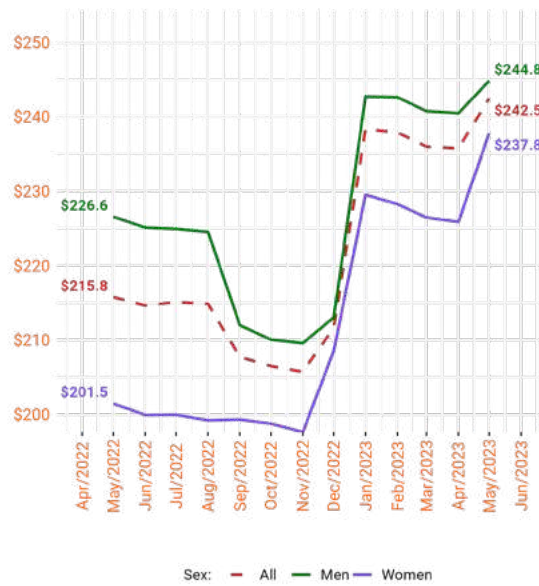
State: Jalisco, Municipality: Amacueca
Total, Permanent, and Temporary Agricultural Sector Workers Registered with IMSS
 State: Jalisco, Municipality: Amacueca



Base Wage for IMSS Contributions for Temporary and Permanent Workers
 State: Jalisco, Municipality: Amacueca



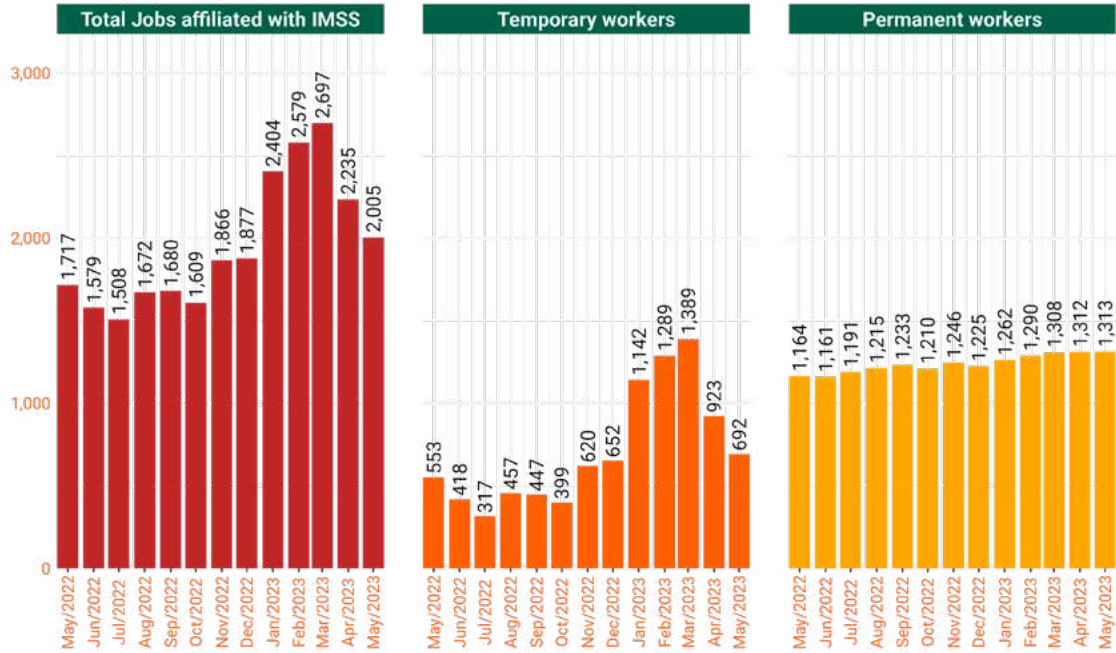
Average Base Wage for IMSS Contributions, by Sex
 State: Jalisco, Municipality: Amacueca



State: Jalisco, Municipality: Amatitán

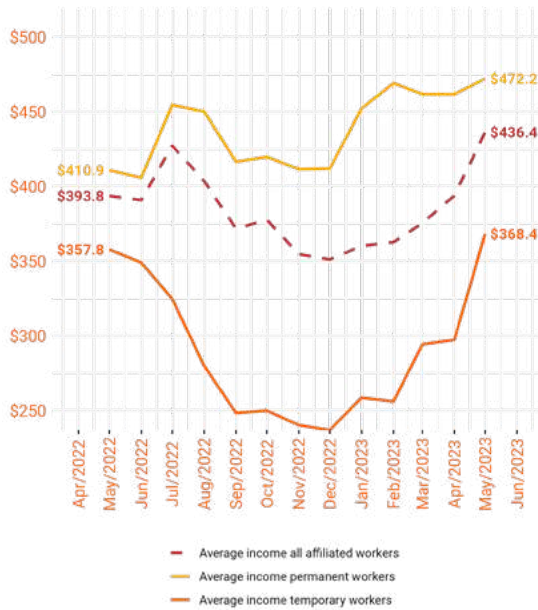
Total, Permanent, and Temporary Agricultural Sector Workers Registered with IMSS

State: Jalisco, Municipality: Amatitán



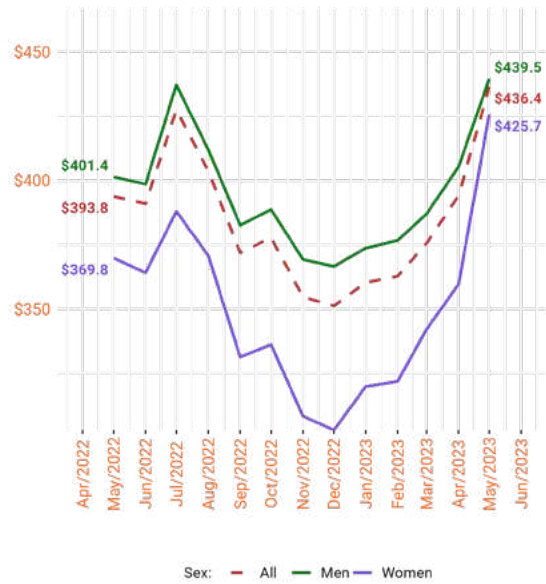
Base Wage for IMSS Contributions for Temporary and Permanent Workers

State: Jalisco, Municipality: Amatitán



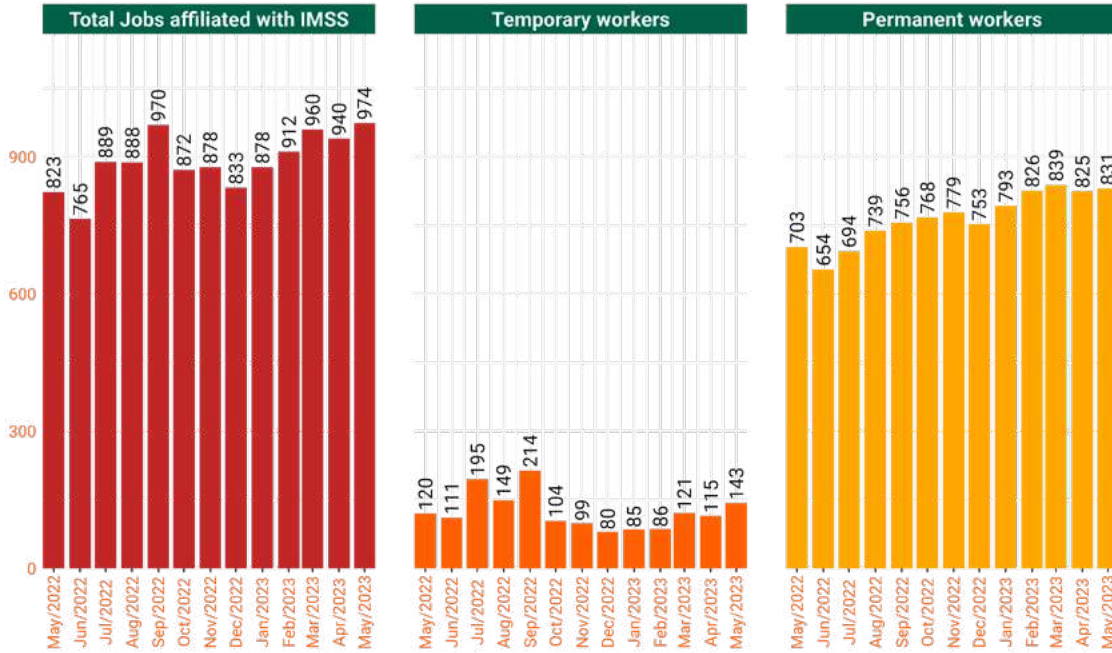
Average Base Wage for IMSS Contributions, by Sex

State: Jalisco, Municipality: Amatitán

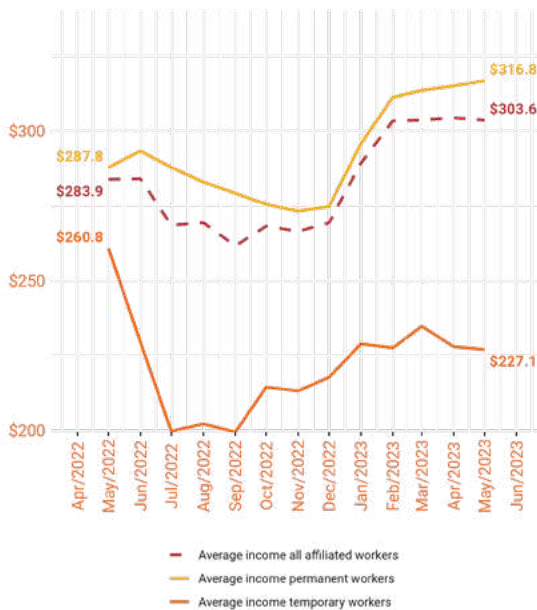


State: Jalisco, Municipality: Arandas

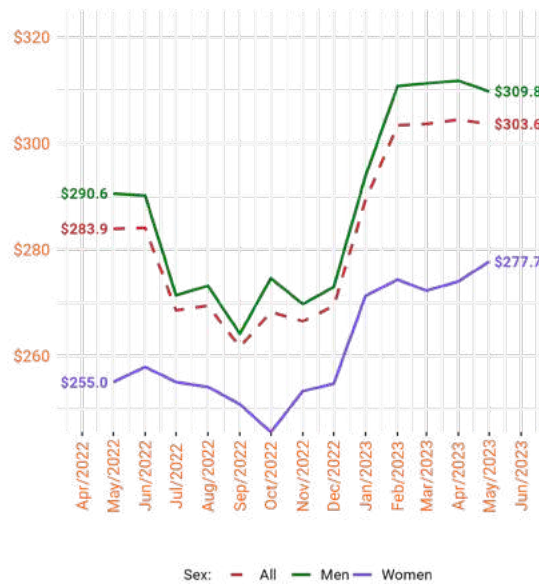
Total, Permanent, and Temporary Agricultural Sector Workers Registered with IMSS
State: Jalisco, Municipality: Arandas



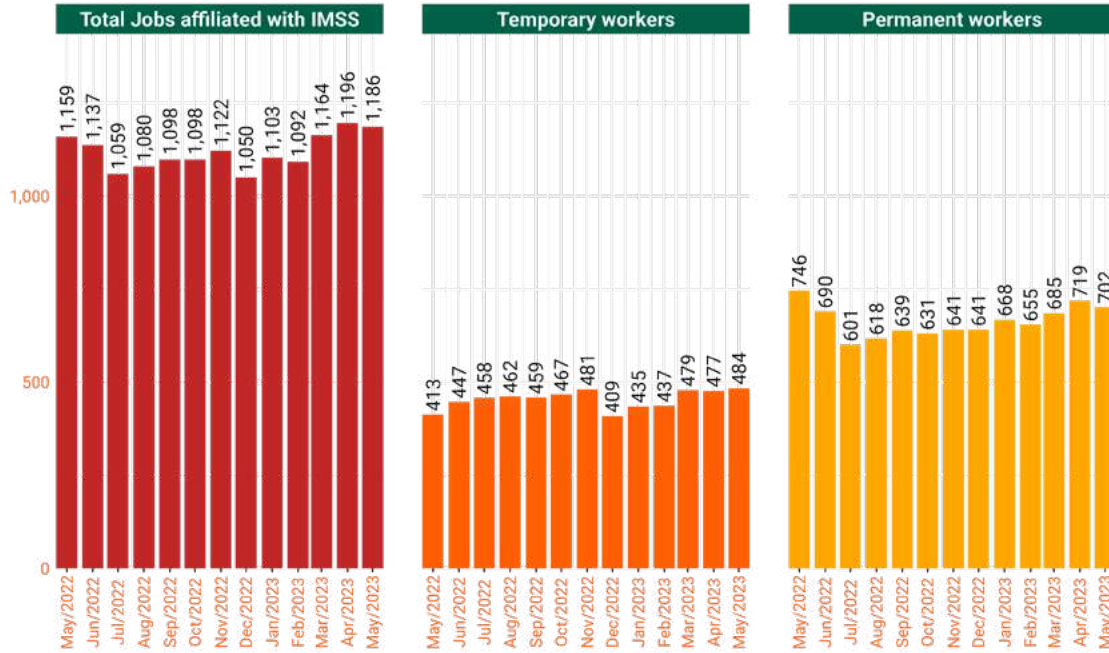
Base Wage for IMSS Contributions for Temporary and Permanent Workers
State: Jalisco, Municipality: Arandas



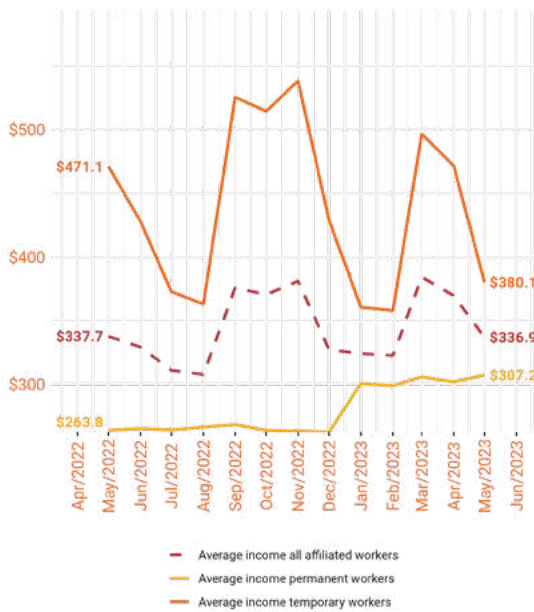
Average Base Wage for IMSS Contributions, by Sex
State: Jalisco, Municipality: Arandas



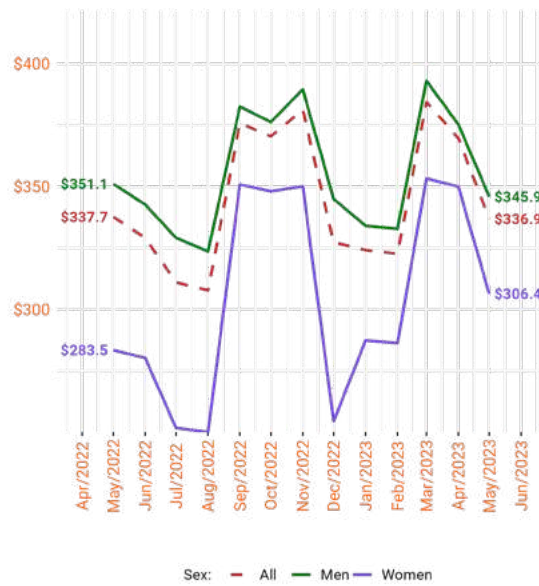
State: Jalisco, Municipality: Atotonilco el Alto
Total, Permanent, and Temporary Agricultural Sector Workers Registered with IMSS
 State: Jalisco, Municipality: Atotonilco el Alto



Base Wage for IMSS Contributions for Temporary and Permanent Workers
 State: Jalisco, Municipality: Atotonilco el Alto



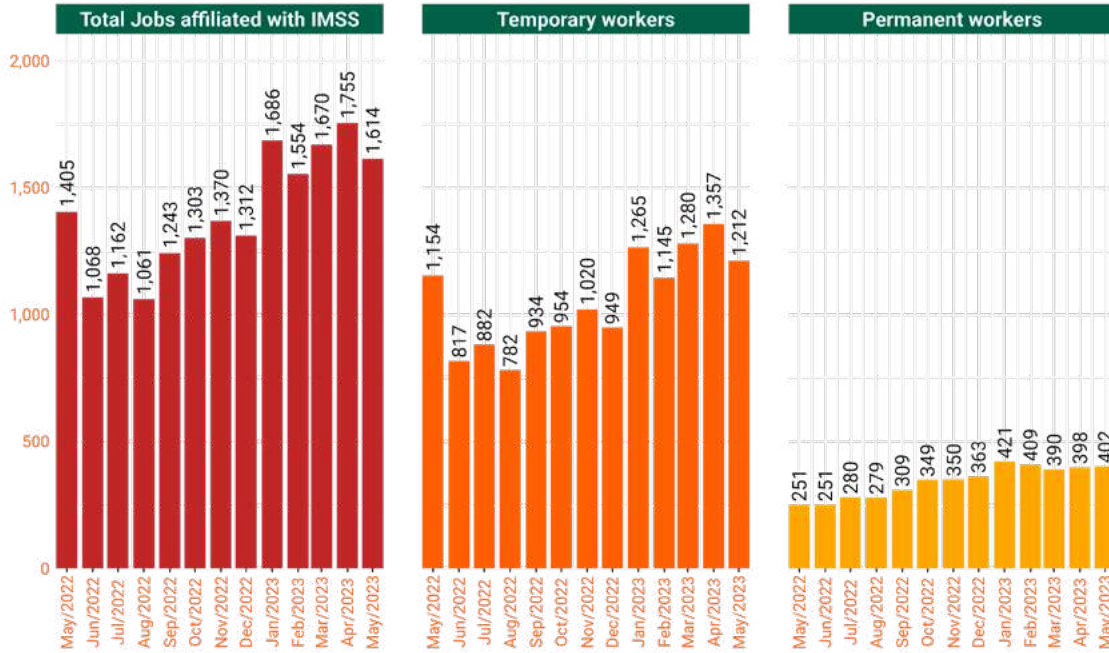
Average Base Wage for IMSS Contributions, by Sex
 State: Jalisco, Municipality: Atotonilco el Alto



State: Jalisco, Municipality: Gómez Farías

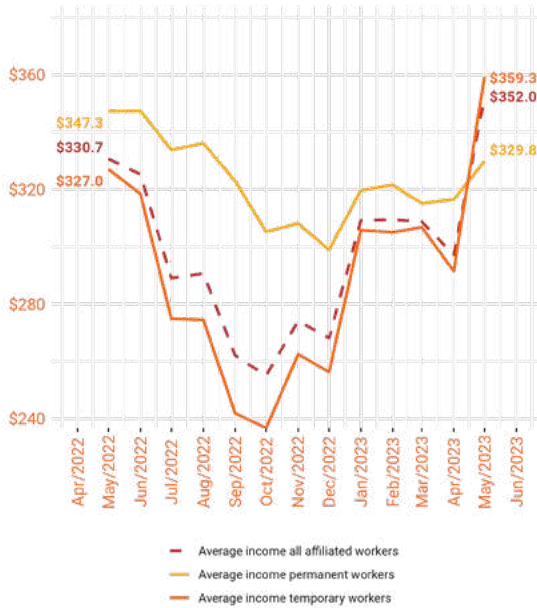
Total, Permanent, and Temporary Agricultural Sector Workers Registered with IMSS

State: Jalisco, Municipality: Gómez Farías



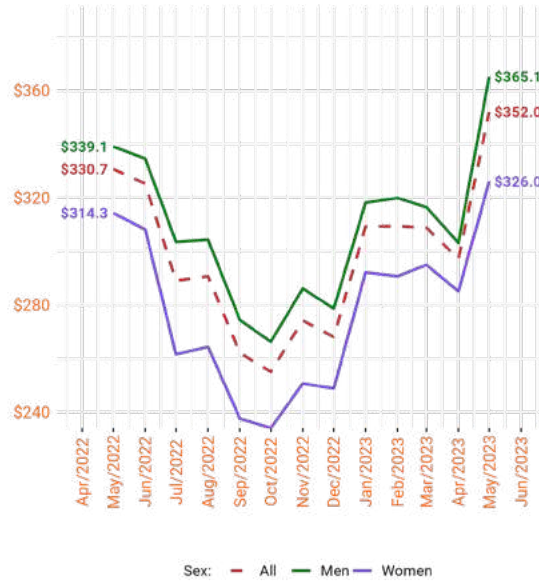
Base Wage for IMSS Contributions for Temporary and Permanent Workers

State: Jalisco, Municipality: Gómez Farías

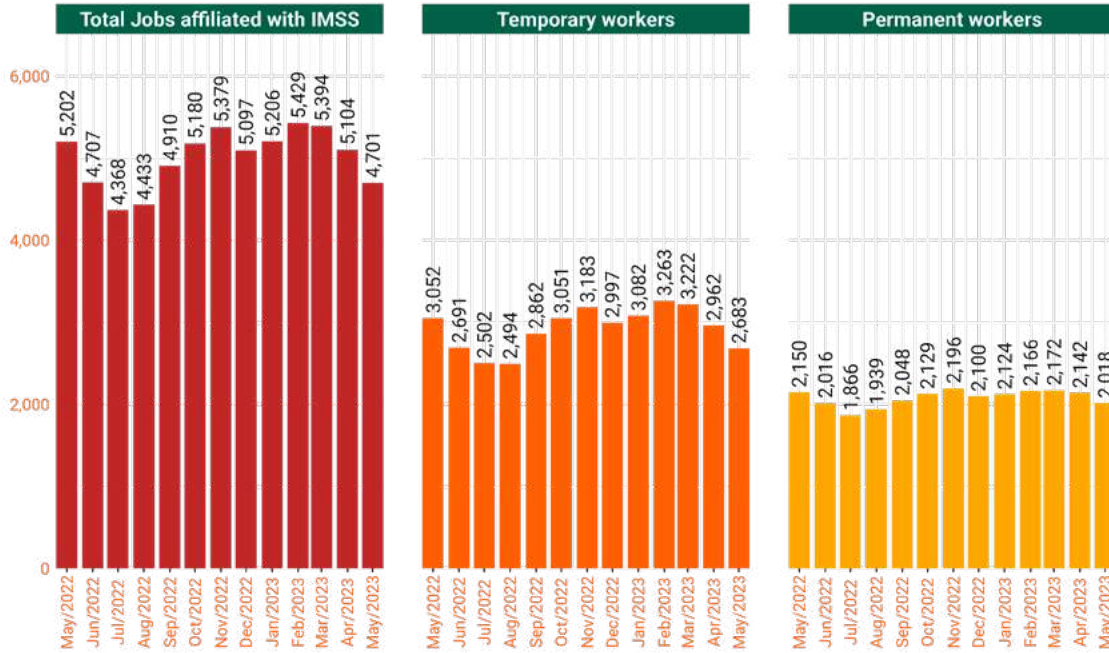


Average Base Wage for IMSS Contributions, by Sex

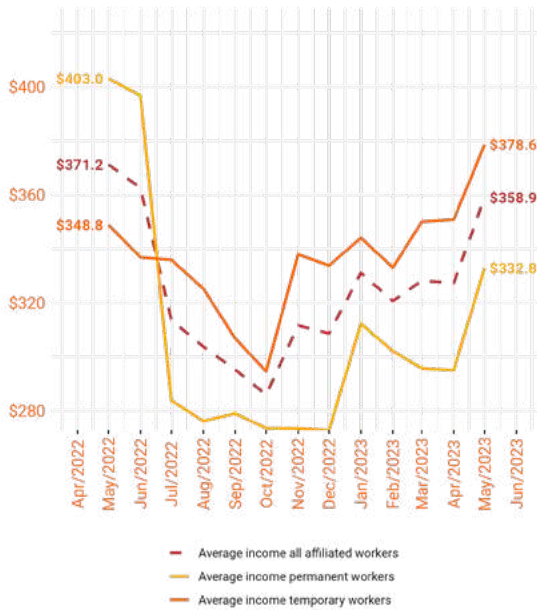
State: Jalisco, Municipality: Gómez Farías



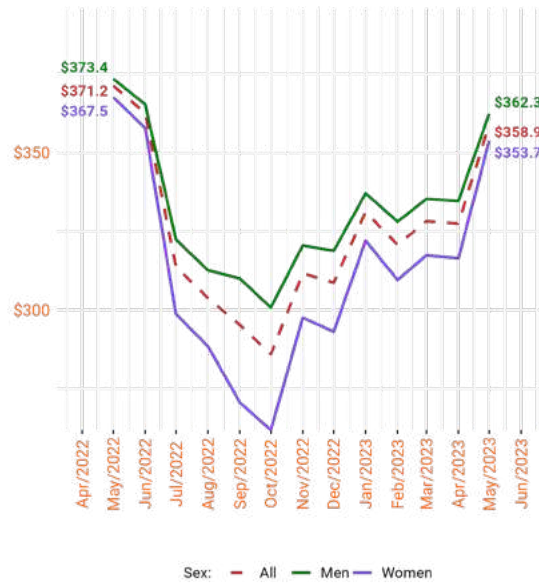
State: Jalisco, Municipality: Jocotepec
Total, Permanent, and Temporary Agricultural Sector Workers Registered with IMSS
 State: Jalisco, Municipality: Jocotepec



Base Wage for IMSS Contributions for Temporary and Permanent Workers
 State: Jalisco, Municipality: Jocotepec



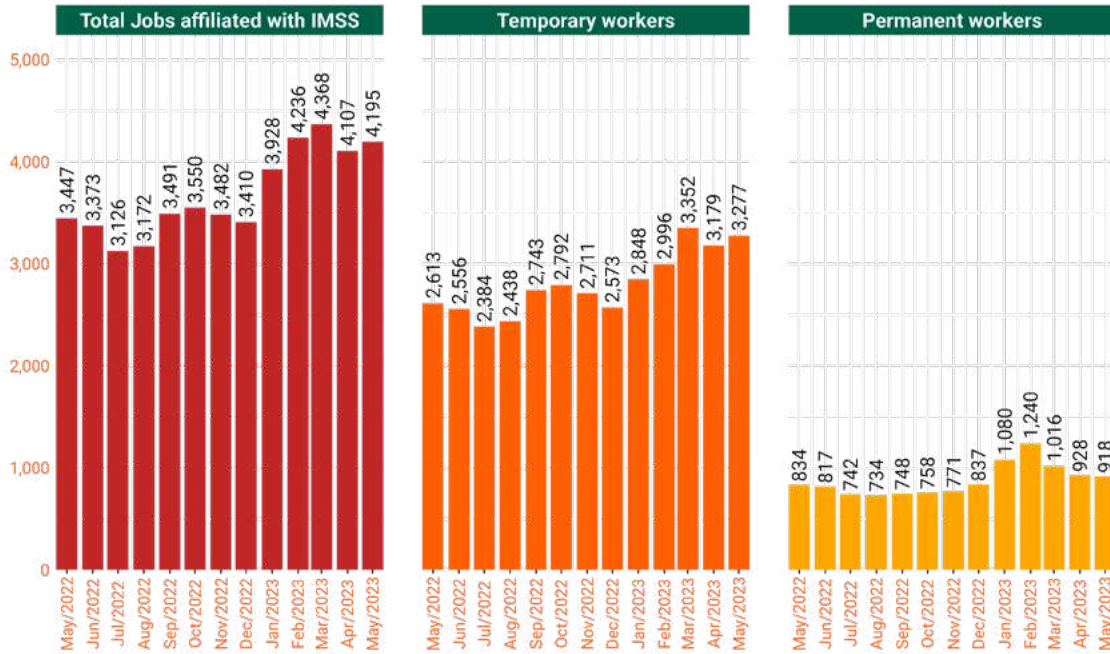
Average Base Wage for IMSS Contributions, by Sex
 State: Jalisco, Municipality: Jocotepec



State: Jalisco, Municipality: Sayula

Total, Permanent, and Temporary Agricultural Sector Workers Registered with IMSS

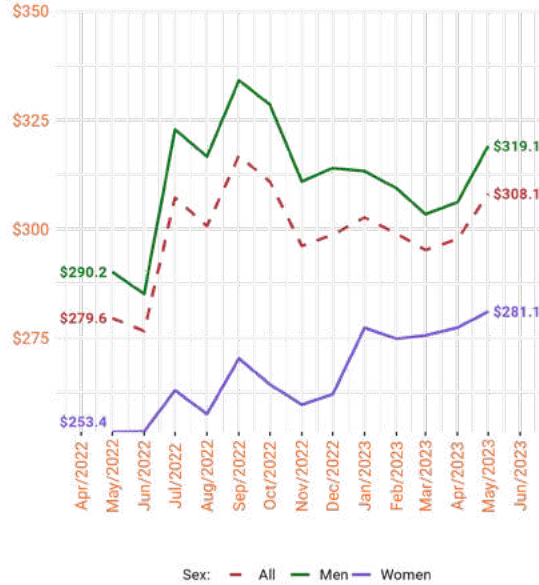
State: Jalisco, Municipality: Sayula



Base Wage for IMSS Contributions for Temporary and Permanent Workers
State: Jalisco, Municipality: Sayula



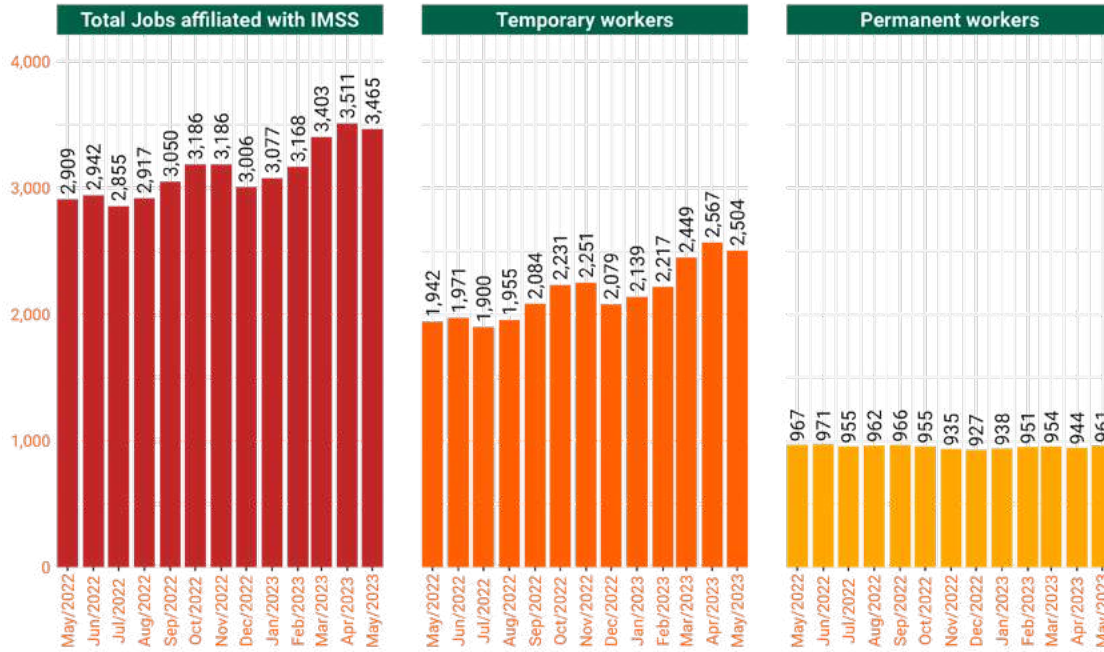
Average Base Wage for IMSS Contributions, by Sex
State: Jalisco, Municipality: Sayula



State: Jalisco, Municipality: Tequila

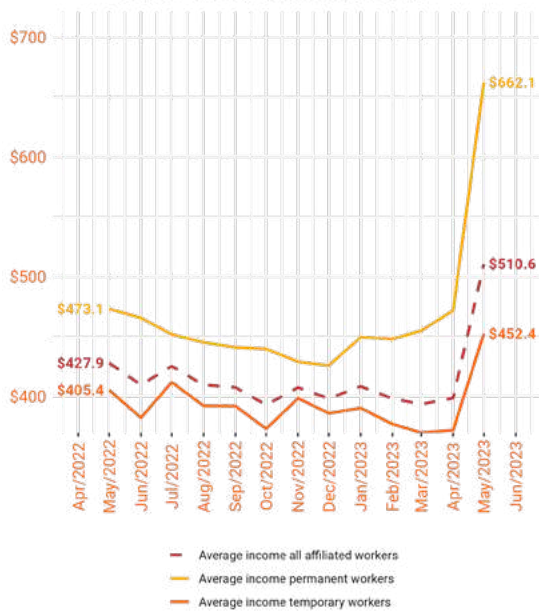
Total, Permanent, and Temporary Agricultural Sector Workers Registered with IMSS

State: Jalisco, Municipality: Tequila



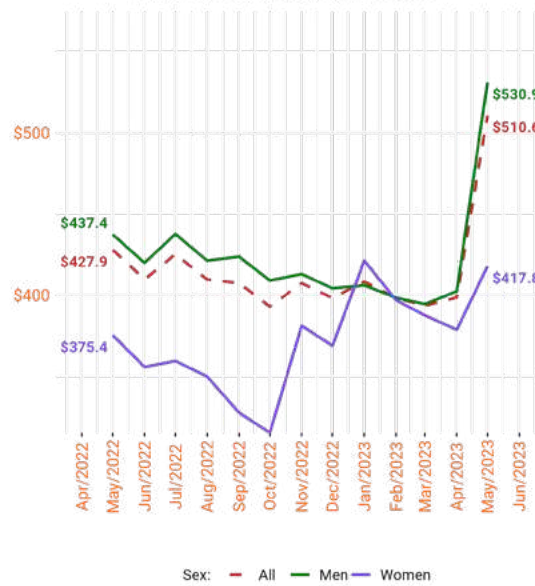
Base Wage for IMSS Contributions for Temporary and Permanent Workers

State: Jalisco, Municipality: Tequila

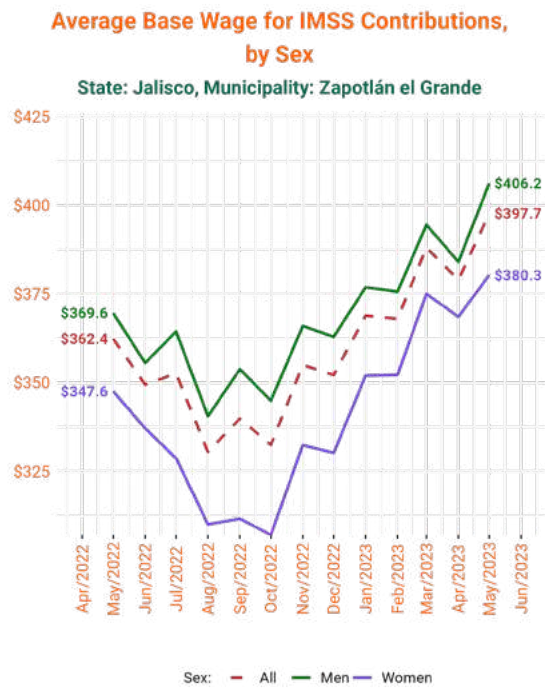
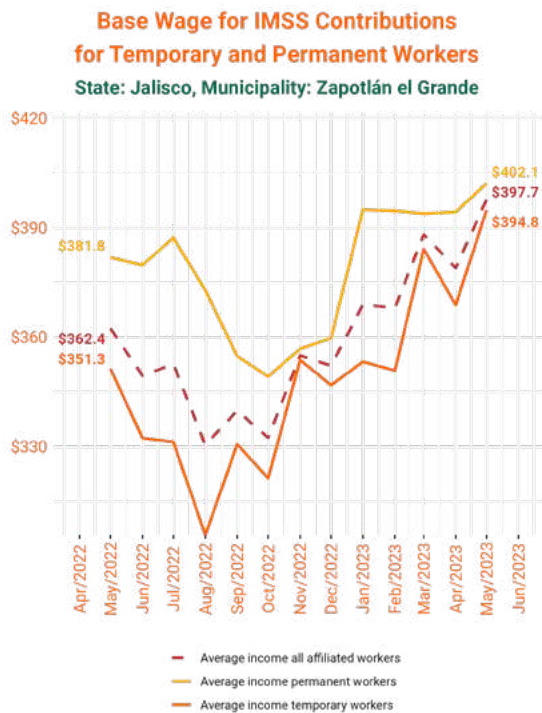
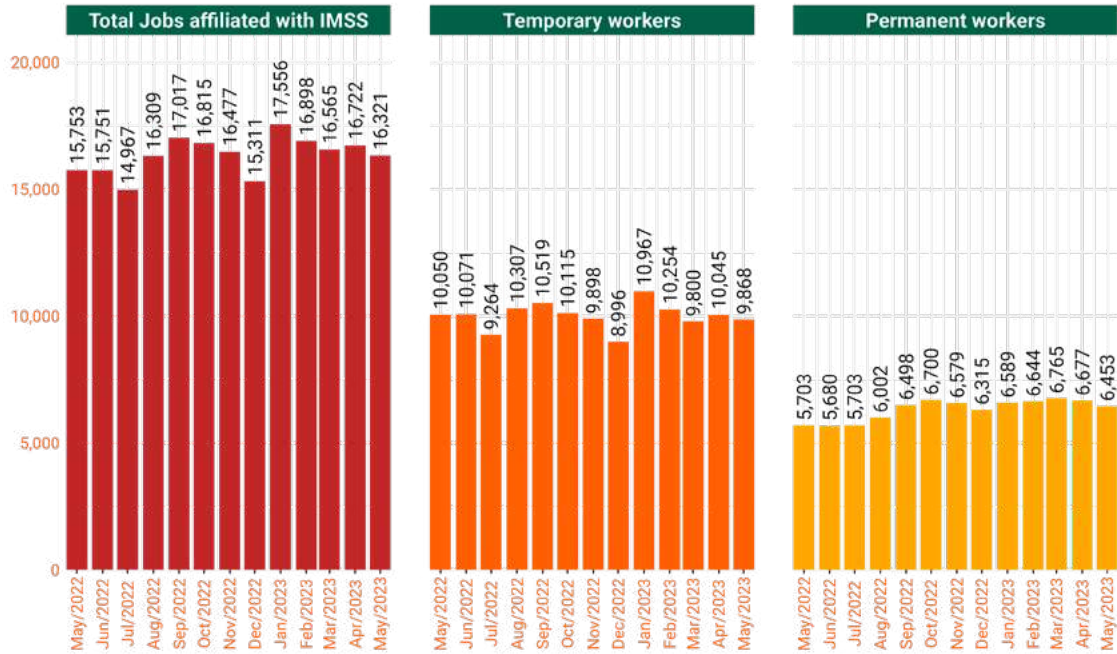


Average Base Wage for IMSS Contributions, by Sex

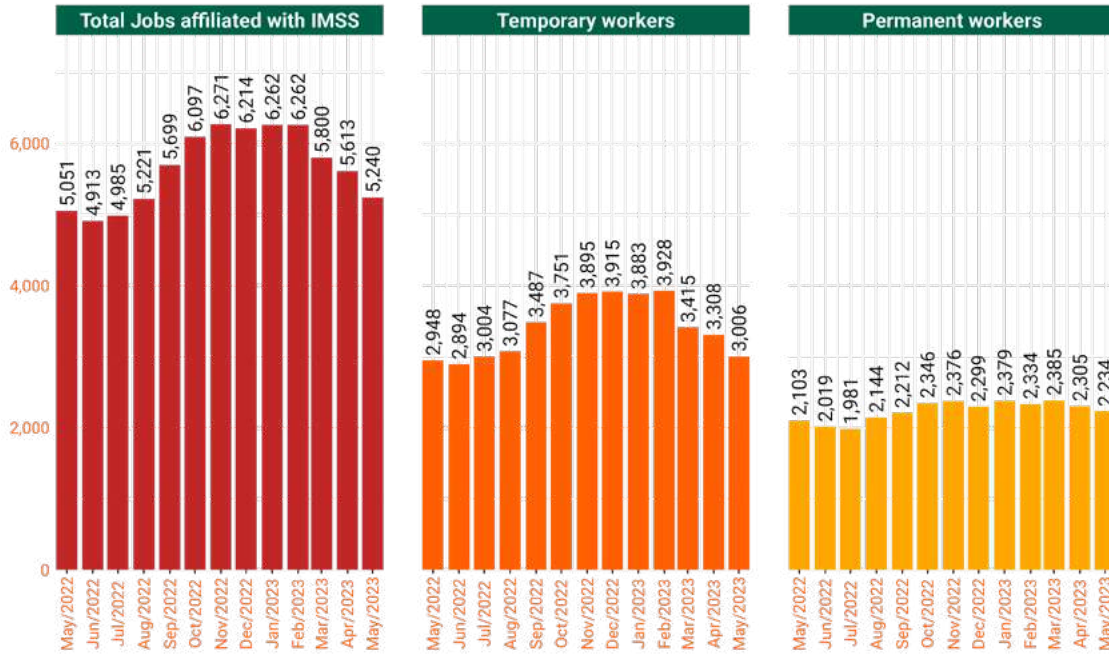
State: Jalisco, Municipality: Tequila



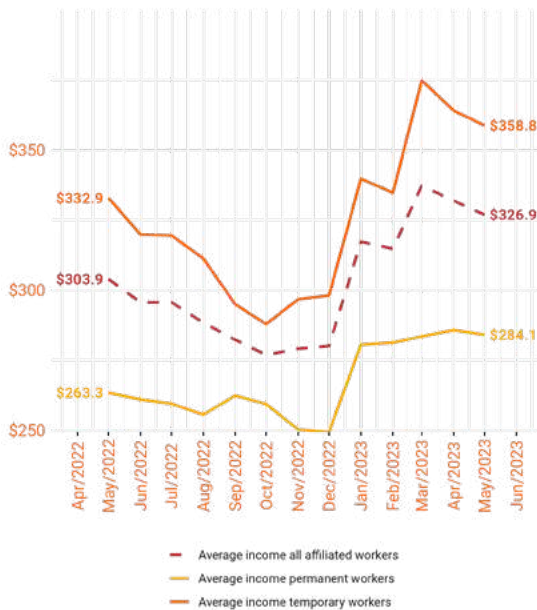
State: Jalisco, Municipality: Zapotlán el Grande
Total, Permanent, and Temporary Agricultural Sector Workers Registered with IMSS
 State: Jalisco, Municipality: Zapotlán el Grande



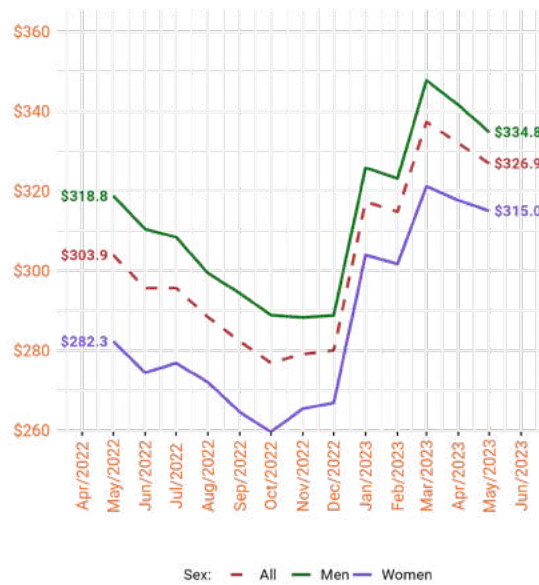
State: Michoacán de Ocampo, Municipality: Jacona
Total, Permanent, and Temporary Agricultural Sector Workers Registered with IMSS
 State: Michoacán de Ocampo, Municipality: Jacona



Base Wage for IMSS Contributions for Temporary and Permanent Workers
 State: Michoacán de Ocampo, Municipality: Jacona



Average Base Wage for IMSS Contributions, by Sex
 State: Michoacán de Ocampo, Municipality: Jacona



State: Michoacán de Ocampo, Municipality: Tancítaro

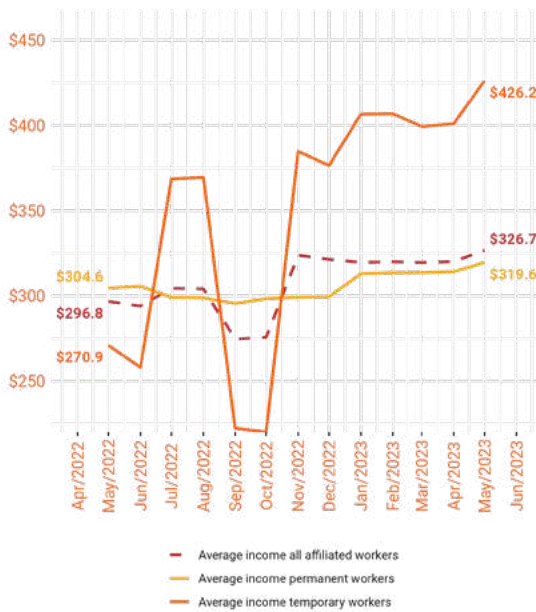
Total, Permanent, and Temporary Agricultural Sector Workers Registered with IMSS

State: Michoacán de Ocampo, Municipality: Tancítaro



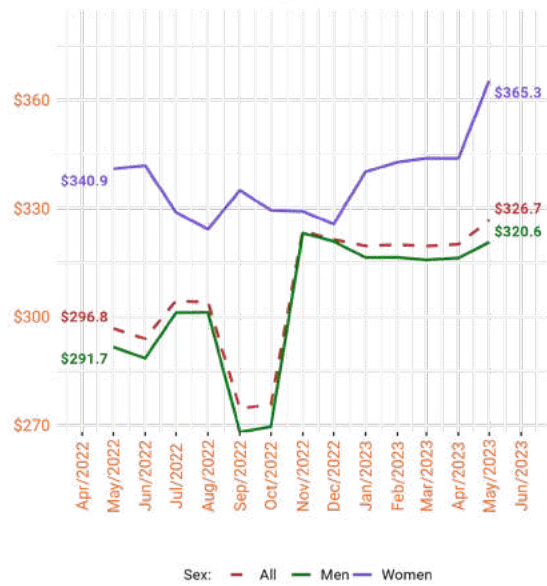
Base Wage for IMSS Contributions for Temporary and Permanent Workers

State: Michoacán de Ocampo, Municipality: Tancítaro

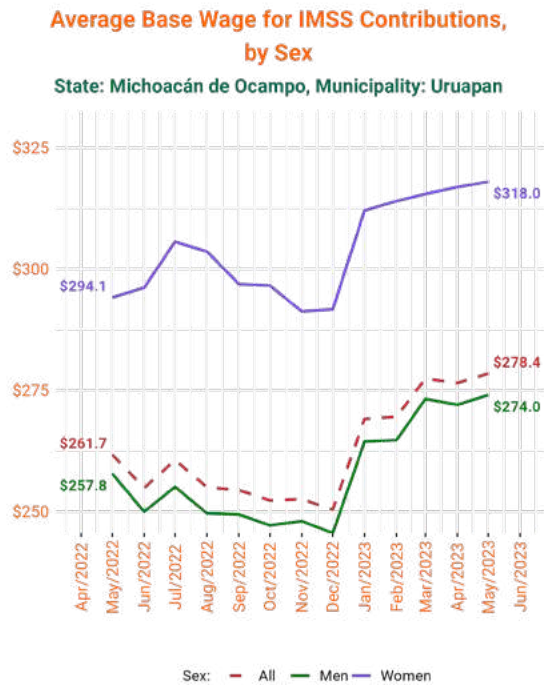
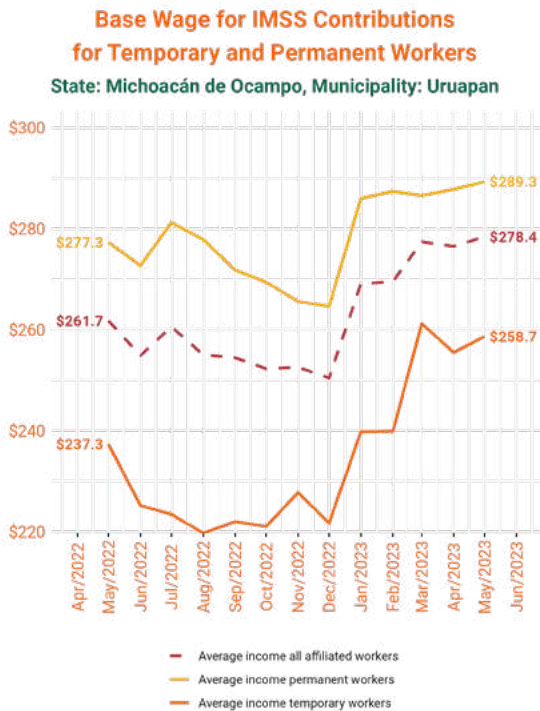
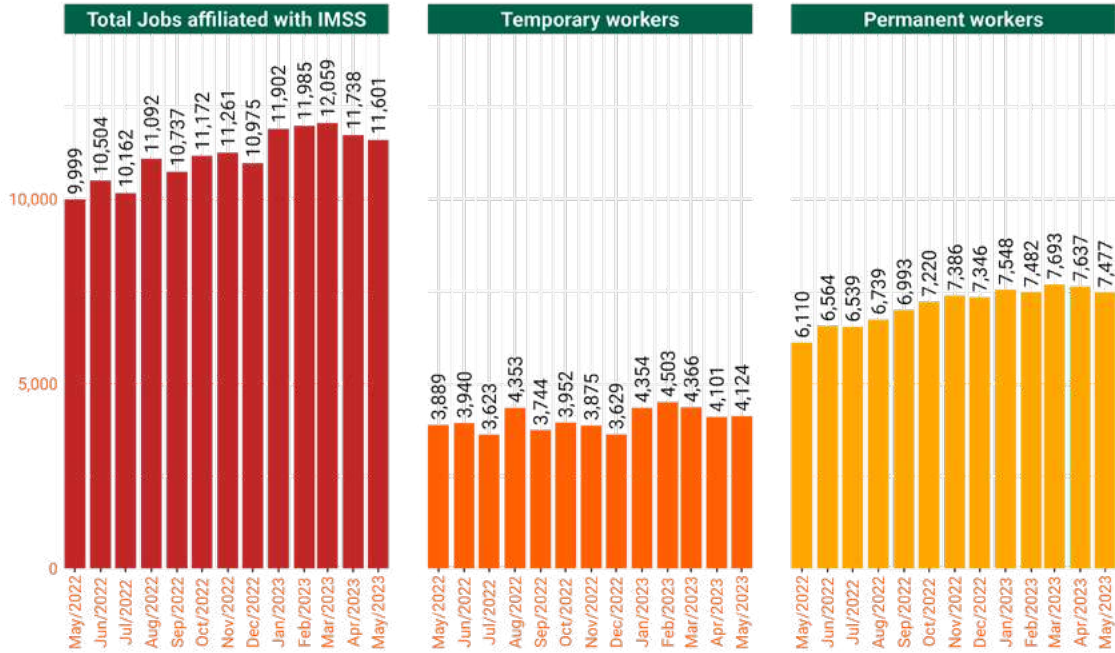


Average Base Wage for IMSS Contributions, by Sex

State: Michoacán de Ocampo, Municipality: Tancítaro



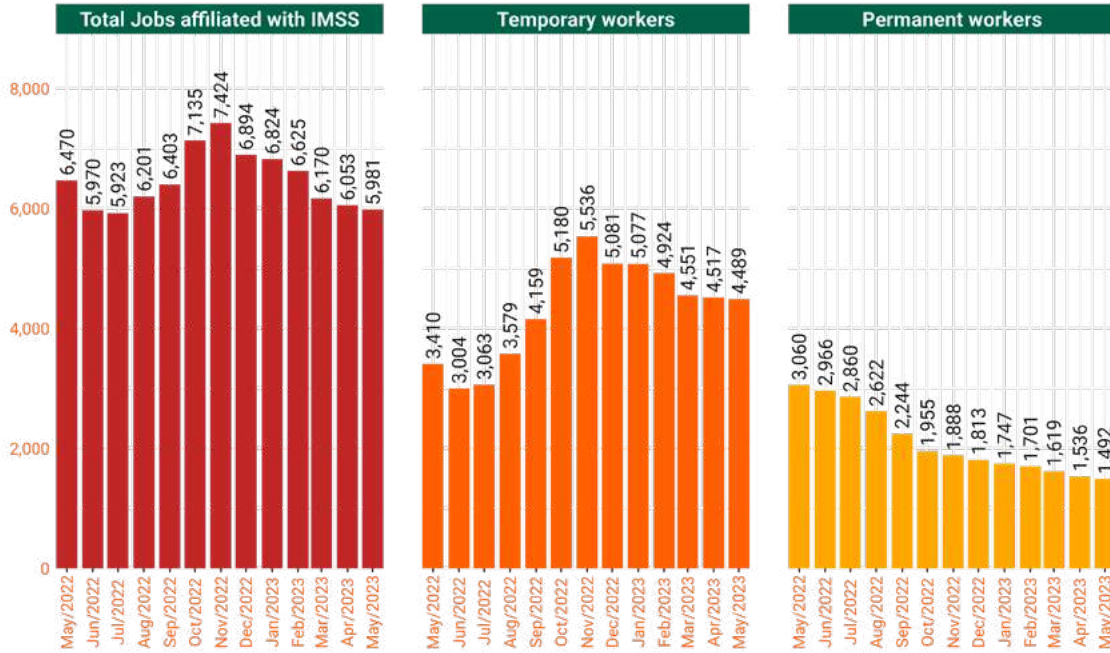
State: Michoacán de Ocampo, Municipality: Uruapan
Total, Permanent, and Temporary Agricultural Sector Workers Registered with IMSS
 State: Michoacán de Ocampo, Municipality: Uruapan



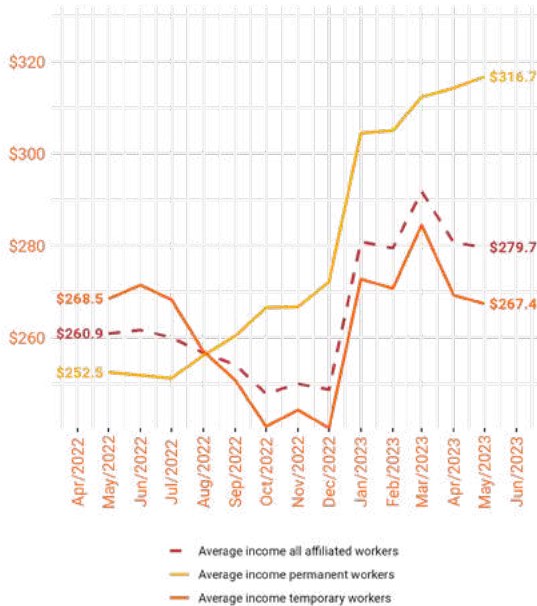
State: Michoacán de Ocampo, Municipality: Zamora

Total, Permanent, and Temporary Agricultural Sector Workers Registered with IMSS

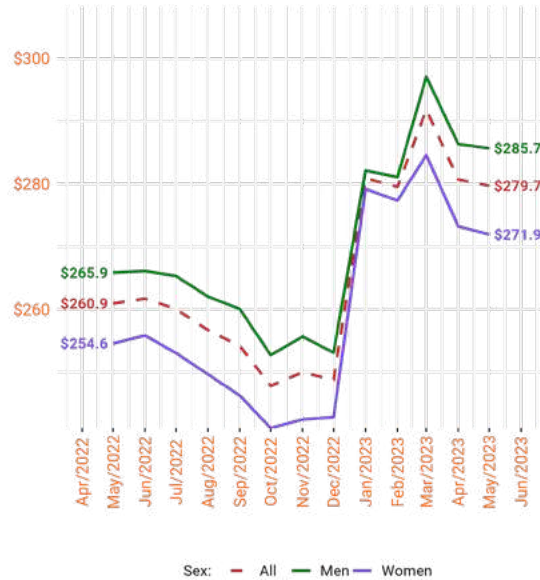
State: Michoacán de Ocampo, Municipality: Zamora



Base Wage for IMSS Contributions for Temporary and Permanent Workers
State: Michoacán de Ocampo, Municipality: Zamora



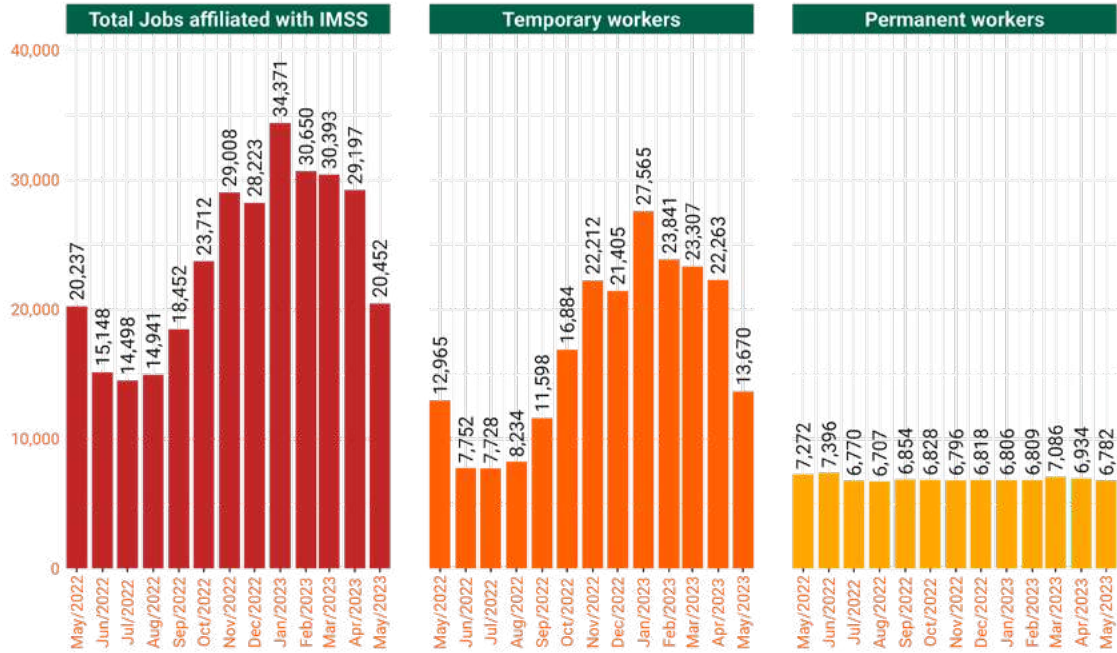
Average Base Wage for IMSS Contributions, by Sex
State: Michoacán de Ocampo, Municipality: Zamora



State: Sinaloa, Municipality: Culiacán

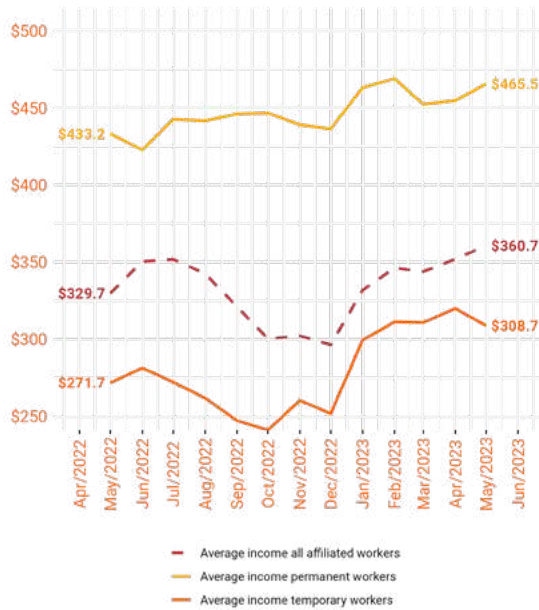
Total, Permanent, and Temporary Agricultural Sector Workers Registered with IMSS

State: Sinaloa, Municipality: Culiacán



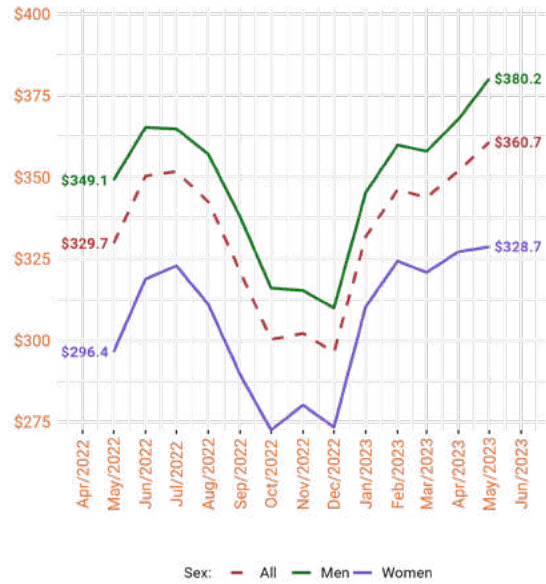
Base Wage for IMSS Contributions for Temporary and Permanent Workers

State: Sinaloa, Municipality: Culiacán



Average Base Wage for IMSS Contributions, by Sex

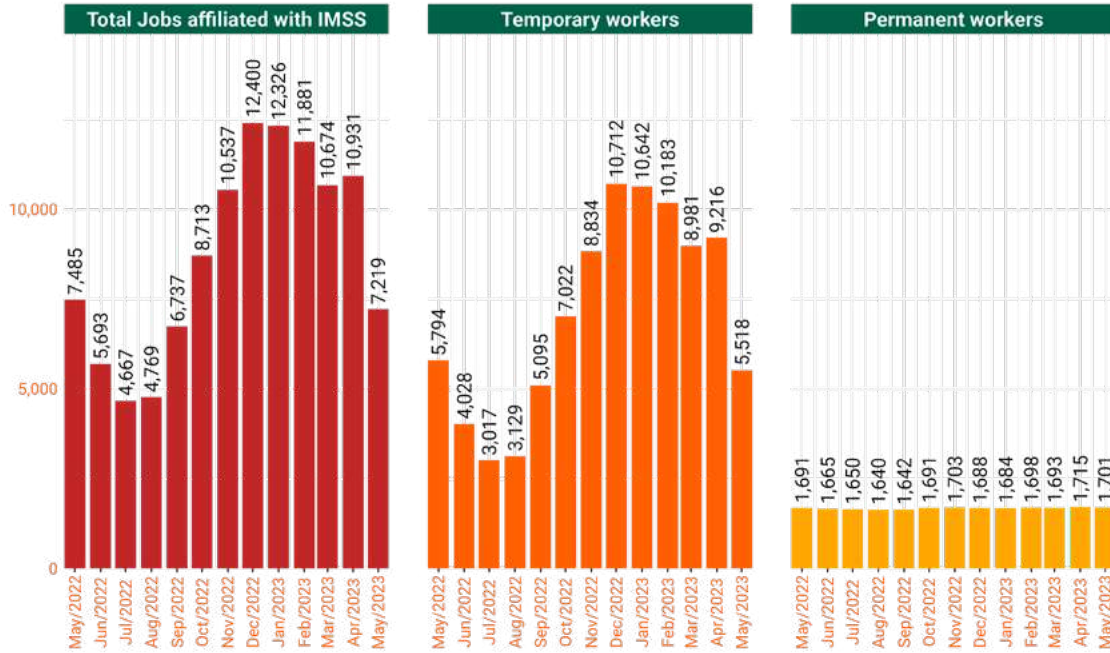
State: Sinaloa, Municipality: Culiacán



State: Sinaloa, Municipality: Navolato

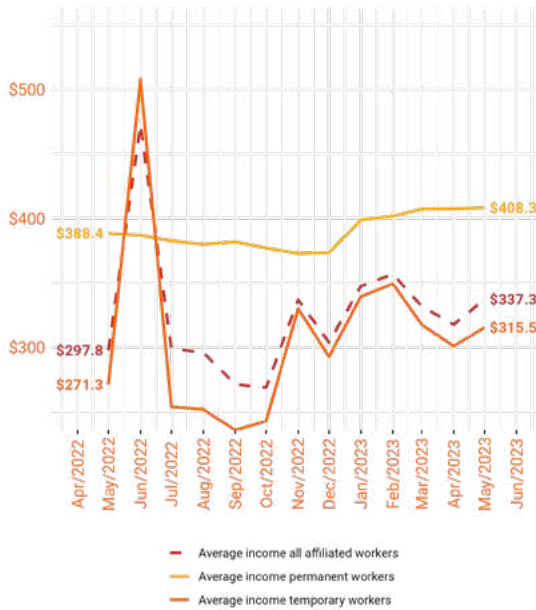
Total, Permanent, and Temporary Agricultural Sector Workers Registered with IMSS

State: Sinaloa, Municipality: Navolato



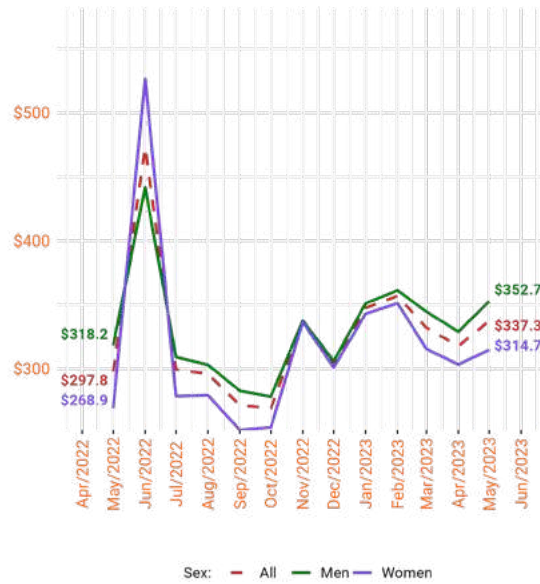
Base Wage for IMSS Contributions for Temporary and Permanent Workers

State: Sinaloa, Municipality: Navolato



Average Base Wage for IMSS Contributions, by Sex

State: Sinaloa, Municipality: Navolato



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