

Appendix 3 - Fast Facts on California's Agricultural Economy

Compiled by: Assembly Committee on Jobs, Economic Development, and the Economy
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California is one of only five agricultural regions in the world that has a Mediterranean growing climate, producing over 400 commodities, more than any other state in the nation.¹ California agricultural production was valued at \$46.7 billion in 2013,² accounting for 17.3% of total U.S. agricultural output.³

California Agriculture

- The agriculture sector of the U.S. economy grew more rapidly than any other sector in 2013 and accounted for 1.6% of the country's GDP.⁵
- California is the country's largest agricultural producer and exporter. Agricultural products were one of California's top 5 exports in 2013, totaling \$13.8 billion in exports, a \$1.8 billion (15%) increase from the previous year.⁶
- California's value of agricultural output was \$46.7 billion in 2013,⁷ with total U.S. output valued at \$269.1 billion.⁸
- California accounted for 15% of national cash receipts for crops in 2012 and 7.1% of the U.S. revenue for livestock and livestock products.⁹
- The top 5 counties for agricultural sales in 2012 were: Fresno County (\$5 million); Tulare County (\$4 million); Kern County (\$4 million); Monterey County (\$3 million); and Merced County (\$3 million).¹⁰

Source of Income	Total	% of Cash Income
Fruits and Nut Crops	\$17.2 million	35.9%
Livestock, Poultry and Products	\$12.1 million	25.4%
Vegetable Crops	\$6.8 million	14.2%
Field Crops	\$5.02 million	10.5%
Nursery, Greenhouse and Floriculture	\$3.5 million	7.4%
Farm Related Income	\$3.2 million	6.7%

Source: USDA National Ag Statistics

Job Creation

- California agriculture employed an estimated 348,900 people in 2013.¹¹
- The agriculture value chain accounts for nearly 2.5 million jobs in California.¹²
- In 2011, agriculture support was the largest component of the value chain with 1.5 million jobs. This includes activities related to agriculture including farming, veterinary services, implement manufacturing, irrigation, and technical consulting. Other agriculture employers by sector were: Agriculture Distribution (585,014 jobs); Agriculture Processing (226,216 jobs); and Agriculture Production (206,303 jobs).¹³
- In 2011, there was an estimated combined five-year growth of 181,740 total new jobs for California's economy, with an average of 36,348 new jobs in agriculture annually.¹⁴
- The San Joaquin Valley supports more agricultural jobs than any other sector in California, providing 183,700 jobs in 2013. Agricultural employment by region includes: Sacramento Valley (22,200 jobs); Desert Valley (28,400 jobs); South Coast (59,900); Central Coast (43,400 jobs); and the North Coast (11,300).¹⁵

California Drought

- California's three-year drought is expected to result in a 6.6 million acre-foot reduction in surface water.¹⁶
- The statewide economic cost of the 2014 drought is estimated at \$2.2 billion, with a total loss of 17,100 seasonal and part-time jobs.¹⁷
- The Central Valley, where many of the nation's fruits and nuts are grown, is the area expected to be most severely affected by net water shortages.¹⁸
- As many as 410,000 acres of row and feed crops will not be planted due to loss of water.¹⁹
- The resulting net water shortage of 1.6 million acre-feet is anticipated to cause losses of \$810 million in crop revenue and \$203 million in dairy and other livestock value, with additional groundwater pumping costing up to \$454 million.²⁰

California Farms

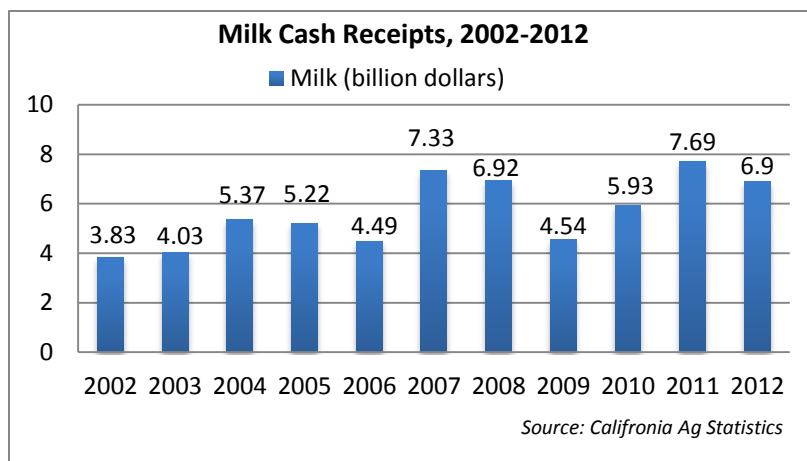
- In 2012, 80,500 farms operated in California, 3.7% of the national total.²¹
- During 2012, California devoted 25.4 million acres to farming and ranching,²² producing nearly two-thirds of U.S. grown fruits and nuts and over a third of U.S. grown vegetables.²³
- California remained the number one state in cash farm receipts in 2012, representing 11% of the U.S. total.²⁴

Agricultural Commodities

- California's agricultural production includes more than 400 commodities, primarily comprised of specialty crops including almonds, grapes, and nursery plants.²⁵
- California's top 20 crop and livestock commodities accounted for more than \$36.4 billion in 2012 and 11 commodities exceeded \$1 billion in value that same year.²⁶
- In 2012, the cash receipts of 13 of the top 20 commodities increased in value from the previous year, including grapes, almonds, cattle, and nursery plants.²⁷
- California's top-ten valued commodities for 2012 were: Milk (\$6.9 billion); Grapes (\$4.5 billion); Almonds (\$4.4 billion); Nursery plants (\$3.5 billion); Cattle, Calves (\$3.3 billion); Strawberries (\$1.9 billion); Lettuce (\$1.5 billion); Walnuts (\$1.4 billion); Hay (\$1.2 billion); and Tomatoes (\$1.17 billion).²⁸

Livestock and Dairy

- California's total livestock and livestock products cash receipts were \$12.2 billion in 2012, with livestock and poultry accounting for 27% of the state's gross cash receipts.²⁹
- California accounts for 7.1% for total U.S. livestock cash receipts, ranking third behind Iowa and Texas.³⁰
- California leads the nation in milk production, with dairies from California producing 41.2 billion pounds of milk in 2013, a 1.3% decrease from the previous year.³¹
- California accounts for nearly 21% of the nation's milk supply.³²
- California ranked number one in the U.S. in the production of fluid milk, butter and nonfat dry milk and was second in total cheese production in 2012.³³
- California's dairy sector received \$6.9 billion for their milk production, a 10% decrease from the previous year (7.68 billion).³⁴
- In 2013, 33 counties contributed to California's milk production. The top five milk-producing counties were: Tulare (27.5%); Merced (15%); Stanislaus (10.5%); Kings (10.3%); and Kern (9.9%).³⁵
- California places 5th among top egg producing states in the country, producing a total of 425 million eggs in 2013.³⁶
- Top producing counties of eggs include San Bernardino, Riverside, San Diego, San Joaquin, Stanislaus, Merced, and Kern counties.³⁷



Fruit and Nut Crops

- In 2012, the total U.S. export value of fruit products totaled \$7.9 billion, with California accounting for 59.9% of U.S. total exports.³⁸
- The nation's largest fruit producing states are California, Florida, and Washington, with California accounting for over half of the harvested fruit acreage in the country.³⁹
- California's total value of all fruits and nuts was \$18.7 billion in 2012, up 20% from the previous year.⁴⁰
- California accounts for 65% of the U.S. non-citrus fruit and nut production and 73% of the national value.⁴¹
- The state produced 16.7 million tons of fruits and nuts in 2012, 52% of the national total.⁴²
- California's increase in its sales value of products for 2012 was led by the grape industry which generated \$4.45 billion in cash receipts, up 15% from the previous year.⁴³
- California grapes accounted for over 90% of the United States utilized grape production in 2012.⁴⁴
- California is the number one producer of almonds and pistachios in the world, producing over 80% of the world's almonds and around 40% of the world's pistachios in 2012.⁴⁵

Vegetable Production

- In 2012, the total U.S. export value of vegetables totaled \$1.6 billion, with California accounting for 63.3% of U.S. exports.⁴⁶
- California accounted for 44% of the U.S. harvested area in 2012, continuing as the leading fresh market vegetable producing state.⁴⁷

- California led the nation in processing vegetable production in 2012, with 25% of the U.S harvested acreage, 70% of the national production and 51% of the total value.⁴⁸
- Total value of California's 2012 fresh and processing vegetable and melon production was \$6.8 billion, down 5.6% from the previous year (\$7.2 billion).⁴⁹
- Crops that had notable value increases were: Chile peppers (39%); artichokes (13%); broccoli (13%); pumpkins (12%); and bell peppers (11%).⁵⁰

Field Crops

- In 2012, the total U.S. export value of field crops totaled \$28.4 billion, with California accounting for 10.2% of exports.⁵¹
- The total value of California field crop production in 2012 was \$5.43 billion, down 7.95% from 2011.⁵²
- Field crops are any crops other than fruits or vegetables that are grown for agricultural purposes. These include cotton, corn, hay, rice, and grain.
- California produced approximately 6.65 million tons of alfalfa hay in 2012, valued at \$1.38 billion.⁵³
- The total value of rice production in California was \$771 million in 2012, declining 14% from the previous year.⁵⁴
- Corn for grain production in California totaled \$235 million for 2012, a 32% increase from 2011.⁵⁵

Floriculture

- In 2012, California's floriculture crops led the nation in sales with a total value of \$974 million, comprising 24.4% of the U.S. total wholesale value in 2012.⁵⁶
- Floriculture is the cultivation of flowering and ornamental plants. California led the country in potted flowering plant value in 2012, with a total value of \$245 million wholesale.⁵⁷
- California was the leader in cut flower production, with a value of \$261 million for 2012.⁵⁸

Exports and Imports

- In 2013, the total amount of agriculture products exported from California to the world totaled \$13.8 billion.⁵⁹
- Tree nuts were the number one agricultural export for California in 2012. The value of U.S. tree nut production in 2012 was over a \$7 billion.⁶⁰
- Almond exports were the top commodity from California in 2012, with a value of \$3.39 billion in foreign sales.⁶¹
- Dairy and dairy products ranked second in California exports with a value of \$1.31 billion.⁶²
- Fruit and nut exports accounted for over 50% of the value of all California agricultural products in 2012.⁶³
- In 2013, the top countries to receive agriculture exports from California were: Canada (\$2.6 billion); Hong Kong (\$1.29 billion); China (\$1.22 billion); Japan (\$1.02 billion); South Korea (\$694 million); and Mexico (\$647 million).⁶⁴
- In 2013, California imported \$10.8 billion agriculture and livestock products. The top import countries to California were: Mexico (\$3.3 billion); China (\$878 million); Vietnam (\$720 million); Chile (\$702 million); and Ecuador (\$558 million).⁶⁵

California Agricultural Export Values	
Year	Export Value (\$Billions)
2013	\$13.7
2012	\$18.18
2011	\$16.77
2010	\$14.75
2009	\$12.44
2008	\$12.90
2007	\$11.17
2006	\$9.82
2005	\$9.37
2004	\$8.24
2003	\$7.50
2002	\$6.55
<i>Source: California Ag Statistics Review</i>	

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<http://www.cdfa.ca.gov/Statistics/PDFs/2013/FinalDraft2012-2013.pdf>
- ² Bureau of Economic Analysis: Value added by Industry
<http://bea.gov/itable/itable.cfm?ReqID=70&step=1#reqid=70&step=7&isuri=1&7003=200&7004=naics&7005=3&7006=00000,01000,02000,04000,05000,06000&7001=1200&7002=1&7090=70&7093=levels> -accessed June 26, 2014
- ³ U.S Bureau of Economic Analysis: Percent of U.S.
<http://bea.gov/itable/itable.cfm?ReqID=70&step=1#reqid=70&step=7&isuri=1&7003=200&7004=naics&7005=3&7006=xx&7001=1200&7002=1&7090=70&7093=percentofus> -accessed July 15, 2014
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- ⁶ Office of Trade and Industry Information: Exports from California <http://tse.export.gov/TSE/ChartDisplay.aspx> -accessed June 26, 2014
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- ¹¹ Employment Development Department: California Agriculture <http://www.calmis.ca.gov/file/agric/2013-4cab.pdf> -accessed July 29, 2014
- ¹² Agriculture Value Chain for California -accessed July 16, 2014
<http://www.butte.edu/departments/careertech/agriculture/Documents/Ag%20Value%20Chain%20in%20California%202011.pdf>
- ¹³ Agriculture Value Chain for California -accessed July 16, 2014
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