

III Demand and Supply

California is part of national and international agricultural markets. Californians consume food that is produced in the state, as well as food that is imported from other states and countries. Agriculture in California is the largest among the states, and produces a variety of animals and animal products, fruit, tree-nuts, vegetables, field crops, and nursery and floriculture products. The Central Valley (composed of the Sacramento and San Joaquin Valleys) accounts for more than half of the State's gross value of agricultural production.

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III.1 Commodity Demand

Between 1970 and 1997 United States per capita consumption of food increased in most categories. In the meat category, decreases in red meat consumption were more than offset by increases in poultry and fish. The largest percentage increases in consumption were in fresh fruit, tree-nut and processed vegetable categories. Eggs were the only category showing a decrease. (Comparable data by state are not available.)

TABLE 27

United States Per Capita Consumption of Major Foods, 1970-97

	Eggs	Meat, Poultry, & Fish	Dairy Products	Fruit, Fresh	Fruit, Processing	Vegetables, Fresh	Vegetables, Processing	Tree-Nuts
Year	Number	Pounds						
1970	308.9	177.3	563.8	101.2	136.5	152.9	182.5	1.7
1975	276.0	170.9	539.1	101.8	150.3	147.1	189.9	1.9
1980	271.1	179.6	543.2	104.8	157.5	149.3	187.2	1.8
1985	254.7	185.4	593.7	110.6	158.8	156.1	201.9	2.4
1990	234.3	183.5	568.4	116.3	157.1	167.2	215.6	2.4
1995	235.4	193.0	584.4	124.6	160.8	175.1	229.9	1.9
1997	238.7	190.3	579.8	133.2	161.5	185.6	230.4	2.2

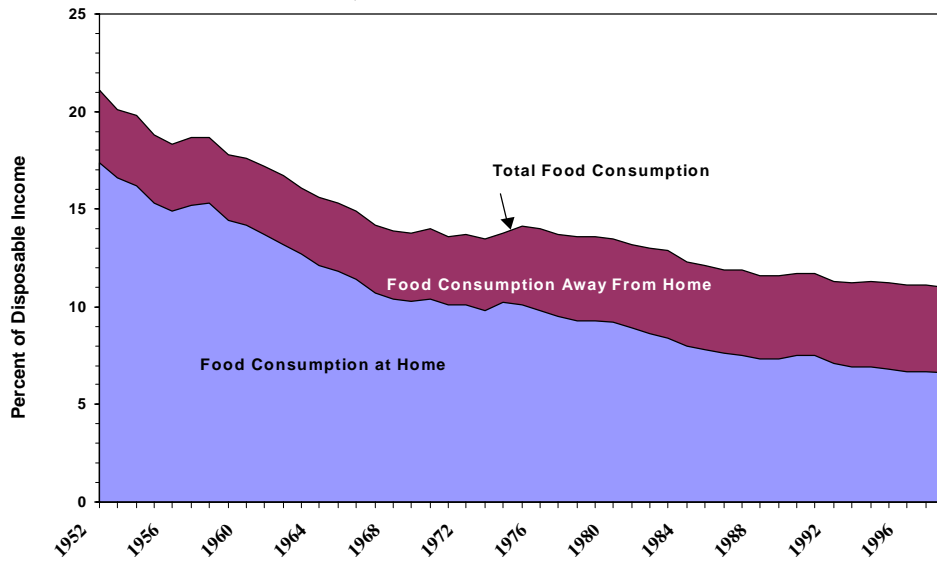
Source: Putnam, Judith Jones, and Jane E. Allshouse, "Food Consumption, Prices, and Expenditures, 1970-97," Food and Rural Economics Division, Economic Research Service, USDA.

- Although California is the nation's largest agricultural producer, Californians still consume many foods imported from other states and countries. Almost all of the pork, much of the beef and much of the grain used for baked products, pasta and livestock feed come from Midwestern states. Tropical products that don't grow well here, such as bananas, are imported from Central and South America. During the local off-season, California imports commodities that it produces, such as winter tomatoes from Florida and Mexico.

■ Although overall United States food consumption has increased in recent decades due to population growth and other factors, increasing per capita income and falling relative price of food have led to food taking up a smaller part of Americans' budgets. In 1998, Americans spent 11% of their disposable personal income on food, compared with 21% in 1952. We also ate more meals away from home.

FIGURE 32

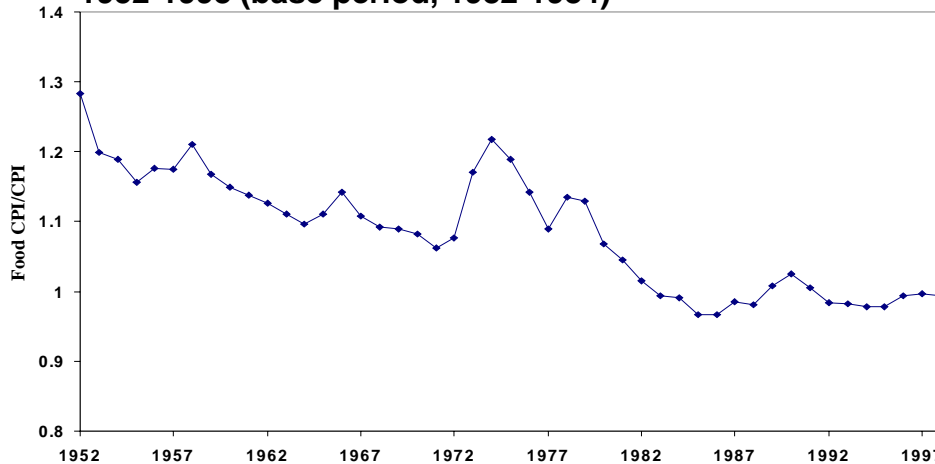
United States Food Expenditures as a Share of Disposable Personal Income, 1952-1998



Source: USDA, Economic Research Service, Food Market Indicators Briefing Room, online data.

FIGURE 33

United States Index of Relative Retail Food Prices, 1952-1998 (base period, 1982-1984)

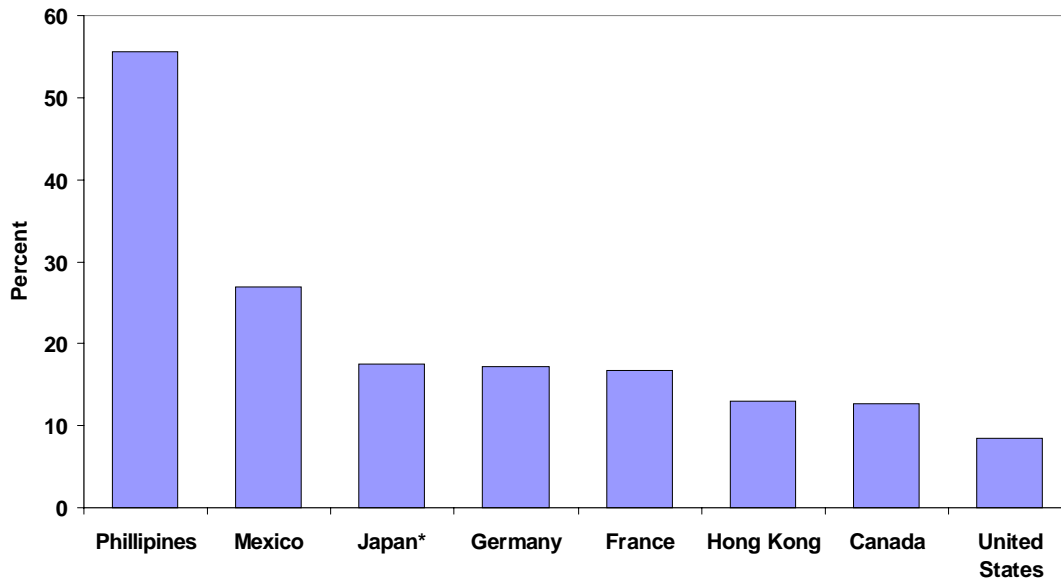


Sources:

1. United States Department of Commerce, Bureau of Economic Analysis, National Income and Product Accounts, online data, 2000.
2. USDA, Economic Research Service, Food Market Indicators Briefing Room, online data, 2000.

FIGURE 34

Food and Alcoholic Beverages Consumed at Home as a Share of Total Personal Consumption Expenditures, 1994



* Includes tobacco

Source: Putnam, Judith Jones, and Jane E. Allshouse, "Food Consumption, Prices, and Expenditures, 1970-97," Food and Rural Economics Division, Economic Research Service, USDA.

- Relative to the rest of the world, Americans used a smaller share of their personal consumption expenditures for food consumed at home. This measure does not include food consumed away from home, which in the United States represented about 40% of total food expenditures in 1998.

III.2 Leading Commodities and Cash Receipts

Most agricultural states specialize in production of a few commodities. California is unique in its crop diversity. Its top 25 agricultural commodities constitute only about 80% of its total agricultural cash receipts, and its top 50 constitute only about 90%. Dairy products, grapes and nursery products were the top commodities, ranked by cash receipts from 1995-1999. With the largest gross sales, dairy products represented about 16% of the state's total agricultural cash receipts in 1999, while grapes and nursery products accounted for about 11% and 7%.

TABLE 28

California's Leading Commodities by Cash Receipts, 1999

Rank* 1999	Commodity	Rank* 1998	Rank* 1997
1	Dairy Products	1	1
2	Grapes	2	2
3	Nursery Products**	3	3
4	Cattle and Calves	4	5
5	Lettuce	5	4
6	Strawberries	7	10
7	Processed Tomatoes	14	12
8	Floriculture ***	8	8
9	Oranges	11	11
10	Almonds	9	6
11	Cotton Lint	6	7
12	Carrots	15	15
13	Chickens	12	13
14	Hay	10	9
15	Broccoli	13	14
16	Avocados	19	21
17	Eggs, Chicken	17	17
18	Fresh Tomatoes	18	20
19	Peaches	23	24
20	Cantaloupe	20	25

*Rankings are based on cash receipts as reported by ERS.

**Includes trees, shrubs, vines, bulbs, turfs, etc., not included in flowers and foliage category.

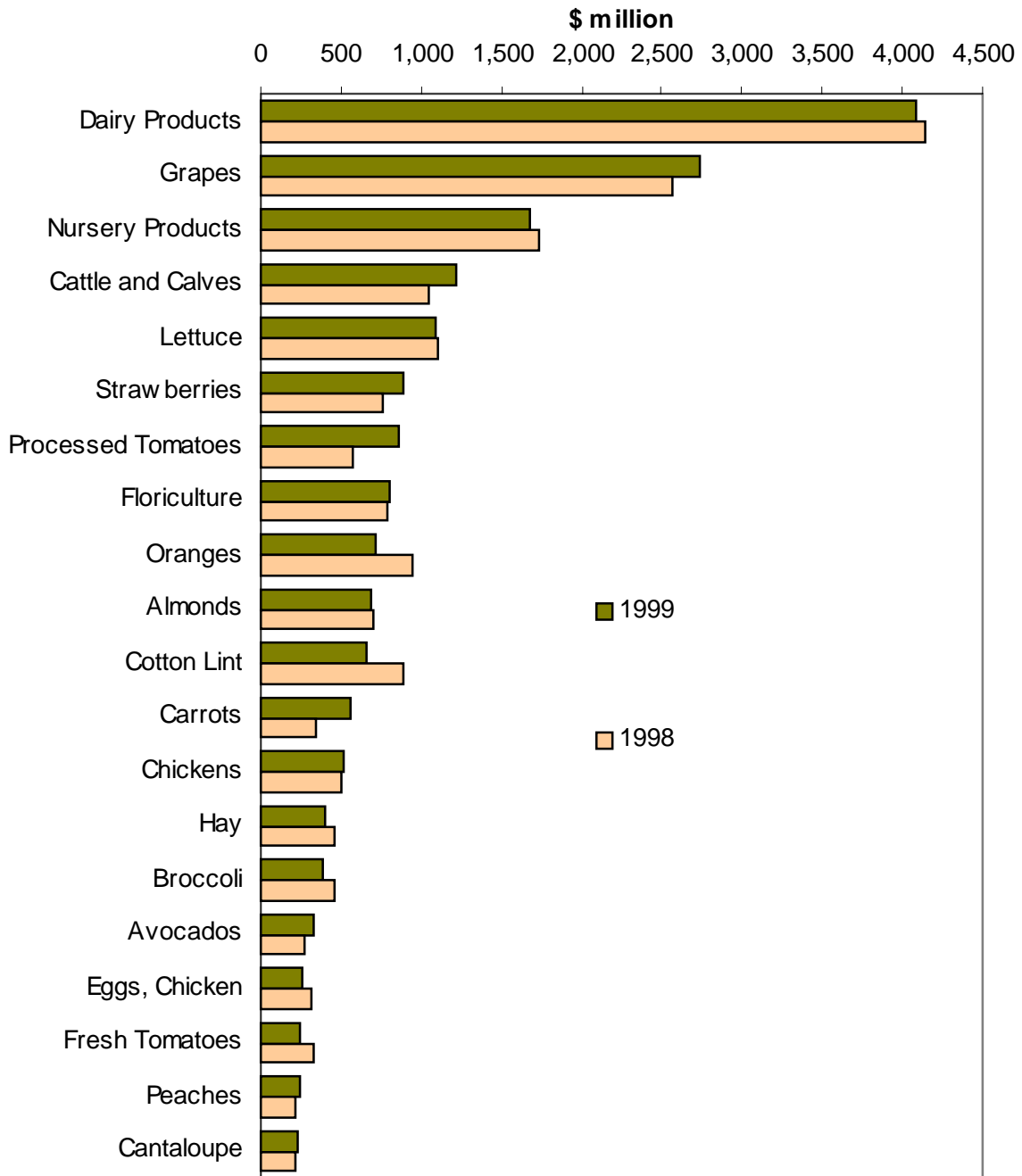
***Includes cut flowers, potted plants, foliage plants, bedding plants and indoor decoratives.

Source: USDA, Economic Research Service, Farm Business Economics Briefing Room, online data.

- Total agricultural cash receipts in 1999 were below the record high of 1997, but remained above those in previous years. Cash receipts for 10 of the top 20 commodities increased between 1998 and 1999 while receipts for the other 10 decreased.

FIGURE 35

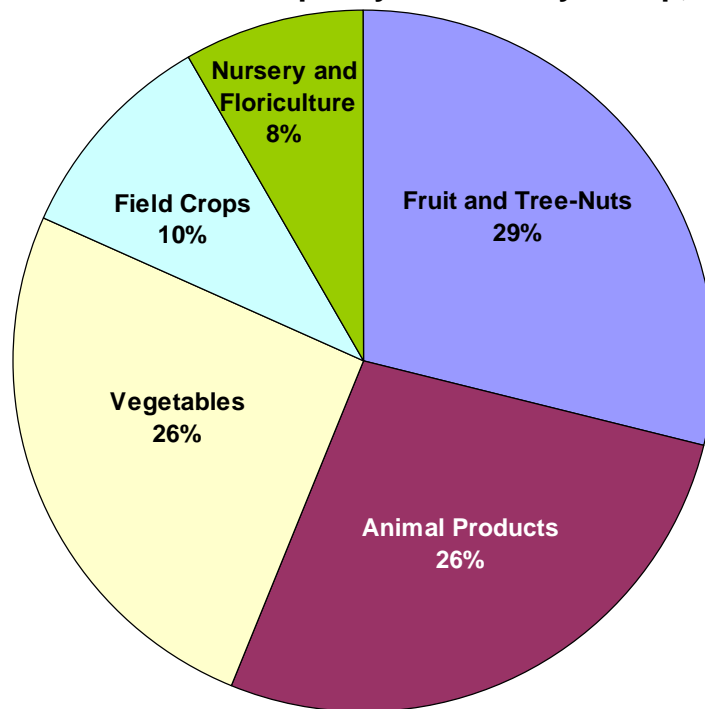
Value of Leading California Farm Products, by Cash Receipts, 1998-1999



Source: USDA, Economic Research Service, Farm Business Economics Briefing Room, online data.

FIGURE 36

California Cash Receipts by Commodity Group, 1999



Source: USDA, Economic Research Service, Farm Business Economics Briefing Room, online data.

- Fruits, tree-nuts and vegetables accounted for about half of California's cash receipts in 1999.

- California is the nation's only significant producer of at least 12 major crops, and produces over 70% of 11 more.

TABLE 29

Crops for Which California is the Sole or Major Producer, 1998

California Accounts for over 99% of National Production	California Accounts for between 70% and 99% of National Production*
Almonds	Wine Grapes
Artichokes	Table Grapes
Dates	Lettuce
Figs	Strawberries
Kiwifruit	Broccoli
Olives	Carrots
Clingstone Peaches	Avocados
Persimmons	Lemons
Pistachios	Plums
Prunes	Celery
Raisins	Cauliflower
Walnuts	

*These crops were selected from the set of California's top 25 commodities, ranked by cash receipts.

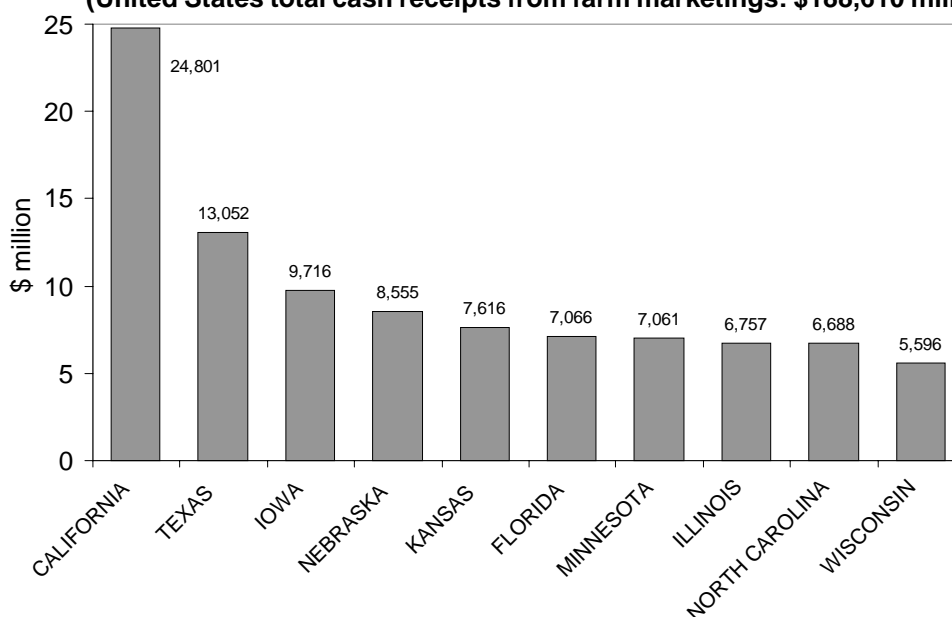
Sources:

1. California Department of Food and Agriculture, *Agricultural Resource Directory*, 1999.
2. USDA, Economic Research Service, Farm Business Economics Briefing Room, online data.

- California has been the largest state in agricultural cash receipts since 1948, and maintains that title today by a wide margin. Only three other states (Texas, Iowa, and Nebraska) had more than a third of California’s cash receipts in 1999.

FIGURE 37

Top 10 States by Cash Receipts from Farm Marketings, 1999
 (United States total cash receipts from farm marketings: \$188,610 million)



- California had almost \$5 billion in net farm income in 1999, but was third behind Arizona and Florida in net income per farm.

TABLE 30

State Rankings for Net Farm Income, 1999

Rank	State Total	\$1,000	Average Per Operation	Dollars
1	California	4,986,433	Arizona	91,907
2	Texas	4,649,677	Florida	62,563
3	Florida	2,815,328	California	56,027
4	Georgia	2,099,384	Delaware	46,415
5	North Carolina	1,966,190	Georgia	41,988
6	Arkansas	1,830,918	New Mexico	41,280
7	Nebraska	1,650,646	Arkansas	37,751
8	Kansas	1,547,850	South Dakota	36,614
9	Iowa	1,450,176	Idaho	35,664
10	Alabama	1,449,606	Connecticut	34,823
	United States	43,397,572	United States	19,779

Source: USDA, Economic Research Service, Farm Business Economics Briefing Room, online data.

- Cash receipts from farming increased significantly between 1960 and 1999 in California and in the United States. For California, the increase was more rapid, leading to its steadily increasing percentage of national receipts (13.1% in 1999).

TABLE 31

Agricultural Output Value, Nominal and Deflated, 1960-1999

YEAR	Cash Receipts from Farm Marketings (\$ million)			Cash Receipts from Farm Marketings (million 1996 dollars*)	
	UNITED STATES	CALIFORNIA	California as a Percent of the United States	UNITED STATES	CALIFORNIA
1960	34,012	3,216	9.5%	152,016	14,376
1965	39,365	3,722	9.5%	164,151	15,520
1970	50,509	4,533	9.0%	172,430	15,476
1975	88,902	8,474	9.5%	220,205	20,990
1980	139,736	13,987	10.0%	243,539	24,377
1985	144,138	14,303	9.9%	194,663	19,317
1989	160,810	18,183	11.3%	192,438	21,759
1990	169,526	19,214	11.1%	195,242	22,128
1991	167,864	17,774	10.5%	187,016	19,802
1992	171,322	19,019	10.7%	186,836	20,741
1993	177,893	20,522	11.3%	188,921	21,795
1994	181,264	21,882	12.1%	188,549	22,761
1995	188,055	22,590	12.0%	191,527	23,007
1996	199,138	23,523	11.8%	199,138	23,523
1997	207,611	26,137	12.6%	204,217	25,710
1998	196,761	24,616	12.5%	191,290	23,932
1999	188,610	24,801	13.1%	180,710	23,762

*GDP deflator from Bureau of Economic Analysis, National Income and Product Accounts, online data.

Source: USDA, Economic Research Service, Farm Business Economics Briefing Room, online data.

III.3 Production by Principal Commodity Group

The 1997 *Census of Agriculture* categorized each farm by its North American Industry Classification System (NAICS) principal commodity group. The census allocated each farm’s total acreage and total sales to whichever commodity group accounted for the largest share (not necessarily the majority) of that farm’s sales. The principal commodity groups are aggregated here as fruits and tree-nuts, livestock and livestock products, vegetables and melons, field crops, and nursery and floriculture. The resulting statistics provide a broad gauge of production of the different commodity groups.

- Fruits and tree-nuts accounted for the largest number of farms and also the smallest average value of production of all categories. Although 73% of fruit and tree-nut farms produced less than \$100,000 each in 1997, the average value of production for fruit and tree-nut producers was over twice that figure.

FIGURE 38

California Fruit and Tree-Nut Producers by Farm Market Value of Products Sold, 1997

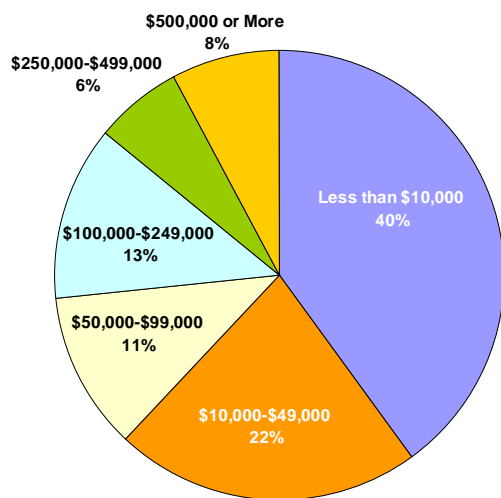


TABLE 32

California Fruits and Tree-Nuts, 1997

Farms	35,422
Acres	4,146,829
Total Value (\$1000)	7,685,708
Average Per Farm (\$)	216,976

Source: USDA, National Agricultural Statistics Service, 1997 *Census of Agriculture*.

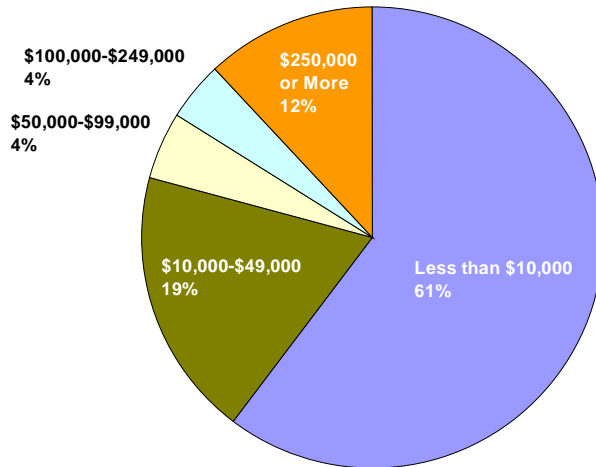
■ In 1997, livestock farms had more total acreage than any other commodity group, but about 80% had less than \$50,000 in sales. Only 12% had sales over \$250,000, yet the average sales value was \$259,804, indicating that a small number of livestock farms had very high sales.

TABLE 33

California Livestock and Products, 1997

Farms	23,330
Acres	15,622,899
Total Value (\$1000)	6,061,233
Average Per Farm (\$)	259,804

FIGURE 39
California Livestock and Product Producers by Farm Market Value of Products Sold, 1997



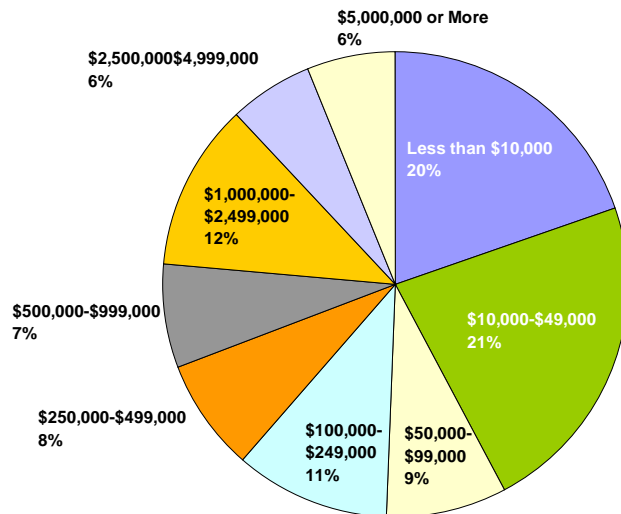
■ The vegetable and melon category accounted for the fewest farms and the largest average per farm sales value. Fifty percent of these farms had sales of more than \$100,000 and about one quarter had sales over \$1 million.

TABLE 34

California Vegetables and Melons, 1997

Farms	3,348
Acres	1,842,290
Total Value (\$1000)	4,235,992
Average Per Farm (\$)	1,265,231

FIGURE 40
California Vegetable and Melon Producers by Farm Market Value of Products Sold, 1997



Source: USDA, National Agricultural Statistics Service, 1997 Census of Agriculture.

■ In 1997, the average farm with field crops as its principal commodity group operated on about 665 acres. About 18% of farms in this category produced over \$500,000, while about 45% produced under \$50,000. The average sales value of \$367,890 per farm indicates that the largest field crop farms do not account for as much of their group’s total sales as do the largest growers in other categories.

FIGURE 41

California Field Crop Producers by Farm Market Value of Products Sold, 1997

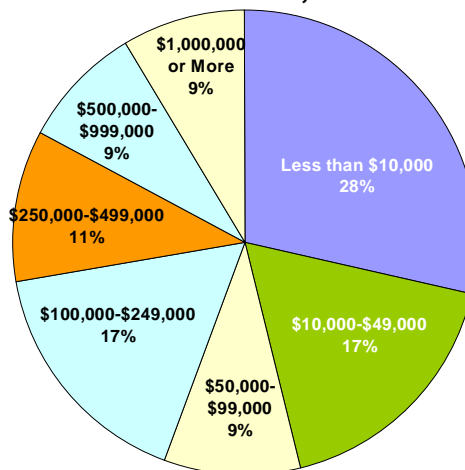


TABLE 35

California Field Crops, 1997

Farms	7,741
Acres	5,147,798
Total Value (\$1000)	2,847,861
Average Per Farm (\$)	367,890

■ The average nursery and floriculture farm operated on about 45 acres. About 14% of nursery and floriculture farms produced over \$500,000, while about 59% produced less than \$50,000.

FIGURE 42

California Nursery and Floriculture Producers by Farm Market Value of Products Sold, 1997

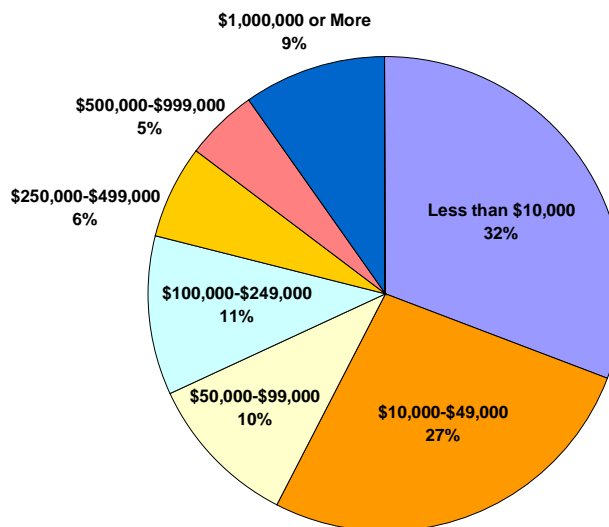


TABLE 36

California Nursery and Floriculture, 1997

Farms	4,285
Acres	194,708
Total Value (\$1000)	2,201,466
Average Per Farm (\$)	513,761

Source: USDA, National Agricultural Statistics Service, 1997 Census of Agriculture.

III.4 County Level Production

In 1999, agricultural producers in each of 11 California counties accounted for over \$1 billion in gross production value. Farms in five other counties produced more than \$500 million and those in another 19, between \$100 and \$500 million.

- There is great variety in the commodities produced in different counties. In some counties, growers specialize in a certain type of crop. For example, farmers in Monterey produce an abundance of cool-weather vegetable crops. In many Central Valley counties, farmers have favorable soil and weather for producing a variety of agricultural products.
- The top six counties, Fresno, Tulare, Monterey, Kern, Merced and San Joaquin, account for about half of California's total value of agricultural production. Of the 10 highest ranked counties, seven list dairy products among their top five grossing commodities, and six list grapes.
- With the exception of San Francisco whose top commodity is nursery products, counties with a low value of production list cattle and calves or pasture as a top commodity.

TABLE 37

California Counties by Gross Value of Agricultural Production in 1999*

Rank 1999	County	Value of Production (\$ million)	Top Commodities**
1	Fresno	3,559	Grapes, Poultry, Cotton, Tomatoes, Milk
2	Tulare	3,075	Milk, Grapes, Navel & Valencia Oranges, Cattle & Calves, Plums
3	Monterey	2,369	Head Lettuce, Leaf Lettuce, Broccoli, Strawberries, Nursery, Grapes
4	Kern	2,128	Grapes, Cotton & Processed Cottonseed, Citrus, Milk, Almonds & By-Products
5	Merced	1,534	Milk, Chickens, Almonds, Tomatoes, Cotton
6	San Joaquin	1,352	Grapes, Milk, Tomatoes, Cherries, Almond Meats
7	San Diego	1,242	Plants/Foliage, Trees and Shrubs, Avocados, Bedding Plants, Cut Flowers
8	Stanislaus	1,210	Milk, Almonds, Chickens, Cattle & Calves, Tomatoes
9	Riverside	1,197	Milk, Table Grapes, Nursery, Eggs, Lemons
10	Ventura	1,059	Strawberries, Lemons, Nursery Stock, Celery, Valencia Oranges
11	Imperial	1,045	Cattle & Calves, Alfalfa, Lettuce, Carrots, Sugar Beets
12	Kings	901	Milk, Cotton, Cattle & Calves, Turkeys, Alfalfa Hay
13	San Bernardino	722	Milk, Cattle & Calves, Oranges, Eggs, Nursery Products, Alfalfa
14	Madera	700	Grapes, Milk, Almonds, Pistachios, Nursery Stock
15	Santa Barbara	653	Strawberries, Broccoli, Winegrapes, Avocados, Head Lettuce
16	Sonoma	483	Winegrapes, Market Milk, Livestock/Poultry/Aquaculture, Cattle & Calves, Vegetables
17	San Luis Obispo	393	Winegrapes, Cattle & Calves, Broccoli, Iceberg Lettuce, Vegetable Transplants
18	Colusa	351	Rice, Processing Tomatoes, Almond Meats, Cucumber Seed, Rice Seed
19	Sutter	347	Rice, Prunes, Peaches, Tomatoes, Walnuts
20	Orange	341	Nursery Stock & Cut Flowers, Strawberries, Tomatoes, Bell & Misc. Peppers, Avocados
21	Yolo	339	Processing Tomatoes, Winegrapes, Seed Crops, Rice, Alfalfa
22	Sacramento	293	Winegrapes, Milk, Bartlett Pears, Processing Tomatoes, Ornamental Nursery Stock
23	Butte	257	Milling Rice, Almonds, Prunes, Walnuts, Kiwifruit
24	Glenn	253	Rice Paddy, Dairy Products, Almonds, Prunes, Cattle & Calves
25	Los Angeles	253	Ornamental Trees & Shrubs, Bedding Plants, Root Vegetables, Peaches, Dry Onions
26	Santa Cruz	248	Strawberries, Woody Nursery Ornamentals, Raspberries, Apples, Head Lettuce
27	Napa	228	Grapes, Nursery Products, Cattle & Calves, Pasture & Range
28	Solano	195	Processing Tomatoes, Nursery Stock, Alfalfa Hay, Winegrapes, Cattle & Calves
29	San Benito	179	Bell Peppers, Nursery Stock, Salad Lettuce, Head Lettuce, Livestock & Poultry

California Counties by Gross Value of Agricultural Production in 1999*

Rank 1999	County	Value of Production (\$ million)	Top Commodities**
30	San Mateo	177	Ornamental Nursery Stock, Potted Foliage Plants, Mushrooms
31	Santa Clara	176	Mushrooms, Nursery Crops, Cut Flowers, Winegrapes, Bell Peppers
32	Mendocino	127	Winegrapes, Bartlett Pears, Cattle & Calves, Milk, Pasture
33	Siskiyou	116	Cattle & Calves, Alfalfa Hay, Nursery Products, Pasture & Range, Potatoes & Potato Seed
34	Yuba	108	Rice, Peaches, Walnuts, Cattle & Calves, Prunes
35	Tehama	97	Cattle & Calves, Walnuts, Prunes, Milk, Olives
36	Humboldt	93	Milk, Nursery Stock, Livestock, Field Crops, Vegetable Crops
37	Contra Costa	86	Bedding Plants, All Milk, All Tomatoes, Grapes, Sweet Corn
38	Modoc	63	Alfalfa Hay, Cattle & Calves, Potatoes, Pasture & Range, Fruits & Nuts
39	Placer	58	Rice, Cattle & Calves, Nursery, Chickens, Pasture & Range, Walnuts
40	Marin	53	Milk, Cattle & Calves, Pasture & Range, Poultry, Livestock Products
41	Shasta	50	Cattle & Calves, Strawberry Plants, Pasture & Range, Other Hay
42	Lake	49	Pears, Winegrapes, Cattle, Walnuts, All Hay
43	Lassen	46	All Hay, Strawberry Plants, All Livestock, Pasture & Range, Wild Rice
44	Alameda	39	Ornamental Trees & Shrubs, Winegrapes, Cattle & Calves, Bedding Plants
45	Del Norte	31	Nursery Products, Milk, Cattle & Calves, Livestock Products, Pasture & Range, Other Hay
46	El Dorado	19	Winegrapes, Nursery Products, Pasture & Range, Apples, Christmas Trees
47	Amador	19	Winegrapes, Cattle & Calves, Pasture & Range, Grain Hay, Alfalfa Hay
48	Mono	19	Cattle & Calves, Carrots, Alfalfa Hay, Pasture & Range, Sheep & Lambs
49	Mariposa	18	Cattle & Calves, Range, Misc. Livestock/Poultry Products, All Poultry
50	Plumas	16	Cattle & Calves, Pasture & Range, Alfalfa Hay, Wild Hay
51	Calaveras	15	Cattle & Calves, Winegrapes, Poultry, Livestock & Poultry Products, Walnuts
52	Tuolumne	13	Cattle & Calves, Pasture & Range, Cord Wood & Fuel, Apiary Products
53	Inyo	13	Cattle & Calves, Turf, Alfalfa Hay, Misc. Hay, Sheep & Lambs
54	Nevada	6	Cattle & Calves, Pasture & Range, Winegrapes, Christmas Trees
55	Sierra	5	Cattle & Calves, Pasture & Range, Wild Hay, Alfalfa Hay
56	Trinity	2	Cattle & Calves, Pasture & Range, Winegrapes, Nursery Products, Other Hay
57	San Francisco	1	Vegetables, Cut Flowers
58	Alpine		Not Reported

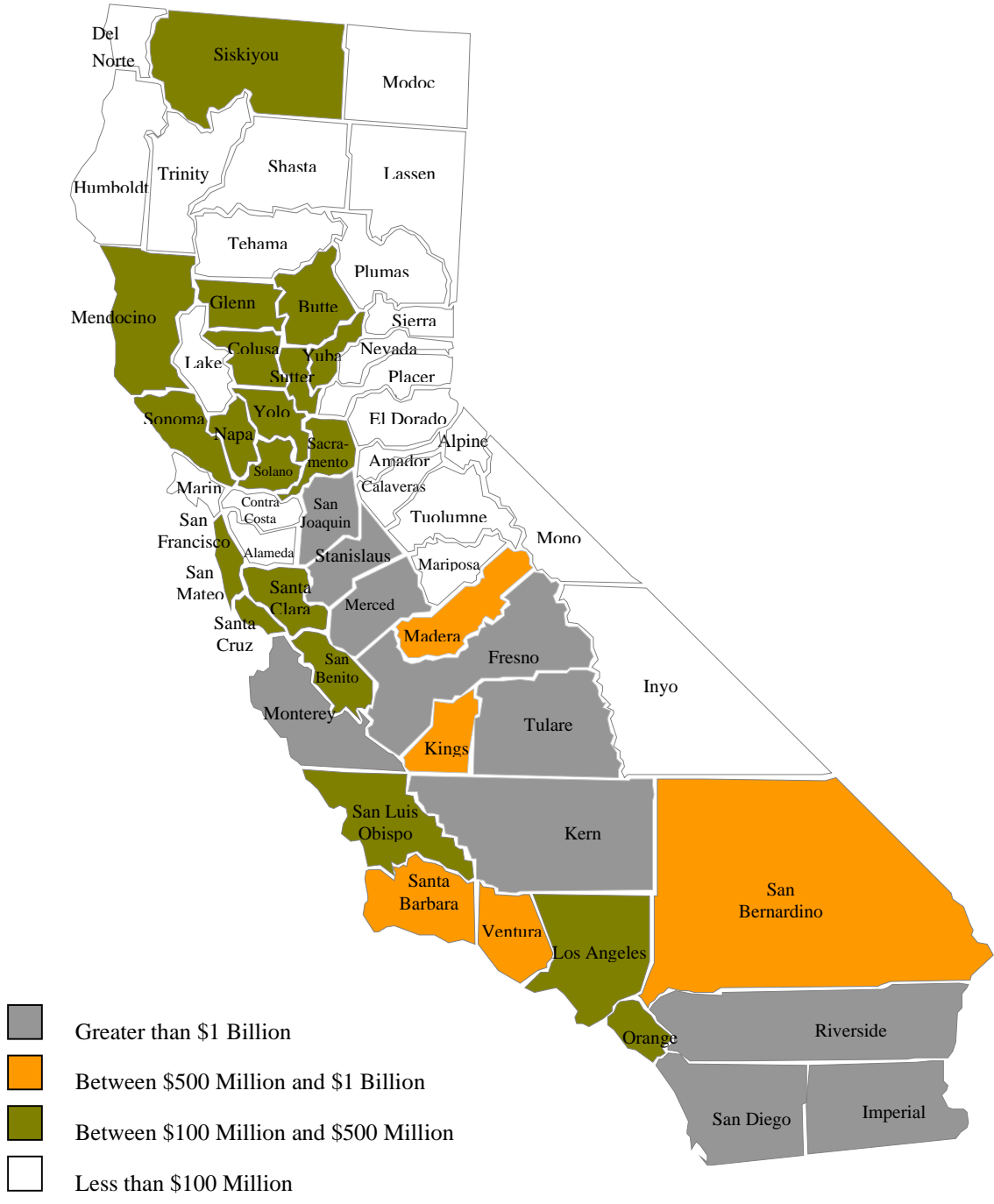
*The "gross value of production" includes all farm production whether sold into usual marketing channels, or used on the farm where produced.

**The "top commodities" column reflects information reported by the agricultural commissioners of each county. The level of detail reported differs by county. For example, some may report grapes (table, raisin, and wine) as an aggregate category, while others may report them as distinct categories.

Source: California Agricultural Statistics Service, *Summary of Agricultural Commissioners' Reports*, electronic data, 2000.

FIGURE 43

Gross Agricultural Production Value by County, 1999



Source: California Agricultural Statistics Service, *Summary of Agricultural Commissioners' Reports*, electronic data, 2000.

FIGURE 44

California's Production Regions

■ California can be divided into seven production regions. San Joaquin Valley, the leading agricultural area in the state, produces a broad array of fruit, vegetables, livestock, tree-nuts, field crops, and dairy products. Many San Joaquin Valley counties include the western slope of the Sierra Nevada Mountains. The Sacramento Valley is known for its horticultural and field crops, particularly processed tomatoes and rice. The Central Coast is a major horticultural producer, as it includes the state's top wine grape and vegetable growing areas. The South Coast also grows a number of horticultural crops, including citrus, and is a major producer of nursery and floriculture products. The Desert region produces winter vegetables, field crops, and horticultural specialties such as dates. The Mountain and North Coast regions hold California's vast forest and rangeland resources. All of these regions contain some urban influence, but the coastal regions contain California's major population centers.

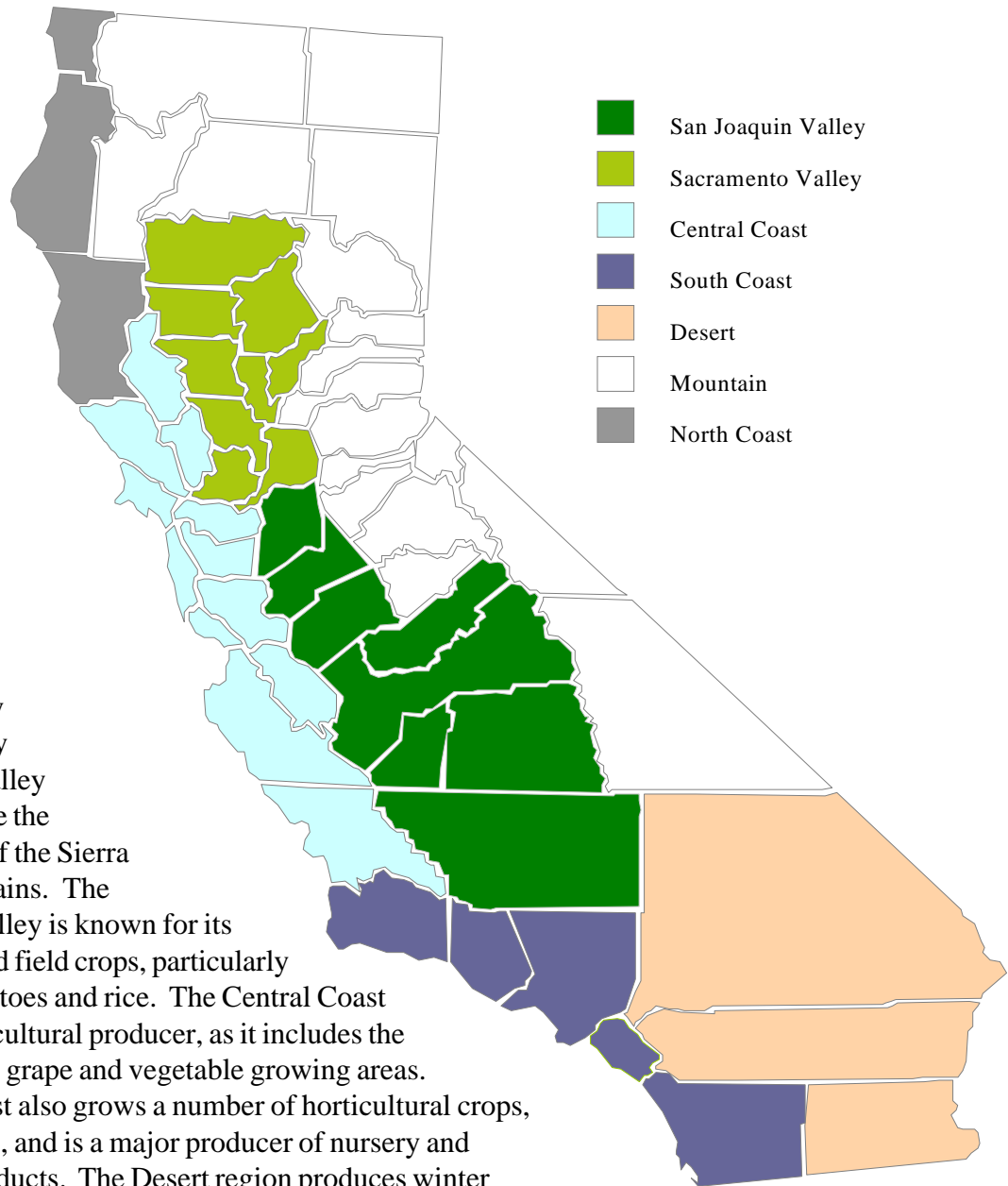


FIGURE 45

California Topography



Source: University of California, Davis, Shields Library Map Collection.

TABLE 38

Percent of California Gross Production Value by Commodity Group and Production Region, 1999*

	Fruit & Tree-Nuts	Livestock Products	Vegetables and Melons	Field Crops	Nursery & Floriculture	All Commodities
Central Coast	14.5%	4.8%	37.3%	2.1%	21.8%	15.8%
Desert	5.0%	17.6%	12.2%	10.9%	4.2%	10.4%
Mountain	0.4%	2.3%	0.7%	4.7%	2.3%	1.7%
North Coast	1.1%	1.2%	0.0%	0.5%	1.6%	0.9%
Sacramento Valley	7.4%	3.6%	5.9%	24.1%	2.7%	7.9%
San Joaquin Valley	58.6%	68.6%	30.7%	56.7%	14.5%	50.8%
South Coast	12.9%	1.9%	13.3%	1.0%	52.9%	12.5%

* Map of Production Regions appears on page 68.

Source: California Agricultural Statistics Service, *Summary of Agricultural Commissioners' Reports*, electronic data, 2000.

- With about 51% of total agricultural production value, the San Joaquin Valley is California's highest grossing region. In 1999, it accounted for about 69% of livestock production value, about 59% of fruit and tree-nuts, and about 57% of field crops. The only commodity groups for which it was not dominant were vegetables and melons, and nursery and floriculture.
- Fresno county, California's largest agricultural county in gross production value, was first or second-ranked in 1999 for: fruits and tree-nuts, vegetables, field crops and livestock products. In production value, Fresno county would have ranked as the 29th largest agricultural state in the nation.
- Tulare was the first or second largest county in gross production value for livestock, fruit and tree-nuts, and field crops.
- Monterey county farmers accounted for 30% of the state's total vegetable and melon production value. No other county produced as large a share of any single commodity group in 1999.

FIGURE 46

Fruit and Tree-Nut Production Value by County, 1999

***Other Significant Counties**

Counties with between 1% and 5% of the state total: Madera, Monterey, Riverside, Stanislaus, Sonoma, Merced, San Diego, Napa, Santa Barbara, Santa Cruz, Sacramento, San Luis Obispo, Sutter, Butte, Mendocino and Orange.

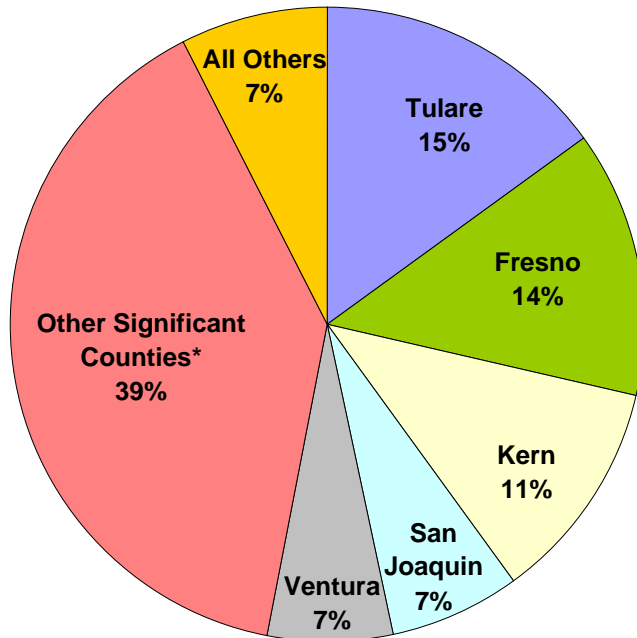
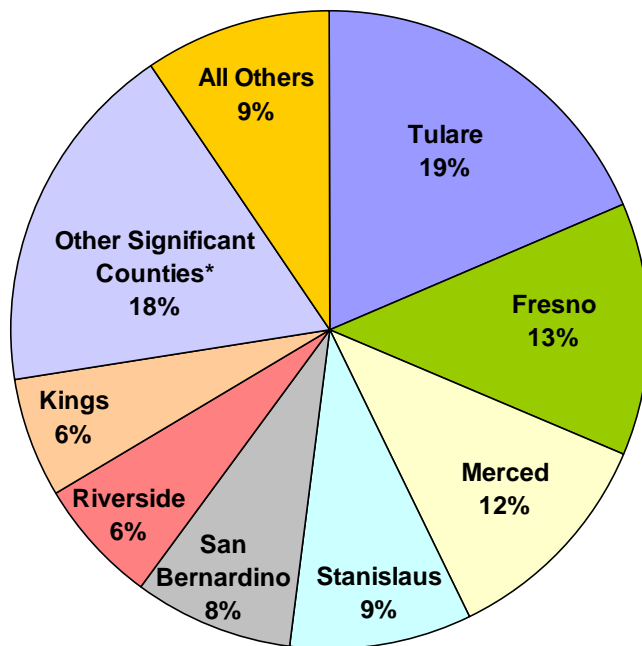


FIGURE 47

Livestock and Products Production Value by County, 1999

***Other Significant Counties**

Counties with between 1% and 5% of the state total: San Joaquin, Kern, Imperial, Madera, Sonoma, San Diego and Sacramento.



Source: California Agricultural Statistics Service, *Summary of Agricultural Commissioners' Reports*, electronic data, 2000.

FIGURE 48

Vegetable and Melon Production Value by County, 1999

***Other Significant Counties**

Counties with between 1% and 5% of the state total: Ventura, Santa Barbara, Riverside, San Joaquin, Merced, Yolo, San Luis Obispo, San Diego, San Benito, Santa Clara, Stanislaus, Colusa.

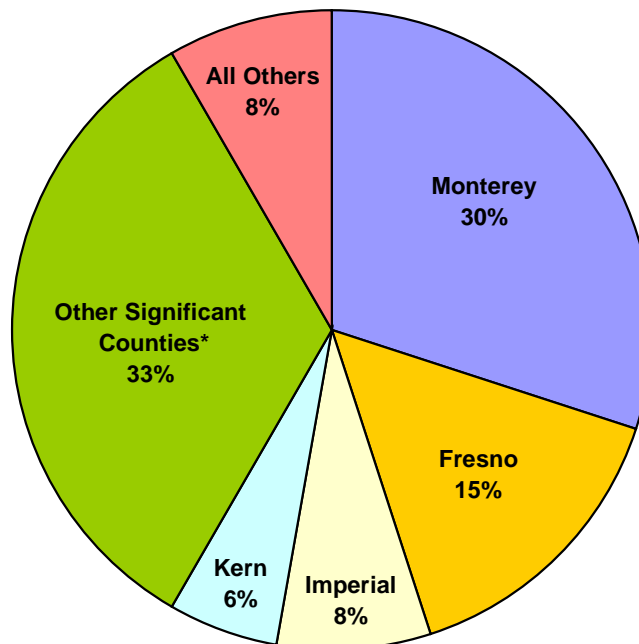
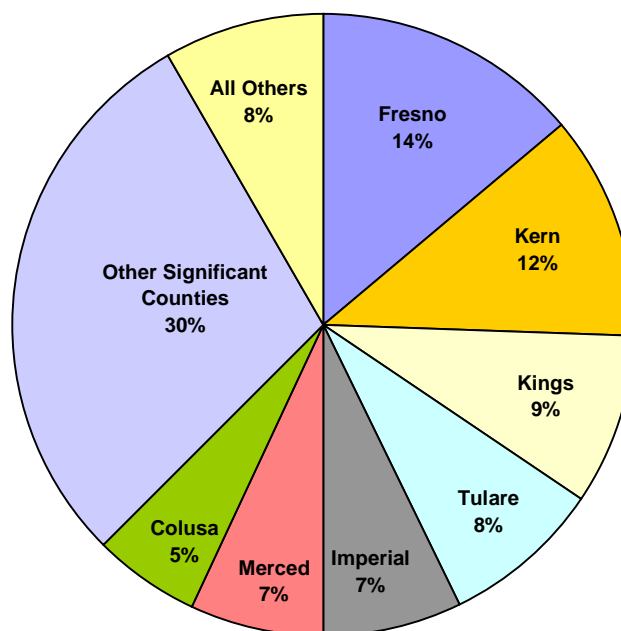


FIGURE 49

Field Crop Production Value by County, 1999

***Other Significant Counties**

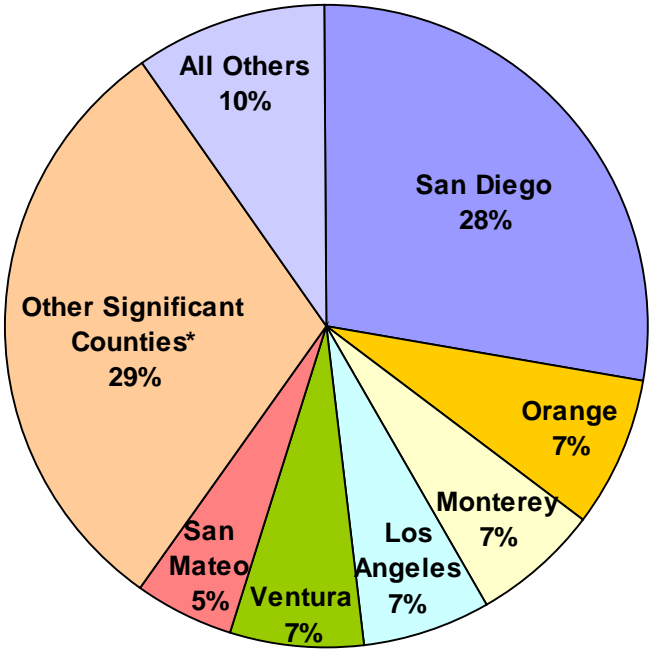
Counties with between 1% and 5% of the state total: San Joaquin, Sutter, Glenn, Butte, Stanislaus, Yolo, Madera, Riverside, Solano, Siskiyou, Sacramento, Yuba.



Source: California Agricultural Statistics Service, *Summary of Agricultural Commissioners' Reports*, electronic data, 2000.

FIGURE 50
Nursery, Flower and Foliage Production Value by County, 1999

***Other Significant Counties**
Counties with between 1% and 5% of the state total:
Santa Barbara, Kern, Riverside, San Luis Obispo, San Joaquin, Tulare, Stanislaus, Santa Cruz, Santa Clara, Fresno, Madera, Solano, Contra Costa.



Source: California Agricultural Statistics Service, *Summary of Agricultural Commissioners' Reports*, electronic data, 2000.

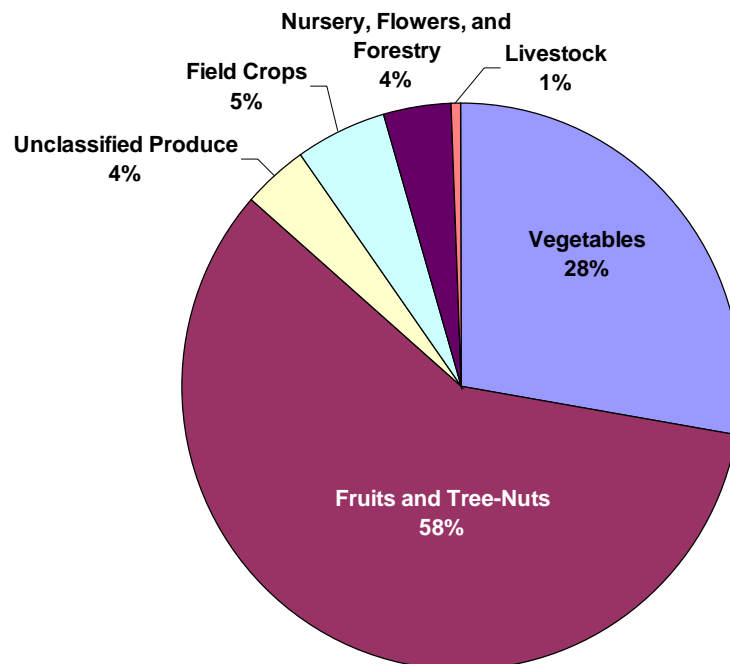
III.5 Organic Agriculture

In 1997-98, 1,526 registered organic growers in California reported more than \$155 million in gross sales on about 68,000 acres. (Organic growers are registered pursuant to CDFR regulations.) Their combined gross sales represented about six-tenths of 1% of the state's total agricultural sales (about eight-tenths of 1% if livestock is excluded).

- Total gross sales in 1998 had more than doubled since 1992-93. Farmers using organic techniques produced over 70 different commodities in 1997-98.
- Organic agriculture in California is characterized by the predominance of vegetable, fruit and tree-nut crops, which represented about 91% of those farms, 74% of acreage and 91% of gross sales. Livestock accounted for slightly more than 1% of organic farms and sales, and data on acres devoted to organic livestock were not available.

FIGURE 51

California Agricultural Commodity Groups by Number of Organic Farms, 1997-1998*



*Some farms reported production in more than one category.

Source: Klonsky, et al, *Statistical Review of California's Organic Agriculture, 1995-1998*, forthcoming, University of California Agricultural Issues Center.

- About 1% of California fruit and tree-nut production value was registered organic in 1998.
- About one-third of registered organic acreage was planted to vegetables, another third to fruit and tree-nuts, and about a fourth to field crops. In contrast, for organic and non-organic in the state as a whole, over half the crop acreage was in field crops, about one-third was in fruit and tree-nuts and only 13% was in vegetables.

FIGURE 52
California Agricultural Commodity Groups by Acres in Organic Farms, 1997-1998

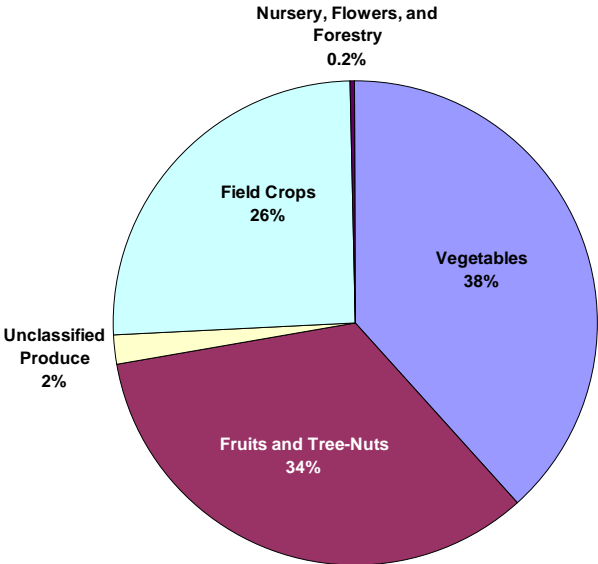
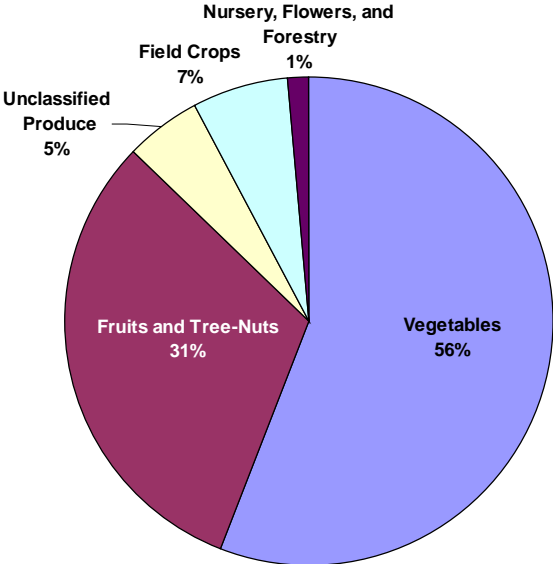


FIGURE 53
California Agricultural Commodity Groups by Gross Sales of Organic Products, 1997-1998



Source: Klonsky, et al, *Statistical Review of California's Organic Agriculture, 1995-1998, forthcoming*, University of California Agricultural Issues Center.

- Gross sales of organic agricultural products grew at an annual average rate of about 15% between 1992-93 and 1997-98. During this period the number of registered organic farms grew by a third, organic acreage increased by almost two thirds and total sales of organic commodities more than doubled. Hence, sales growth can be attributed primarily to an increase in income per acre and expansion of existing farms, rather than entry of new growers.

TABLE 39

California Organic Agriculture, 1992-98

Year	Number of Farms	Acres	Gross Sales
1992-93	1,157	42,302	75,436,817
1993-94	1,129	40,571	78,331,295
1994-95	1,372	45,070	95,099,386
1995-96	1,425	45,710	112,692,489
1996-97	1,469	54,589	135,936,781
1997-98	1,526	67,639	155,907,237

Source: Klonsky, et al, *Statistical Review of California's Organic Agriculture, 1995-1998*, forthcoming, University of California Agricultural Issues Center.

- To an even greater extent than conventional agriculture, organic agriculture is comprised of a large percentage of small growers, and a small percentage of large growers who dominate sales. Specifically, 59% of organic growers reported gross sales of less than \$10,000 for 1997-98, whereas less than 2% reported sales over \$1 million. However, almost half of all sales receipts were generated by the top 2% of growers, and over three fourths by the top 8%.

■ Growth in registered organic field crop acreage (111%) and vegetable crop acreage (83%) during 1992-98 was much greater than for fruit and tree-nut acreage (21%). Most of this expansion occurred between 1996 and 1998.

FIGURE 54
California Organic Agriculture by Acres in Commodity Group, 1992-1998

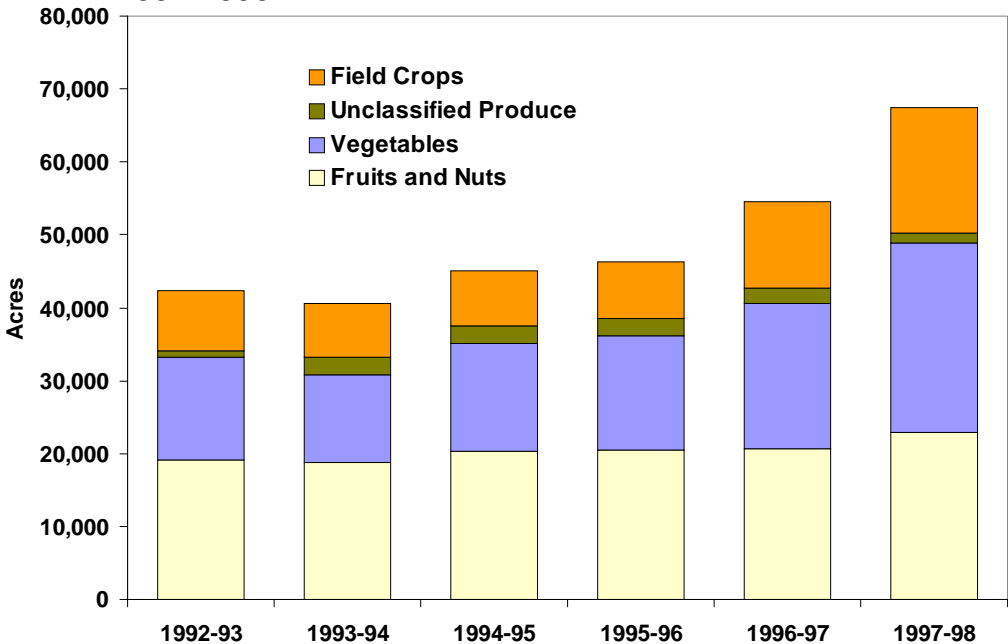
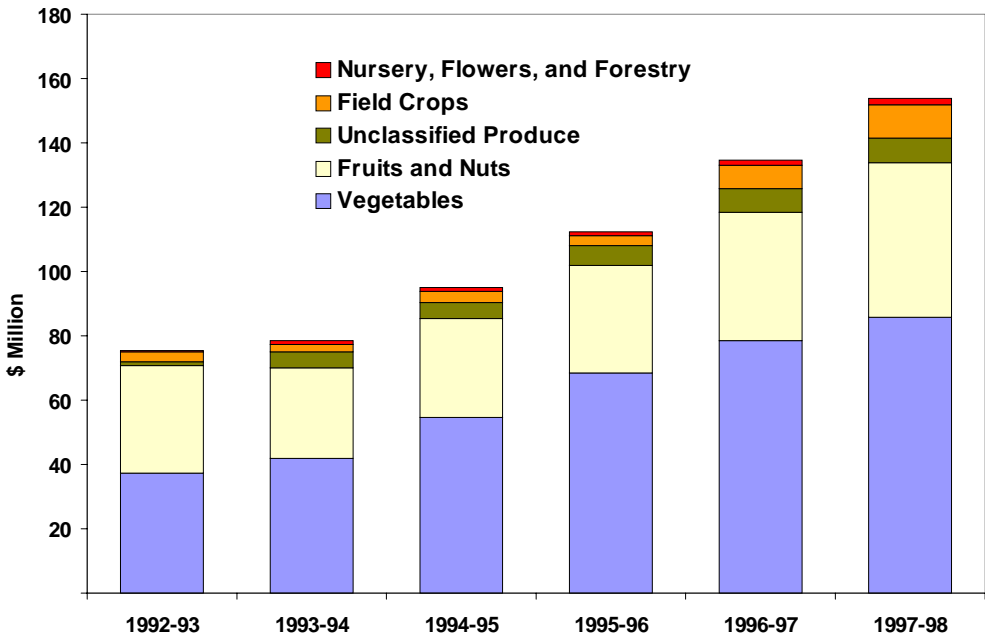


FIGURE 55
California Organic Agriculture by Gross Sales in Commodity Group, 1992-1998



Source: Klonsky, et al, *Statistical Review of California's Organic Agriculture, 1995-1998*, forthcoming, University of California Agricultural Issues Center.

