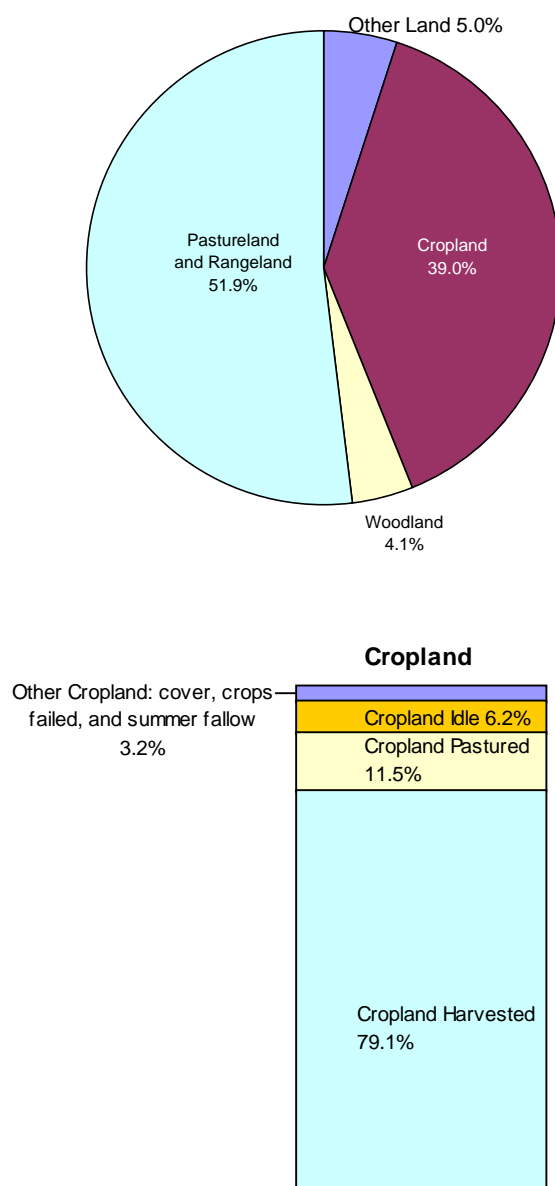


Introduction and Overview

FIGURE 3 (PAGE 10)
Agricultural Land Use in California, 1997
 Total Acres 27,698,779



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

California agriculture is large, diverse, complex and dynamic. *The Measure of California Agriculture (MOCA), 2000* documents the industry and its relationship to the rest of the economy. *MOCA, 2000* also provides an overview of general or unifying forces and trends.

Our aim is to supply a convenient compilation of facts and figures from a variety of sources. We also help interpret the wide array of data presented. The following overview provides highlights of data presented in the chapters.

Chapter I describes California farms and farmers in terms of land use, farm size, sales, legal organization, and demographics. California encompasses 99.8 million acres of land. In total, about 27.7 million acres, including 5 million acres of federal grazing land, are used for agriculture. About half of this total is pasture and range, another 39% is cropland, and the remainder is divided between woodland and other land.

About 97% of California's 74,126 farms are family or individually operated, with 77% organized legally as proprietorships, 15% as partnerships and 6% as corporations.

The “average” California farm operates on 374 acres. However, most of the state’s farms are much smaller in terms of acreage and sales, while large farms account for most of the total acreage and sales. About 5,000 of the largest farms (those with over \$1 million in sales) account for 75% of all market value of agricultural products sold.

Almost half of the state’s farm operators do not consider farming their principal occupation and many spend more days employed off the farm than on it. Roughly 20% of the state’s farm operators are under 44 and another 20% are over 70. The number of women reported as farm operators almost doubled between 1978 (7.6%) and 1997 (13.6%). California also has a greater share of farm operators with Hispanic (6%) and Asian or Pacific Islander (4.5%) origins than the United States average.

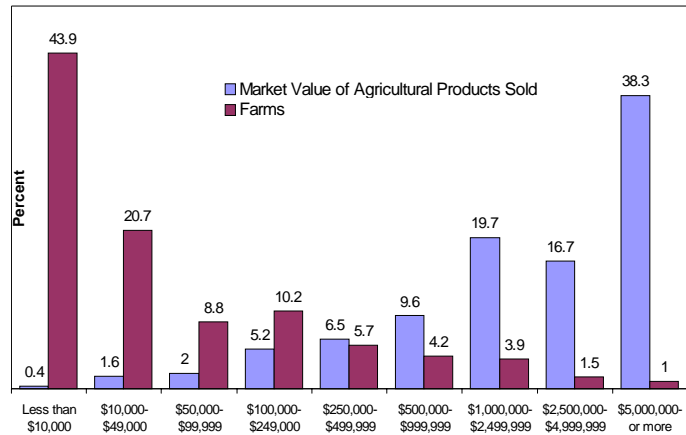
Chapter II covers a variety of inputs used by farmers: capital, labor, chemicals and fertilizer, water, technology, and research and development.

The hired farm labor market is characterized by an almost entirely foreign-born (mostly Hispanic) and largely young and male workforce. Wages are low relative to most non-farm occupations, and many jobs are part time.

Agriculture accounts for only about one-third of all pesticides purchased

FIGURE 10 (PAGE 24)

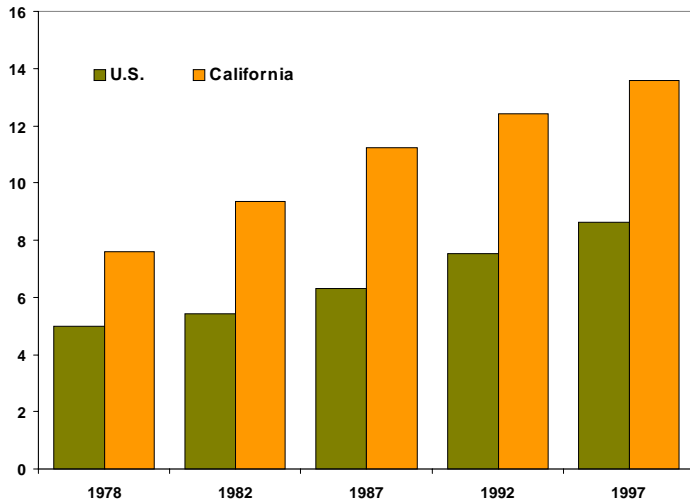
Share of California Farms and Market Value of Agricultural Products Sold, by Total Sales Category, 1997



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

FIGURE 13 (PAGE 29)

Females as a Percent of Farm Operators, 1978-1997



Sources:

- 1) U.S. Bureau of the Census, *Census of Agriculture, 1978-1992*.
- 2) USDA, National Agricultural Statistics Service, *1997 Census of Agriculture*.

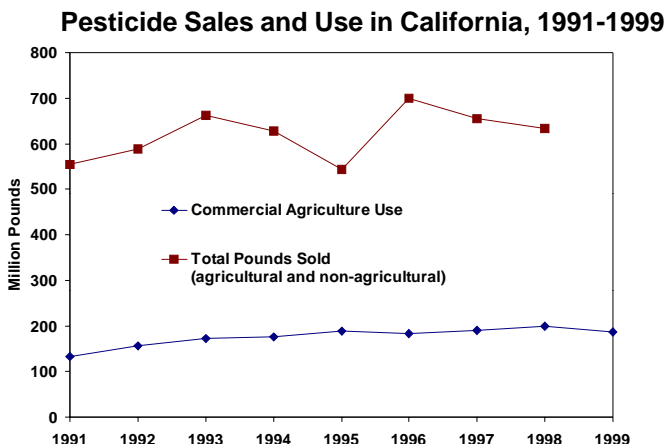
TABLE 19 (PAGE 37)

Characteristics of California Crop Workers, 1995-1997

	Percent of Workers
Foreign Born	95
Male	82
Under 34	63
Married	61
Family in United States	60
In United States Less than 5 Years	53
2 to 4 Farm Jobs per Year	53
Unauthorized	42

Source: Martin, Philip, and J. Edward Taylor, “For California Farmworkers, Future Holds Little Prospect for Change, *California Agriculture 2000*,” *California Agriculture*, from National Agricultural Workers Survey data.

FIGURE 20 (PAGE 38)



Source: California Environmental Protection Agency, Department of Pesticide Regulation, Pesticide Use Reporting, online data, 2000.

TABLE 21 (PAGE 40)

California Annual Average Water Budget*

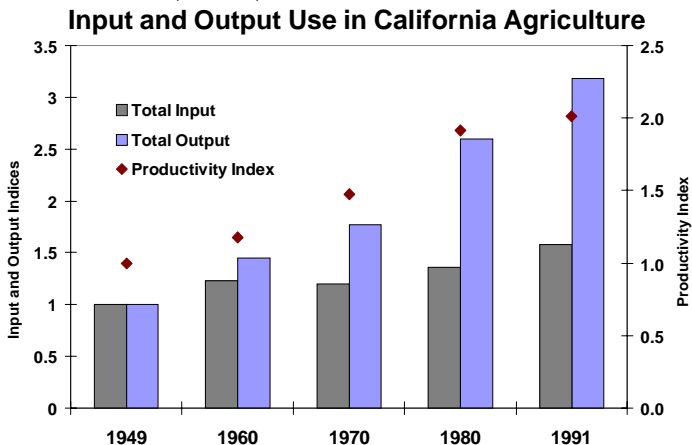
	Million Acre Feet
Water Use	
Urban	8.8
Agricultural	33.8
Environmental	36.9
Total	79.5
Supplies	
Surface Water	65.1
Groundwater**	12.5
Recycled & Desalted	0.3
Total	77.9
Shortage	1.6

*Normalized data for a non-drought year.

**Excludes overdraft.

Source: California Department of Water Resources, *The California Water Plan Update*, Bulletin 160-98.

FIGURE 25 (PAGE 45)



Source: Alston, Julian M. and David Zilberman, "Science and Technology in California Agriculture," *California Agriculture Issues and Challenges*, 1997.

in California by weight. Total pounds of pesticide used have expanded gradually, but weight does not reflect the toxicity of the pesticides. In 1999, agricultural applications of many of the most toxic chemicals were at their lowest level in years.

Surface water provides the source of most irrigation supply in California. A combination of federal, state and local water projects capture, store, transport, and import surface supplies. On average, agriculture uses about 43% of the state's water budget.

Technology and research and development have led to productivity increases and changes in farming practices. Between 1949 and 1991 the productivity index for California agriculture (the index of total farm production outputs divided by the index of total farm production inputs) doubled. One representative indicator, output per acre, has increased significantly for many of California's representative crops in recent decades.

Chapter III provides information on agricultural commodities demanded and supply from California farms. Although California produces more agricultural output than any other state, Californians still consume many foods shipped in from other states and countries, such as grain products from the Midwest and products from the Tropics. Meanwhile, most of

California’s farm output is shipped to other states and countries.

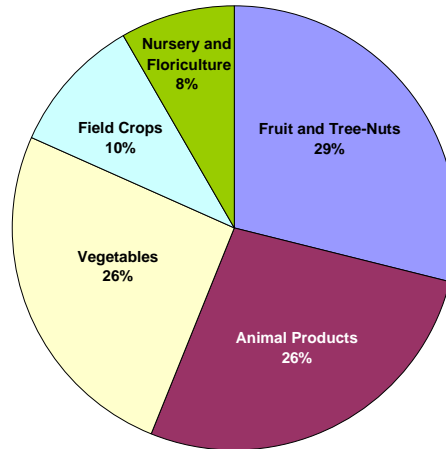
Among the states, California is unique in the breadth of farm commodities produced. California is a significant producer of animals and animal products, fruit and tree-nuts, vegetables, field crops, and nursery and floriculture products. Dairy is the top commodity in California and California is the nation’s largest dairy producer. About half of the state’s 1999 agricultural cash receipts were from fruits, tree-nuts, and vegetables. For some of these commodities such as grapes, almonds and broccoli, California accounts for virtually all of the nation’s production.

In 1999, California agriculture had about \$24.8 billion in cash receipts. California has had the most agricultural cash receipts among the states in every year since 1948. Farmers in California have gradually increased their share of U.S. farm cash receipts from 9.5% in 1960 to 13.1% in 1999. To give an international perspective, in 1999 Australia and Canada each had about \$18.5 billion in agricultural cash receipts.

Chapter IV introduces a number of topics including cooperatives, contracting, international exports, exotic pests and diseases, risk management and government support. Many farmers join cooperatives, contract with processors or purchase crop

FIGURE 36 (PAGE 57)

California Cash Receipts by Commodity Group, 1999

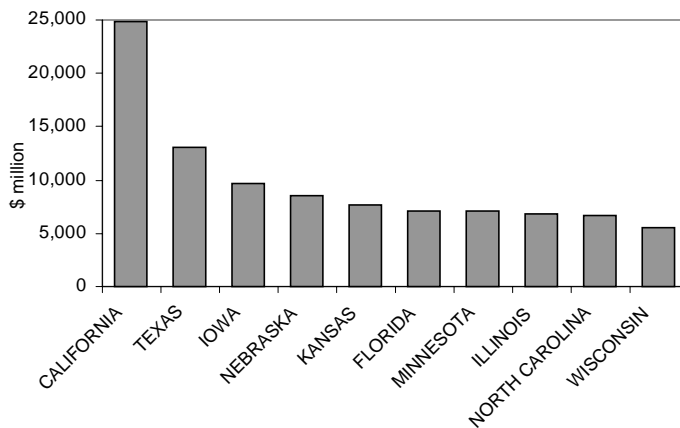


Source: USDA, Economic Research Service, Farm Business Economics Briefing Room, online data.

FIGURE 37 (PAGE 59)

Top 10 States by Cash Receipts from Farm Marketings, 1999

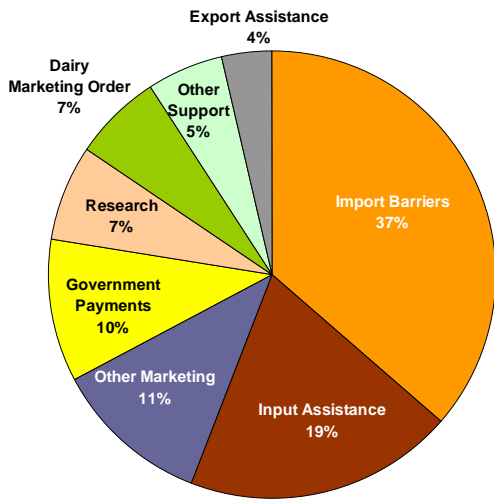
(United States total cash receipts from farm marketings: \$188,610 million)



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

FIGURE 64 (PAGE 99)

Share of Total California Agriculture Support by Policy Area



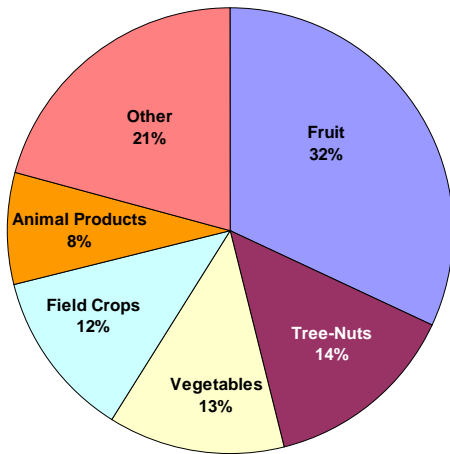
Source: Sumner, Daniel A., and David Hart, "Government Policy and California Agriculture," in *California Agriculture, Issues and Challenges*, August, 1997.

insurance. Farmers also receive direct or indirect government support. Producer subsidy equivalents give an idea of the degree to which agriculture is subsidized by the government through internal support and trade barriers.

California agriculture is part of the global marketplace. Between 16% and 19% of California's agricultural production is exported to international markets annually. In 1999, international exports were valued at about \$6.1 billion. East Asia, Canada and the European Union were the top export destinations.

FIGURE 58 (PAGE 88)

California Agricultural Exports by Category, 1999



Source: Kuminoff, et al., "California's 1999 International Agricultural Exports," AIC Issues Brief, no. 13, 2000.

Chapter V summarizes the agricultural sector's impact on the state and regional economies by presenting multiplier effects generated with the IMPLAN model. Through multiplier effects, agriculture accounts for between 6% and 7% of the state's personal income, value-added, and jobs. In California's Central Valley these economic impacts are much greater, ranging from 21% of the regional value-added to 25% of the employment. Economy-wide impacts are greatest in the San Joaquin Valley.

Perhaps the most distinguishing feature of California agriculture is its diversity—diversity in farms,

farmers, inputs and outputs. This industry is often measured, and is reported here, with averages. However, in some cases the distributions from which the averages are taken provide more insight and are also presented. The following chapters are designed to be an objective statistical overview of California's agriculture, with the caveat that California agriculture is far too complex and diverse to understand comprehensively with these relatively few statistics. ■