

Rural Migration News

Blog 275

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California Agriculture: Monterey

California's farm sales are \$50 billion a year, almost twice the \$27 billion farm sales of number two Iowa. Half of the state's farm sales are from the eight-county San Joaquin Valley, where Fresno, Kern, and Tulare counties collectively account for 45 percent of the state's farm sales.

The coastal county of Monterey is fourth, with farm sales of \$4 billion, followed by Ventura and Santa Barbara counties, where farm sales are almost \$2 billion each. In the three coastal counties, the leading commodity by farm sales is strawberries.

The three major coastal farming counties have 600,000 acres of irrigated crop land, half in Monterey county, or eight percent of the state's irrigated crop land, but they produce \$8 billion worth of farm commodities a year, over 15 percent of the state's farm sales.

Monterey

Some 300,000 acres of Monterey county farm land is irrigated, and most of Monterey's irrigated crop land straddles Highway 101 that runs north-south through the center of

the county. Monterey's harvested crop land exceeds 300,000 acres because some land can produce two or more vegetable crops a year. Two thirds of Monterey county's farm land is pasture.

Monterey county had farm sales of \$4 billion in 2020, almost three-fourths from vegetables, making Monterey the US salad bowl. The leading commodity was strawber-

ries worth \$920 million, followed by leaf (\$710 million) and head (\$430 million) lettuce.

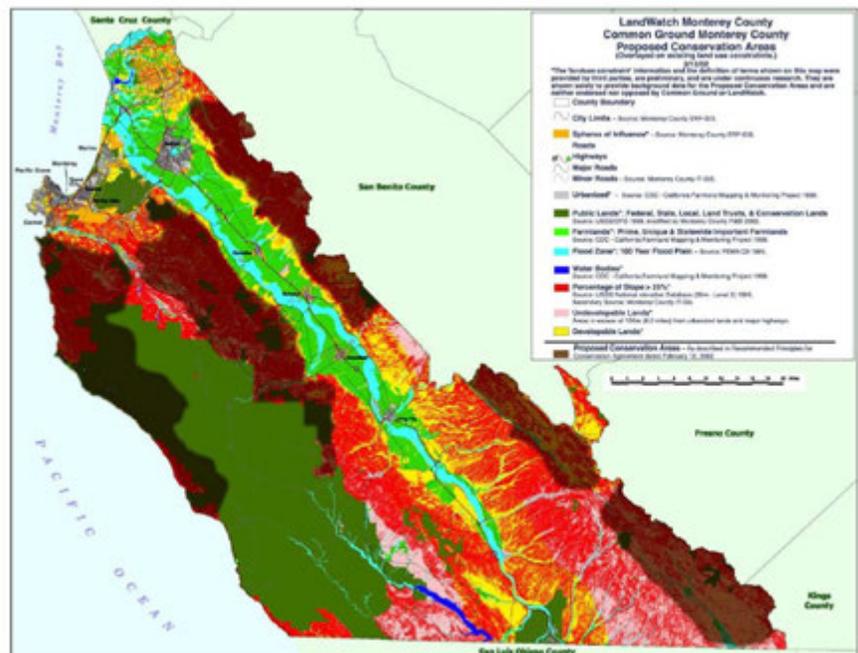
Since 2000, head or iceberg lettuce has lost its dominance to leaf lettuces such as Romaine.

Most head and Romaine lettuces are harvested and wrapped in plastic in the field for sale to consumers, and such field-wrapped lettuces accounted for two-thirds of the value of all lettuce in 2020. Bulk lettuces are harvested and placed in bins for processing into bagged salads.

The 10,000 acres of strawberries in Monterey county generated 35 tons an acre worth \$2,600 a ton or \$1.30 a pound. A quarter of Monterey county's lettuce acreage, and a third of the county's strawberry acreage, is organic.

Monterey wine grape acreage has been stable at 45,000 acres, but tonnage and the value of wine grapes fluctuate. Monterey wine grape production peaked at 200,000 tons worth almost \$250

Monterey's 300,000 Acres Irrigated Crop Land Lie Along Highway 101



Lettuce and Strawberries Accounted for Over Half of Monterey's Farm Sales in 2020

CROP	2020 CROP VALUE	2020 CROP RANKING	2019 CROP RANKING
Strawberry	\$922,683,000	1	2
Leaf Lettuce	\$712,681,000	2	1
Head Lettuce	\$428,580,000	3	3
Broccoli	\$341,495,000	4	4
Cauliflower	\$192,790,000	5	5
Spinach	\$141,284,000	6	10
Nursery & Flowers	\$119,836,000	7	9
Brussels Sprout	\$116,250,000	8	7
Celery	\$114,920,000	9	12
Livestock & Poultry	\$110,891,000	10	11

Leaf Lettuces have Replaced Head Lettuce as Most Planted and Valuable

CROP	YEAR	ACREAGE	PRODUCTION PER ACRE	TOTAL	UNIT	VALUE PER UNIT	TOTAL
HEAD LETTUCE							
Naked	2020	—	—	5,796,000	ctn ⁸	\$11.30	\$65,495,000
	2019	—	—	5,656,000	ctn	\$13.60	\$76,922,000
Wrapped	2020	—	—	20,548,000	ctn	\$13.80	\$283,562,000
	2019	—	—	21,536,000	ctn	\$14.90	\$320,886,000
Bulk	2020	—	—	283,000	ton	\$281.00	\$79,523,000
	2019	—	—	306,000	ton	\$380.00	\$116,280,000
HEAD LETTUCE, TOTAL	2020	39,007	1,005	39,202,000	ctn	—	\$428,580,000
	2019	40,277	1,020	41,083,000	ctn	—	\$514,088,000
LEAF LETTUCE							
Butter Leaf	2020	939	950	892,000	ctn	\$10.40	\$9,277,000
	2019	1,045	950	993,000	ctn	\$10.90	\$10,824,000
Endive	2020	329	900	266,000	ctn	\$11.30	\$3,006,000
	2019	318	1,100	350,000	ctn	\$9.26	\$3,241,000
Escarole	2020	236	900	143,000	ctn	\$12.30	\$1,759,000
	2019	171	1,100	188,000	ctn	\$13.50	\$2,538,000
Green Leaf	2020	4,779	950	4,540,000	ctn	\$13.30	\$60,382,000
	2019	6,406	950	6,086,000	ctn	\$10.59	\$64,451,000
Red Leaf	2020	2,694	950	2,559,000	ctn	\$12.50	\$31,988,000
	2019	3,194	950	3,034,000	ctn	\$11.10	\$33,677,000
Leaf Lettuce, Bulk	2020	—	—	34,800	ton	\$581.00	\$20,219,000
	2019	—	—	35,100	ton	\$630.00	\$31,059,000
Romaine, Fresh ⁹	2020	33,410	1,000	33,410,000	ctn	\$13.90	\$464,399,000
	2019	35,203	1,000	35,203,000	ctn	\$14.28	\$502,699,000
Romaine, Bulk	2020	—	—	239,000	ton	\$509.00	\$121,651,000
	2019	—	—	238,000	ton	\$807.00	\$192,066,000
LEAF LETTUCE, TOTAL	2020	54,912	—	54,802,000	ctn	—	\$712,681,000
	2019	58,846	—	58,728,000	ctn	—	\$840,555,000
LETTUCE CROPS TOTAL	2020	93,919					\$1,141,261,000
	2019	99,123					\$1,354,643,000

million in 2014, and was less than 100,000 tons worth about \$100 million in 2020 due to fires that led to over 10 percent of the county's wine grapes not being harvested.

Cannabis is not included in these farm sales data. Monterey county is a leading producer of cannabis. County farm-level sales were almost \$500 million in 2020, including 85 percent from mixed light flower, meaning that the cannabis was grown in a greenhouse with natural and artificial light.

Employment

Employment in Monterey county agriculture averages 50,000, which suggests that up to 100,000 individuals are employed for wages on county farms sometime during the year due to seasonality and turnover. Average direct-hire employment in crops (NAICS 111) has been stable at about 19,000 since 2010, but average employment in crop support services (1151) almost doubled to 35,000 in 2020.

About two-thirds of employment in Monterey crop support services is with FLCs (115115), whose average employment was 22,000 in 2020. However, the fastest growth in crop support employment has been in post-harvest sorting and packing, 115114, where average employment almost tripled to 11,000 in 2020.

Average weekly wages in crop support were lower than direct hire wages until 2016, when crop support wages of \$705 were five percent higher than direct-hire's \$680 a week. Crop support wages remain five percent higher at \$815 versus \$785 for direct hires in 2020.

Within crop support, FLC weekly wages of \$680 in 2020 were 85 percent of the \$815 average for all crop support workers, and this

Most Head and Romaine Lettuce is Bagged in the Field



Workers Harvesting Strawberries



ratio has been stable over the past two decades. Post-harvest sorting and packing wages, by contrast, fell from 50 percent above average crop support wages to 35 percent above or almost \$1,100 a week in 2020.

These employment and wage data include H-2A workers. Monterey county had 6,400 jobs certified to be filled with H-2A workers in FY20, a quarter of all H-2A jobs in the state.

Monterey Wine Grape Production and Value Fluctuates

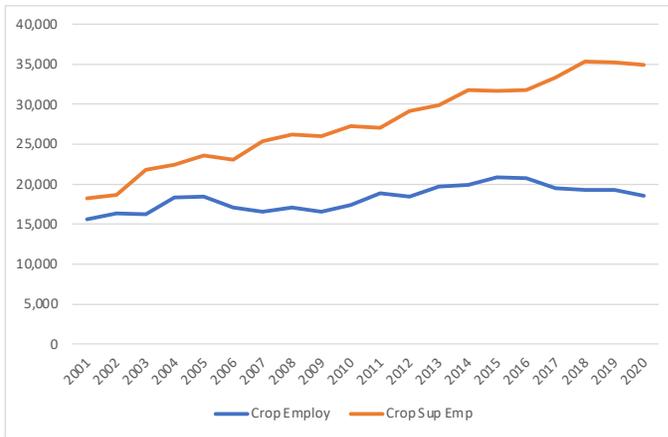
YEAR	NONBEARING ACRES	BEARING ACRES	TOTAL TONS	VALUE
2020	1,028	44,886	94,300	\$105,991,000
2019	1,147	44,683	132,000	\$186,096,000
2018	1,137	44,924	180,000	\$247,758,000
2017	896	44,299	171,000	\$239,027,000
2016	1,496	44,771	172,000	\$238,892,000
2015	2,549	44,296	140,300	\$185,925,000
2014	2,512	45,993	200,000	\$247,357,000
2013	1,531	42,986	185,000	\$226,982,000
2012	1,936	45,130	172,000	\$214,306,000
2011	2,006	43,034	124,000	\$140,976,000
2010	2,572	43,321	177,000	\$172,916,000

Most Cannabis Relies on Natural and Artificial Light

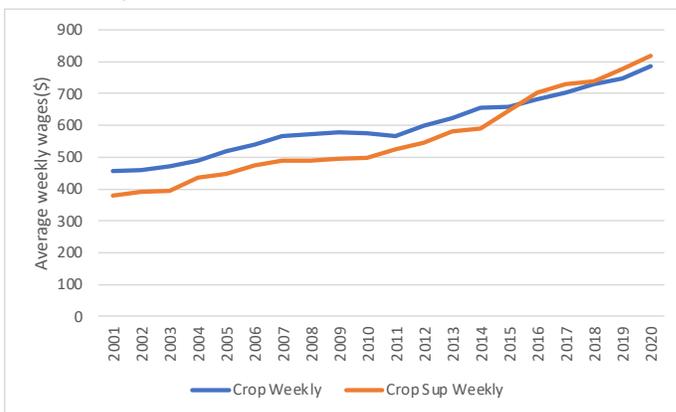
PRODUCT	PRODUCTION	UNIT	\$ PER UNIT	VALUE
Nursery Products	2,063,000	Each	\$11.00	\$22,693,000
Flower (Mixed Light)	460,000	Pound	\$900.00	\$414,000,000
Flower (Indoor)	36,200	Pound	\$1,100.00	\$39,820,000
Trim	99,300	Pound	\$75.00	\$7,448,000
Seed	141,000	Each	\$1.00	\$141,000
TOTAL 2020				\$484,102,000
TOTAL 2019				\$449,688,000



Direct-Hire Average Crop Employment (Blue) has been Stable in Monterey Since 2000, while Average Crop Support Employment Almost Doubled



The Average Weekly Wages of Crop Support Workers (Orange) have been Higher than the Wages of Direct-Hire Crop Workers Since 2016



References

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