

Rural Migration News

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California Farm Sales: \$51 billion in 2021

California had farm sales of \$51 billion in 2021, up from \$49 billion in 2020 and 1.5x the farm sales of Iowa. California accounted for 12 percent of US farm sales of \$434 billion in 2021, including \$238 billion from the sale of crops and \$195 billion from the sale of animal commodities.

The most valuable California commodity was milk worth \$7.6 billion, followed by grapes worth \$5.2 billion and almonds and nursery crops each worth \$5 billion. Cattle and calves, strawberries, pistachios, lettuce, tomatoes, walnuts and rice were among the 11 commodities that each had farm sales of over \$1 billion in 2021.

California exported farm commodities worth \$22 billion in 2021, led by \$4.6 billion worth of almonds (88 percent of the almonds were exported), \$2.5 billion worth of dairy products, and \$2 billion worth of wine. Tree nut exports of almonds, pistachios, and walnuts were over a third of California's farm exports.

The three leading farm counties, Kern, Fresno, and Tulare, each had farm sales of over \$8 billion and collectively accounted for over half

of the state's farm sales. The leading commodity in Kern and Fresno county was grapes, and in Tulare county oranges.

FVH Commodities

California agriculture specializes in high-value fruits and nuts, vegetables and melons, and horticultural specialties (FVH commodities). California's fruits and nuts were worth \$22 billion in 2021, vegetables and melons were worth \$7 billion, and nursery and floriculture products were worth \$6 billion, making FVH commodities worth \$35 billion or

almost 70 percent of the state's farm sales.

Within each FVH commodity group, a few crops dominate. The three tree nuts, almonds, pistachios, and walnuts, accounted for \$9 billion or 40 percent of fruit and nut sales. Tree nuts are not labor intensive, but their large acreage means that 1,900 establishments hired an average 18,000 workers directly in 2021, second only to strawberries, where 300 establishments hired an average 25,000 workers. These data do not include workers brought to farms by FLCs and other crop support service firms, and some of the directly hired tree nut workers could be employed in packing plants that clean and sort the farm's harvested nuts.

The leading labor-intensive fruit crops by value included strawberries worth \$3 billion, oranges worth \$900 million, tangerines and mandarins worth \$800 million, and lemons worth \$600 million. Raspberries worth \$400 million were more valuable than cherries, \$300 million, and blueberries, \$200 million. Peaches were worth \$400 million and avocados \$300 million.

The value of labor-intensive fruits was \$7 billion or a third of the total

CA's Farm Sales of \$51 Billion were 1.5x Iowa and 2x Texas in 2021

Top 5 Agricultural States in Cash Receipts, 2021		
Rank	State	Crop Cash Receipts ¹ \$1,000
	United States	433,569,038
1	California	51,109,546
2	Iowa	34,626,720
3	Nebraska	26,345,219
4	Texas	24,898,569
5	Illinois	21,720,187

value of fruits and nuts in 2020. The acreage of labor-intensive fruits such as blueberries increased over the past decade while the acreage of raspberries and strawberries has been decreasing. The acreage of oranges declined over the past decade, the acreage of lemons increased, and the acreage of mandarins and tangelos rose by over 50 percent over the past decade to 66,000.

The acreage of apples and apricots declined over the past decade, the acreage of avocados (47,000 acres) and sweet cherries (33,000 acres) was stable, and the acreage of table grapes rose over the past decade. The acreage of peaches, pears and raisin grapes fell over the past decade.

California crushes about 3.5 tons of wine-variety grapes a year, with the crush exceeding four million tons in some years. About 55 percent of the crush in 2021 involved red varieties worth \$1,100 a ton, and 45 percent were white varieties worth \$700 a ton.

Within the \$7 billion vegetable and melon sector, hand-harvested lettuce worth \$2 billion accounted for almost 30 percent of the value of the state's vegetables and melons, followed by \$800 million worth of carrots, \$600 million worth of broccoli, and over \$300 million worth of spinach. Shrinking production of melons (\$300 million of cantaloupes, honeydews, and watermelons) and fresh tomatoes (\$275 million) is reflected in falling acreage and sales of these commodities.

There are three major types of lettuce, head, leaf, and Romaine. Head lettuce acreage declined over the past decade, leaf lettuce acreage rose, and Romaine acreage was stable.

11 California Commodities had Farm Sales of More than \$1 billion in 2021

Top 20 Commodities in California, 2019-2021						
Commodity	Value and Ranks ¹					
	2019		2020		2021	
	\$1,000	Rank	\$1,000	Rank	\$1,000	Rank
Dairy products, Milk	7,382,830	1	7,265,456	1	7,571,954	1
Grapes	5,398,164	3	4,488,553	4	5,229,902	2
Almonds (shelled)	6,169,100	2	5,251,410	2	5,028,320	3
Miscellaneous crops ²	5,054,471	4	4,875,731	3	4,955,667	4
Cattle and calves	3,064,300	5	2,736,559	6	3,114,550	5
Berries, All Strawberries	2,286,330	6	2,211,430	8	3,023,230	6
Pistachios	2,082,210	7	2,622,950	7	2,910,600	7
Lettuce, All	1,841,423	8	3,067,771	5	2,029,089	8
Tomatoes, All	1,174,395	10	1,117,840	9	1,181,966	9
Walnuts	1,237,950	9	948,000	11	1,022,250	10
Rice	913,602	12	946,293	12	1,003,864	11
Broilers	843,036	13	690,034	17	996,023	12
Floriculture	1,015,012	11	967,206	10	962,498	13
Oranges, All	699,458	17	858,093	13	901,281	14
Hay, All	786,891	14	678,561	18	839,453	15
Tangerines	679,638	19	795,034	14	815,089	16
Carrots, All	708,872	16	772,549	16	776,367	17
Lemons	688,163	18	614,933	19	638,250	18
Broccoli	746,918	15	782,122	15	631,455	19
Other animals/products	578,569	20	550,316	20	550,316	20

Tree Nuts were Over 1/3 of CA Farm Exports

California Agricultural Products Export Values and Rankings, 2019-2021					
2021 Rank	Product	2019	2020	2021	Change in Value
					Percent ²
		\$1 Million			
1	Almonds	4,901	4,658	4,647	-0.2
2	Dairy and Products	1,805	2,037	2,537	24.6
3	Pistachios ^{2,3}	2,009	1,669	2,071	24.0
4	Wine ^{2,3}	1,228	1,143	1,288	12.7
5	Walnuts	1,250	1,246	1,247	0.1
6	Rice	765	831	774	-6.8
7	Table Grapes	743	731	668	-8.7
8	Tomatoes, Processed	623	618	659	6.5
9	Oranges and Products ^{2,3}	549	597	625	4.6
10	Beef and Products ⁴	404	409	572	39.7
11	Strawberries	402	407	475	16.6
12	Hay ²	338	346	382	10.2
13	Seeds for Sowing	333	311	314	0.9
14	Lettuce	292	292	304	4.4
15	Cotton	437	289	287	-0.9
16	Raisins	257	226	224	-1.0
17	Lemons ²	203	186	189	2.0
18	Raspberries and Blackberries ^{2,5}	142	140	162	15.4
19	Prunes	126	122	159	30.4
20	Peaches and Nectarines	119	120	146	21.7

The top 15 commodities as reported by county agricultural commissioners generate a similar picture. Kern is the leading producer of grapes, almonds, pistachios, and tangerines and mandarins, while Fresno is the leading producer of peaches and number two in grapes and pistachios. Tulare is the leading county

for dairy, cattle, and lemons, and second in peaches and alfalfa.

Trends

Rising farm labor costs are encouraging producers of labor-intensive commodities to invest in (1) machines to replace workers and

mechanical aids that make them more productive, (2) housing for H-2A guest workers, and (3) production outside CA to take advantage of lower labor and other costs. The mix of machines, H-2A workers, and imports and other state production varies by commodity.

For example, the production of milk may shift from California to midwestern states due to lower feed costs, lower wages, and fewer environmental restrictions on dairies. Americans are consuming more milk products as cheese and butter rather than fluid milk, which makes it easier to separate the production and consumption of dairy products. Grape production, by contrast, is likely to remain centered in California, albeit with more mechanization in raisin grapes and mechanical aids that make table grape workers more productive.

Lettuce and strawberries are also likely to remain in California, with mechanical aids making the field workers who hand harvest most

Kern, Fresno, and Tulare Counties Accounted for 1/2 of California's Farm Sales

Top 10 Agricultural Counties, 2020-2021					
County	Total Value and Rank				Leading Commodities
	2020		2021		
	\$1,000	Rank	\$1,000	Rank	
Kern	7,568,984	2	8,342,178	1	Grapes (All), Oranges (All), Pistachios, Almonds
Fresno	7,966,308	1	8,109,917	2	Grapes (All), Pistachios, Milk, Oranges (All)
Tulare	7,229,365	3	8,089,377	3	Oranges (All), Milk, Grapes (All), Cattle
Monterey	3,908,317	4	4,100,240	4	Lettuce (All), Strawberries, Broccoli, Grapes (All)
Merced	3,473,093	5	3,697,992	5	Milk, Almonds, Sweet Potatoes, Chicken
Stanislaus	3,437,722	6	3,471,196	6	Almonds, Milk, Poultry (Misc), Horticulture (All)
San Joaquin	3,048,128	7	3,211,550	7	Almonds, Milk, Grapes (All), Walnuts
Kings	2,179,476	8	2,338,144	8	Milk, Pistachios, Almonds, Cattle
Imperial	2,026,427	9	2,287,312	9	Cattle (All), Lettuce (All), Alfalfa, Broccoli
Ventura	1,983,478	10	2,052,020	10	Strawberries, Lemons, Horticulture (All), Raspberries

of these commodities more productive. Technology that increases efficiency in packing sheds may increase also efficiency in the field, as with workers who cut lettuce that is washed and bagged in salad plants. Similarly, workers can pick strawberries faster into lugs that are taken to packing houses for sorting and packing rather than having workers sort and pack in the field.

Mature-green tomatoes, cantaloupes, asparagus are among the

commodities whose production is likely to continue to shrink in the face of declining consumption and rising imports from lower wage countries.

FVH Commodities were Worth \$35 Billion or 70% of CA's Farm Sales in 2021

Cash Income by Commodity Groups, 2019-2021							
Source of Income	2019	2020	2021	Source of Income	2019	2020	2021
		\$1,000				\$1,000	
FIELD CROPS				VEGETABLES AND MELONS			
Corn for Grain	47,628	50,313	54,634	TOTAL	8,130,456	8,890,371	7,465,654
Cotton Lint	367,315	400,912	400,203	% of Gross Cash Income	15.2	16.2	13.6
Oil Crops	46,918	37,364	30,940	LIVESTOCK, POULTRY AND PRODUCTS			
Rice	913,602	946,293	1,003,864	Cattle and Calves	3,064,300	2,736,559	3,114,550
Wheat	40,008	34,361	66,228	Hogs	26,458	18,051	18,858
Other Field Crops	889,181	767,481	912,816	Milk and Cream	7,382,830	7,265,456	7,571,954
TOTAL	2,304,652	2,236,724	2,468,685	Poultry and Eggs	1,308,566	1,279,549	1,525,578
% of Gross Cash Income	4.3	4.1	4.5	Other Livestock/Poultry	623,360	594,929	590,544
FRUIT AND NUT CROPS				TOTAL	12,405,514	11,894,544	12,821,484
TOTAL	21,626,501	20,214,944	22,196,688	% of Gross Cash Income	23.2	21.6	23.4
% of Gross Cash Income	40.4	36.7	40.4	TOTAL CASH INCOME FROM MARKETINGS			
ALL OTHER CROPS				TOTAL	50,806,060	49,354,001	51,109,546
TOTAL	5,323,923	5,150,212	5,194,537	FARM RELATED INCOME ¹			
% of Gross Cash Income	9.9	9.4	9.5	TOTAL	2,769,573	5,690,792	3,770,772
FLORICULTURE				% of Gross Cash Income	5.2	10.3	6.9
TOTAL	1,015,012	967,206	962,498	GROSS CASH INCOME FROM FARMING			
% of Gross Cash Income	1.9	1.8	1.8	TOTAL	53,575,633	55,044,792	54,880,319

Blueberry Acreage is Rising; Strawberry Acreage is Stable

Berry Acreage, Production and Value, 2012-2021

Crop	Crop Year	Harvested	Yield Per Acre	Production	Utilized Production	Value Per Unit ¹	Total Value
		Acres	Cwt.	Cwt.	Cwt.	\$/Cwt.	\$/,000
Blueberries	2012	4,200	97.4	409,000	409,000	327.00	133,743
	2013	4,800	107.0	514,000	514,000	248.00	127,520
	2014	4,800	115.0	571,000	552,000	216.00	119,093
	2015	6,200	103.0	641,000	639,000	188.00	120,303
	2016	6,400	93.3	605,000	597,000	182.00	108,765
	2017	6,600	94.8	630,300	626,000	220.00	137,596
	2018	6,600	98.4	649,000	634,700	220.00	139,755
	2019	7,300	101.0	737,000	717,800	285.00	204,460
	2020	6,800	116.6	793,000	789,000	273.00	215,698
	2021	7,300	102.0	745,000	742,100	301.00	223,536
Strawberries, All	2012	39,000	710.0	27,646,000	NA	77.10	2,130,637
	2013	41,500	665.0	27,573,000	NA	79.80	2,200,729
	2014	41,500	665.0	27,592,000	NA	88.40	2,437,918
	2015	40,500	685.0	27,697,000	27,697,000	67.70	1,875,483
	2016	38,200	710.0	27,122,000	28,973,900	105.00	2,849,626
	2017	38,100	645.0	24,574,500	24,549,900	103.00	2,530,903
	2018	35,300	660.0	23,298,000	23,298,000	89.50	2,086,077
	2019	34,100	610.0	20,800,000	20,770,000	110.00	2,286,330
	2020	36,600	650.0	23,800,000	23,750,000	93.10	2,211,430
	2021	39,000	620.0	24,200,000	24,150,000	125.00	3,023,230

Orange Acreage is Declining, Lemon Acreage is Stable, Mandarin Acreage is Rising

Citrus Acreage, Production and Value, 2012-2021^{1,2}

	Crop Year	Bearing	Yield Per Acre	Utilized Production	Value Per Unit ¹	Total Value
		Acres	Cartons	Cartons	\$/Carton	\$/,000
Oranges, All	11-12	177,000	655	116,000,000	6.60	764,783
	12-13	171,000	637	109,000,000	6.52	711,137
	13-14	166,000	596	99,000,000	9.52	942,171
	14-15	163,000	592	96,400,000	8.02	773,356
	15-16	157,000	746	117,000,000	7.06	826,294
	16-17	152,000	636	96,600,000	9.20	888,331
	17-18	147,000	602	88,400,000	12.37	1,093,052
	18-19	147,000	710	104,400,000	6.70	699,458
	19-20	145,000	746	108,200,000	7.93	858,093
	20-21	142,000	706	100,200,000	9.00	901,281
Lemons	11-12	45,000	912	41,000,000	10.63	435,752
	12-13	45,000	933	42,000,000	D	D
	13-14	46,000	818	37,600,000	D	D
	14-15	47,000	876	41,200,000	D	D
	15-16	47,000	894	42,000,000	D	D
	16-17	47,000	872	41,000,000	17.51	717,746
	17-18	47,000	902	42,400,000	16.08	681,564
	18-19	49,000	968	47,400,000	14.52	688,163
	19-20	50,000	1,012	50,600,000	12.16	614,933
	20-21	50,000	852	42,600,000	14.99	638,250
Mandarins and Mandarin Hybrids (Includes Tangelos, Tangerines and Tangors)	11-12	38,000	568	21,600,000	D	D
	12-13	41,000	634	26,000,000	D	D
	13-14	46,000	626	29,400,000	D	D
	14-15	52,000	720	37,400,000	D	D
	15-16	57,000	762	43,400,000	D	D
	16-17	59,000	806	47,600,000	11.18	532,038
	17-18	62,000	620	38,400,000	14.48	556,024
	18-19	64,000	828	53,000,000	12.83	679,638
	19-20	66,000	678	44,800,000	17.75	795,034
20-21	67,000	838	56,200,000	14.51	815,089	

Raisin Grape Acreage is Declining; Table Grape Acreage is Increasing

Non Citrus Fruit Acreage, Production and Value, 2012-2021								
Crop	Crop Year	Bearing Acres	Non-Bearing ¹ Acres	Yield Per Acre Tons	Production Tons	Utilized Production Tons	Value Per Unit ² \$/Ton	Total Value \$1,000
Grapes, Raisin ⁴	2012	200,000	3,000	9.05	1,810,000	1,810,000	457.00	826,326
	2013	200,000	3,000	11.40	2,270,000	2,270,000	364.00	826,921
	2014	190,000	2,000	9.86	1,874,000	1,874,000	381.00	713,432
	2015	184,000	2,000	10.60	1,952,000	1,952,000	349.00	681,963
	2016	170,000	2,000	9.24	1,570,000	1,570,000	277.00	435,009
	2017	158,000	2,000	8.23	1,301,000	1,301,000	414.00	538,092
	2018	152,000	4,000	10.16	1,545,000	1,545,000	428.00	661,063
	2019	149,000	4,000	9.26	1,380,000	1,380,000	266.00	366,609
	2020	142,000	3,000	8.38	1,090,000	1,190,000	256.00	304,373
	2021	136,000	2,000	7.87	1,070,000	1,070,000	372.00	397,809
Grapes, Table ⁴	2012	105,000	13,000	9.75	1,024,000	1,024,000	1,220.00	1,250,728
	2013	110,000	10,000	11.20	1,227,000	1,227,000	1,260.00	1,542,328
	2014	110,000	11,000	10.60	1,165,000	1,165,000	1,350.00	1,569,956
	2015	112,000	12,000	10.10	1,135,000	1,135,000	1,530.00	1,734,735
	2016	111,000	12,000	10.40	1,150,000	1,150,000	1,340.00	1,536,873
	2017	111,000	10,000	10.70	1,190,000	1,190,000	1,330.00	1,587,042
	2018	121,000	11,000	10.74	1,300,000	1,300,000	978.00	1,271,435
	2019	121,000	9,000	9.83	1,190,000	1,190,000	1,030.00	1,221,315
	2020	122,000	10,000	9.10	1,110,000	1,110,000	1,320.00	1,465,840
	2021	118,000	10,000	8.90	1,050,000	1,050,000	1,150.00	1,211,633

Most of California's Wine Grapes are More Valuable Red Varieties

Grape Crush Tonnage and Price, 2007-2021												
Crop Year	Red Wine Type		White Wine Type		Total Wine Type		Raisin Type		Table Type		All Types	
	1,000 Tons	\$/Ton	1,000 Tons	\$/Ton	1,000 Tons	\$/Ton	1,000 Tons	\$/Ton	1,000 Tons	\$/Ton	1,000 Tons	\$/Ton
2007	1,875	627	1,372	482	3,248	565	364	155	63	138	3,674	522
2008	1,676	661	1,338	543	3,015	609	494	224	165	180	3,674	547
2009	2,078	671	1,625	536	3,703	612	307	171	85	143	4,095	574
2010	2,051	628	1,538	501	3,589	574	274	215	124	174	3,986	545
2011	1,920	708	1,427	542	3,347	637	373	265	155	219	3,874	592
2012	2,292	884	1,726	625	4,018	773	270	319	99	272	4,387	738
2013	2,417	852	1,829	623	4,246	754	328	255	127	222	4,700	713
2014	2,141	893	1,753	596	3,894	759	156	233	95	234	4,145	744
2015	2,041	790	1,664	540	3,705	679	92	248	71	253	3,868	672
2016	2,280	919	1,751	598	4,032	780	90	214	95	153	4,217	763
2017	2,250	966	1,766	588	4,016	800	94	253	132	178	4,242	778
2018	2,447	1,019	1,834	635	4,281	856	83	302	142	192	4,506	832
2019	2,158	1,020	1,762	590	3,920	827	61	245	134	263	4,115	811
2020	1,822	797	1,591	559	3,414	685	42	251	95	160	3,551	680
2021	2,033	1,074	1,601	676	3,634	898	138	291	108	183	3,880	862

Leaf and Romaine Lettuces are More Valuable than Head Lettuce

Commodity Rank, Acreage, Production, and Value, 2021

Commodity	CA Rank in U.S. ¹	CA Share of U.S. Receipts ²	Area Harvested	Production	Total Value ²	Commodity Rank in CA ¹	
	Ranking	Percent	1,000 Acres	1,000 Tons	\$1,000	2020 Ranking	2021 Ranking
VEGETABLE AND MELON CROPS TOTAL VALUE							
Artichokes	1	100.0	4.9	41.7	57,477	48	51
Asparagus	2	30.6	2.8	6.6	21,337	64	65
Beans, All Snap	5	9.2	5.6	22.4	25,522	63	62
Broccoli	1	87.8	94.5	614.3	631,455	15	19
Cabbage, All	NA	NA	14.6	270.1	NA	41	NA
Carrots, All	1	93.4	61.4	1,258.7	776,367	16	17
Cauliflower	1	77.6	39.3	353.7	265,905	29	30
Celery	1	100.0	27.8	764.5	374,603	27	24
Corn, Fresh Market Sweet	2	19.1	25.5	197.6	148,059	39	41
Cucumbers, All	4	9.2	6.7	51.9	24,043	61	63
Garlic	1	100.0	26.2	209.6	244,184	32	31
Lettuce, All	1	75.7	195.5	2,756.7	2,029,089	5	8
Lettuce, Head	1	75.4	75.4	1,244.1	728,313	NA	NA
Lettuce, Leaf	1	81.2	49.7	509.4	532,325	NA	NA
Lettuce, Romaine	1	72.5	70.4	1,003.2	768,451	NA	NA
Melons, Cantaloupe	1	58.7	23.4	345.2	162,911	38	39
Melons, Honeydew	1	100.0	6.9	88.0	48,914	56	54
Melons, Watermelon	3	13.1	10.0	245.0	69,797	54	48
Mushrooms	2	22.6	NA	NA	203,990	34	36
Onions, All	1	28.6	45.3	951.3	297,120	30	29
Peppers, All	1	40.0	11.1	223.8	214,348	28	35
Peppers, Bell	1	40.0	9.0	191.3	184,707	NA	38

Kern, Fresno, and Tulare Counties Lead in Sales of the Most Valuable Commodities

Top 15 Commodities by Value of Production and Leading Counties, 2021

Rank	Commodity	State Total Value	County Ranked 1st	Percent of Value	County Ranked 2nd	Percent of Value
		\$1,000				
1	Grapes, All	7,362,933	Kern	25.4	Fresno	18.1
2	Milk, Cow's, All	7,126,149	Tulare	27.3	Merced	15.3
3	Almonds, All	6,981,059	Kern	17.2	Stanislaus	15.5
4	Oranges, All	4,302,388	Tulare	56.9	Kern	28.4
5	Horticulture, All	3,920,946	San Diego	33.5	Riverside	6.8
6	Cattle, All	3,309,498	Tulare	19.1	Imperial	14.0
7	Pistachios	3,168,498	Kern	38.4	Fresno	22.8
8	Berries, Strawberries, All	3,099,590	Monterey	31.2	Santa Barbara	27.4
9	Lettuce, All	2,076,201	Monterey	57.3	Imperial	19.9
10	Walnuts	1,415,051	San Joaquin	26.0	Butte	9.9
11	Tangerines & Mandarins	1,344,490	Kern	45.0	Tulare	32.1
12	Peaches, All	1,254,050	Fresno	35.8	Tulare	31.4
13	Alfalfa, All	1,075,989	Imperial	23.4	Tulare	10.2
14	Rice, All	965,379	Colusa	28.1	Glenn	16.1
15	Lemons	956,188	Tulare	36.3	Ventura	26.5

References

California Agricultural Statistics Review 2020-21. https://www.cdfa.ca.gov/Statistics/PDFs/2021_Ag_Stats_Review.pdf

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