

WELCOME!!

Overview of Organic Production in San Diego County

Ramiro E Lobo, Advisor, Small Farms & Agricultural Economics

Organic Agriculture Workshop

Escondido, CA – November 8, 2022



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Topics Covered

- Overview of Agriculture in San Diego County
- San Diego County Farmers...who are they?
- Overview of Organic Agriculture
- Issues and challenges identified
- Trends impacting organics
- Assets and Opportunities/Closing comments



San Diego County Agriculture

2021 HIGHLIGHTS

TOTAL VALUE OF PRODUCTION	\$1,752,999,086
Total Acreage	219,874
Commodity with Highest Reported Dollar Value	Bedding Plants, Color, Perennials, Cacti & Succulents
Highest Dollar Value Per Acre	Indoor Flowering & Foliage Plants
Lowest Dollar Per Acre	Rangeland
Greatest % Increase in Total Dollar Value from 2020	Livestock and Poultry
Greatest % Decrease in Total Dollar Value from 2020	Honey & Beeswax
Commodity with Greatest Amount of Planted Acreage	Avocados

[2021CropReportEN.pdf \(sandiegocounty.gov\)](#)

Major Changes:

- ✓ Total value of agricultural production declined from \$1.81 Billion to \$1.753 Billion from 2020 to 2021
- ✓ Total Acreage farmed declined from 224,549 acres farmed in 2020 to 219,874 acres farmed in 2021

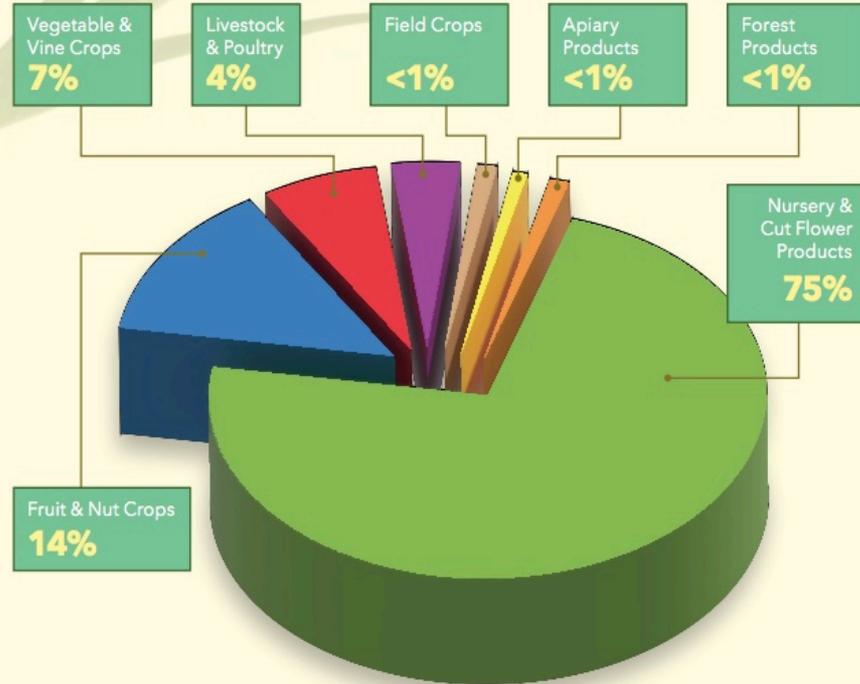


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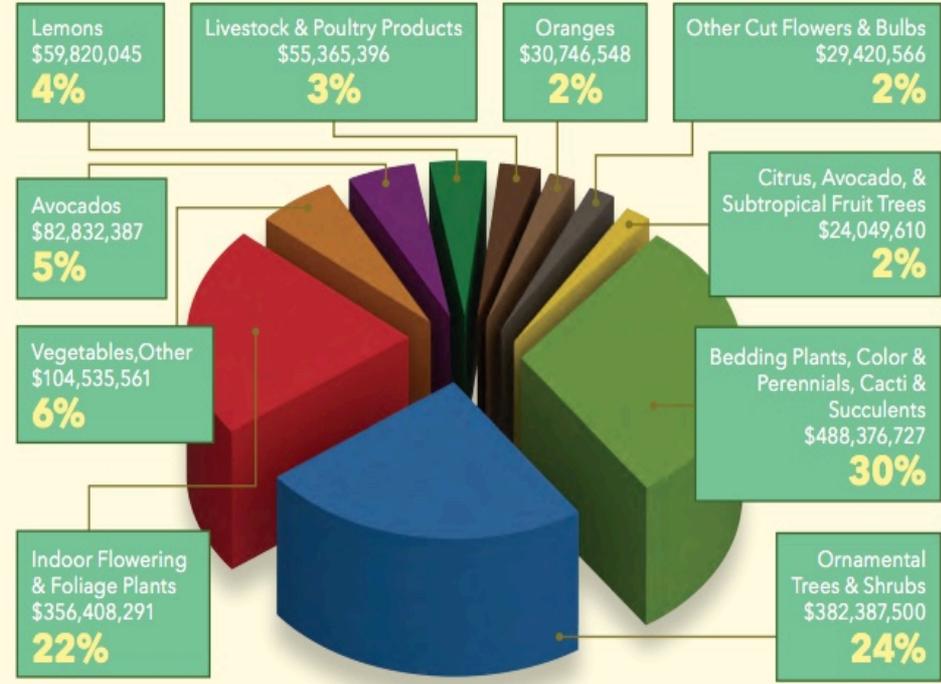
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CROPS BY GROUP OVERALL



TOP 10 CROPS OVERALL



[2021CropReportEN.pdf \(sandiegocounty.gov\)](#)



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San Diego County Agriculture

FIVE YEAR TREND ANALYSIS

TOTAL ACRES
TOTAL \$ VALUE

NURSERY & CUT FLOWER PRODUCTS



FRUIT & NUT CROPS



VEGETABLE & VINE CROPS



INTERNATIONAL TRADING PARTNERS

IN 2021 WE CERTIFIED 8,982 SHIPMENTS OF PLANT MATERIAL (INCLUDING FRUITS AND VEGETABLES) GOING TO 47 COUNTRIES

Domestic Trading



Top issued certificates of commodities grown in San Diego county reported in the United States

Commodity: Ornamental Trees & Shrubs Certificates: 599



Commodity: Cacti & Succulents Certificates: 166

Commodity: Tomato Plants Certificates: 115



TOP TRADING PARTNERS

Mexico	6,290
Canada	1,607
Total	7,897

SOUTH AMERICA

Chile	7
Ecuador	4
Paraguay	2
Uruguay	1
Total	14

CENTRAL AMERICA & THE CARIBBEAN

Guatemala	37
Honduras	13
Bahamas	13
Trinidad and Tobago	5
Panama	4
Bermuda	1
Aruba	1
Costa Rica	1
Total	75

EUROPE

Netherlands	50
France	12
United Kingdom	9
Spain	6
Italy	4
Germany	4
Greece	4
Ukraine	3
Poland	2
Belgium	2
Switzerland	1
Bulgaria	1
Russian Federation	1
Malta	1
Total	100

ASIA

Japan	447
Korea, Republic of	154
Taiwan	109
Hong Kong	43
Thailand	23
United Arab Emirates	13
Singapore	12
China	12
India	7
Jordan	2
Armenia	1
Macao	1
Philippines	1
Indonesia	1
Kuwait	1
Total	827

DOMESTIC PARTNERS

Top three states by certificate count

Arizona	378
Texas	285
Florida	142

Top three counties by certificate count

Kern	245
Fresno	183
Tulare	153

AFRICA

South Africa	4
Egypt	4
Total	8

AUSTRALIA & OCEANIA

New Zealand	38
Australia	23
Total	61

[2021CropReportEN.pdf \(sandiegocounty.gov\)](#)

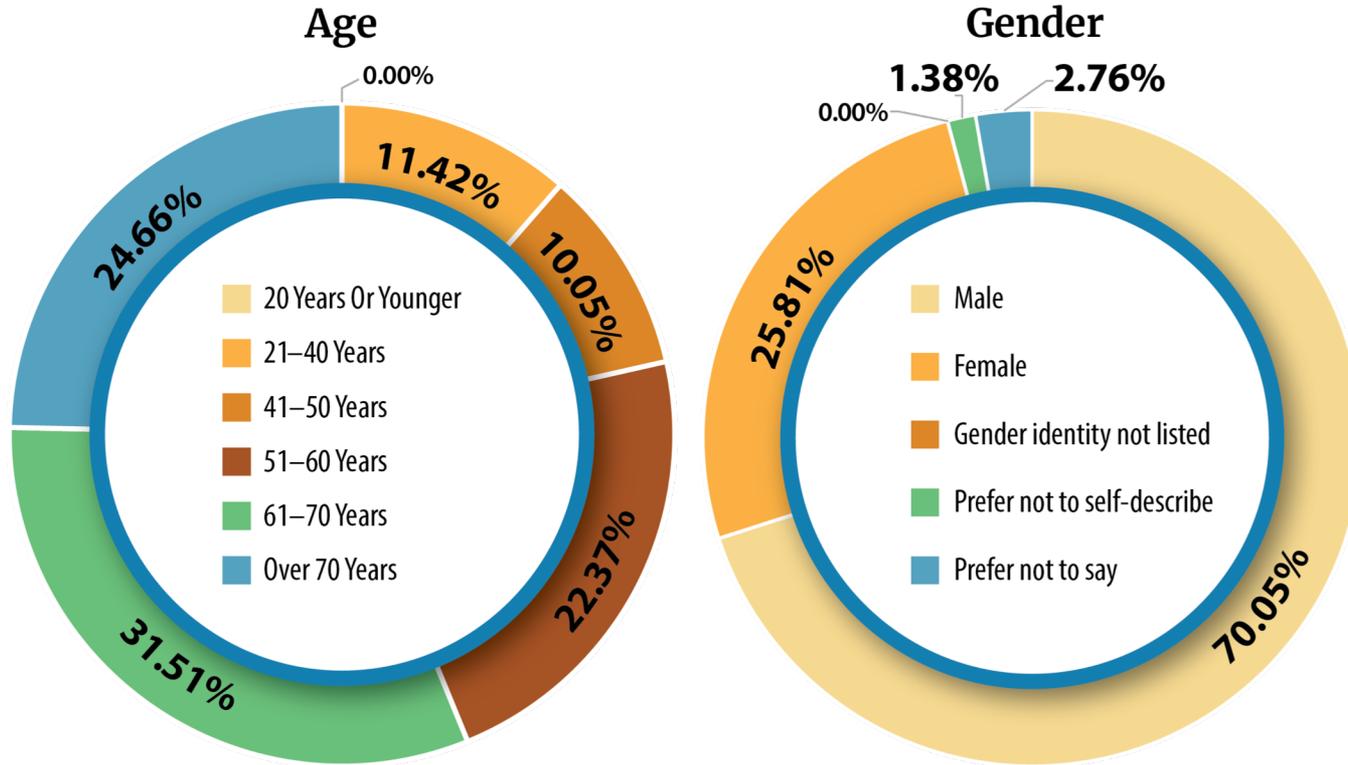


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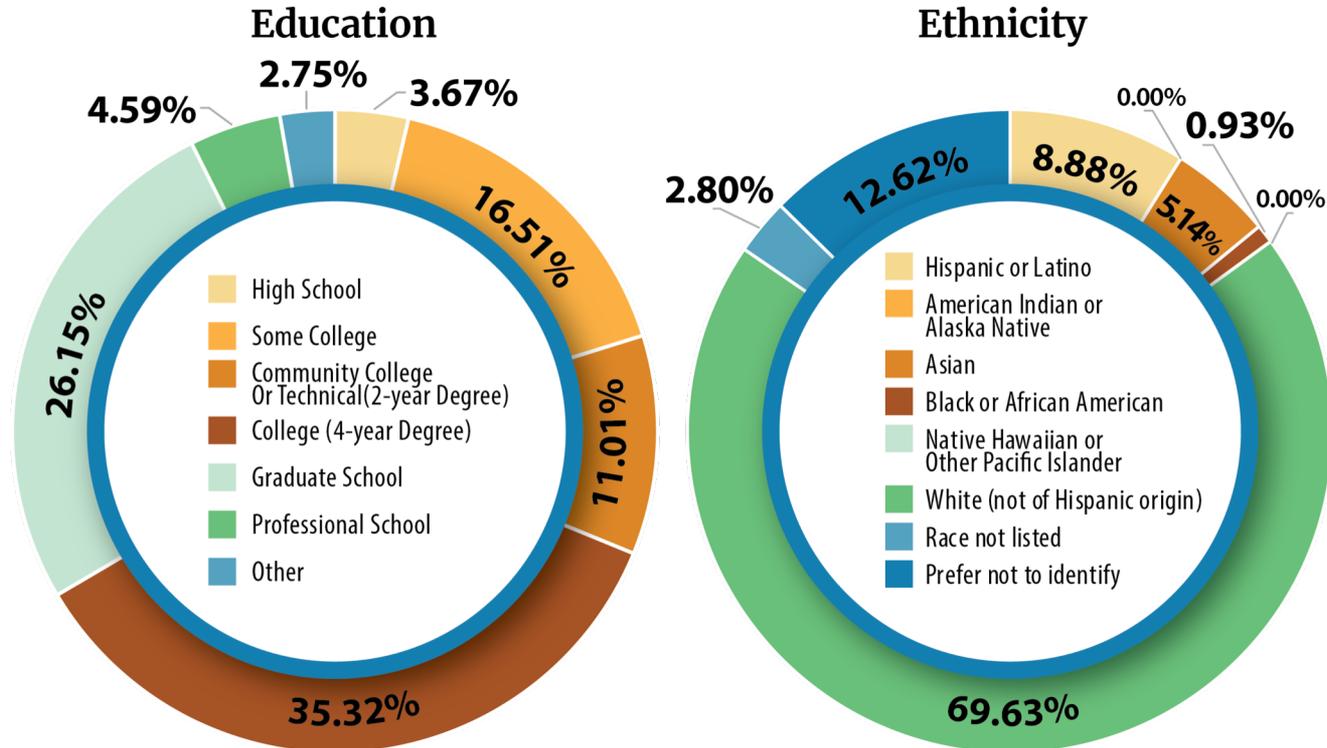
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San Diego County Farmers

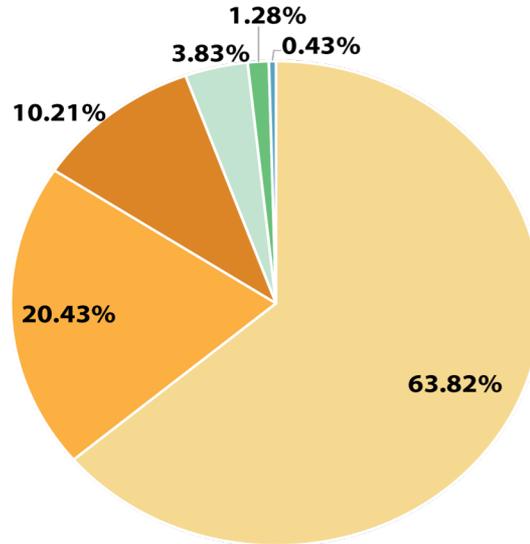


San Diego County Farmers

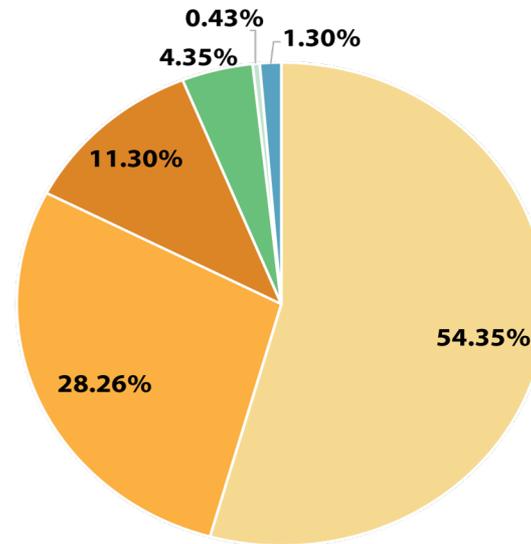


San Diego County Farmers

Acres Currently Farmed



Acres Owned or Controlled



- 0 to 9 acres
- 10 to 49 acres
- 50 to 179 acres
- 180 to 499 acres
- 500 to 999 acres
- 1,000 acres or more

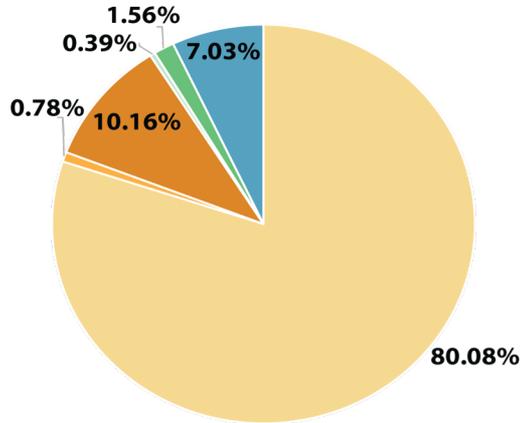


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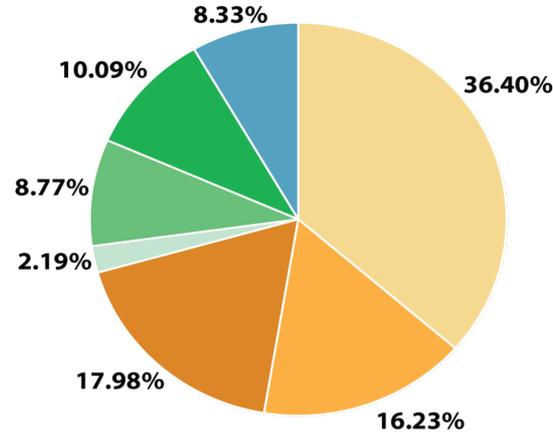
San Diego County Farmers

Primary Role



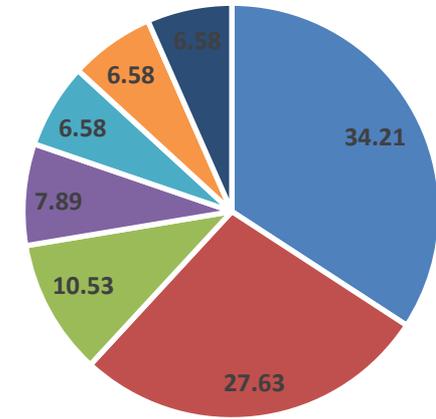
- Owner Operator
- Absentee Owner
- Farm/Grove Manager
- Agricultural Production
- Pest Control Adviser (PCA)
- Other:

Production Systems Used



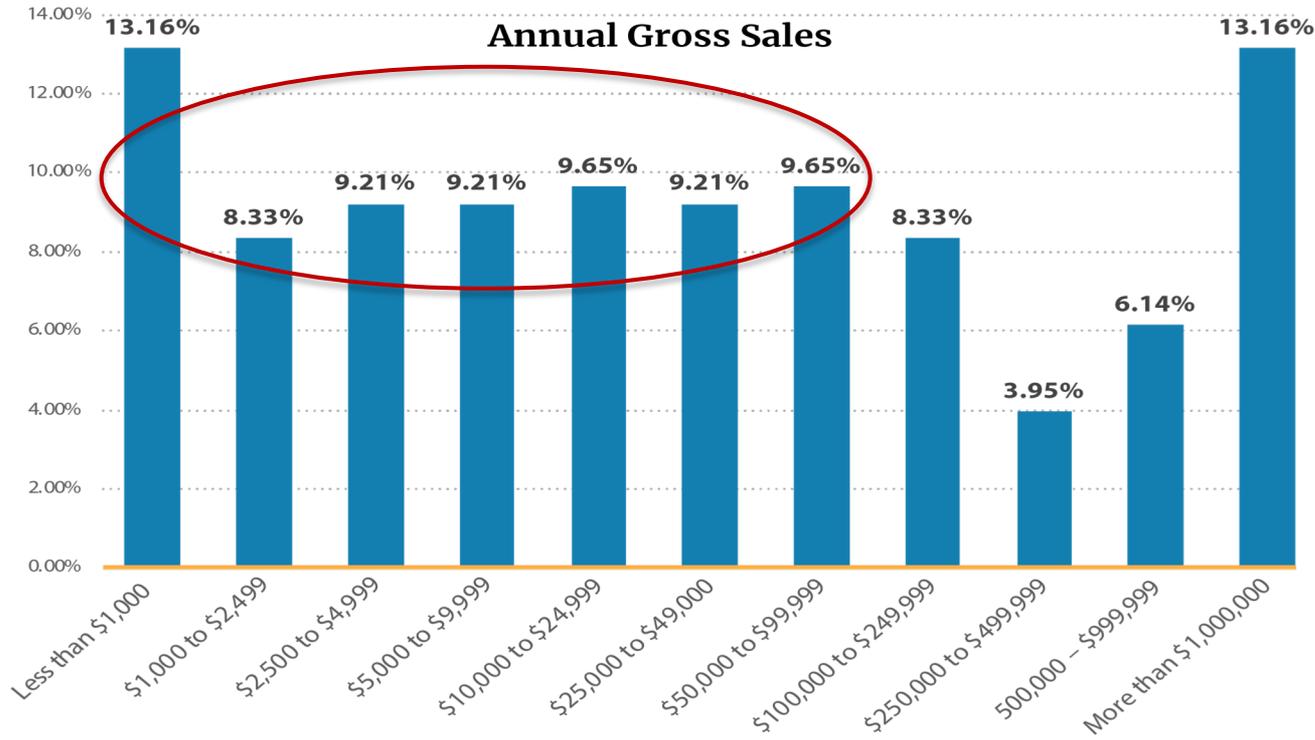
- Conventional Farming and not in transition to organic
- Certified Organic Farming
- Organic Farming, but not "certified"
- Transitional to organic (actively implementing farming practices towards achieving organic certification)
- Controlled Environment
- Mix (e.g. organic and conventional)
- Other:

Roles Represented Today



- Grower
- Farm Land Owner
- Manager
- Research & Education
- Consultant/Technical Advisor
- Regulator
- Other

San Diego County Farmers



All farmers (~5,700), farm managers and decision makers in the county with Special emphasis on Small-scale (~ 77 % of total) farmers as defined by the Census of Agriculture and the San Diego County Department of Agriculture.

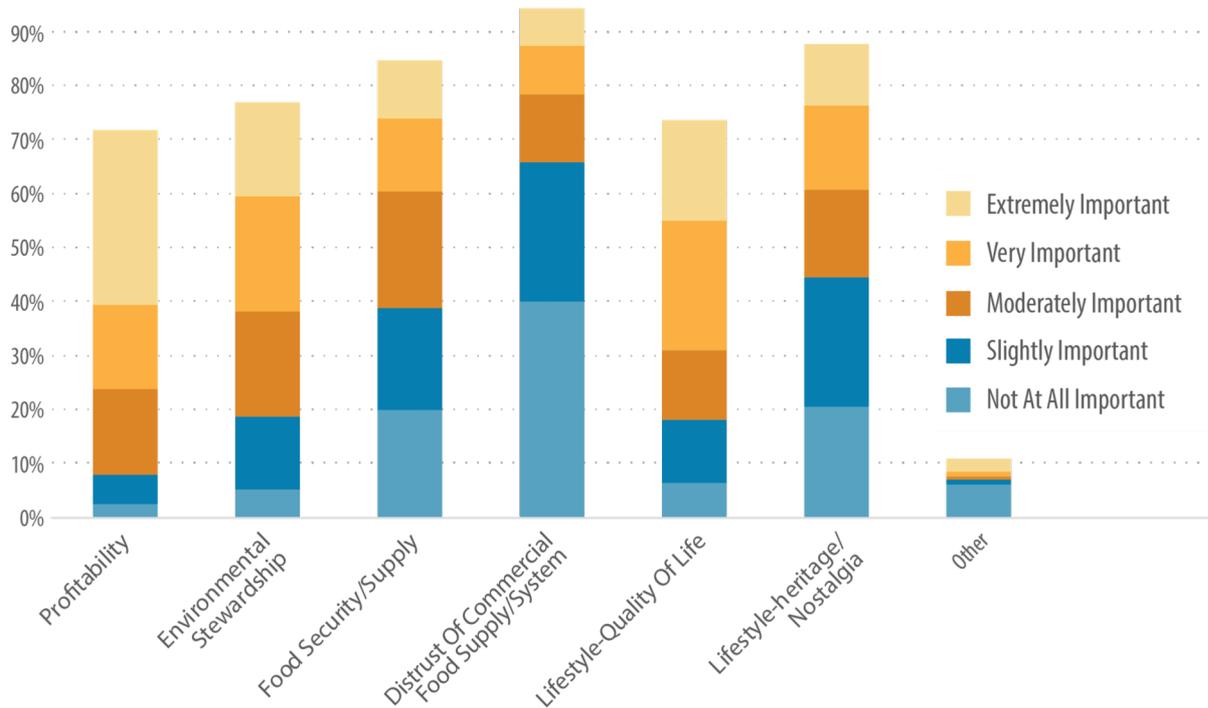


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Motivators for Farming Decisions

Motives Influencing Farming Decisions



Profitability is single most important motivator, but other factors also important drivers of farming decisions.



San Diego County Organic Agriculture

Fruit, Vegetable, Seed & Other Crops	Acreage
All other fruit Crops	4626.82
Citrus	3418.25
All other vegetables	354.16
Stone fruit	290.83
Pome Fruit	122.85
All Other Berries	58.95
Grapes - Wine	44.61
Lettuce (Head, Leaf, Spring/Salad Mixes)	37.61
Tomatoes	29.62
Strawberries (Fresh Market)	26.13
Carrots	16.60
All Other Nut Crops	13.90
Celery/Celereac	8.89
Broccoli	8.61
Grapes - Table	7.25
Spinach(Fresh and Processed)	4.25
Seed Crops	3.12
Propagation	2.28
Almonds	0.02

All Other, Field Crops, Seed Crops, Poultry, Livestock and Dairy	Acreage
All other not previously reports or listed	721.96
All Other Field Crops (Including Pasture and Rangeland)	66.03
Chicken - Layers	3.69
Seed Crops	3.12
All Other Poultry/Livestock & Products	2.62
Propagation	2.28
Chicken - Broilers	1.0
All Other Dairy and Dairy Products	0.25



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Organic Sales in San Diego County

Source: CDFA's 2021 California Organics Report

	2018	2019	2020	Percentage Change 19-20
Producers	545	583	635	8.9 %
Gross Sales by Producers	97,959,038	102,353,725	115,363,928	12 %
Handlers	83	90	102	13.3 %
Gross Sales by Handlers	223,107,951	187,601,152	321,977,074	71.6 %
Processors	10	12	14	16.7 %
Gross Sales by Processors	5,893,932	1,704,021	1,455,967	14.6 %

Organic sales represent an estimated 6.5% of total agricultural sales and 26.32% of total agricultural sales excluding nursery and cut flower products.



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Issues and Challenges Identified

From our Grower Survey

- Land and Water availability and prices
- Imports/Foreign Competition
- Growth and Urbanization
- Aging farmers/Succession planning
- Laws and Regulations
- Exotic pest problems/quarantines
- Farm labor supply, regulations and costs
- Declining profits (low prices/high costs)

What You Identified

- ✓ Pest and Disease Management
- ✓ Weed Management
- ✓ Regulations – specific mention of organic certification
- ✓ Fertilizers & Fertility Management
- ✓ Water Cost and Availability
- ✓ Labor Cost & Availability
- ✓ Overall costs of doing business
- ✓ Other – Access to capital, Crop culture information, Equipment availability, Land Conservation

Trends You Are Concerned About

- Increasing Costs of Doing Business
 - ✓ Labor and workforce development, Water prices and supply, infrastructure needs - must pack own products
- Increasing awareness about soil and climate Issues/practices
 - ✓ Regenerative agriculture, soil health, climate smart agriculture, carbon farming
- Increasing concern about legitimacy of "Organics"
 - ✓ Is it organic or not?, input quality and efficacy, acceptance?
- Marketing and market trends
 - ✓ Increased acceptance and demand for organics, locally grown, health conscious consumers, declining prices for organics because of competition

Agriculture and Food Industry Trends

- ◆ Increasing demand for healthy foods or superfoods
- ◆ Increasing demand for organic products
- ◆ Increasing demand for Religious or ethnic foods certified
- ◆ Demand for Value Added/Convenience Meals
- ◆ Marketing based on different value systems
- ◆ Demand for local meals, fresh, with better taste and quality
- ◆ Trends in restaurants and food industry



Organic Specific Trends

[Adapted from: The 2022 food trends that will shape the future of organic - Bio Eco Actual](#)

- ◆ Plant-based – biggest single food trend
- ◆ Organic plant-based – great opportunity for organics
- ◆ Sustainable livestock – high welfare, pasture-raised
- ◆ Net Zero Food – carbon farming, carbon neutral ag.
- ◆ Eco-Convenience – Net zero food ingredients in environmentally friendly packaging
- ◆ Wholefood 2.0 – concerns about food integrity and nutrient matrix of wholefood
- ◆ Fair Food – Fair trade, fairness and food justice becoming more important



Assets & Opportunities

- ◆ County demographics/ethnic diversity
- ◆ Large local and/or regional markets
- ◆ Well developed Infrastructure
- ◆ Market trends/Marketing opportunities
- ◆ Excellent climate, year-round production
- ◆ Favorable regulatory environment (AB551 Urban Agriculture, AB1616 Cottage Foods, AB1258 Farm Stays)
- ◆ Educated consumers willing to support local farms



Preguntas/Comentarios?

Ramiro E. Lobo

Small Farms & Agricultural Economics Advisor

UCCE - San Diego County

9335 Hazard Way, Suite 201

San Diego, CA 92123

Phone: 858/246-1860

Cell: 858/243-4608

E-mail: relobo@ucdavis.edu

<http://cesandiego.ucdavis.edu>

<https://ucanr.edu/sites/OAR/AgriTourism/>



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