Food Production
SWOT Analysis
San Diego County Food Vision 2030, an initiative of the San Diego Food System Alliance, is a 10-year strategic plan that will guide collective action toward a healthy, sustainable, and just food system in our region.
Imagine a food system that belongs to all of us.
Understanding Food Systems

Food systems encompass the processes, resources, and people involved in providing nourishment to humans and many species of animals.

Visible in the crops, animal species, production systems, cuisines, lingos (e.g., soda versus pop), products, and built environments of places.

Linked at local, regional, national, and global scales.
...What if?

» More flexible financing options for food producers
» More opportunities for food producers to network
» More opportunities for food producers to access profitable markets
» More educational opportunities
» More celebration of San Diego’s food producers!

» More and better technical and business assistance for food producers
» More pipelines for accessing land and other resources for historically disadvantaged producers
» Improved viability and quality of life for food producers
Food Production SWOT Analysis

We are analyzing strengths, weaknesses, opportunities, and threats for San Diego County’s food system.

We are thinking about specific categories or subsystems of San Diego County’s food system, like food production, and we are thinking about organizations within categories, like farms or technical assistance organizations.
Strengths and weaknesses are internal to San Diego’s Food System. These are the things we can change.
Opportunities and threats are external to San Diego’s Food System. We can take advantage of opportunities and try to protect against threats, but we may not have the power to change them.
**Synonyms**

**Strengths:** power, advantages, durability, assets, authority, authenticity, desirability, image

**Weaknesses:** deficiencies, disadvantages, fragility, gaps, instability, shortcomings

**Opportunities:** hopes, markets, education, investments

**Threats:** hazards, risks, dangers
Strengths

» Mediterranean climate

» Many unique/biodiverse land and sea microclimates

» California is America’s food production juggernaut. San Diego County is 12th—with nurseries—or 16th largest county—without—by sales)

» San Diego County has both agricultural and seafood sales ($592 million)

» San Diego County is the top California county for:
  • Nursery/Greenhouse: $731M
  • Flowers/Foliage: $531M
  • Avocados: $125M
  • Fresh Tomatoes: $54M

» San Diego County agriculture has a large multiplier effect: Direct value of $554M yields additional $331M

» Largest number of farms in California (5,082)
Strengths

» Largest number of New + Beginning Farms of any county in CA (1,848)

» Diverse producers compared to many California counties

» More than 9.5 billion pounds of food flows through San Diego County to more than 380 counties in America, plus exports
Unique Metropolitan, Coastal Community

Agriculture Average Value Per Acre

<table>
<thead>
<tr>
<th>Location</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAN DIEGO COUNTY</td>
<td>$3,835</td>
</tr>
<tr>
<td>CALIFORNIA</td>
<td>$1,886</td>
</tr>
<tr>
<td>IOWA</td>
<td>$970</td>
</tr>
</tbody>
</table>

Food System is Major Employer

# Economic Effects of Agricultural Production

<table>
<thead>
<tr>
<th>CATEGORIES</th>
<th>DIRECT</th>
<th>INDIRECT</th>
<th>INDUCED</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nursery &amp; Cut Flower Products</td>
<td>$1,146.8</td>
<td>$276.1</td>
<td>$453.6</td>
<td>$1,876.4</td>
</tr>
<tr>
<td>Timber Products</td>
<td>$0.9</td>
<td>$0.8</td>
<td>$0.3</td>
<td>$2.0</td>
</tr>
<tr>
<td>Fruits &amp; Nuts</td>
<td>$320.7</td>
<td>$74.2</td>
<td>$134.5</td>
<td>$529.4</td>
</tr>
<tr>
<td>Vegetables</td>
<td>$146.6</td>
<td>$29.2</td>
<td>$51.0</td>
<td>$226.8</td>
</tr>
<tr>
<td>Livestock &amp; Poultry Products</td>
<td>$47.9</td>
<td>$14.2</td>
<td>$8.3</td>
<td>$70.4</td>
</tr>
<tr>
<td>Livestock &amp; Poultry</td>
<td>$30.9</td>
<td>$9.2</td>
<td>$5.4</td>
<td>$45.4</td>
</tr>
<tr>
<td>Apiary</td>
<td>$4.1</td>
<td>$1.0</td>
<td>$1.2</td>
<td>$6.3</td>
</tr>
<tr>
<td>Field Crops</td>
<td>$4.0</td>
<td>$1.4</td>
<td>$1.8</td>
<td>$7.2</td>
</tr>
<tr>
<td>TOTAL ECONOMIC OUTPUT</td>
<td>$1,701.8</td>
<td>$406.0</td>
<td>$656.0</td>
<td>$2763.8</td>
</tr>
<tr>
<td>MINUS NURSERY, CUT FLOWER, &amp; TIMBER PRODUCTS</td>
<td>$554.1</td>
<td>$129.1</td>
<td>$202.1</td>
<td>$885.1</td>
</tr>
</tbody>
</table>

Weaknesses

» Farm and fishing viability: the cost of doing business (e.g., land, water, and labor)

» Decreasing amount of land in agriculture in San Diego County

» Decreasing number of farms in CA and San Diego County

» Static number of fishing operations in San Diego County but decreasing employment

» Most farms and fishing operations in CA and SDC are small and generate low sales

» SDC has largest cohorts of 45-54, 55-65, 65-74, and 75+ producers of any county in CA

» Excluding Nursery, Cut Flower, and Timber Products removes over $1.2 billion from the value of agricultural and seafood sales in SDC
Weaknesses

» Limited technical support; limited TA for socially disadvantaged and/or farmers of color

» Limited vegetable, seafood, and livestock processing infrastructure

» Scale and access to markets; still challenging to source local products

» Limited data/research available for fishing operations

» Most food produced in the county leaves the county
Excluding Nursery Products Removes $1.2 Billion in Value

Total: $1,854,688,485

- Total Nursery Products: $1.2 Billion (68.1%)
- Total Ag Products: $581 Million (31.4%)
- Total Seafood: $10.3 Million (0.6%)

$592,026,710

Source: County of San Diego Agriculture, Weights & Measures.
Total Edible Agricultural and Seafood Sales

Land in Agriculture is Mostly Rangeland...


And Rangeland Accounts for Fraction of Agricultural Sales
Most Farms in San Diego County are Small

72-74% (3,700—4,800 FARMS) of San Diego County Farms had sales of LESS THAN $20K from 2007 to 2017. These farms accounted for 2.3-3.3% of sales.

21-24% (1,000—1,600 FARMS) of San Diego County Farms had sales between $20K and $499K from 2007 to 2017. These farms accounted for 11-17% of sales.

3.2-4.8% (185—265 FARMS) Farms had sales over $500K. These farms accounted for 80-86% of sales.

Most Farms in SDC Have Low Sales

72-74% of San Diego County farms had sales of less than $20K from 2007 to 2017. These farms accounted for 2.3-3.3% of sales ($19.6-$30.4 million).

21-24% (1,000—1,6000 farms) of San Diego County farms had sales between $20K and $499K from 2007 to 2017. These farms accounted for 11-17% of sales ($95.6-$174.8 million).

3.2-4.8% (185—265 farms) farms had sales over $500K. These farms accounted for 80-86% of sales ($635 million - $1 billion).

Opportunities

» 3.3 million consumers in SDC; increasing consumer demand for local, healthy, and organic food through traditional market outlets and market match programs

» Consumer Education campaign (invest in the things you love)

» Agritourism (76 becomes Agricultural Scenic Byway)

» Rebuilding Extension/local research/TA capacity to meet needs of producers

» Creative revenue streams for food producers (e.g., farm ecosystem service payments, agritourism)

» Increased support & comprehensive wrap-around TA for producers, especially socially disadvantaged and food producers of color

» Beginning farmer support programs (e.g., farm incubation, land-linking)
Opportunities

» Best examples/case studies of profitable enterprises

» Intensified production on fewer acres

» Carbon farming

» Increased indoor production (e.g., aquaculture, hydroponics, polyculture)

» Crop and fishery transitions; niche products

» Increased processing and storage infrastructure

» Improved/expanded peer-to-peer producer network

» World class water saving + recycling infrastructure; aggregated water pricing

» Incentivized/expanded conservation/preservation practices

» Alternative models for increasing health and wealth for producers: coops, employee ownership
Are Direct Sales Maximized?


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Supermarkets and Grocery Stores
$6.3 billion
44.9%

Full-Service Restaurants
$2.9 billion
21.3%

Limited Service Restaurants
$2.4 billion
17.1%

Specialty Food Services
$546 million
3.9%

Snack + Beverage Bars
$457 million
3.3%

Liquor Stores
$361 million
2.6%

Drinking Places
$320 million
2.4%

Conv. Stores
$225 million
2.1%

Mobile Food Services
$19.8 m / 0.1%

Direct Sales
$12.4 m / 0.1%

Small % of Sales Given Population

TOTAL: $14,019,082,861

Threats

» Climate change:
  • Temperature increase
  • Drought - water price and availability
  • Wildfire (producers getting their fire insurance canceled)
  • Worker health issues
  • Ocean temperature increase
  • Ocean acidification and hypoxia (low oxygen zones)
  • Disruption of ocean food pathways

» Land and sea pests/diseases/pathogens

» Development pressure and competition for space in North County, coastal communities, and ocean

» Market prices are set globally but production costs are local

» Lack of labor and changing immigration policies

» Inequality
"It's the price of water. Period."

ERIC LARSON, FORMER EXECUTIVE DIRECTOR
SAN DIEGO COUNTY FARM BUREAU
San Diego Producers Pay a High Water Rate

Sources: Valley Center Municipal Water District.
California Has Experienced Many Billion Dollar Disasters from 1980 to 2019

35 Events = $204.6 Billion

WILDFIRE
- 14 events
- $76.7B

DROUGHT
- 11 events
- $99.5B

SEVERE STORM
- 5 events
- $9.3B

FLOODING
- 2 events
- $6.5B

FREEZING EVENT
- 3 events
- $12.6B

“We need to start being better ancestors.”

Connor Magee
Pala Tribe