

# Food Systems Leadership Institute

## June 16, Shell Beach

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California Pear Growers Association



Association of California Egg Farmers



Almond Alliance  
OF CALIFORNIA



SAN GABRIEL VALLEY  
MUNICIPAL  
WATER DISTRICT  
AZUSA, SIERRA MADRE, MONTEREY PARK, ALHAMBRA



PACIFIC COAST  
RENDERERS ASSOCIATION



CALIFORNIA STATE  
FLORAL ASSOCIATION

CALIFORNIA  
OLIVE RANCH



TRUE  
ORGANIC PRODUCTS, INC.

CALIFORNIA  
ASSOCIATION  
OF WHEAT GROWERS



MesaWater  
DISTRICT

AMERICAN  
BEVERAGE  
DRIVING SOLUTIONS TOGETHER



DARLING  
INGREDIENTS, INC.

California Seed  
Association

CALIFORNIA  
GRAIN  
& FEED  
ASSOCIATION



CALIFORNIA  
BEAN SHIPPERS  
ASSOCIATION

Cacique

CALIFORNIA  
WAREHOUSE  
ASSOCIATION



CONSUMER  
BRANDS  
ASSOCIATION

# 2022 US Elections

## California has 40 million Residents

- Major growth in inland CA – Inland Empire in South, Central Valley – More Conservative, Traditional Agricultural Areas

## Political Fallout

- 1<sup>st</sup> Time Ever, CA Lost a Congressional Representative – Fall from 53 to 52
- Democrats, 11 Republicans – Who will lose?

## US Trends – Northern and Western Liberal States Lose Seats, Southern Conservative states pick up seats

- Seven states lose 1 seat:
- Illinois, Michigan, New York, Ohio, Pennsylvania, West Virginia
- Six states will have their congressional delegations grow:
- Colorado, Florida, Montana, North Carolina, Oregon
- Texas – 2 seats [added more than 4 million residents over the past decade]

## 2022 Mid terms – Historical Trend, Every President Loses Seats in Midterms?

# CALIFORNIA POPULATION CHANGES



Statewide Growth: +5.09%

## Percent Change\*



\*A comparison for the 2010 Census PL-94 and 2018 Census ACS 5-Year Data Sets.

# California Political Composition

## CA is a One Party State

- All Statewide Officers are Democrats
- Senate 40 total members – 29 D -11R
- Assembly 80 total members – 60 D – 19 R, 1I

# Trends in Statewide Voter Registration 1998 – 2022

	1998	2002	2006	2010	2014	2018	2022
Democrat	46.8%	45.0%	42.7%	44.5%	43.4%	44.4%	46.77%
Republican	35.8%	35.0%	34.4%	30.8%	28.4%	25.1%	23.93%
No Party Preference	12.4%	14.8%	18.5%	20.2%	21.2%	25.5%	22.71%

## Hispanics made up more than half of total U.S. population growth from 2010 to 2019

*U.S. population change by race and ethnicity, 2010-2019*

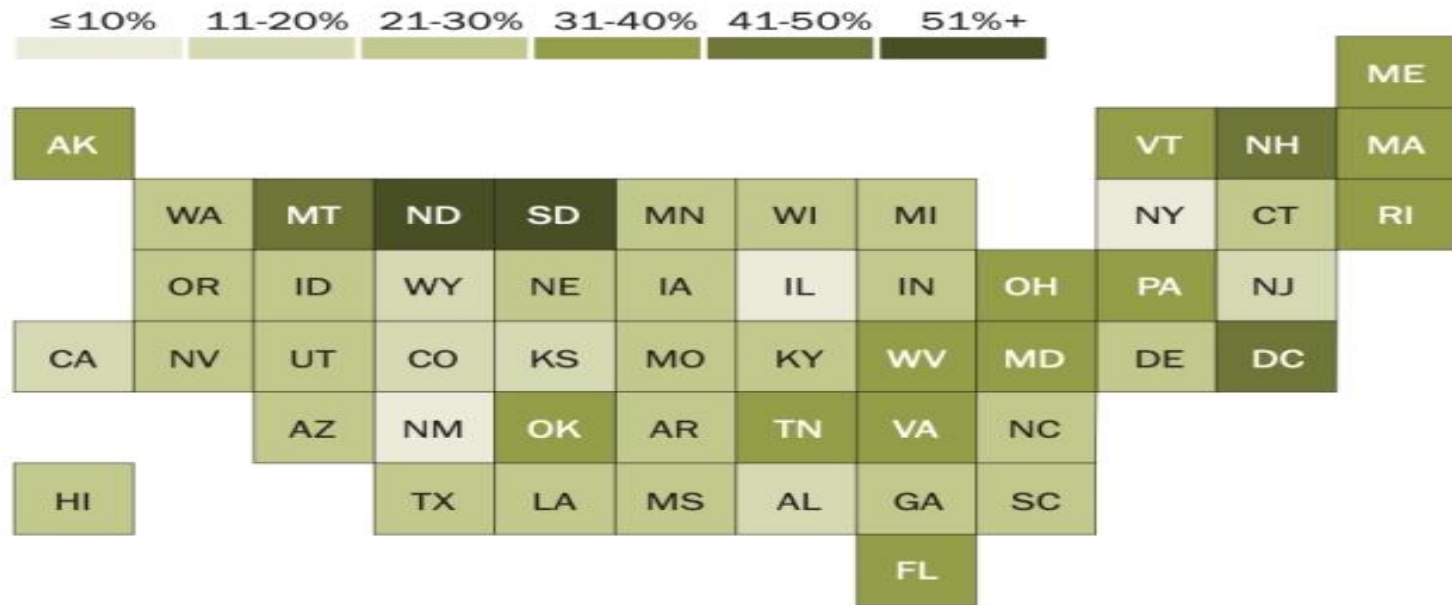
	2019 population	Change, 2010-19	Share of total increase
<b>Hispanic</b>	60,572,000	9,829,000	52%
<b>Asian</b>	18,906,000	4,145,000	22%
<b>Black</b>	41,147,000	3,134,000	17%
<b>White</b>	197,310,000	-79,000	<0%
<b>Total</b>	328,240,000	18,918,000	

Note: White, Black and Asian individuals include those who report being only one race and are not Hispanic. Hispanics are of any race. Population figures rounded to nearest 1,000. Shares of total increase are calculated from unrounded numbers and may not add to 100%. Source: Pew Research Center analysis of U.S. Census Bureau Vintage 2019 estimates for 2010-2019.

**PEW RESEARCH CENTER**

## North Dakota and South Dakota have seen fastest increases in Hispanic population since 2010

*% increase in Hispanic population, by state, 2010-2019*



Note: Percent increase of each state rounded to the nearest whole number. Population estimates are as of July 1, 2019. Hispanics are of any race.

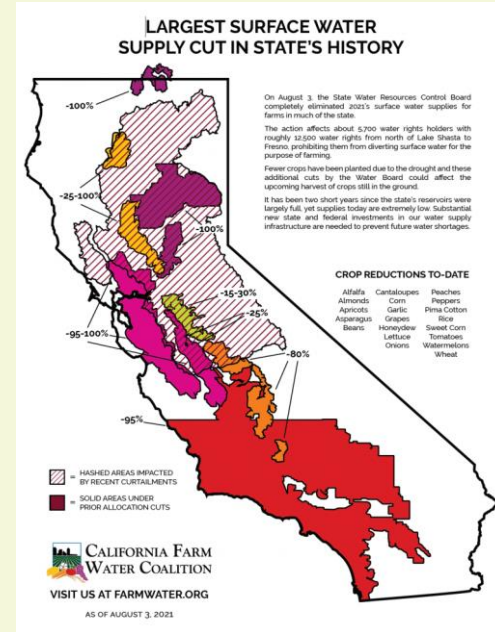
Source: Pew Research Center analysis of U.S. Census Bureau Vintage 2019 estimates for 2010-2019.

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# California Food and Agriculture Facts

- CA has approx. 76,700 Farms
- CA Has approx. 15.8 Million Acres of Farmland Harvested Annually
- 9+ million Irrigated Acres
- CA Grows over 400 commercial crops (Asparagus to Yams), 14 are only grown in CA
- Dedicate 25.8 million Acre Feet of Water to Growing Crops
- CA Farms Produce approx. \$51 Billion in Farm Gate Value (FGV)
- Contribute approx. \$140 Billion to states economy
- CA focuses on High Value Crops – 2.5% of land, 12.9% of total FGV
- Drought creates significant challenges for many regions in the state
- Highly dependent on Surface Water, replace with Groundwater
- In the last month major CA entities sold or closing: Foster Farms, Western Milling, Imperial Western, Farmer John closing - Smithfield Leaving?



## Food and Agriculture Policy Trends

What Happens In Vegas, May Stay in Vegas

What Happens in California,  
Does Not Stay in California

# Food and Agriculture Policy Trends

- **Words Matter-** Framing an Issue is Important – Agriculture does not frame issues well.
- Example: Climate Change and Water Storage
- **Timing and Messenger**
  - Vaccines - Who said: “If \_\_\_\_\_ tells me to take it (Vaccine), I am not taking it.”
  - Kamala Harris, VP Debate
  - CA Gov Newsom created our own Vaccine Approval Panel, delaying vaccines in CA for almost 2 weeks.
  - I ask “If Donald Trump were elected, would Democrats be refusing to take the Vaccines?”
- **You Cannot Run Against Numbers!**
  - 2020 Election Pivoted on approximately 30 counties
  - Every Pundit knew – NC, AZ, NV, GA, Ohio, PA important, but only a handful of counties in those states mattered.

# Food and Agriculture Policy Trends

## Animal Welfare

- **Proposition 2**, 2008 Ballot Initiative
- Required hens to “Stand up, turn around, w/o touching another hen or a cage”
- Why a performance standard and not “cage free”?
- Started with Eggs, “Just a little more room” “penny an egg”
- Passed with the Highest Percentage of any Ballot Initiative (Obama Bump, Poor Campaign)
- HSUS and Egg Farmers Cooperate to Ban “Sale” of Non Compliant Eggs in CA – AB 1437, CDFA Regulations on Food Safety (Size Requirement in law)
- Balance Commerce Clause – Lawsuits from Midwestern States, not producers – CA Egg Farmers, HSUS on same side.
- CA Egg Farmers want Strong Enforcement and Rules
- CA Farmers went from Corporate Ag Criminals, to Victims

# Animal Welfare Continued

- Prop 12, 2016 Ballot Initiative— Requires “Cage Free Eggs” Bans Gestation Crates Pork  
<https://www.cdfa.ca.gov/ahfss/pdfs/Prop12-OutreachProcessedFoodLtr.pdf>
- Biological Systems – Changing Practices Takes Time, Money, Impact Health
- Regulations Out for Comment – Enforcement “Stayed” until 6 mo after enactment.
- Size Step to 144” Hens, Cage Free Equipment in 2022
- Liquid Eggs Included
- Whole Swine Meat
- CA Leads the Country:
  - 10 states Restrict Battery Cages Production, 7 states sales
  - 10 states Ban Gestation Crates, 2 sale of Pork Gestation Crates
- Other AW Issues, Dairy Cattle Tail Docking, Dehorning, Foie Gras, Wild Horses, Horse Race Tracks

# Food and Agriculture Trends

## Natural Resources

- **Climate Change Policy**

- Implementation of Regulations

- Cap and Trade <https://ww2.arb.ca.gov/our-work/programs/cap-and-trade-program>

- Electrification

- Low Carbon Fuel Standards <https://ww2.arb.ca.gov/our-work/programs/low-carbon-fuel-standard>

- Livestock Production, Methane <https://clear.ucdavis.edu/>

- Renewable Energy Production – Intermittent, cost etc.

- Byproducts, Organics Waste Management, Short Term Climate Pollutants

- Feed and Livestock, Compost, Rendering

- Adaptation – impact on cropping patterns, Drought, Heat

Regulatory Issues – CA Has a very High Cost for Regulatory Compliance

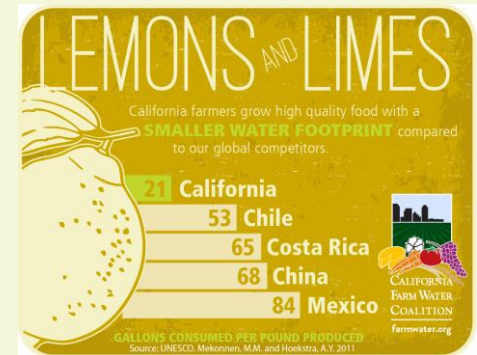
- Pesticides – elimination of many Fumigants, Glyphosate, issues with Phylloxera, Nematodes

- Air Quality

- Emissions from Cultivation, Livestock Emissions, Pesticides

# Food and Agriculture Trends Water

- More Water is Good <https://www.farmwater.org/>
- 2 major Ag System, State Water Project, Central Valley Project
- SWP – 10 dams, 701.5 miles of canals, Power 3000 MW, 5.7 million AF
- CVP – 20 dams, 643 miles of canals, Power 2,254 MW, 7 million AF
- **Supply** – Storage – Surface, Conjunctive Use, Desal, Water Reclaim
- Sustainable Groundwater Management – SGMA, Remove 500,000-1,000,000 acres of high value land
- **Water Quality** May be more important than supply, can Impact Farmers and Processors down to the Farm/Processor Level
- CV Salts <https://www.cvsalinity.org/>
- Nitrogen, Clean Drinking Water
- “Human Right to Water” – Quality, Affordability, Contamination  
[https://www.waterboards.ca.gov/water\\_issues/programs/hr2w/](https://www.waterboards.ca.gov/water_issues/programs/hr2w/)



# Food and Agriculture Trends Standard of Identity/Terms/Geographic

- **Meat** – “Plant Based” “Imitation” – Federal Bill, 23 states have bills, 11 passed
- UBS says \$84 Billion by 2030
- Milk/Cheese – Soy, Oat, Almond
- Product Composition - % fats not solid in Milk
- Julian Dates
- **Marketing Terms**
- “Natural”
- “Sustainable”
- Proposition 65 – Mandatory Labels
- **Geographic Protectionism** <https://californiagrown.org/>
- Geographic Terms such as “California” “Napa” “Sonoma”
- Appellations common in wine, not in food – More to come
- 5 bills in CA on the Issue
- Voluntary Licensing Agreement <https://californiagrown.org/>





# Food and Agriculture Trends

## Packaging

- **Plastics**
  - Extended Producer Responsibility (EPR)
  - SB 54/AB 1080 – Failed twice
  - Passed in OR, Maine – Bills in 26 states, EU
  - CA Initiative
- **Mandatory Minimum Content**
  - AB 793 Beverages, AB 478 Thermoforms, EU, 11 states
- **Recyclable and Compostable Mandates**
  - Truth in Package Labeling
  - Resin ID Codes – Mandated in 23 states, CA wants to Ban Them
  - Biggest Issue, Balkanization of Labeling – Nut. Ed Labeling Act



# Food and Agriculture Trends

## Labor

- The US and CA continue to have ag labor challenges – Cost, Availability
- CA Farms Employ 829,000 people (2015 US Census)
- 79.3% of CA Ag Workers were foreign born (2019)
- Driving cropping decisions – row crops to almonds
- CA has higher minimum wage – currently \$14.50 hr, \$15 in 2023
- CA has restrictive Overtime Rules – 1.5 x wages > 8 hrs day, 40 hour in a week
- Immigration, H2A, Agriculture Supports Immigration reform and Foreign Worker Programs
- Technology – Every Industry is Working on Tech to Replace Labor
  - Difficult to Prune Wine Grapes with Robots
- Workers Comp, Heat Stress, Covid, UI
- Competition with Restaurants, Construction