California's Working Landscapes
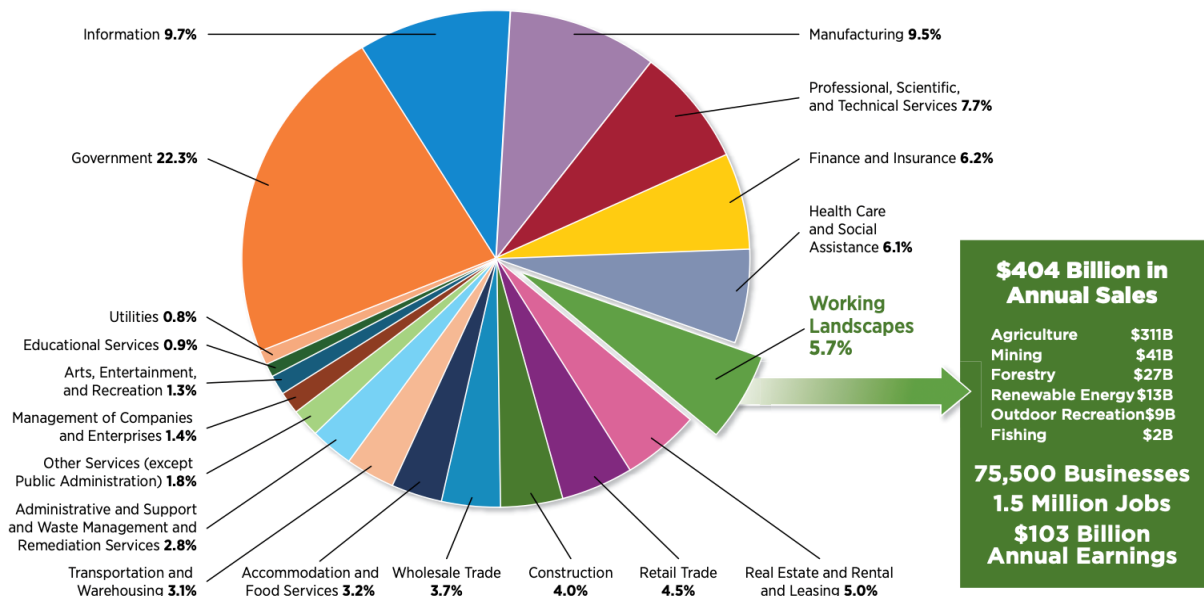## Evolving Contributions to National, State, and Regional Economies

Explore the full report at: https://ucanr.edu/working-landscapes-2025

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California is well-known to be the nation's largest agricultural producer and sole producer of many specialty agricultural products. However, California's working landscapes extend beyond agriculture and the major agricultural production areas in the state. The state's vast and diverse working landscapes are key contributors to regional, statewide, and national economies. This report analyzes the economic contributions of California's working landscapes, focusing on nine segments: agricultural distribution, agricultural processing, agricultural production, agricultural support, fishing, forestry, mining, outdoor recreation, and renewable energy. We analyze how these segments contribute to the state, regional, and national economy in 2024 by summarizing the number of jobs they provide, total worker earnings, total industry sales, and number of businesses.

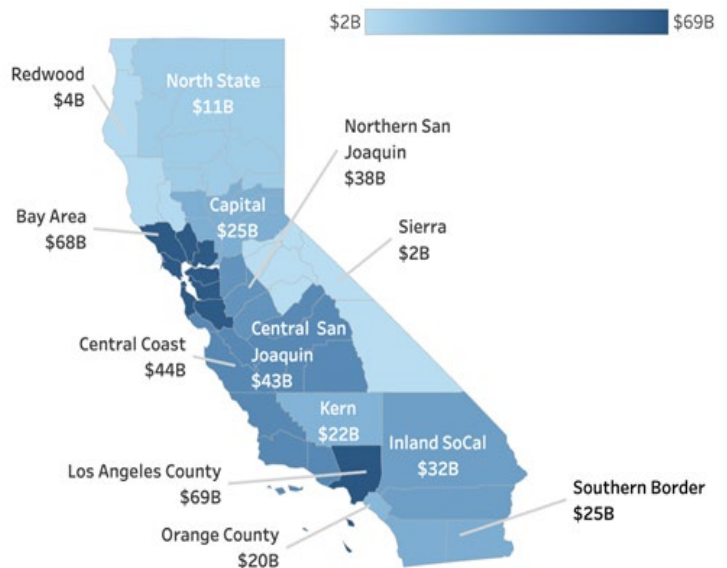**Exhibit 1: Total California 2024 Sales for all 20 industry sectors ($7.1 Trillion)**

Information **9.7%**
Manufacturing **9.5%**
Professional, Scientific, and Technical Services **7.7%**
Finance and Insurance **6.2%**
Health Care and Social Assistance **6.1%**
Government **22.3%**
Working Landscapes **5.7%**
Utilities **0.8%**
Educational Services **0.9%**
Arts, Entertainment, and Recreation **1.3%**
Management of Companies and Enterprises **1.4%**
Other Services (except Public Administration) **1.8%**
Administrative and Support and Waste Management and Remediation Services **2.8%**
Transportation and Warehousing **3.1%**
Accommodation and Food Services **3.2%**
Wholesale Trade **3.7%**
Construction **4.0%**
Retail Trade **4.5%**
Real Estate and Rental and Leasing **5.0%**

$404 Billion in Annual Sales

Agriculture	$311B
Mining	$41B
Forestry	$27B
Renewable Energy	$13B
Outdoor Recreation	$9B
Fishing	$2B

75,500 Businesses
1.5 Million Jobs
$103 Billion Annual Earnings

In 2024, California's working landscapes accounted for nearly 6% of total industry sales in the state, placing as 7th most important among all California sectors in terms of sales. The working landscapes sectors supported nearly 1.5 million jobs and 75,500 businesses while generating $404 billion in sales and providing $103 billion in worker earnings.

Exploring the Working Landscapes Data

The four agricultural segments of the working landscapes—agricultural distribution, processing, production, and support—account for $311 billion in annual sales, create more than 1.2 million jobs, and provide $84 billion in worker earnings. At the other end of the spectrum, the fishing, outdoor recreation, and renewable energy segments are the smallest of California's working landscapes segments across all metrics. However, while these segments are small relative to others in the state's working landscapes, they are incredibly important nationally. For example, in terms of sales, California's outdoor recreation and renewable energy industries are the most important of any state, accounting for 11% and 23% of their respective national industry sales in 2024. One theme of our analysis is that California's working landscapes segments all contribute substantially to the national economy and play important roles within the state's economic regions.

This study also examines the geographic concentration—by CA Jobs First Regions—of economic indicators for each of the nine segments. Our analysis unveils that different regions specialize in different working landscapes segments. In terms of sales, the top segments by region range from forestry in the Redwood Coast, to agricultural production in the North State and Central Coast, to Agricultural Processing in much of central California and the Southern Border, agricultural distribution in Orange County and Inland SoCal, and mining in Kern County.

Total Working Landscapes Industry Sales ($billions)
By California Jobs First Region

$2B — $69B

Redwood $4B
North State $11B
Northern San Joaquin $38B
Bay Area $68B
Capital $25B
Sierra $2B
Central Coast $44B
Central San Joaquin $43B
Kern $22B
Inland SoCal $32B
Los Angeles County $69B
Southern Border $25B
Orange County $20B

This report does not include the economic values of Ecosystem Services

For decades, researchers and policymakers have offered frameworks and methods to valuate "ecosystem services" to provide a more comprehensive picture of the benefits that result from nature and the environment than what is captured in these established economic impact models. These valuation methods are important and would drastically increase our estimates of the value of the states' working landscapes, however these approaches are beyond the scope of this report and thus our estimates should be considered lower bounds on the true economic contributions of the state's working lands.