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San Joaquin Valley Ag 2026

A Supplement to **The Business Journal**

Raised on the Range

Ranching isn't just a livelihood — it's the dream her father refused to give up

A Valley Under Glass

Return of tule fog brings rare blessing, costly burden

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About the cover
Rizpah Bellard represents a new generation of San Joaquin Valley agriculture — rancher, educator, entrepreneur and housing advocate, all at 31. Her story, rooted in her father's pioneering legacy, reflects the Valley's evolving identity and the next generation of stewards stepping up to shape its future.

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Gabriel Dillard
Managing Editor
The Business Journal

Welcome to our eighth edition of San Joaquin Valley Ag, the publication we launched in 2018 to celebrate, evaluate and illuminate the more than $20 billion ag industry in Fresno, Kings, Madera and Tulare counties combined.

Eight editions in, one theme keeps returning: the Valley's extraordinary capacity to produce food is not the same thing as economic security. In 2026, that gap is harder to close than ever.

Consider what has unfolded in just the past several months. A wave of closures and layoffs — Del Monte's Modesto cannery, Mission Bell Winery in Madera, JBT FoodTech — has erased roughly 2,100 jobs from food processing and ag manufacturing. These are not isolated corporate decisions. They reflect a longer structural shift: the Valley risks becoming more of a grow-and-ship region and less of a process-and-manufacture one. That distinction matters enormously for the wages and economic resilience of communities here.

Water, as always, remains the defining uncertainty. Even after a wet winter, California's State Water Project opened 2026 with a 10 percent initial allocation. The paradox is structural: heavy storms no longer guarantee reliable deliveries. Between environmental constraints, aging infrastructure and groundwater limits imposed by SGMA, wet years and water security are no longer the same thing.

A rare and prolonged tule fog blanketed the Valley for much of late 2025 — the longest such stretch in half a century. For stone fruit growers, it delivered the chill hours their crops crave. For some citrus growers, it brought real losses, with fruit falling prematurely and no recovery possible until next season.

California's raisin industry, meanwhile, offers a study in stubborn competitiveness. Production has declined 38 percent over the past decade, but the growers who remain are leaner and better positioned globally than the numbers suggest. A difficult decade already did the work of forcing adaptation.

And then there is Rizpah Bellard — a 31-year-old cattle rancher, educator and entrepreneur connecting Fresno students to the full breadth of what agriculture can offer. Her story may be the most hopeful in this issue, and a reminder that the next generation of Valley agriculture is already being built.

Succession runs through nearly every story we tell this year. The question of who inherits the future of Valley agriculture has never been more pressing — or more open.

We hope you find this edition useful and worth your time. Please send feedback and story ideas to editor@thebusinessjournal.com or 559-490-3467.

Photo via Rizpah Bellard | **Rizpah Bellard, 31, is carrying on the legacy of her father, Cleveland Bellard, a pioneering Black farmer. She is passing down her knowledge and passion for agriculture to the younger generation.**

Raised on the Range

Ranching isn't just a livelihood — it's the dream her father refused to give up

By Frank Lopez

The day Cleveland Bellard's path toward agriculture began, he was 10 years old and trespassing.

He had snuck onto private property in Richmond, chasing rabbits with his dog, when the farm foreman caught him. Instead of sending him home with just a warning, the foreman walked him through the property — explaining how the farm worked, how cattle were raised, and how some of those animals would eventually end up on the dinner plates of people in town.

"That is still something that opened up in my subconscious mind about fields and farming," Cleveland said.

Decades later, that chance encounter has rippled forward in ways the foreman could never have anticipated. Cleveland went on to become a pioneering African-American cattle rancher — studying agricultural sciences at Fresno State in the early 1980s, launching his career in cattle breeding at Carnation Genetics in Houston, and eventually consulting in international agricultural markets from China to New Zealand to Senegal. Today he specializes in bee husbandry and still travels the globe.

And now his daughter, Rizpah Bellard, is carrying that knowledge into a new generation — not just as a rancher, but as an educator, entrepreneur and housing advocate working to reshape what agriculture looks like in the Central Valley.

Building Nova Farming

Rizpah grew up on her father's cattle ranch in Guinda, in Yolo County, learning from Cleveland how to raise sheep, goats, pigs, cows, horses, ponies and chickens. She left for the East Coast for her education, earning a bachelor's degree from Cornell University and a master's from the University of Denver, before returning to California and settling in Fresno in 2021.

Rizpah Bellard

She founded Nova Farming, which provides high-quality, all-natural beef, ranching and farming consulting, and an agriculture curriculum for Fresno Unified School District (FUSD) students from kindergarten through 12th grade. The curriculum is built around a simple but ambitious idea — that agriculture is not just a job for the children of farm laborers, but a gateway to careers in technology, marketing, international trade and beyond.

"I talk about all the parts of the industry — I don't only focus on production," Rizpah said. "A lot of the kids I work with have parents who are farm laborers. I talk about the tech side, the marketing side. My main focus in teaching is to show all the possibilities in the ag industry."

One of her larger goals is helping students understand the global food supply chain — that career opportunities in agriculture exist not just in California or across the U.S., but internationally, including in foreign agricultural development.

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Nova Farming has also made a significant commercial mark. In six months, Rizpah sold $1.5 million in ground beef and carne asada to FUSD and the Central California Food Bank. She is matter of fact about what that number represents.

"There is no 31-year-old Black woman who is a small cattle rancher that has made that money in such a short amount of time," she said.

The cost of being ahead

Cleveland's path was not without serious obstacles. Though racial prejudice in the agriculture industry is less overt today than in decades past, it has not disappeared — and during the years he was building his operation, it cost him significantly.

Rizpah said her father was denied agricultural loans, had cattle stolen and was blocked from acquiring the generational wealth that land ownership can provide. Buyers defaulted on business deals with him in favor of white male counterparts. Opportunities to expand his cattle operation were denied.

"He had more knowledge than the time was ready for in the '80s, '90s and early 2000s," Rizpah said. "He was the wrong messenger for the message."

Despite those obstacles, Cleveland built a career that eventually took him far beyond the Central Valley. He has consulted in international agricultural markets and today remains active globally, specializing in bee husbandry.

Succession question

The story of the Bellards is also the story of one of the most pressing challenges facing American agriculture: succession.

A major issue confronting the cattle ranching industry is that many ranchers are now in their 60s and 70s with no clear plan for what happens when they step back. Land that has been in families for generations is being sold off or lost simply because no one is prepared to take it over.

"A lot of land is being lost because family members aren't taking over for their parents or their grandparents," Rizpah said.

It is part of what drives her work with students — the belief that connecting young people to agriculture early, and showing them the full breadth of what the industry offers, is how the next generation of stewards gets built.

When Rizpah talks about eventually taking over her father's operation, Cleveland corrects her framing.

"I tell her, 'I'm going to bombard you with knowledge and you're going to be able to comprehend this and apply it,'" Cleveland said. "'That's how your dad made a living — with knowledge.'"

Beyond the ranch

Rizpah's work extends beyond farming. She operates Blynd Essence, a ranch in West Fresno with an 11-bedroom home that provides housing for men and women who have come out of mental health institutions, the prison system or homelessness. It is her second independent living facility in Fresno County, operated in partnership with the Independent Living Association, which works to lower housing barriers across the region.

She is also running for the Fresno Unified School District Area 1 board seat, with election day on June 2.

Taken together, her portfolio — ranching, education, housing, civic engagement — reflects the same philosophy her father instilled in her on that ranch in Yolo County: that knowledge, applied broadly and shared generously, is the most durable thing you can pass on.

"I wanted to pass down what I learned from my education and from working with my father," she said. "To teach children about the value agriculture provides to the world."

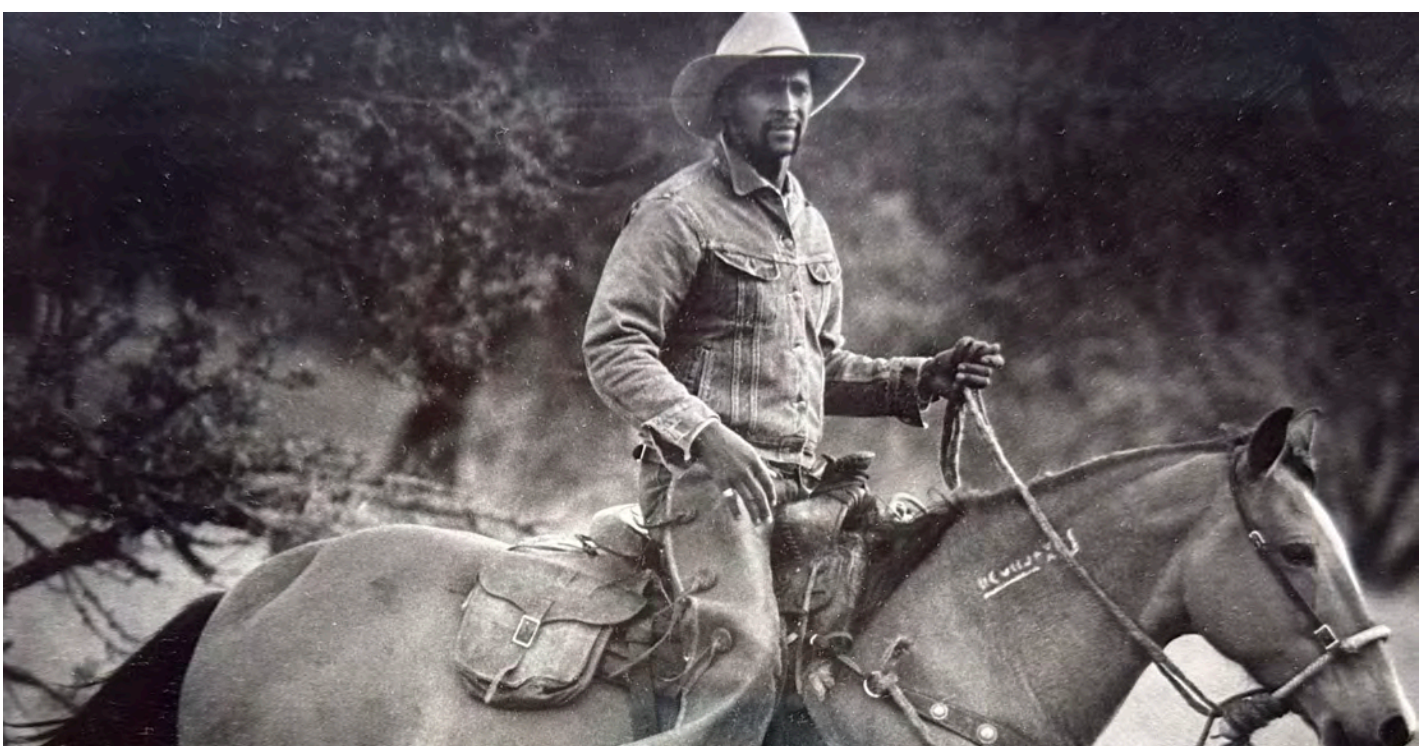

Photo via Rizpah Bellard | **Cleveland Bellard didn't come from a farming family, but exposure to the agricultural world as a young boy growing up in Richmond, California, led him to work various jobs on farms and horse stables before going to study agriculture at Fresno State.**

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NASA image | **An atmospheric phenomenon occurring over much of California was unmistakable in satellite imagery in late autumn 2025. Fog stretching some 400 miles across the state's Central Valley appeared day after day for more than two weeks in late November and early December. Known as tule (TOO-lee) fog, these low clouds tend to form in the Valley in colder months when winds are light and soils are moist. They have a mixed impact on farm operations.**

A Valley Under Glass

Return of tule fog brings rare blessing, costly burden

By Frank Lopez

The final weeks of 2025 and a good chunk of early 2026 brought the San Joaquin Valley something it hadn't seen in more than a decade — a heavy blanket of tule fog that settled across the region and refused to let go.

Motorists across the Central Valley contended with dense fog in the early morning and late afternoon hours, but the weather phenomenon carried both promise and peril for the region's crops.

The tule fog blanketed 400 miles of the Central Valley for more than two weeks. A 22-consecutive-day streak in December marked the longest such stretch since the 1970s, according to the National Weather Service.

Tule fog forms in the Valley during colder months when winds are light and soils are moist, hugging the ground in low, dense layers that can persist for days.

Ryan Jacobsen, CEO of the Fresno County Farm Bureau, called the recent blanket fogs a "throwback to yesteryear" — a return of a weather pattern that younger Valley residents have rarely if ever experienced.

A major contributor to the return of heavy fogs, Jacobsen said, is dramatically improved air quality. Air quality today is 85% cleaner than it was in 1990, he said, allowing more

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water molecules to attach to the air and form the dense fog layers the Valley once knew well.

A blessing for some

For many of the Valley's fruit growers, the fog arrived as welcome news. Many fruit trees and vines require extended periods of lower temperatures to reach dormancy — a critical stage for a healthy growing season ahead.

Peaches, plums and nectarines require roughly 600 to 1,000 chill hours, while cherries require about 1,200, Jacobsen said.

"This fog essentially acts as a blanket — it keeps temperatures low and prevents the drying out of the wood," Jacobsen said. "We've been through long stretches of no fog and sunshine through January from sun-up to sundown and that could be problematic for the upcoming year's budwood."

An added benefit is that fog tends to keep temperatures just above freezing, he said. According to NASA, while temperatures in the Central Valley were significantly cooler under the fog layer, the ambient air mass above was warmer overall — offering a kind of insulation against hard freezes.

The cooler temperatures also stave off an early bloom, Jacobsen said. Earlier blooms leave crops more susceptible to frost damage later in the season.

A threat to citrus

Not all growers are celebrating. Certain varieties of citrus have struggled — the fruit stays wet for weeks without drying out, which can lead to a decline in quality, Jacobsen said. The full extent of the damage won't be known until the citrus season is over.

At Schletewitz Farms in Sanger, which grows mandarins, peaches, apricots, plums, pluots, grapes, pomegranates and garden vegetables across 85 acres, grower Eric Schletewitz said the fog has led to significant crop loss.

The fog is causing fruit to produce ethylene longer, he said, accelerating the ripening process to the point where fruit is falling off the tree prematurely. Ethylene is a gaseous plant hormone that triggers ripening — useful in controlled amounts, but destructive with prolonged exposure.

"The fruit is falling off of the tree so the only harvestable fruit will be whatever is remaining on the tree when we do get to harvest, so there has been a lot of loss," Schletewitz said. "Can it recover? No, not till next year until we grow a new crop."

He estimates the farm could be facing losses of 50% or more, and said the situation is widespread among other citrus farmers in the region.

Many growers delayed harvest, waiting for weather patterns to shift.

Recent heavy rains have left soil profiles full of moisture, Schletewitz added, which will carry crops well into spring.

Labor and safety

Along with its impact on crops, the heavy fog has affected farm labor operations across the valley.

"There is a great sensitivity to making sure our employees get to their locations safely," Jacobsen said. "Many of our employees arrive early in the morning, and depending on location and conditions — it is less foggy early in the morning. It gets thicker closer to sunup."

Employees and employers are working together to ensure workers are arriving at worksites safely, Jacobsen said.

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Looking ahead

Shane Alvidrez and his wife, Kileen, run Succulent Vertical Gardens in Clovis, a nursery and event venue they established in 2015. Along with their succulent business, the property includes about 125 peach, nectarine and apricot trees — crops that thrive on cold.

Alvidrez said his trees need 70 or more days of temperatures around 30 degrees Fahrenheit to perform well. He's not worried about the cold — he's welcoming it.

"I kind of wish we had more cold days," Alvidrez said. "A lot of my trees are starting to bud and we just got into February. We have plenty of growing time."

Photo by Gabriel Dillard | **Dense tule fog blankets a Central Valley field near Selma in January, a weather pattern that returned to the region for the first time in decades — bringing both relief and hardship for local growers.**

Adobe stock image | **A raisin muffin — but count them carefully. As shrinkflation quietly trims ingredients across the food industry, California's raisin growers are fighting to keep their fruit in the mix, one muffin at a time.**

California raisin industry refuses to shrink with the muffins

Vikaas Shanker

As agriculture markets are navigating the effects of tariffs and other global shifts, California's raisin growers have been remarkably competitive despite a decade of challenges, industry experts say.

More than 1,500 raisin growers in the Central Valley produce all of the United States' commercial raisins. A decade of change has positioned these growers well.

A Decade of Decline

One of the most consequential shifts for Central Valley growers has been the steady decline in raisin production.

In 2014, the total quantity of raisin crop produced and purchased in the United States was about 366,000 tons, according to the National Agriculture Statistics Service. In 2024, that quantity reduced to 226,000 tons, a 38% decline.

Labor availability, rising costs, and the encroachment of more profitable nut crops into vineyard acreage contributed to the decline.

"Costs have gone up considerably," said Steve Loftus, president and chief operating officer for Sun-Maid. "Ultimately, the economics for our growers is all about relative profitability."

That includes a generational transition seen throughout the farming population.

Many raisin vineyards in the Central Valley are family-owned operations that have been in production for decades, in some cases approaching 100 years.

As older vines reach the end of their productive life, the next generation is tasked with choosing whether to replant traditional raisin grape varieties, invest in new varieties, or transition to an entirely different crop, Loftus said.

'Ripe for Opportunity'

In response to these pressures, the industry has increasingly turned its focus toward yield and efficiency, Loftus said.

Rather than expanding acreage, growers are looking for ways to produce more raisins per acre while managing costs.

This includes the adoption of higher-yield grape varieties and dry-on-vine systems, which allow grapes to dry naturally on the vine, reducing labor and handling requirements.

Thankfully, change isn't new for California growers, who are well-positioned.

"California raisin growers are perhaps the savviest farmers on the planet," said Jeff Smutny, president

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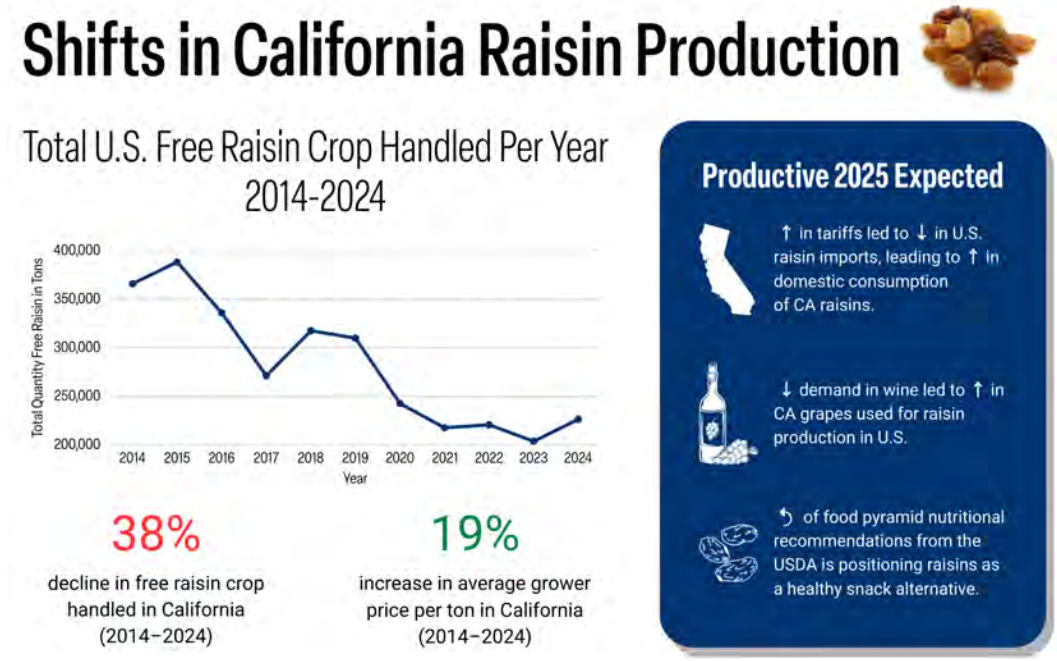
and managing director for the Raisin Administrative Committee (RAC)

Post-recession increases in labor costs, combined with the unique regulatory requirements in the state over the past decade, have kept growers elastic to change and open to innovation, Smutny said.

Improving yield has become central to maintaining economic viability, particularly as growers navigate higher costs associated with labor, food safety programs, and regulatory compliance.

Climate considerations are also shaping planting and harvest strategies. Raisins are especially vulnerable to late-season rain, which can damage crops and disrupt harvests. As a result, some growers are prioritizing grape varieties that can be harvested earlier in the season, ideally by August, reducing exposure to fall weather risks.



Despite the industry contraction, tariffs, and uncertainty, California raisin growers will be especially competitive on the global market this year, thanks to good harvests in the Central Valley, competitors' lower yields, and shifts in domestic grape crop allocation.

Raisin production is projected to surpass industry estimates of 180,000 tons, an increase from pre-harvest estimates, Smutny said.

Also, recent declines in demand in the wine industry have converted some grape tonnage into raisin production, Smutny said. The additional

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wine-to-raisin shifts could lift total raisin production to more than 200,000 tons.

Marketing California Raisins

Globally, California raisin growers continue to operate in a competitive marketplace, Smutny said.

Other countries, including Turkey, South Africa, Chile, and Mexico, have gained share over the years by competing on price. California raisins consistently command higher price points due to stricter food safety standards, certification requirements, and production costs.

But that emphasis on safety, traceability, and consistency has cultivated a reputation for premium quality California production, allowing them to remain competitive in both domestic and export markets.

"We're working (globally) with retail stores, providing tastings of new products, educational seminars, and social media influencing," Smutny said.

Globally, the Raisin Administrative Committee is nurturing relationships to tout this reputation and create new products that include raisins while countering phenomena like shrinkflation.

"In some cases, a muffin may have included five raisins but now includes four," Smutny said, a 20% reduction in demand. "We are trying to address those types of things."

As growers continue to track global trends, most of California's raisin production is still consumed in the United States and Canada, and rising import costs from tariffs have highlighted Central Valley raisins as a more attractive option for domestic consumption, according to Loftus.

Also, the FDA recently announced a shift in nutritional guidelines, emphasizing avoidance of added sugars, natural and non-processed foods, and high-fiber foods.

"These guidelines have just made it clearer that California raisins, and raisins overall, meet the definition of healthy foods," Loftus said.

SunMaid photo | **Sun-Maid grapes grow on trellised vines in the Central Valley. The shift toward dry-on-vine systems and higher-yield varieties is helping raisin growers squeeze more productivity from fewer acres as the industry adapts to a leaner, more competitive era.**

SunMaid photo | **Raisin grape vines stretch across the San Joaquin Valley floor beneath an open sky. More than 1,500 growers tend vineyards like this one, some approaching a century in production — and facing the pivotal question of what the next hundred years will look like.**

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California Ag Counties

Ranked by 2023 gross agricultural values among California counties

2022 2021	County County Seat	Total ag value Percent change from 2022	Top crops	Ag Commissioner(s)
1 (3)	**Kern County** Bakersfield	$8,626,533,000 11.68%	Grapes, citrus, pistachios, almonds, carrots	Glenn Fankhauser
2 (2)	**Fresno County** Fresno	$8,589,054,000 6.10%	Grapes, almonds, pistachios, tomatoes, cattle & calves	Melissa Cregan
3 (1)	**Tulare County** Visalia	$7,866,730,100 -8.66%	Milk, grapes, cattle & claves, oranges, pistachio nuts	Tom Tucker
4 (4)	**Monterey County** Salinas	$4,353,338,000 -6.14%	Strawberries, lettuce, broccoli, wine grapes, cauliflower	Juan Hidalgo
5 (5)	**Merced County** Merced	$4,223,547,000 -12.96%	Milk, almonds, sweet potatoes, cattle & calves, chickens	Sean Runyon
6 (6)	**Stanislaus County** Modesto	$3,366,082,000 -9.67%	Almonds, milk, poultry, cattle & calves, fruit & nut nursery stock	Linda Pinfold
7 (7)	**San Joaquin County** Stockton	$3,220,324,000 -0.75%	Milk, grapes, almonds, cherries, chicken & eggs	Kamaljit Bagri
8 (8)	**Imperial County** El Centro	$2,692,716,000 3.07%	Cattle, alfalfa, lettuce, spinach, onions	Jolene Dessert
9 (10)	**Ventura County** Ventura	$2,170,243,000 2.00%	Strawberries, nursery stock, lemons, celery, raspberries	Korinne Bell
10 (9)	**Kings County** Hanford	$2,155,882,000 -16.91%	Milk, pistachios, cotton, cattle & calves, tomatoes	Jimmy Hook
11 (12)	**Santa Barbara County** Santa Barbara	$1,875,978,000 -2.82%	Strawberries, nursery, wine grapes, broccoli, cauliflower	Jose Chang
12 (11)	**Madera County** Madera	$1,859,365,000 -7.98%	Almonds, milk, pistachios, grapes, cattle & calves	Rusty Lentsberger
13 (13)	**San Diego County** San Diego	$1,656,337,261 -6.78%	Nursery & cut flower products, avocados, lemons, vegetables, livestock & poultry	Ha Dang
14 (14)	**Riverside County** Riverside	$1,540,340,000 3.35%	Nursery stock, dates, eggs, alfalfa, avocados	Ruben Arroyo
15 (16)	**Napa County** Napa	$1,207,919,300 35.07%	Wine grapes	Tracy Cleveland
16 (15)	**San Luis Obispo County** San Luis Obispo	$1,100,000,000 1.44%	Wine grapes, strawberries, cattle & calves, broccoli, avocados	Martin Settevendemie
17 (17)	**Sonoma County** Santa Rosa	$945,722,700 18.81%	Wine grapes, milk, livestock & poultry, nursery, cattle & calves	Andrew Smith
18 (20)	**Colusa County** Colusa	$878,077,000 102.70%	Rice, almond, walnuts, sunflower	M. Anastacia Allen
19 (19)	**Glenn County** Willows	$708,599,000 21.76%	Rice (paddy), almond, walnut, dairy (total milk), apiary products	Marcie Skelton
20 (18)	**Butte County** Oroville	$573,853,302 -17.17%	Rice, almonds, walnuts, prunes, rice seed	Louie Mendoza

WND-Would Not Disclose. NR-Not Ranked. All data has been provided by The Business Journal research. Data from California Department of Food & Agriculture website and from county Ag Commissioner websites.

Research: Alex Light
Original Publication Date: March 7, 2025
Email: alex@thebusinessjournal.com

The Paradox of Plenty

Why California can be wet and still short on water

Adobe stock image | **The California Aqueduct, part of the State Water Project, is the backbone of water delivery for millions of Californians and a lifeline for Central Valley agriculture. Managing its flows involves a complex web of regulations, environmental requirements and infrastructure constraints that can limit deliveries even in years of plentiful precipitation.**

By Jeff Macon

For much of California's agricultural history, a wet winter brought relief. Reservoirs filled, rivers ran high, and growers assumed surface water deliveries would follow. Today, that assumption no longer holds.

Even in years marked by heavy storms and strong reservoir storage, water allocation anxiety persists across the San Joaquin Valley.

The disconnect reflects a fundamental shift in water management. California's system is now governed as much by regulation, environmental constraints, groundwater limits and operational rules as by precipitation totals. In short, flood years no longer guarantee reliable water.

The 2026 water year opened with a familiar signal of uncertainty. On Dec. 1, the California Department of Water Resources (DWR) announced an initial State Water Project (SWP) allocation of 10 percent. DWR stressed that early allocations are conservative by design and may rise as winter unfolds. But for growers and water-dependent businesses, the initial number still matters

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because timing matters. "Maybe later" water does not reopen planting windows, rehire laid-off workers or restore fallowed acreage.

Ryan Endean, DWR's deputy director of communications, said the initial allocation is not intended to track headlines about whether California is "drought-free." It is an early season forecast based on current hydrology, reservoir levels and an assumption of dry conditions ahead. The U.S. Drought Monitor, he noted, is not used by DWR as an indicator for SWP allocations. Instead, DWR updates the allocation forecast as conditions change through the winter, with final allocations set in late spring. The practical implication, Endean said, is that uncertainty is baked in until the season's precipitation and snowpack are clearer: "Every day it doesn't rain or snow, our snowpack and precipitation averages drop," and that ultimately affects supply.

At the federal level, volatility has become routine as well. Central Valley Project (CVP) agricultural contractors received an initial allocation of 35 percent last season — an improvement over prior lows, but still emblematic of a system that struggles to deliver predictable supply.

Adobe stock image | **The California Aqueduct stretches through the Mojave Desert on its journey toward Los Angeles. The State Water Project's sprawling infrastructure moves water hundreds of miles from Northern California — a system that even a wet winter cannot always guarantee will deliver.**

So why does uncertainty persist even when water appears abundant? The answer is a structural mismatch between when water arrives and when the system can store or use it.

During major storm events, California regularly releases large volumes of water to protect dam safety and downstream communities. That is a public safety obligation. Yet the ability to capture flood flows — either in reservoirs or through groundwater recharge — is constrained by physical capacity, conveyance bottlenecks, permitting and water-rights requirements and operational rules intended to protect ecosystems and manage flood risk.

Sarge Green, a project director with Fresno State's California Water Institute and former general manager of the Tranquillity Irrigation District, said recharge during flood events is often misunderstood as an easy fix. In practice, recharge depends on percolation rates and geology, and the best locations are limited. Floodwater naturally moves to low-lying areas that often have poor permeability, so capturing it frequently requires redirecting flows

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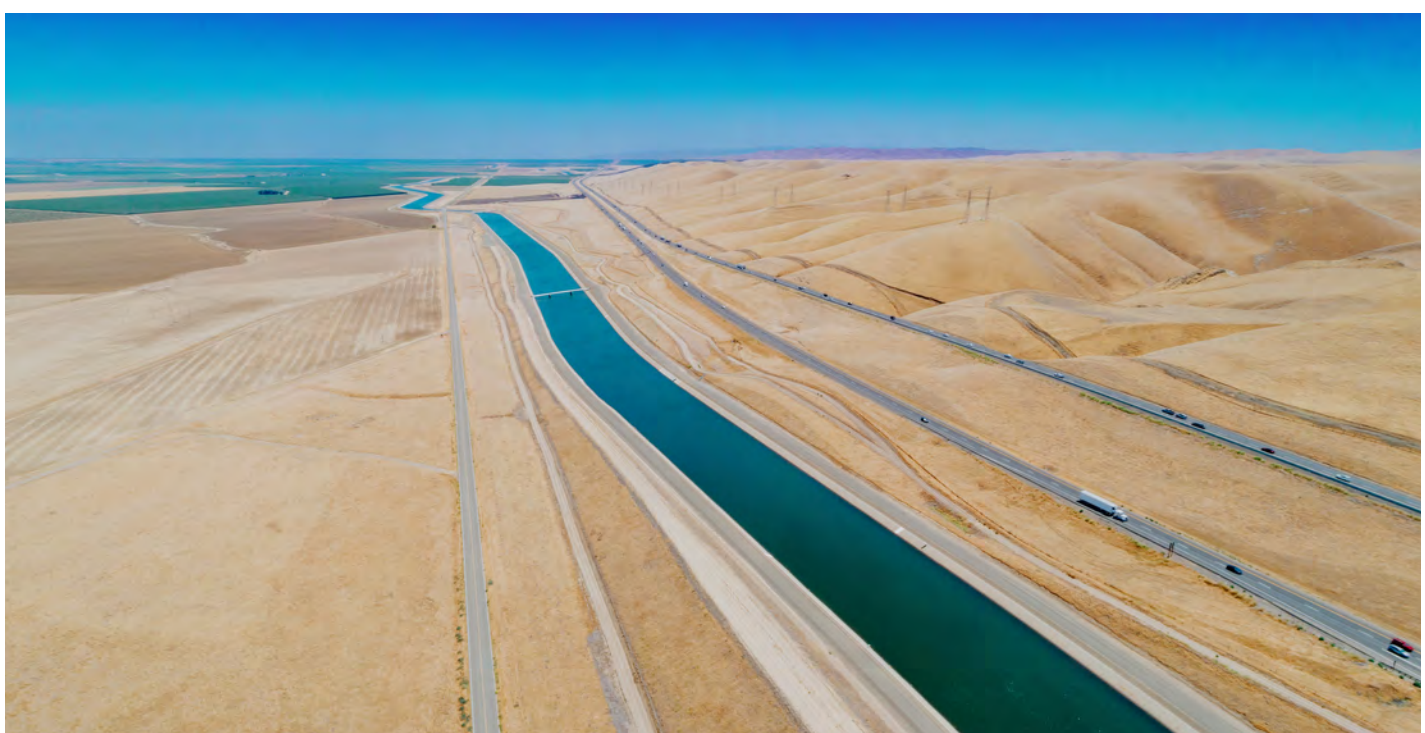

Adobe stock image | **An aerial view of the California Aqueduct cutting through arid land near Los Banos. Despite strong reservoir storage heading into 2026, the State Water Project opened the year with an initial allocation of just 10 percent — a reminder that in California, abundant rain and reliable water supply are no longer the same thing.**

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to better soils — work that depends on infrastructure and coordination among landowners, districts, and agencies.

"By definition, floodwater occurs when reservoirs are full, and distribution systems are already at capacity," Green said. "At that point, much of the water has to move downriver through flood channels."

Climate change is intensifying the challenge. Green noted that California is increasingly receiving heavier rainfall instead of snowpack. Historically, snowpack functioned as the state's largest and most flexible storage system because it melts gradually through spring, allowing reservoirs to be filled, drawn down and refilled. When more precipitation arrives as rain, more water comes in short bursts — harder to store, harder to move and easier to lose through flood releases. This season illustrates the new paradigm: reservoirs can look strong while snowpack remains weak, raising risk for later allocations.

Groundwater limits add another permanent constraint. The Sustainable Groundwater Management Act (SGMA), enacted in 2014, requires basins to reach long-term sustainability by the early 2040s. In overdrafted regions, that means pumping reductions. Groundwater, once the backstop during surface shortages, can no longer simply "fill the gap" without worsening overdraft and subsidence.

Jennifer Pierre, general manager of the State Water Contractors, said California's infrastructure and regulatory framework were built for seasons that were either mostly wet or mostly dry. "That is no longer the case," she said. Pierre argued that while operating rules should better reflect real-time conditions, the most consequential improvements for SWP reliability require infrastructure—specifically the Delta Conveyance Project and repairs to subsided canals.

The economic stakes are not abstract. Westlands Water District has warned that SGMA is narrowing the safety valve growers historically relied on when surface supplies fell short. In its 2025 Economic Impact Report, Westlands said growers must reduce groundwater use from about 603,000 acre-feet in 2022 to roughly 305,000 acre-feet by 2030. The report links consecutive years of zero federal allocation to steep regional impacts: a roughly 25 percent decline in economic activity, nearly 7,500 jobs lost, and reduced local tax revenues that support schools, roads, and public safety.

California's new water reality is not simply "more drought" or "more floods." It is greater volatility colliding with infrastructure and rules that cannot always pivot fast enough to capture water when it arrives. For Central Valley businesses, farmers, and communities, the challenge is adapting to a system where even flood years do not guarantee water security — and whether policy, infrastructure and coordination can evolve quickly enough to match the new normal.

Photo by Sara Nevis / California Department of Water Resources | **The California Department of Water Resources (from left) Snow Survey and Water Supply Forecasting Unit Manager Andy Reising, Engineer Jacob Kollen and Hydrometerologist Angelique Fabbiani-Leon conduct the second media snow survey of the 2026 season at Phillips Station in the Sierra Nevada. The snow survey is held approximately 90 miles east of Sacramento off Highway 50 in El Dorado County. Photo taken January 30, 2026.**

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FSMA Food Safety Schedule

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Training Opportunities

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- **HACCP:** March 3rd & 4th, 2026
- **PSA Grower:** March 5th, 2026
- * **PSA Grower** (English - Grant Funded): March 10th, 2026
- * **PSA Grower** (Spanish - Grant Funded): March 11th, 2026
- * **GAP Fieldworker - Train the Trainer** (Spanish - Grant Funded): Jan. 15th, 2026
- * **GAP Fieldworker - Train the Trainer** (English - Grant Funded): Jan. 15th, 2026
- **Global GAP:** March 16th & 17th, 2026

April 2026

- **PCQI:** April 22nd, 23rd & 24th, 2026

May 2026

- **Internal Auditor:** May 13th, 2026
- **HACCP:** May 20th & 21st, 2026

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Agricultural Commodities

Numbers reflect combined totals from Fresno, Kings, Madera and Tulare counties - ranked by 2024 dollar value

2025 2024	Name	2024 Dollar Value	Quantity Measure / Units	Tons per acre	Major export destinations	End products
1 (1)	Milk	$3,975,082,000	161,609,238 Hundred weight	WND	Mexico, Japan, Taiwan, Philippines	Yogurt, ice cream, butter, cottage cheese, cheese, buttermilk, half and half, whey
2 (2)	Almonds	$2,664,277,000	587,503 Harvested acres	4.34	Germany, Spain, Japan, India, Netherlands, United Kingdom, France	Oil, cosmetics, butter, candies, bakery goods, cookies, liqueurs
3 (4)	Calves and Cattle	$2,276,684,000	1,134,319 Head	WND	Mexico, Canada, South Korea	Beef, paint brushes, soap, candles, crayons, medicine, leather products
4 (5)	Pistachios	$1,733,687,000	387,081 Harvested acres	4.52	Canada, Japan, Mexico	Snacks, ice cream, cookies, baked goods, extracts
5 (3)	Grapes (table)	$1,439,470,000	52,810 Harvested acres	47.82	United Kingdom, Japan, Canada, Netherlands, Hong Kong, Mexico, Germany	Juice, concentrates, jams, jellies, natural food coloring, cream of tartar
6 (8)	Poultry	$1,347,352,000	17,671,015 Head	WND	Israel, Slovakia	Tray packs, bulk, livers, dog food
7 (6)	Oranges (Navel and Valencia)	$1,035,932,000	115,610 Harvested acres	65.14	Japan, Canada, Hong Kong	Orange juice, peels for marmalade, orange zest, Vitamin C
8 (9)	Tangerines	$742,724,000	66,107 Harvested acres	45.1	Morocco, Israel, Brazil, Argentina	Some varieties marketed as "Cuties" or "Sweeties" very popular with children
9 (7)	Tomatoes	$670,592,000	101,853 Harvested acres	248.22	Canada, Japan, Mexico	Tomato paste, ketchup, salsa, stewed tomatoes, sauces, soups
10 (10)	Peaches (cling and freestone)	$625,807,000	32,048 Harvested acres	81.33	Canada, Taiwan, Hong Kong, Japan, Italy, Germany, United Kingdom	Juice, jams, jellies, canned, dried, candies
11 (11)	Nectarines	$470,331,000	19,707 Harvested acres	27.67	United Kingdom, Japan, Canada, Netherlands, Hong Kong, Mexico, Germany	Juice, jams, jellies, canned, dried, candies
12 (12)	Raisins	$432,141,000	92,700 Harvested Acres	31.61	Shipped to more than 60 countries around the world	Energy bars, baked goods, flavor additive
13 (13)	Wine Grapes (crushed & juice)	$396,012,000	89,422 Harvested Acres	57.41	All over the world	Chardonnay, Sauvignon Blanc, Cabernet Sauvignon, Merlot, Pinot Noir, Zinfandel & more
14 (19)	Cotton (Pima and upland, seed and lint)	$351,460,000	137,775 Harvested acres	3018.32	South Korea, Japan, Indonesia, Taiwan	Oil, cosmetics, medicines, clothing, soap
15 (18)	Pollination (value of service)	$349,074,100	1,191,530 Colonies	WND	N/A	Pollination for seed crops, fruit and nut crops, melons, vegetables
16 (15)	Plums (including pluots and prunes)	$340,411,000	21,523 Harvested acres	37.72	Canada, Taiwan, Hong Kong, Japan, Italy, Germany, United Kingdom	Juice, prunes, paste, jams, fruit roll-ups
17 (17)	Lemons	$326,279,000	23,440 Harvested acres	28.32	Canada, Japan, Netherlands, Middle East	Frozen lemonade, juice, wood cleaner, air freshener, soft drinks
18 (16)	Garlic	$275,589,000	22,390 Harvested acres	7.73	Canada, Mexico	Cooking, aged garlic has been known to help in the prevention of diabetes & to increase immunity and cardiovascular health
19 (NR)	Onions	$213,092,000	12,320 Harvested acres	25.89	Canada, Japan, Mexico	Can be granulated, ground, minced, chopped dried, and sliced. Can be used for cooking and some medicines.
20 (NR)	Melons	$204,301,000	19,440 Harvested acres	80.41	N/A	N/A

N-Not Disclosed. NR-Not Ranked. N/A-Not Available. All data has been compiled from the annual crop reports of the agricultural commissioners' offices of Fresno, Kings, Madera and Tulare counties.

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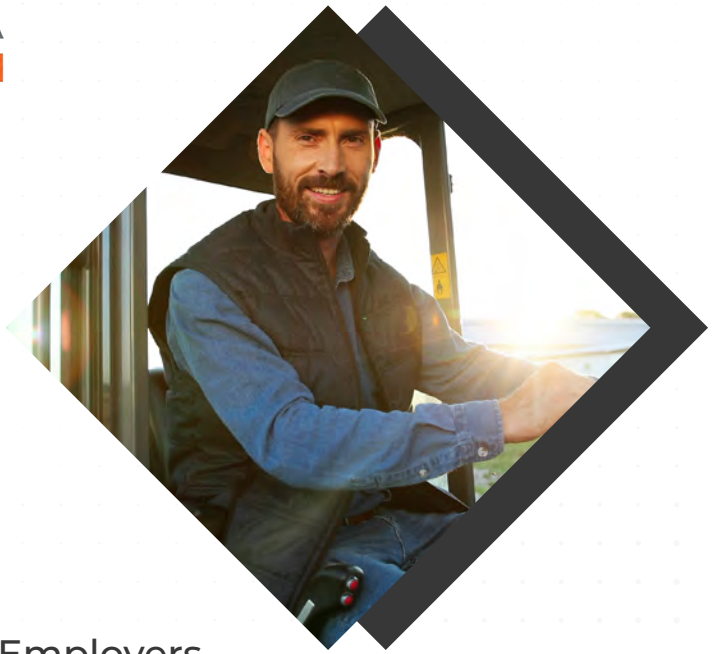

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Pearson Realty photo | **Farmland in the Central Valley remains largely in the hands of multigenerational family operations, even as institutional investors participate selectively in the market.**

Family Farmers Reclaim Ground as Institutions Pull Back From Valley Land

By Dylan Gonzales

Institutional investors are pulling back from Central Valley farmland, ceding ground to family farmers in a shift driven largely by water uncertainty and the high cost of navigating California's increasingly complex agricultural regulations.

Nearly 95% of farmland sales in the past year have gone to family operations, according to Matt McEwen, senior vice president of farmland sales at Pearson Realty — a reversal from just a few years ago when institutional buyers were more active in the market.

The difference comes down to water.

Properties without reliable surface water allocations — what McEwen calls "white areas" because they rely solely on groundwater — have seen the steepest declines in market value. Institutional investors, unlike multigenerational farmers with diverse holdings and intimate knowledge of local conditions, are largely avoiding them.

McEwen, who has sold Central Valley farmland since 1998 with a focus on citrus, almonds, pistachios and walnuts, said the calculus is straightforward.

"If a property has a water source that is short or not adequate, buyers typically stay away from it, especially institutional buyers," he said. "It has hugely impacted buying decisions."

That caution is reshaping the market. Scott Schuil, vice president and agent at Schuil Ag Real Estate, said institutional sellers have been more active than at any point in recent years as investment groups reassess risk in light of Sustainable Groundwater Management Act (SGMA) implementation, commodity price pressures and uncertain water supplies.

"In several cases, institutional owners are exiting assets that no longer fit their portfolio or risk profile — for example, walnut properties impacted by several years of lower commodity pricing, or farms located in less desirable water districts," Schuil said.

Family farmers, meanwhile, are stepping in. They're buying from institutions, from retiring neighbors and from each other as generational transitions reshape ownership across the Valley.

Where families move, institutions won't

Local operators and small buyer groups are often more confident stepping into deals that institutions are pulling

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back from, Schuil said.

"Local families and smaller groups tend to have a more practical understanding of the water landscape and SGMA risks in their specific area," he said. "They often know exactly what a property can and cannot support and are comfortable underwriting those risks at the right price."

Unlike family farmers who might already own multiple properties with different debt levels, institutional buyers typically enter with a single property and base their investment on current market conditions — a structure that limits their flexibility when prices shift or water access grows uncertain.

Sullivan Grosz, president of Pearson Realty's agricultural division, said water restrictions, commodity prices and the cost of farming have complicated institutional buying over the last several years.

"Institutional investors have marching orders and obligations to get the best returns for their clients," Grosz said. "If commodity prices aren't favorable, the returns aren't there to make a good investment. The unknowns with water regulations, SGMA implementation and future supply make investing more difficult."

The divergence between family farms and institutional investors often comes down to legacy and flexibility as much as finances.

"Family farms have legacy and tradition," Grosz said. "They reinvest in good years and hunker down in bad years. Institutions maintain consistent returns for investors, which can limit flexibility but ensures expertise and capital for large-scale improvements."

Institutions do bring some advantages, Grosz noted — mainly in capital and access to technology. Family farms adopt innovation as well, but institutional investment can accelerate it.

"They have deeper pockets to invest in new technology or projects, working with UC systems or agencies on mechanization and autonomous equipment," he said.

Who is selling and why

Seller motivations shift from year to year. Grosz estimates roughly a third of current sellers are driven by generational transitions, another third by personal or financial decisions and the remaining third by financial strain.

For family farmers who sell, the most common buyers are other families looking to expand. Generational transitions play a significant role in those deals, McEwen said.

Those selling under financial strain tend to share a common profile, Grosz said.

"Those are usually the ones whose debt or land values don't match current market expectations," he said. "Lenders often help them balance portfolios, but some are being forced to sell."

Schuil said financial strain has become more visible in recent years, particularly among operators who entered the market near peak pricing.

"A lot of it comes down to timing and leverage," he said. "Buyers who entered the market near the peak with higher leverage and variable-rate debt have faced real challenges."

Water, labor and what comes next

Looking ahead, industry observers expect current patterns to hold — family farmers continuing to buy from peers, institutions investing selectively where water and returns are reliable. Water availability and labor will remain the dominant factors shaping transactions.

"Buyers should really research the water scenario for the property they're looking at," McEwen said. "That's key to value."

Grosz said broader profitability improvements

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Pearson realty photo | **Water access, commodity prices and generational transitions continue to shape buying and selling activity across Central Valley agricultural properties.**

FOOD PROCESSORS

In the Central San Joaquin Valley - Ranked by total number of local employees.

	Company Address	Web site Phone	Number of local full time employees	Gross revenue 2024 Square footage	Types of food processed	Markets or areas of distribution	Location of headquarters Year founded locally	Top local executive
1 (1)	**Producers Dairy Foods, Inc.** 250 E. Belmont Ave. Fresno, CA93701	producersdairy.com 559-264-6583	524	WND	Dairy, juice and water	WND	Fresno 1932	Richard A. Shehadey, chairman , Scott W. Shehadey, CEO
2 (2)	**Wawona Frozen Foods** 100 W. Alluvial Ave. Clovis, CA93611	wawona.com 559-299-2901	320	WND	Peaches, strawberries, blueberries, pears, plums, mangos	US and Canada	Clovis 1963	Blake E. Smittcamp, executive vice president, Bill S. Smittcamp, president & CEO
3 (3)	**Sun-Maid Growers of California** 6795 N. Palm Ave., 2nd Floor Fresno, CA93711	sunmaid.com 559-896-8000	220	WND	Raisins and other dried fruit	Global	Fresno 1912	Steve Loftus, president
4 (4)	**The Brownie Baker, Inc.** 4870 W. Jacquelyn Ave. Fresno, CA93722	browniebaker.com 559-277-7070	150	WND 70,000	Baked goods	Nationwide	Fresno 1979	Teri Recchio, director of human resources, Glenn Jones, VP of sales, Mike Collins, VP of operations, Chad Troop, CFO, Ryan Perkins, VP of marketing, Jackie Perkins Ireland, VP of administration, Dennis Perkins, president and CEO
5 (6)	**La Tapatia Tortilleria, Inc.** 104 E. Belmont Ave. Fresno, CA93701	www.tortillas4u.com 559-441-1030	100	WND	Tortillas, tortilla chips, wraps	California; Beijing, China; Jakarta, Indonesia; South Korea;	Fresno 1969	Helen Hansen, President & CEO, Carla Monis, Chief Administrative Officer
6 (NR)	**Chooljian Brothers Packing Co.** 3192 S. Indianola Ave. Sanger, CA93657	chooljianbrothers.com 559-875-5501	50	WND 100,000	Raisins, dried fruits	Worldwide	Sanger 1947	Sandra Barr, Michael Chooljian
7 (NR)	**CenCal Foods** 1828 E. Hedges Fresno, CA93703	498-7115	48	WND 20,000	Chicken, Beef, Pork	California, Western USA	Fresno 2010	Bob Coyle, managing partner/owner
8 (NR)	**Rosa Brothers Milk Company** Tulare	WND	40	WND 22,000	Milk, Ice Cream	WND	Hanford, CA WND	WND
9 (8)	**Valley Lahvosh Baking Co., Inc.** 502 M St. Fresno, CA93721	valleylahvosh.com 559-485-2700	26	WND	Lahvosh cracker bread and peda bread	National	Fresno 1922	Agnes Saghatelian, president/owner
10 (9)	**Sunnyland Mills** 4469 E. Annadale Ave. Fresno, CA93725	sunnylandmills.com 559-233-4983	12	WND 16,000	100% Whole Grains (Organic and Traditional Bulgur Wheat)	U.S. Dominican Republic, Canada, Columbia	Fresno 1935	Steven C. Orlando, president

WND-Would Not Disclose. NR-Not Ranked. All data has been provided by representatives of the businesses listed and The Business Journal research. Not all sources surveyed responded to inquiries.

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Family Farmers | From 22

in agriculture would benefit both types of buyers — and the communities that depend on working land staying in production.

"I'd like to see commodity prices support more profitability so institutions can invest strategically, and family farms can continue or expand," he said. "That helps ensure farmland remains in production and communities thrive."

Pearson Realty photo | **Agricultural land values in the Central Valley continue to adjust as growers and investors respond to long-term profitability and changing regulatory pressures.**

Schuil Ag Realty photo | **The largest farmland deal of 2025 came through a deal brokered by Schuil Ag Real Estate.**

RANKED: The end of the mega farm sales?

By Gabriel Dillard

The Central San Joaquin Valley's agricultural real estate market in 2025 showed a marked departure from the previous year, when massive portfolio liquidations — most notably Prima Wawona's bankruptcy — flooded the market with distressed properties.

The list of Largest Agricultural Real Estate Transactions (see page 26-27) for 2025 shows a shift with less deal volume as bankruptcy sales tapered off.

Top 3 Deals - 2025:

- 1.$16.3 million - 728 acres, almonds/water shares, Lemoore (Schuil Ag)
- 2. $14.4 million - 1,886 acres, pistachios, Delano (AgriWealth)
- 3. $13.0 million - 788 acres, almonds/open land, Delano (AgriWealth)

Top 3 Deals - 2024:

- 1. $47.5 million - 1,463 acres, plums/peaches, Sanger (Pearson Realty)
- 2. $45.5 million - 1,056 acres, pistachios, Kern County (Schuil Ag)
- 3. $38.6 million - 1,102 acres, peaches/nectarines, Raisin City (Pearson Realty)

Prima Wawona's collapse weighed heavily on the 2024 list. Pearson Realty marketed nearly 14,000 acres from the bankrupt stone fruit company with a total list price of $370 million — what senior VP Dan Kevorkian called a "once in a lifetime" offering. Stone fruit properties appeared in 14 of the top 20 deals in 2024, many concentrated in Sanger and Raisin City where Prima Wawona operated.

By 2025, those large-scale liquidations had ended. The top transaction was $16.3 million compared to 2024's $47.5 million peak, and no deals exceeded $17 million. Stone fruit largely disappeared from the top tier.

Pistachios emerged as the dominant crop, appearing in six of the top 20 transactions. In 2024, only two pistachio deals made the list. Almonds remained present in both years, though 2025 prices were more modest.

Water became explicitly valuable. The top 2025 sale included water shares in its description — a direct response to SGMA regulations that have reshaped how properties are valued.

The 2025 market showed more deals in the $3-7 million range compared to 2024's concentration above $10 million. Transaction sizes normalized after the bankruptcy-driven surge, with buyers focusing on smaller, water-secured properties rather than large portfolio acquisitions.

Just missing the 2025 list dates was the sale of Mission Ranch in Southwest Fresno — 330 acres sold for about $14 million earlier this month, reported The Fresno Bee. The sale by the Assemi family marks its departure from almond and pistachio production.

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LARGEST AGRICULTURAL REAL ESTATE TRANSACTIONS

In the Central San Joaquin Valley-ranked by dollar amount of transaction between Jan. 1, 2025 and Dec. 31, 2025

	Selling/Leasing Office Address	Phone	Location	Amount of transaction Crop Description	Area	Date of transaction	Sale or lease	Agent(s)	Local Executive Name
1	**Schuil Ag Real Estate** 5020 W. Mineral King Ave. Visalia, California 93291	559-734-1700	W. Lacey Blvd., Lemoore, CA 93245	$16,276,000 Open Almonds/Water Shares	728 Acres	July 17, 2025	Sale	Rick Schuil, Dirk Schuil & Blake Grilione	Doug Phillips, president
2	**AgriWealth, Inc.** 6049 N. Palm Ave. Fresno, California 93704	559-286-5587	Highway 43 & Avenue 16, Delano, CA	$14,397,471 Pistachios	1,886 Acres	Dec. 18, 2025	Sale	Kyle Orth	Kyle Orth, CEO/president
3	**AgriWealth, Inc.** 6049 N. Palm Ave. Fresno, California 93704	559-286-5587	Highway 43 & Schuster Rd., Delano, CA	$13,000,000 Almonds & Open Land	788 Acres	Sept. 4, 2025	Sale	Kyle Orth	Kyle Orth, CEO/president
4	**Schuil Ag Real Estate** 5020 W. Mineral King Ave. Visalia, California 93291	559-734-1700	Avenue 160, Tulare, CA 93274	$11,800,000 Pistachios	412 Acres	Dec. 9, 2025	Sale	Jonathan Verhoeven, Marc Schuil & Scott Schuil	Doug Phillips, president
5	**Schuil Ag Real Estate** 5020 W. Mineral King Ave. Visalia, California 93291	559-734-1700	5th Avenue, Hanford, CA 93230	$10,396,508 Farmland	395 Acres	June 26, 2025	Sale	Blake Grilione and Ryan Boertje	Doug Phillips, president
6	**Schuil Ag Real Estate** 5020 W. Mineral King Ave. Visalia, California 93291	559-734-1700	Road 9, Firebaugh, CA	$9,672,000 Pistachios	806 Acres	April 2, 2025	Sale	Rick Schuil Schuil & Dirk Schuil	Doug Phillips, president
7	**Schuil Ag Real Estate** 5020 W. Mineral King Ave. Visalia, California 93291	559-734-1700	Avenue 216, Tulare, CA 93274	$9,457,200 Farmland	420 Acres	Oct. 3, 2025	Sale	Phil Heynen	Doug Phillips, president
8	**Pearson Realty** 7480 N. Palm Ave., Ste. 101 Fresno, California 93711	559-432-6200	N & S side of Nees Ave, Firebaugh, CA	$8,400,000 Open Land	699 Acres	Oct. 25, 2025	Sale	Dan Kevorkian, Sullivan Grosz, A.J. Ferdinandi	Peter Orlando, CEO/President
9	**Schuil Ag Real Estate** 5020 W. Mineral King Ave. Visalia, California 93291	559-734-1700	Hwy 43, Allensworth, CA	$8,281,000 Pistachios & Open Land	637 Acres	Nov. 25, 2025	Sale	Rick Schuil & Dirk Schuil	Doug Phillips, president
10	**Schuil Ag Real Estate** 5020 W. Mineral King Ave. Visalia, California 93291	559-734-1700	Avenue 24, Allensworth, CA	$8,049,440 Pistachios	1,006 Acres	Sept. 25, 2025	Sale	Rick Schuil, Dirk Schuil	Doug Phillips, president
11	**Pearson Realty** 7480 N. Palm Ave., Ste. 101 Fresno, California 93711	559-432-6200	American Avenue, Kerman, CA	$7,539,360 Almonds	628 Acres	Nov. 25, 2025	Sale	Sullivan Grosz, A.J. Ferdinandi & Ryan O'Rourke	Peter Orlando, CEO/President
12	**AgriWealth, Inc.** 6049 N. Palm Ave. Fresno, California 93704	559-286-5587	Avenue 14 & Road 19, Madera, CA	$6,801,955 Almonds	316 Acres	May 29, 2025	Sale	Kyle Orth	Kyle Orth, CEO/president
13	**Lindemann Properties Inc.** 3734 W. Spruce Ave Fresno, California 93711	559-479-1658	Douglas Avenue & Highway 33, Firebaugh, CA	$6,708,000 Almonds and Pistachios	246 Acres	Dec. 30, 2025	Sale	Tom Lindemann	Tom Lindemann broker/owner
14	**Pearson Realty** 7480 N. Palm Ave., Ste. 101 Fresno, California 93711	559-432-6200	NWC Hwy 180 & Del Rey Ave., Sanger, CA	$6,100,000 Navels, Mandarins	140 Acres	April 25, 2025	Sale	Dan Kevorkian, Sullivan Grosz, A.J. Ferdinandi & Martin Hovsepian	Peter Orlando, CEO/President
15	**Pearson Realty** 7480 N. Palm Ave., Ste. 101 Fresno, California 93711	559-432-6200	Lincoln Ave. S of Kerman, Fresno Co.	$5,367,200 Almonds	406 Acres	Oct. 25, 2025	Sale	Dan Kevorkian, Sullivan Grosz, A.J. Ferdinandi	Peter Orlando, CEO/President
16	**Pearson Realty** 7480 N. Palm Ave., Ste. 101 Fresno, California 93711	559-432-6200	SEC Ave 152 & Rd 216, Porterville, Tulare Co.	$5,350,000 Mandarins	197 Acres	Dec. 30, 2025	Sale	Sullivan Grosz, A.J. Ferdinandi & Justin Lawson	Peter Orlando, CEO/President
17	**Pearson Realty** 7480 N. Palm Ave., Ste. 101 Fresno, California 93711	559-432-6200	North of Helm, CA	$5,275,980 Almonds & Open Land	586 Acres	July 25, 2025	Sale	Sullivan Grosz, A.J. Ferdinandi & Ryan O'Rourke	Peter Orlando, CEO/President
18	**Pearson Realty** 7480 N. Palm Ave., Ste. 101 Fresno, California 93711	559-432-6200	S. of Woodlake, CA	$4,800,000 Citrus and home	119 Acres	July 25, 2025	Sale	Seth Tillery	Peter Orlando, CEO/President
19	**Pearson Realty** 7480 N. Palm Ave., Ste. 101 Fresno, California 93711	559-432-6200	Highland Avenue, Setma, CA	$4,500,000 Cold storage facility	7 Acres	Dec. 10, 2025	Sale	Dan Kevorkian, Sullivan Grosz & A.J. Ferdinandi	Peter Orlando, CEO/President
20	**AgriWealth, Inc.** 6049 N. Palm Ave. Fresno, California 93704	559-286-5587	Highway 198 & 27th Avenue	$4,250,000 Pistachios	892 Acres	Dec. 29, 2025	Sale	Kyle Orth, Robbie Stites	Kyle Orth, CEO/president

WND-Would Not Disclose. NR-Not Ranked. All data has been provided by representatives of the businesses listed and The Business Journal Research. Not all sources surveyed responded to inquiries.

[1] Area units are rounded to the nearest whole number

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LARGEST AGRICULTURAL REAL ESTATE TRANSACTIONS

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	Selling/Leasing Office Address	Phone	Location	Amount of transaction Crop Description	Area	Date of transaction	Sale or lease	Agent(s)	Local Executive Name
21	**AgriWealth, Inc.** 6049 N. Palm Ave. Fresno, California 93704	559-286-5587	6200 S. Clovis Ave, Fowler, CA	$4,250,000 Open Land	28 Acres	Nov. 13, 2025	Sale	Roger Parvanian	Kyle Orth, CEO/president
21	**Pearson Realty** 7480 N. Palm Ave., Ste. 101 Fresno, California 93711	559-432-6200	S. side of Lincoln Avenue, Fresno Co.	$4,250,000 Row Crops-Transitional Land	28 Acres	Nov. 19, 2025	Sale	Craig Larson	Peter Orlando, CEO/President
23	**Pearson Realty** 7480 N. Palm Ave., Ste. 101 Fresno, California 93711	559-432-6200	SEC Ave 24 & Rd 92, Dinuba, CA, Tulare Co.	$4,200,000 Almonds	146 Acres	Sept. 15, 2025	Sale	Robb Stewart & Kameron Stewart	Peter Orlando, CEO/President
24	**Pearson Realty** 7480 N. Palm Ave., Ste. 101 Fresno, California 93711	559-432-6200	Ave. 26, N of Madera, CA	$4,078,000 Figs	313 Acres	May 7, 2025	Sale	Dan Kevorkian, Sullivan Grosz, A.J. Ferdinandi	Peter Orlando, CEO/President
25	**Pearson Realty** 7480 N. Palm Ave., Ste. 101 Fresno, California 93711	559-432-6200	Robertson Btvd., S. of Chowchilla, Madera Co'	$3,962,000 Almonds	198 Acres	Oct. 1, 2025	Sale	Stanley Kjar, Jr. & A.J. Ferdinandi	Peter Orlando, CEO/President
26	**Pearson Realty** 7480 N. Palm Ave., Ste. 101 Fresno, California 93711	559-432-6200	S & E of Alpaugh, CA, Tulare Co.	$3,700,000 Open land	1,991 Acres	Sept. 29, 2025	Sale	Dan Kevorkian, Sullivan Grosz & A.J. Ferdinandi	Peter Orlando, CEO/President
27	**AgriWealth, Inc.** 6049 N. Palm Ave. Fresno, California 93704	559-286-5587	6347 S. Clovis Ave., Fowler, CA	$3,526,000 Almonds	18 Acres	Feb. 17, 2025	Sale	Roger Parvanian	Kyle Orth, CEO/president
28	**Pearson Realty** 7480 N. Palm Ave., Ste. 101 Fresno, California 93711	559-432-6200	Rd. 14 1/2,Chowchilla, CA, Madera Co.	$3,500,000 Almonds and home	154 Acres	Aug. 6, 2025	Sale	Dan Kevorkian, Sullivan Grosz & A.J. Ferdinandi	Peter Orlando, CEO/President
29	**Pearson Realty** 7480 N. Palm Ave., Ste. 101 Fresno, California 93711	559-432-6200	Mountain View & S Chateau Aves, Fresno	$3,459,960 Almonds	165 Acres	Feb. 11, 2025	Sale	Dan Kevorkian & Stanley Kjar, Jr.	Peter Orlando, CEO/President
30	**Pearson Realty** 7480 N. Palm Ave., Ste. 101 Fresno, California 93711	559-432-6200	Ave.416, W of Orosi, Tulare Co.	$3,433,600 Treefruit	170 Acres	March 28, 2025	Sale	Dan Kevorkian, Sullivan Grosz, A.J. Ferdinandi & Martin Hovsepian	Peter Orlando, CEO/President
31	**Pearson Realty** 7480 N. Palm Ave., Ste. 101 Fresno, California 93711	559-432-6200	NEC Rd 208 & Ave 136, SW of Porterville, Tulare Co.	$3,400,000 Almonds & open land	172 Acres	Feb. 5, 2025	Sale	Matt McEwen & Jonathan Motl	Peter Orlando, CEO/President
32	**Pearson Realty** 7480 N. Palm Ave., Ste. 101 Fresno, California 93711	559-432-6200	N. Chateau Fresno Ave., Fresno	$3,224,250 Open land	72 Acres	Nov. 3, 2025	Sale	Dan Kevorkian, Sullivan Grosz & A.J. Ferdinandi	Peter Orlando, CEO/President
33	**Pearson Realty** 7480 N. Palm Ave., Ste. 101 Fresno, California 93711	559-432-6200	NWC Ave. 19 & Rd 18, Madera Co.	$3,000,000 Almonds	152 Acres	April 28, 2025	Sale	Dan Kevorkian, Sullivan Grosz, A.J. Ferdinandi & Cole Petersen	Peter Orlando, CEO/President
34	**Pearson Realty** 7480 N. Palm Ave., Ste. 101 Fresno, California 93711	559-432-6200	Rd.5 1/2, Firebaugh, CA	$3,000,000 Almonds	150 Acres	Feb. 10, 2025	Sale	Dan Kevorkian, Sullivan Grosz & A.J. Ferdinandi	Peter Orlando, CEO/President
35	**Pearson Realty** 7480 N. Palm Ave., Ste. 101 Fresno, California 93711	559-432-6200	W. of Rd. 80, SW of Dinuba	$2,965,200 Peaches, nectarines	85 Acres	March 18, 2025	Sale	Dan Kevorkian, Sullivan Grosz, A.J. Ferdinandi & Melvin Lubisich	Peter Orlando, CEO/President
36	**Pearson Realty** 7480 N. Palm Ave., Ste. 101 Fresno, California 93711	559-432-6200	N. of Central Ave., W. of I-45, Tulare Co.	$2,837,040 Treefruit	236 Acres	Jan. 22, 2025	Sale	Dan Kevorkian, Sullivan Grosz & A.J. Ferdinandi	Peter Orlando, CEO/President
37	**Pearson Realty** 7480 N. Palm Ave., Ste. 101 Fresno, California 93711	559-432-6200	NWC Ave. 208 & Rd. 204, SW of Lindsay, Tulare Co.	$2,718,600 Navels	79 Acres	Dec. 8, 2025	Sale	Matt McEwen & Jonathan Motl	Peter Orlando, CEO/President
38	**Pearson Realty** 7480 N. Palm Ave., Ste. 101 Fresno, California 93711	559-432-6200	N. of Navetencia, CA	$2,700,000 Citrus	160 Acres	Nov. 4, 2025	Sale	Justin Lawson	Peter Orlando, CEO/President
38	**Pearson Realty** 7480 N. Palm Ave., Ste. 101 Fresno, California 93711	559-432-6200	S. Marks Ave., Caruthers, CA	$2,700,000 Almonds	160 Acres	July 22, 2025	Sale	Robert Nielsen & Ryan O'Rourke	Peter Orlando, CEO/President
40	**Pearson Realty** 7480 N. Palm Ave., Ste. 101 Fresno, California 93711	559-432-6200	E. side of Rd. 196, W. of Woodlake, CA, Tulare Co.	$2,583,800 Citrus	134 Acres	April 2, 2025	Sale	Matt McEwen & Jonathan Motl	Peter Orlando, CEO/President

WND-Would Not Disclose. NR-Not Ranked. All data has been provided by representatives of the businesses listed and The Business Journal Research. Not all sources surveyed responded to inquiries.

[1] Area units are rounded to the nearest whole number

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CVJC photo | The Del Monte Foods processing plant in Modesto's Beard Industrial District, which is closing as part of the company's bankruptcy. The plant employed 1,800 workers and was a cornerstone of the region's food processing industry for decades.

Central Valley loses more than 20,000 food-production jobs this century – including Del Monte

Agencies still brag about the region's food manufacturing legacy. But the trend away from canned food is real.

By GARTH STAPLEY | Modesto Focus / Central Valley Journalism Collaborative

When summer heats up in Modesto, so do its famed food processing plants. During canning season, the four largest, including Del Monte, generate the same amount of sewage as a city of 1 million — between four and five times Modesto's actual population.

Government and nonprofit entities brag about Modesto's rightly deserved place atop the food and beverage ecosystem, offering canneries as proof.

But the food-packing season won't be quite the same this year. Del Monte Foods — long a cornerstone of Modesto's food processing legacy — is calling it quits. Its venerable plant, in the Beard Industrial District, is closing and will lay off 1,800 workers making from $20 to $40 an hour as part of the 140-year-old company's bankruptcy, Del Monte said in an announcement.

In a recent CapRadio interview, Vito Chiesa called the closure "a tough gut punch." He's chairman of the Stanislaus County Board of Supervisors, but on a personal level, his family farm went through a bankruptcy with another cannery, Tri Valley Growers — costing the Central Valley some 11,000 jobs in 2000.

Between those devastating failures came numerous others in the food-processing industry with a combined loss this century of more than 20,000 jobs, a Modesto Focus analysis shows.

"I feel bad for the people who worked at Del Monte forever," said Maryn Pitt, policy director of the Manufacturers Council of the Central Valley. But she and other experts say that despite periodic bad news, food production remains an important anchor to the area economy.

Among the heavy hitters are the E & J Gallo Winery, Crystal Creamery, SunOpta and Stanislaus Food Products.

Consumers prefer fresh food these days, not canned

Del Monte's demise serves as a warning to other fruit and vegetable packers, said Gökçe Soydemir, a business economics professor with Stanislaus State University. Some "miscalculated," he said, with investments in canned food production as people ate more shelf-stable food during COVID-19's stay-home stretches, a short-lived trend.

"Specific to Del Monte, we've seen a shift in consumer patterns" over time, he said, from canned to fresh food.

Pitt said, "Think how little space canned food takes up in the grocery store" now compared to years ago, when grocers carried mostly staples. Catering to demand, many now offer sushi platters, rotisserie chicken and

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more prepared food, she said.

Bill O'Brien, a co-owner of O'Brien's grocery stores in Modesto, recalls a time when frozen juices filled two freezer compartments. Now his stores carry about a half-dozen frozen-juice items — and lots more fresh juices.

"Trends are always going to evolve," O'Brien said. "But," he added, "ag is still king" in these parts.

Stanislaus and Modesto fruit farmers left out in the cold

Growers contracting to deliver fruit to Del Monte are feeling the sting, wrote Caleb Hampton, Ag Alert editor. The Modesto plant processed more than 40% of Valley-grown pears, he wrote, and a significant portion of peaches and apricots as well.

Most of the rest goes to Lodi's Pacific Coast Producers, which acquired some of Del Monte's assets in New Jersey bankruptcy proceedings that started in July with hopes that another company would step in and keep open the Modesto plant. None did, and the bankruptcy was finalized Jan. 29, leaving area growers in the cold.

It can take 10 years for a peach farmer, for instance, to recover the investment of planting a peach orchard, Hampton wrote, saying, "Del Monte's exit from the sector means many growers may never make their money back."

Also out of luck are companies in related sectors, supplying cans, packing cartons, boxes and such. One in eight local jobs is "directly tied to agriculture or related food manufacturing, placing our county at some risk unless we continue to diversify," warns the Stanislaus County Comprehensive Economic Development Strategy.

Others hurt by the Del Monte collapse could include, believe it or not, Modesto City Hall, and by extension, its taxpayers.

City officials will be forced to adjust to less wastewater revenue with Del Monte leaving, utilities director Will Wong told The Modesto Focus. The city relies on that revenue to make payments of $4 million to $5 million a year on a $144 million upgrade to its sewer system, approved in September.

Del Monte's sewage bill was about $861,000 a year, the city said in documents used to attract investors in a $60 million bond for the sewer upgrade.

A couple of decades ago, the city installed a huge sewer pipe carrying just wastewater from Gallo, Stanislaus Foods, Frito-Lay and Del Monte. It's poured onto farmland instead of being treated with other municipal sewage.

Del Monte's departure frees up some wastewater capacity for other businesses, Wong said. But "it remains to be seen if someone else will come," he added. "It's a waiting game to see what true impacts this will have to our city."

Help available with job searching – and upgrading worker skills

Opportunity Stanislaus will aggressively market the Del Monte property, CEO Dave White said. "We'll market it like crazy, trying to find a company that's growing and wants to be in this market," he told The Modesto Focus. "We'll scour the data bases to see who's growing and thriving, and will work with their real estate broker."

His organization hosted a job fair in Oakdale a couple of weeks ago that attracted anxious Del Monte workers, White said.

They're encouraged to seek opportunities with Stanislaus County Workforce Development. Its board chairman, O'Brien, said, "There are programs and monies available for exactly what's happening" with Del Monte.

Workers who know how to operate a palletizer – an item-stacking machine – might get lucky with an area logistics company, said Pitt. Human resources and accounting skills also could transfer to another sector, she said.

Soydemir, the Stanislaus State professor, recommends that anyone in a low-wage job seriously consider upgrading their skills. People who work in stores and hotels are particularly vulnerable, according to his twice-yearly publication, the San Joaquin Valley Business Forecast.

His advice: "Go out there and get a skill. Invest in your future."

Garth Stapley is the accountability reporter for The Modesto Focus, a project of the nonprofit Central Valley Journalism Collaborative. Contact: garth@cvlocaljournalism.org

Del Monte image | **A can of Del Monte sliced peaches — a product that defined Central Valley food processing for generations. The company's decision to close its Modesto cannery in 2026 marks the end of an era, eliminating hundreds of jobs and signaling a**

Del Monte's retreat happened here too

By Gabriel Dillard

The closure of Del Monte's Modesto cannery, announced this month with the loss of 1,800 jobs, marks the end of a consolidation strategy that began over a decade ago — and began in Kingsburg.

In May 2012, Del Monte shuttered its Kingsburg facility, eliminating 70 full-time positions and approximately 1,100 seasonal jobs. Company officials shifted peach processing operations north to Modesto. Now, 14 years later, that Modesto plant has seen its last summer canning season.

Del Monte's predecessor, California Packing Corp., grew to operate more than 60 canneries across the West by the early 20th century, becoming a vertically integrated giant in the food system.

At its peak in the 1940s, Del Monte's San Jose plant operated around the clock during summer, while its Emeryville facility was the largest cannery in California in the early 1920s. Until the 1960s, Santa Clara Valley was the world's largest fruit production region, with 39 canneries.

Del Monte would go on to close its Bay Area plants and move inland. Facilities in San Jose, Oakland, Emeryville, and San Leandro eventually shuttered.

The Kingsburg plant was believed to be in operation for more than 90 years before its closure. Mayor Bruce Blayney told the Hanford Sentinel newspaper it was "a major blow to the local economy." Economic development coordinator Jolene Polyack said the community was "literally heartbroken." The ripple effects extended beyond the cannery itself. Silgan Containers, which manufactured cans on-site, laid off 60 employees when Del Monte left.

Del Monte would go on to file for bankruptcy in July 2025 under $1.2 billion in debt and declining consumer demand for canned goods. The rising cost of steel due to tariffs was also a factor.

No buyer emerged for the Modesto facility during asset auctions, prompting the closure announcement.

The move ends Del Monte's more than 100-year history as a processor of California-grown fruits and vegetables, leaving Central Valley peach and pear growers scrambling for alternative markets. Pacific Coast Producers in Lodi, the nearest remaining processor, cannot absorb the full volume under contract, according to published reports.

The former Del Monte plant in Kingsburg would go on to be purchased by Sacramento Container Co. in 2013, and corrugated box manufacturing operations continue there, employing about 200 people.

Central Valley's food processing edge dulls as 2,100 jobs disappear

From the Editor
Gabriel Dillard

In an excruciating span of just a few days, the Central Valley has been hit with announcements that will eliminate roughly 2,100 jobs tied to the agriculture and food processing this year.

Del Monte's Modesto cannery is set to close, reported The Modesto Bee, costing about 600 full-time jobs and another 1,200 seasonal positions. Mission Bell Winery in Madera is preparing to lay off more than 200 workers. JBT FoodTech, a manufacturer of equipment used by the food processing industry, is winding down its Madera operation with layoffs ahead of a planned closure in 2026.

Taken individually, each of these decisions has its own explanation. Del Monte is in bankruptcy and the canned fruit business has been shrinking for years. Mission Bell is closing after losing a major distribution contract. JBT FoodTech appears to be shifting production to Florida and Brazil. But taken together — and viewed in historical context — they point to a longer-term shift in how and where the Valley fits into the food economy.

This is not about agriculture going away. The Valley will continue to grow enormous volumes of food. What seems to be changing is how much of the processing, manufacturing and value-added work happens here.

Canned fruit has been losing shelf space to fresh and frozen for decades. Labor-intensive, hand-harvested crops like peaches have become harder to pencil out. The Del Monte closure in Modesto is not only a clear example of a long trend — it's also an echo of the past. Del Monte closed its Kingsburg cannery in 2012, shedding over 1,000 jobs and consolidated operations into — you guessed it — Modesto. Now that plant, too, is gone.

Mission Bell's situation reflects a different reality of modern food and beverage businesses: local facilities are often only as secure as their place in a much larger corporate supply chain. Losing a single major contract such as Gallo can determine the fate of a plant, regardless of its history or workforce.

Not to mention, the wine industry is in a correction period as alcohol consumption trends shift, though some see "green shoots" of recovery for a wine industry in decline.

JBT FoodTech is a different kind of signal. This is not a grower or a processor, but a company that builds the machinery used by food processors. If production is indeed shifting to Florida and Brazil, it suggests that future investment is being directed to places seen as more competitive or better positioned for manufacturing growth.

That inevitably raises a sensitive but unavoidable question: how much does California's business climate factor into these decisions? Costs, regulations, energy prices, permitting timelines and overall complexity all play a role in where companies choose to invest. It would be simplistic to blame any one factor, but it's also unrealistic to think it plays no role at all — especially when companies are openly moving production to other states or countries.

What emerges from all of this is a quieter but important shift: the Central Valley is at risk of becoming more of a production-and-shipping region and less of a processing-and-manufacturing region.

That distinction matters. Processing and manufacturing are where higher-wage, skilled jobs tend to concentrate — mechanics, technicians, engineers, supervisors and managers. When those layers thin out, the economic ecosystem becomes less diverse and less resilient.

None of this means the Valley's agricultural economy is in crisis. But it does suggest it is changing in structure. And over time, that structure will determine whether the region captures the full economic value of what it grows — or whether more of that value is created somewhere else.

Gabriel Dillard is managing editor of The Business Journal, and will celebrate his 20th anniversary with The Business Journal in April.

Photo via Netafim | **Drip irrigation lines run between rows of onions in a Central Valley field. Precision water delivery systems have become increasingly essential as growers face tightening groundwater restrictions under the Sustainable Groundwater Management Act.**

USDA bets $700M on regenerative farming — and Netafim says it's ready

By Ben Hensley

For Fresno-based Netafim, one of the world's largest irrigation companies, a newly launched federal pilot program formalizes what the company has been doing for years — and opens a funding channel it calls "pretty unique" in the agricultural sector.

In December, the U.S. Department of Agriculture unveiled a $700 million Regenerative Pilot Program designed to help farmers adopt practices that improve soil health, reduce erosion and boost long-term productivity. Administered by the USDA's Natural Resources Conservation Service, the program dedicates $400 million through the Environmental Quality Incentives Program and $300 million through the Conservation Stewardship Program for fiscal year 2026.

A key feature of the program — and one that caught Netafim's attention — is its explicit invitation for private companies to co-invest alongside federal funding.

"What's real unique about this pilot program is that USDA and NRCS are welcoming private-party money to offset costs," said Dominic Rossini, who oversees agronomy on the West Coast for Netafim. "That's pretty unique in the regenerative agriculture sector."

For Netafim, the program represents a potential boost in demand. Farmers who receive federal support to transition to regenerative practices will need the kind of precision irrigation infrastructure the company said it can provide. Companies interested in partnering with NRCS can contact the agency at regenerative@usda.gov.

The regenerative connection

Netafim specializes in drip and micro-irrigation systems that deliver water and nutrients directly to plant root zones — a method the company says addresses the same resource concerns that regenerative agriculture is built around.

"What's interesting about regenerative agriculture is if you look at the premise of it, it's soil health — minimizing water use, utilizing fertilizer less," Rossini said. "It basically comes back to utilizing some sort of micro irrigation."

Unlike flood or high-volume sprinkler irrigation — both of which Rossini acknowledged are sometimes necessary for water table recharge — micro-irrigation keeps water and nutrients from moving beyond the root zone, reducing runoff, limiting erosion and protecting groundwater quality.

"You don't eat your whole week's worth of food in one sitting," Rossini said. "A plant is still a living, breathing organism, so you want to make sure that you're feeding your plant the same way that you're feeding yourself."

Rossini said growers often underestimate how much soil management decisions made in the months between harvests affect the following year's crop.

"By growing a cover crop, you actually have a higher infiltration rate of rainwater than when it's just pure soil," he said. "People always talk about agriculture as a growing season, but you also need to make sure what's going on in the offseason."

Measurement and verification

As regenerative practices gain traction with regulators and buyers, Rossini said documentation is becoming central to adoption. Netafim

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has expanded its digital farming tools to integrate weather station data, soil sensors, flow meters and irrigation controls, giving growers the ability to remotely manage inputs and build a verifiable record of their practices.

"You can control your pumps, your irrigations, your fertilizers and then record all of that," Rossini said. "You can replicate what you did that gave you real benefits."

That data trail matters increasingly as growers report water use and inputs to state regulators and supply chain buyers, some of whom now require environmental documentation as a condition of doing business.

MAHA and the pilot program

The USDA pilot is an outgrowth of the Make Our Children Healthy Again Strategy, released in September 2025 by the Make America Healthy Again Commission — a federal body chaired by Health and Human Services Secretary Robert F. Kennedy Jr. The strategy outlines more than 120 initiatives across food policy, nutrition research and agricultural practice, framing soil health and regenerative farming as tools with direct public health implications.

"If we intend to Make America Healthy Again, we must begin by restoring the health of our soil," Kennedy said when the pilot program was announced in December 2025.

USDA Secretary Brooke L. Rollins said the program is designed to cut bureaucratic barriers that have historically slowed farmer participation in conservation programs, and to give both beginning and experienced growers a single application pathway to bundle multiple regenerative practices under one conservation framework.

"Protecting and improving the health of our soil is critical not only for the future viability of farmland, but to the future success of American farmers," Rollins said. "[This] announcement encourages these priorities while supporting farmers who choose to transition to regenerative agriculture."

Photo via Netafim | **Roma tomatoes ripen across a Central Valley field, fed by subsurface drip irrigation. Delivering water directly to the root zone reduces waste and runoff — a critical advantage as growers face mounting pressure to produce more with less.**

Making the economics work

For Rossini, the long-term success of any federal regenerative program will hinge on whether it makes financial sense at the farm level.

"Farmers love to farm," he said. "If they can make production better, easier and simpler on themselves, that's huge."

Farmers and ranchers interested in applying for the Regenerative Pilot Program can do so through their local NRCS Service Center ahead of their state's ranking dates for FY2026 funding consideration.

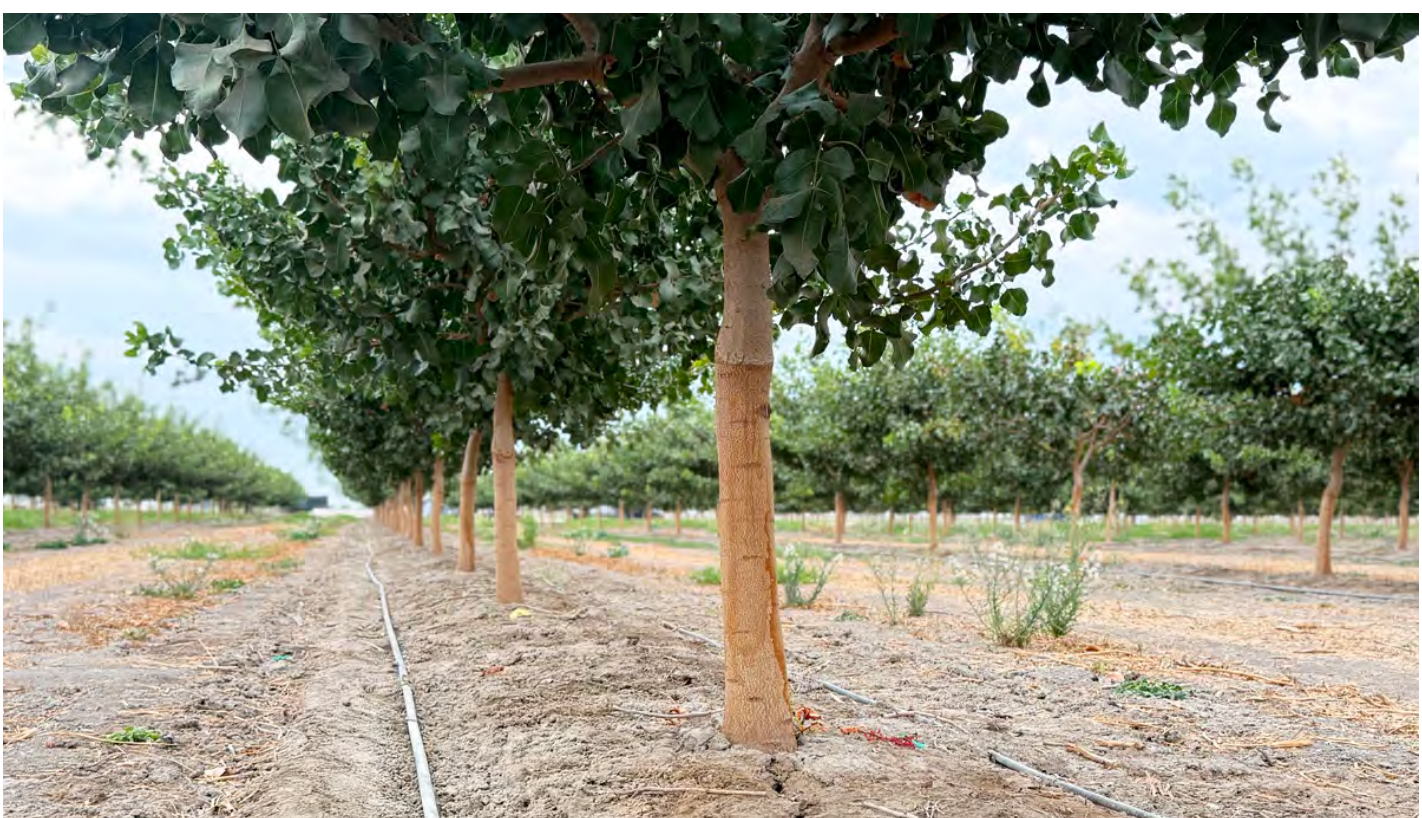

Photo via Netafim | **A pistachio orchard fed by drip irrigation in the San Joaquin Valley. Nut crops have steadily displaced more water-intensive row crops across the region as growers weigh long-term profitability against rising costs and shrinking water allocations.**

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