

Farm Water in San Diego County

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Water Challenges

Imported supply

- Price
- Supply
- Quality

Growers are tied to the urban supply

Price

- \$1000 per acre-foot is at hand
- Crop price sensitivity varies

Indoor decorative Least sensitive

Cut flowers

Nursery crops

Strawberries

Tomatoes

Avocados

Citrus



Most sensitive

Actions Driven by Price

- Citrus acreage taken out of production
 - Some conversion to nursery production
 - Idle or converted to residential
 - Substantial production only remains in the few groundwater areas
- Avocado growers looking year-to-year
 - No new investment
 - Meter turn-offs expected after 2010 harvest

Actions Driven by Price

- New wells
 - Cost and lack of certainty
- Reconsideration of wells abandoned because of quality
 - Cost of cleanup and brine disposal
- Search for alternative crops
 - No critical mass
 - Hilly terrain

Actions Driven by Price

- Under-watering
 - Leads to production drop
 - Soil salinity build-up
- Some investment in technology
- Acute awareness of irrigation practices and system efficiency

Supply

San Diego County growers, by choice, fall into one of three customer categories that dictates price and water use allocations

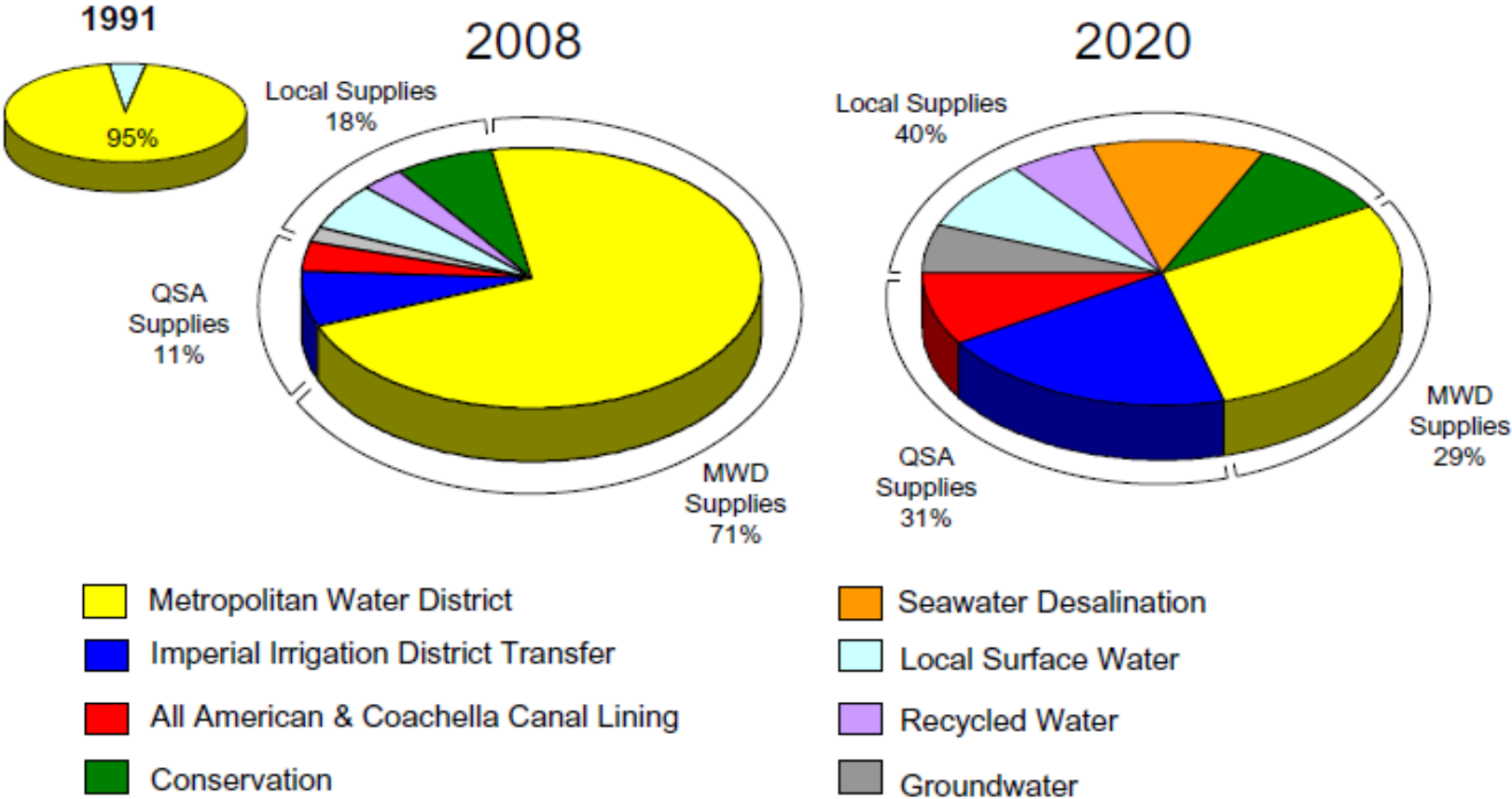
Metropolitan Water District

- Interim Agricultural Water program
 - 25% use reduction from base year for 2010
 - \$86 per acre-foot discount
 - Program ramping out over four years
- 2010/2011 allocation to be set in April
- One level change (M&I goes from 13.3% to 15%) would take IAWP to 34%

San Diego County Water Authority

- Special Agricultural Water Rate
 - 13.3% use reduction from base year – same as MWD M&I
 - \$109 per acre-foot discount
 - Program currently “transitional”
- Full price
 - 8% use reduction from base year – same as M&I within CWA

Diversifying San Diego County's Water Supply Portfolio



Water Quality

- Greater dependence on Colorado River sources
- Price of water affects ability to leach as a management practice for tree crops
- Leaching in container plants creates secondary problem of additional runoff management