



COUNTY OF MONTEREY  
COUNTYWIDE COMPREHENSIVE ECONOMIC  
DEVELOPMENT STRATEGY: **YEAR 3 UPDATE**

OCTOBER 7, 2025

PROJECT LEAD: Grow America

RESEARCH, ANALYSIS & PRODUCTION: CVL Economics



# PURPOSE

## WHAT IS A CEDS?

A Comprehensive Economic Development Strategy (CEDS) is a strategy-driven plan for regional economic development. It provides a vehicle for individuals, organizations, local governments, institutes of learning, and private industry to engage in a meaningful conversation and debate about what capacity building efforts would best serve development in the region.

## WHY PRODUCE A CEDS?

Regions must prepare a new CEDS at least every five years for communities and organizations within the region to qualify for U.S. Economic Development Administration (EDA) funding. In addition, other federal funding agencies give local jurisdictions extra scoring points if a proposed project is part of a coordinated regional planning process or document like the CEDS.

## WHO CONDUCTS THE CEDS?

Planning for the Monterey County CEDS is under the purview of the Board of Supervisors, and the County's Economic Development Department is responsible for conducting the research, staffing the Economic Development Committee, and overseeing ongoing implementation and reporting. Project consultants for this engagement are Grow America and CVL Economics.

## WHAT IS THE YEAR 3 UPDATE?

This report is the third annual update to the *County of Monterey's Countywide CEDS: 2021-2026*. The Year 1 Update focused on Monterey County's recovery from the Covid-19 pandemic with respect to numerous economic metrics and an emphasis on target sectors, and the Year 2 Update assessed the county's emerging technology ecosystem. This year's report dives deeper into the state of the county's Agriculture sector and examines how climate change is affecting the economic landscape.



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# ECONOMIC CONDITIONS

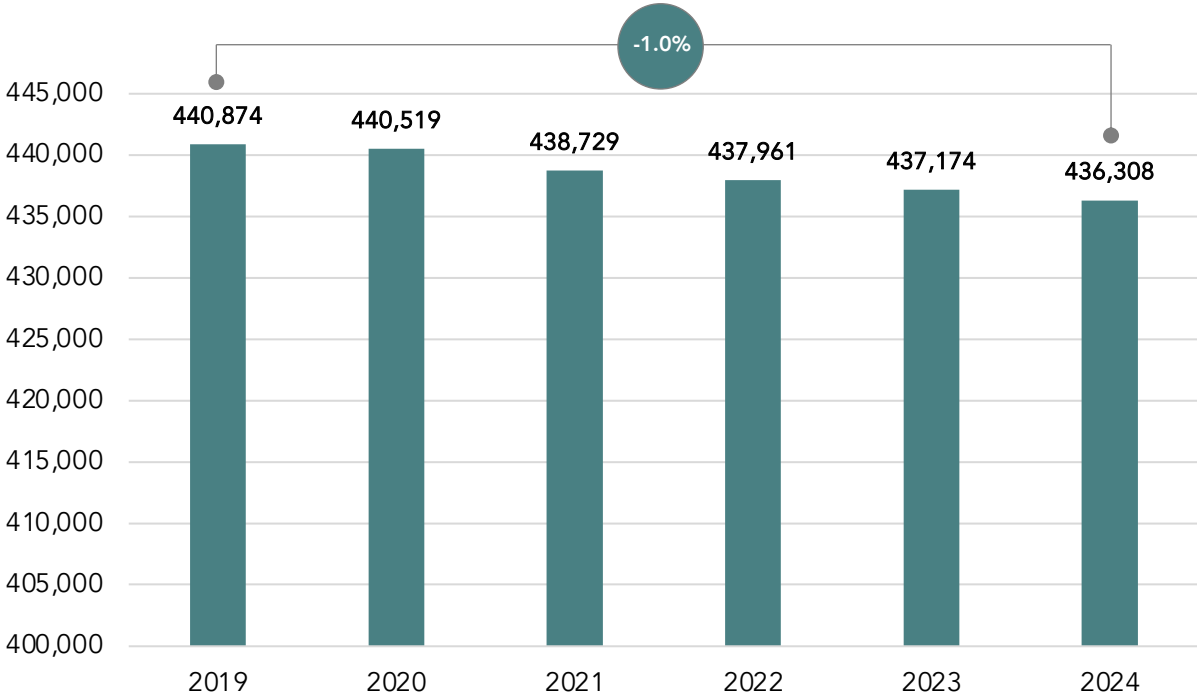
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# POPULATION CHANGE

## Change in Resident Population | 2019 to 2024

(a) Monterey County



(b) Select Cities

	TOTAL CHANGE	% CHANGE
Salinas	+29	0.0%
Seaside	-2,075	-6.4%
Monterey	-994	-3.5%
Soledad	-833	-3.0%
Marina	+505	+2.3%
King City	+935	+7.0%

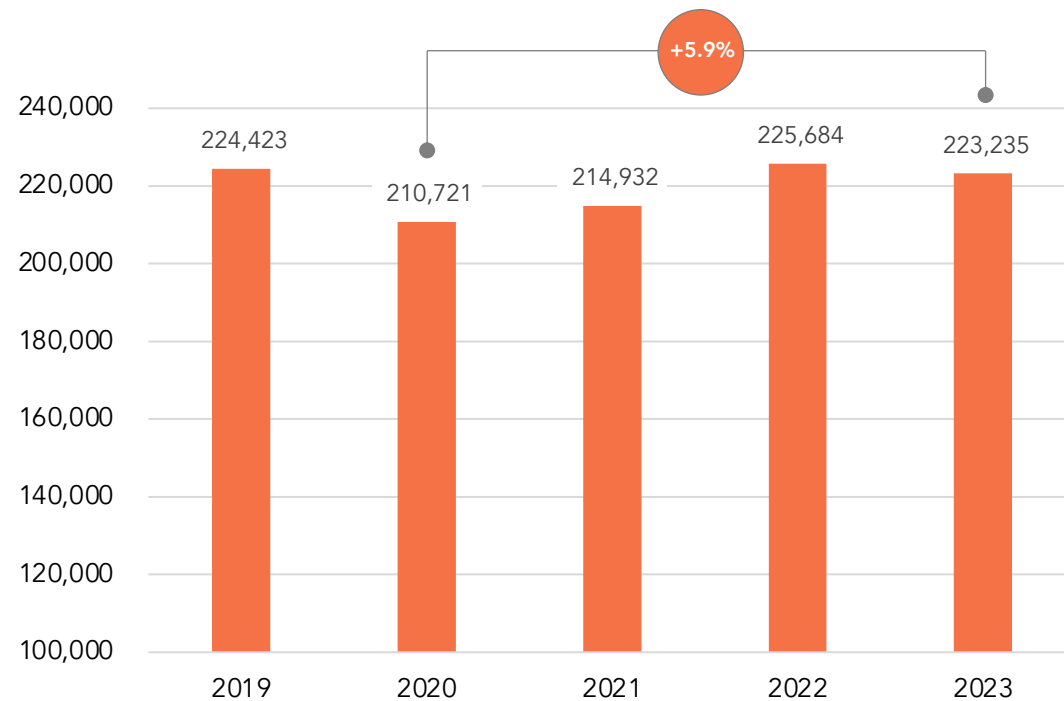
Source: California Department of Finance, CVL Economics.

# JOB GROWTH



## Change in Employment | 2019 to 2023

(a) Total Number of Jobs



(b) Top Sectors for Employment Growth

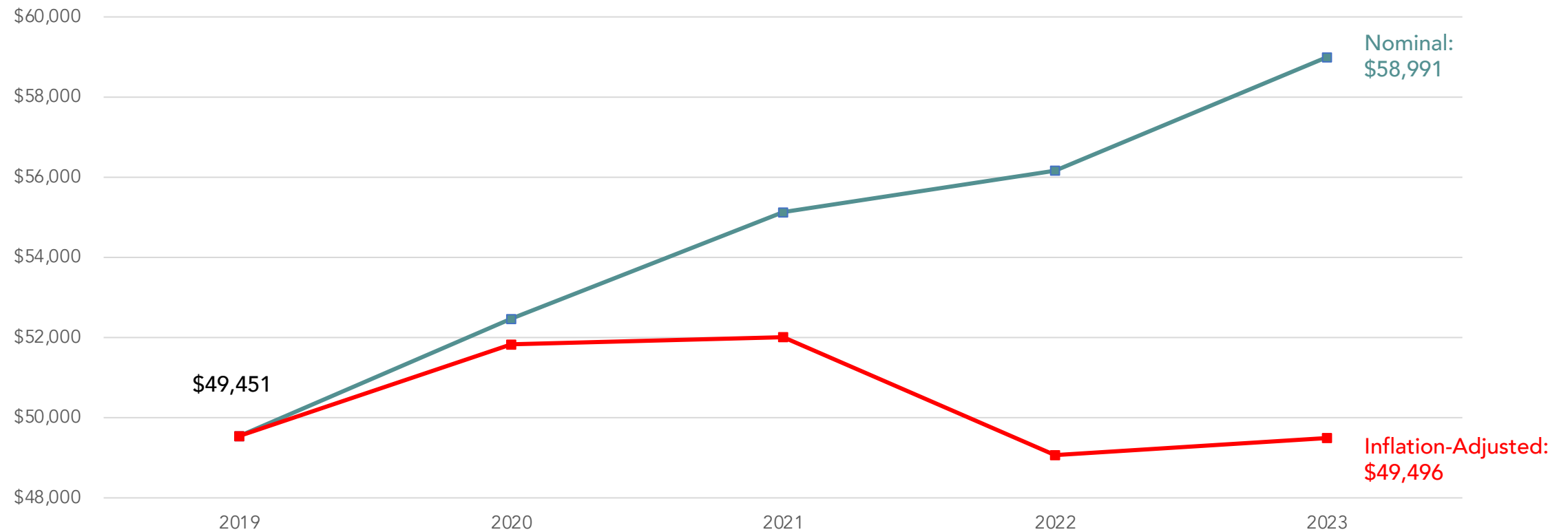
	5-YEAR CHANGE	5-YEAR % CHANGE
Health Care and Social Assistance	895	4.7%
Construction	554	6.5%
Government	428	1.1%
Educational Services	182	6.3%
Arts, Entertainment, and Recreation	74	2.1%
Management of Companies	30	2.0%

Source: U.S. Bureau of Labor Statistics, U.S. Census. Lightcast, CVL Economics.

# WAGE GROWTH



## Change in Average Annual Wages | 2019 to 2023

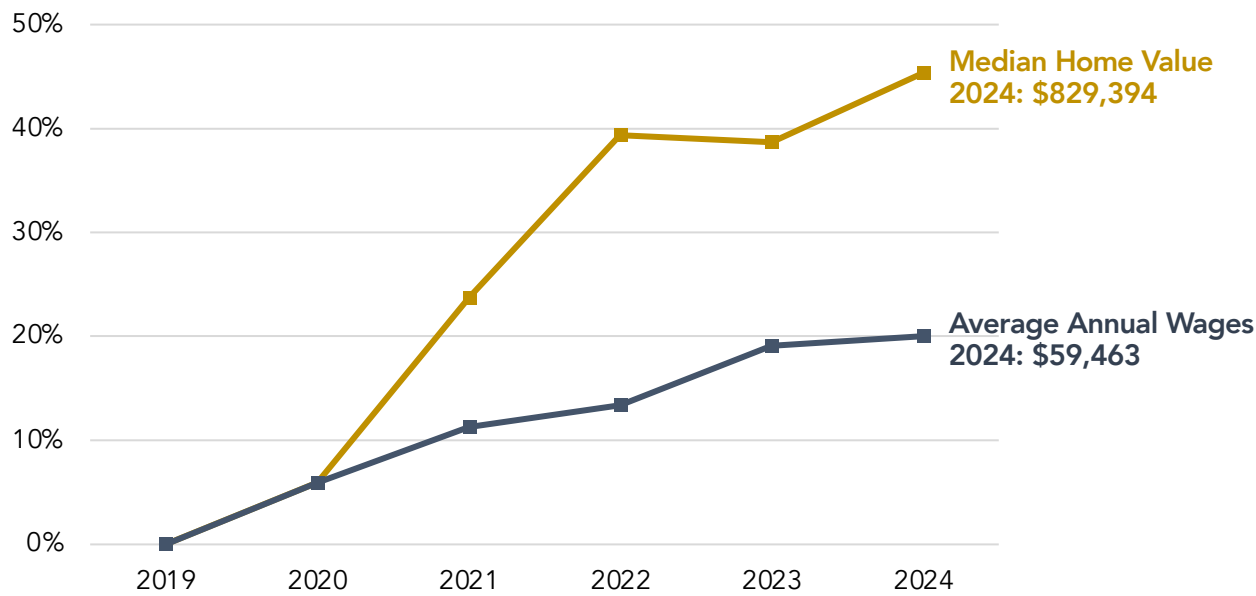


Source: U.S. Bureau of Labor Statistics, U.S. Census. Lightcast, CVL Economics.

# HOUSING MARKET

## Change in Home Values | 2019 to 2024

(a) Monterey County



(b) Select Cities

	2019	2024	% CHANGE
Salinas	\$493,133	\$726,786	47.4%
Seaside	\$412,087	\$679,615	64.9%
Monterey	\$323,745	\$517,662	59.9%
Soledad	\$216,632	\$315,898	45.8%
Marina	\$810,422	\$1,183,692	46.1%
King City	\$303,450	\$470,922	55.2%

Source: U.S. Bureau of Labor Statistics, U.S. Census, Zillow, CVL Economics.



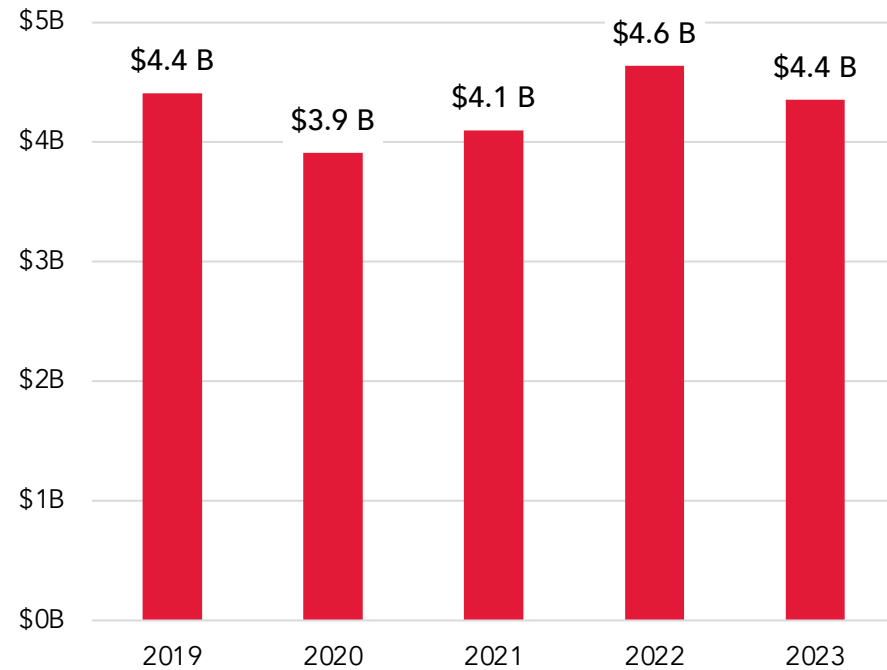
# THE AGRICULTURE SECTOR



# AGRICULTURE ECONOMIC CONTRIBUTION



## Gross Agricultural Production | 2019 to 2023



Source: County of Monterey Office of Agriculture Commissioner, CVL Economics.

## Economic and Fiscal Impact | 2023

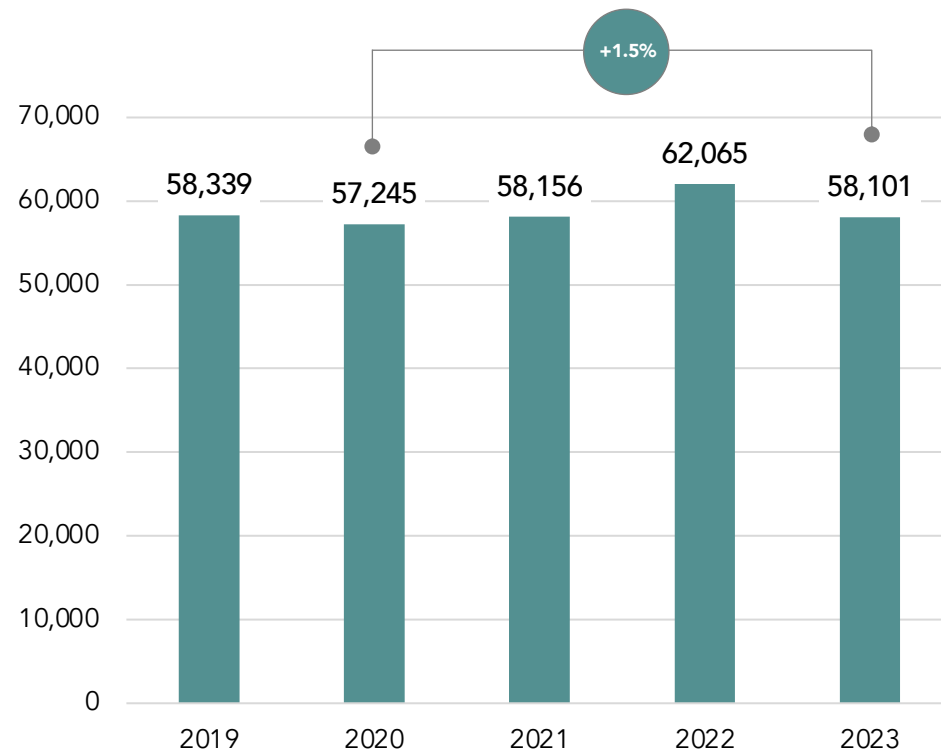
	NUMBER OF JOBS	LABOR INCOME	VALUE ADDED	TAX REVENUE
Direct	58,101	\$4.0 B	\$6.1 B	\$9.4 B
Indirect	16,601	\$1.1 B	\$1.4 B	\$1.9 B
Induced	13,651	\$931.5 M	\$1.6 B	\$2.5 B
<b>Total</b>	<b>88,353</b>	<b>\$6.0 B</b>	<b>\$9.1 B</b>	<b>\$13.8 B</b>

Source: MPLAN, CVL Economics.

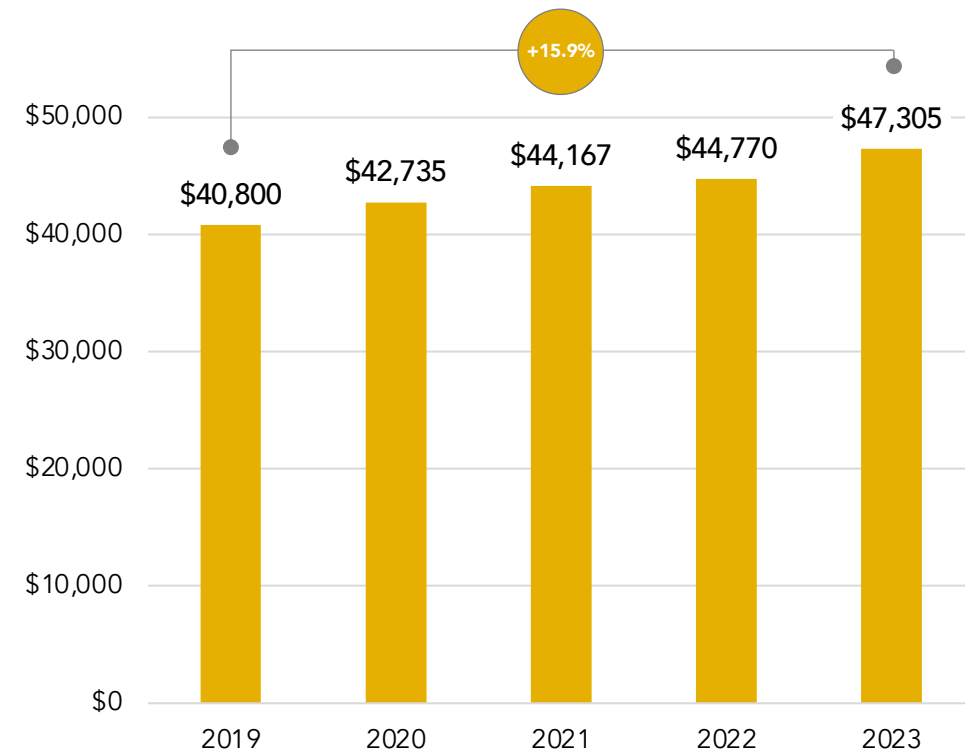
# AGRICULTURE EMPLOYMENT AND WAGES



## Job Growth in Monterey County 2019 to 2023



## Average Annual Wages in Monterey County 2019 to 2023

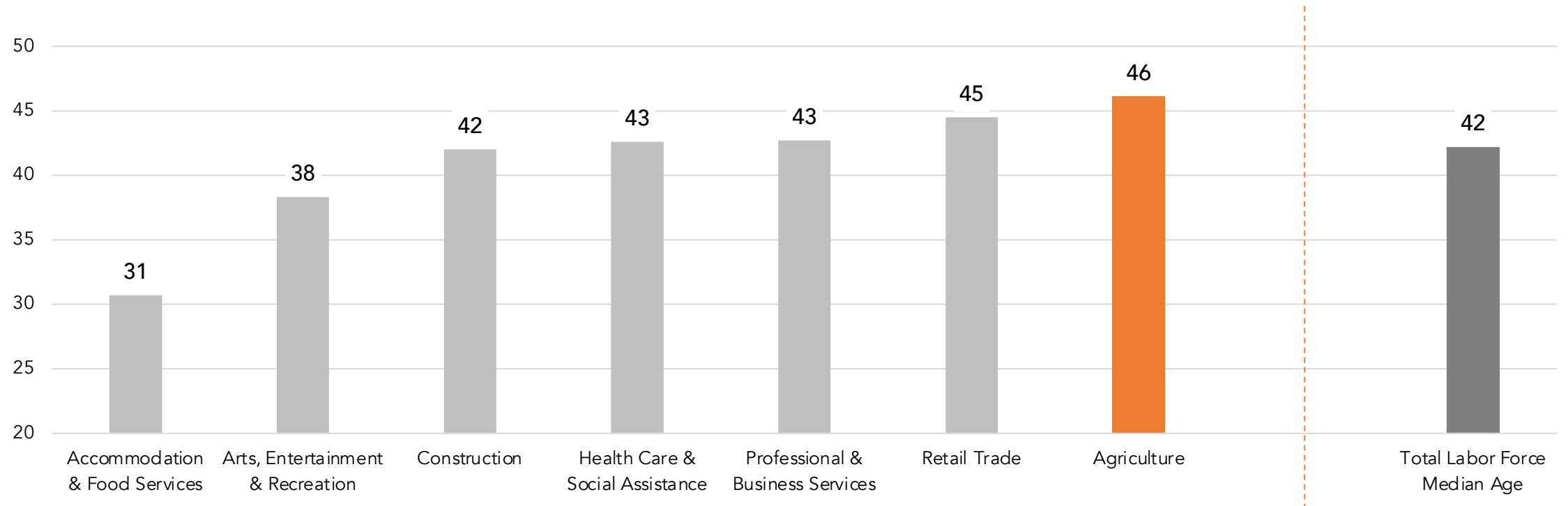


Source: U.S. Bureau of Labor Statistics, U.S. Census. Lightcast, CVL Economics.

# AGRICULTURE WORKER CONSIDERATIONS



## Median Age of Employed U.S. Workers by Sector 2023

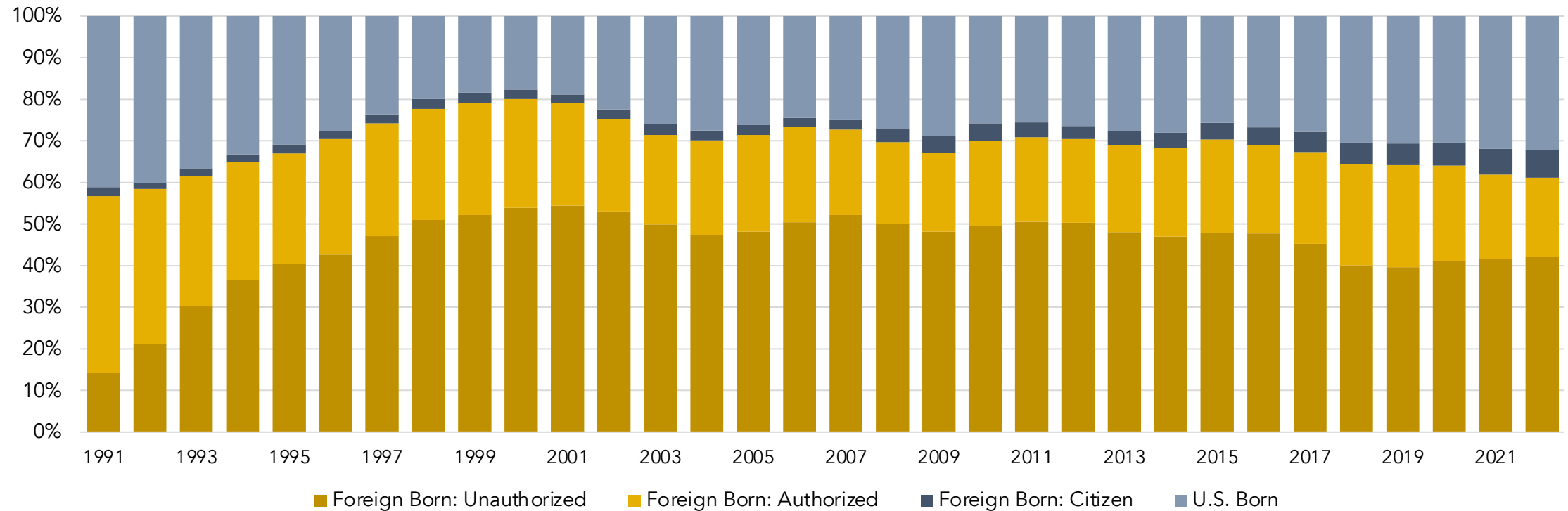


Source: U.S. Bureau of Labor Statistics, U.S. Census Bureau, CVL Economics.

# AGRICULTURE WORKER CONSIDERATIONS



## Legal Status of Hired Crop Farmworkers in the United States | 1991 to 2022

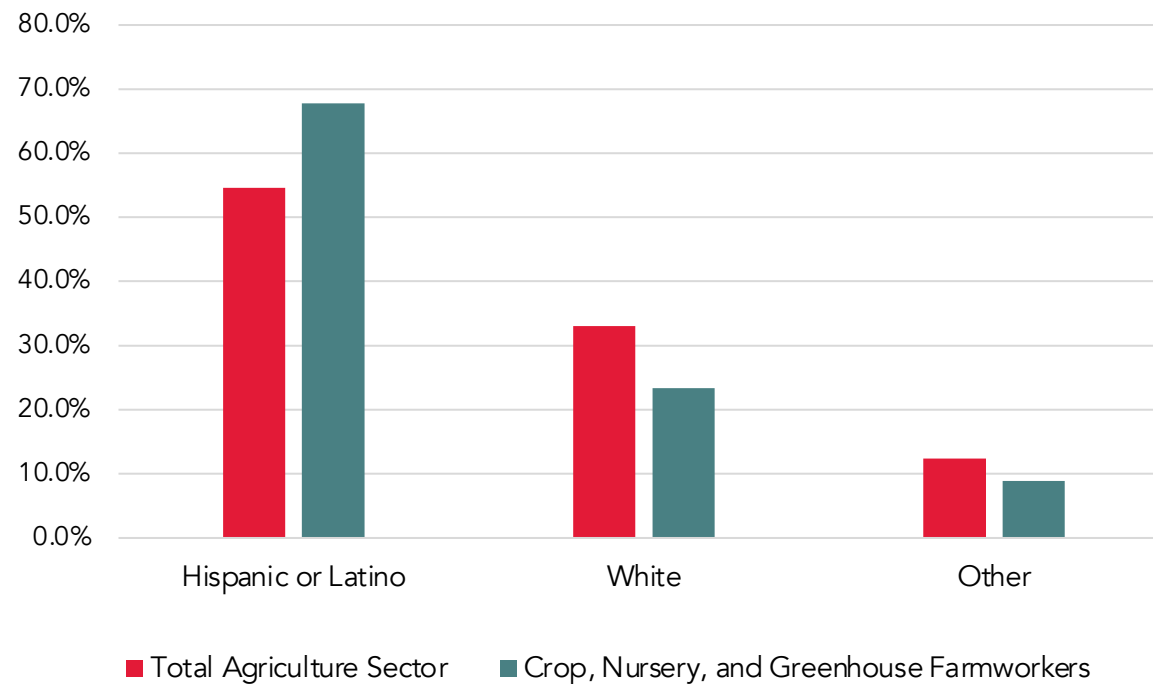


Source: United States Department of Agriculture, U.S. Department of Labor, CVL Economics.

# AGRICULTURE WORKER CONSIDERATIONS



Race/Ethnicity of Agriculture Workers in Monterey County 2023



H-2A Certifications in California by County 2013 vs. 2023

	2013		2023	
	COUNT	SHARE	COUNT	SHARE
Kern	48	1.1%	230	0.8%
Monterey	44	1.0%	8,157	29.4%
Fresno	9	0.2%	1,089	3.9%
Tulare	21	0.5%	80	4.7%
Santa Barbara	158	3.5%	4,581	16.5%
Imperial	661	14.7%	1,481	5.3%
California	4,505	-	27,759	-

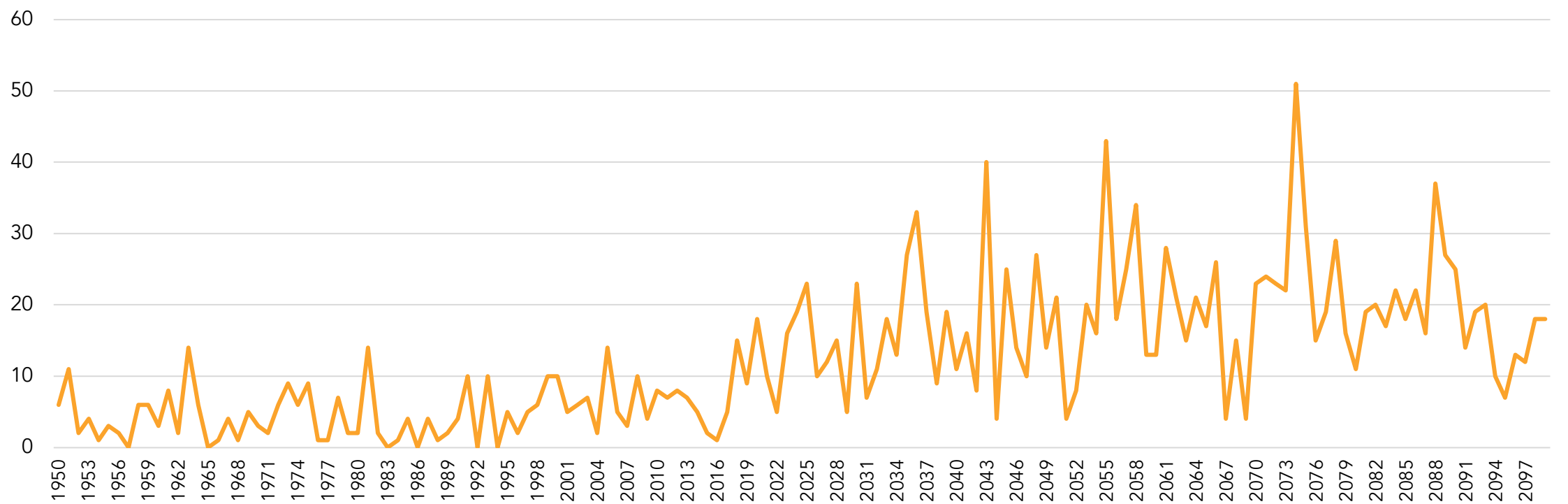
Source: U.S. Census Bureau, UC Davis Labor and Community Center of the Greater Capital Region, U.S. Department of Labor, Department of Homeland Security, CVL Economics.



# CLIMATE CHANGE CONSIDERATIONS



Observed and Forecasted Number of Extreme Heat Days in Monterey County | 1950 to 2100



Source: Cal-Adapt, CVL Economics.

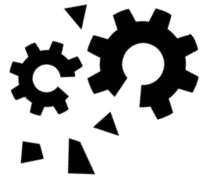


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# CHALLENGES & OPPORTUNITIES

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# CHALLENGES



## Labor Shortages and Workforce Vulnerability

Monterey's growers face acute labor shortages, exacerbated by immigration enforcement concerns and a lack of legal pathways for consistent farm labor. Increasing reliance on H-2A workers comes with its own challenges, including housing, transportation, and integration needs.



## Technology Access and Education Gaps

Small and mid-sized farms face steep barriers in accessing capital, training, and technical support needed to modernize. Meanwhile, K–12 agricultural education in much of the county remains under-resourced, limiting awareness of career paths in farming, ag mechanics, or sustainable land stewardship.



## Regulatory Complexity and Compliance Burdens

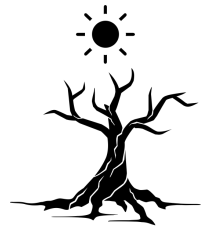
State and County regulations and processes—such as prolonged project approval timelines, CEQA litigation risks, and electrification mandates that are difficult to implement—tend to disproportionately burden small and mid-sized farms, which lack the capacity to absorb additional compliance costs.

# CHALLENGES



## Housing Affordability and Infrastructure Barriers

Although over 5,000 farmworker beds have been built in the last decade, access to housing for AgTech professionals, drone operators, and skilled mechanics remains limited. Regulatory hurdles continue to slow housing approvals, and many potential development sites lack basic utility access.



## Climate Stress and Water Security

Extreme heat, drought, and increasingly erratic weather are changing the viability of key crops and threatening farmland in low-lying areas. SGMA-related pumping restrictions, saltwater intrusion, and regulatory uncertainty have already pushed some land into fallowing.

# OPPORTUNITIES



## Positioning Monterey County as an AgTech Leader

Position Monterey County as a leader in agricultural technology innovation by supporting AgTech startup incubation, workforce development, and regional marketing efforts that emphasize the County's unique crop profile and technological edge.



## Reimagining workforce development and education

Strengthen the education pipeline from middle school through college by investing in and expanding CTE pathways, upgrading agricultural program facilities, and aligning curricula with emerging AgTech careers.

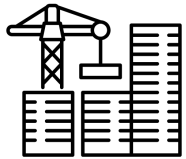


## Revitalizing small farms through ecosystem development

Develop demonstration projects and targeted support programs to improve small and mid-sized farmers' access to land, regenerative practices, and new technologies that promote long-term resilience.



# OPPORTUNITIES



## Addressing the housing imbalance

Housing affordability is the linchpin of workforce retention. Advocate for regulatory reforms and explore community land trust models to increase the supply of affordable housing, particularly for mid-skill and AgTech professionals in the agricultural workforce.



## Building Monterey County's reputation as a leader in agricultural sustainability

Create a compelling narrative around sustainable agriculture that positions Monterey County as a national leader in climate resilience, carbon farming, and regenerative innovation—with cross-sector coordination to match.



## Unlocking agricultural tourism and storytelling potential

Develop agritourism demonstration sites along key corridors (e.g., Highway 68) to connect regenerative farming, AgTech, and public education while working to modernize zoning and general plan policies that currently limit growth.



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THANK YOU

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