

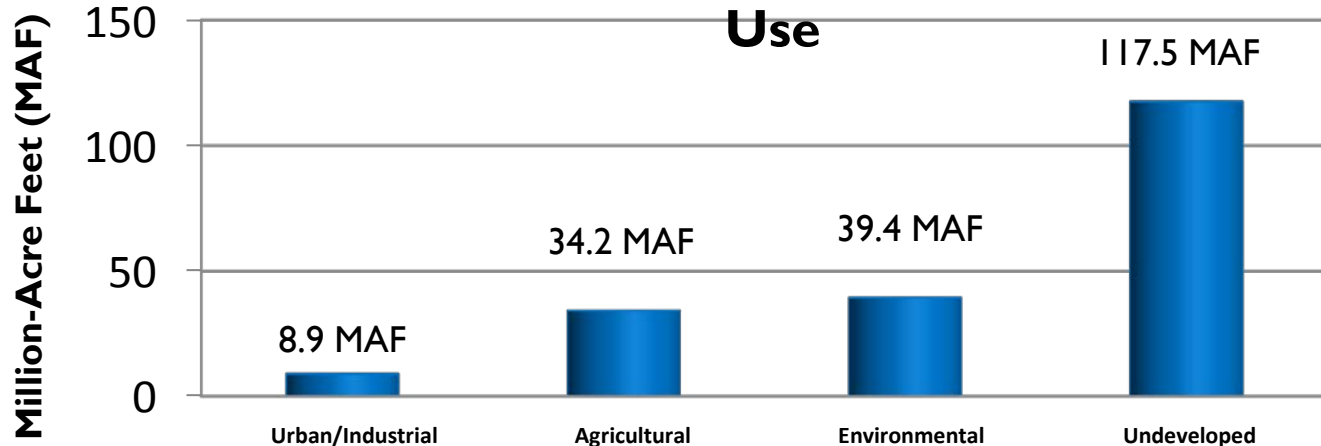
A New Era of Limits: California Agriculture and Water Supply

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Mother Nature's Blessings

California's Average Annual Water Supply and Use



Developed (82.5 MAF)

8.9

34.2

39.4

-

CA Water (200.0 MAF)

8.9

34.2

39.4

117.5

Developed (%)

10.8%

41.5%

47.8%

-

CA Water (%)

4.5%

17.1%

19.7%

58.8%

Water Projects: Then and Now

For the Benefit of Irrigation

Central Valley Project

State Water Project

Local/regional surface water projects

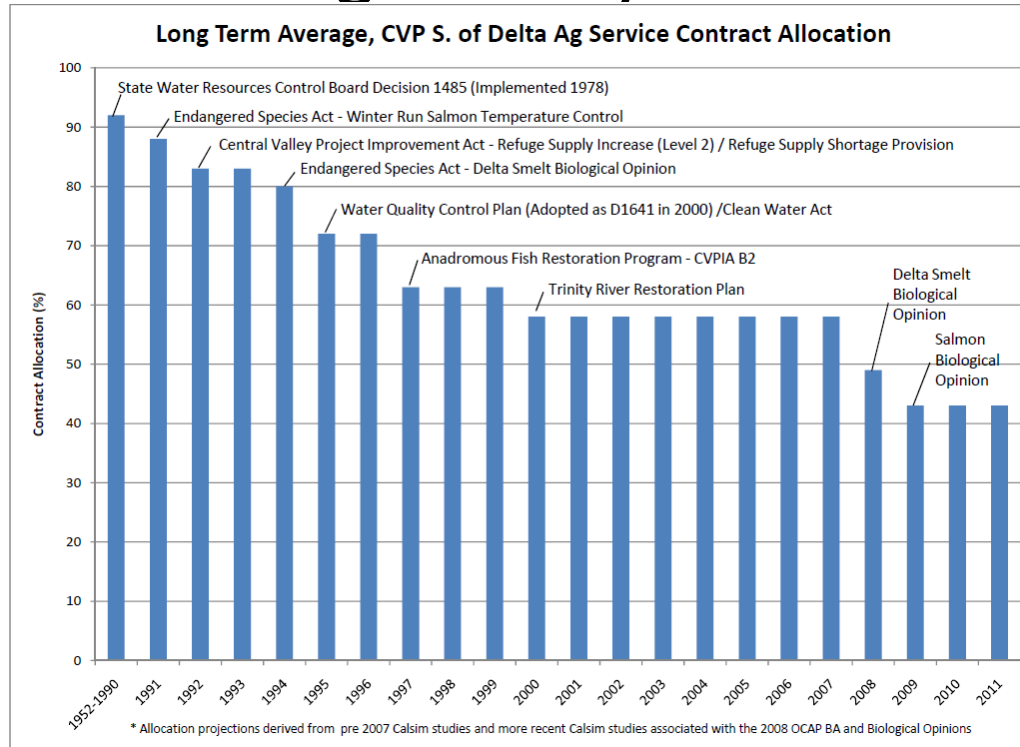
For the Benefit of Environmental Needs

ESA

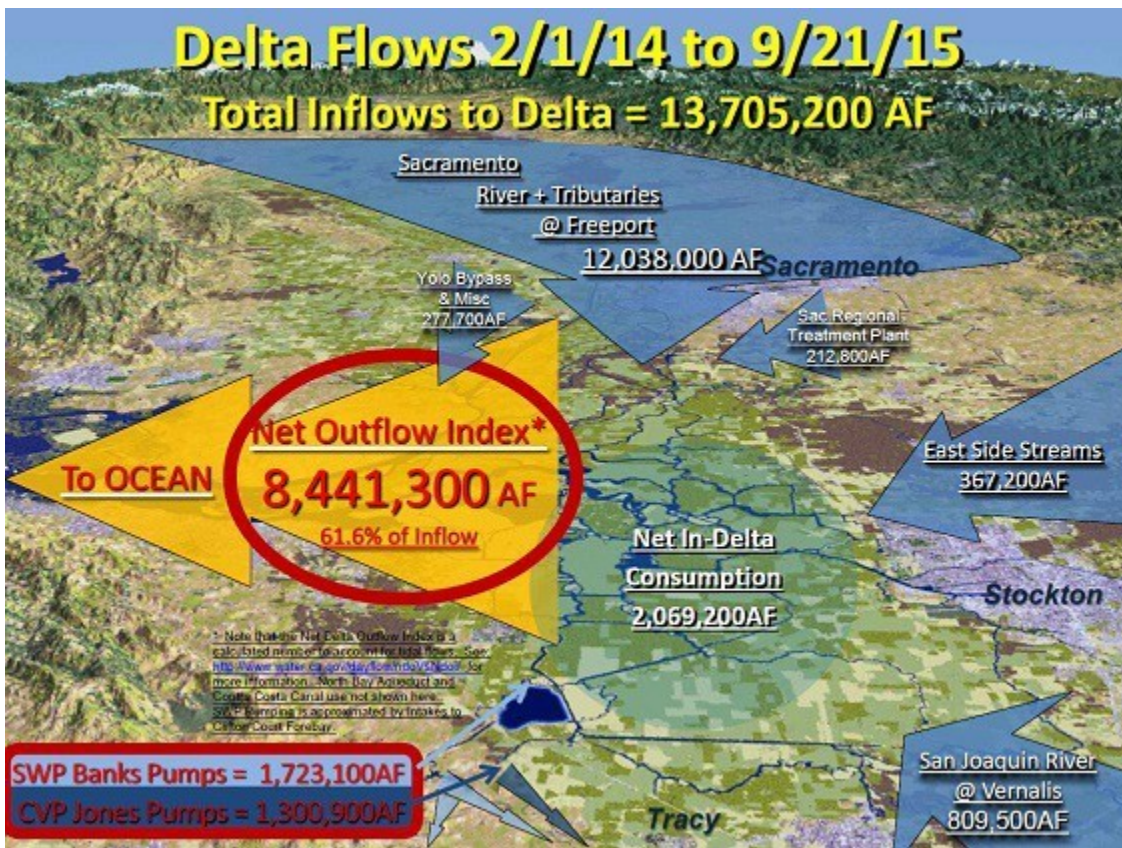
NEPA/CEQA

CVPIA and related legislative repurposing

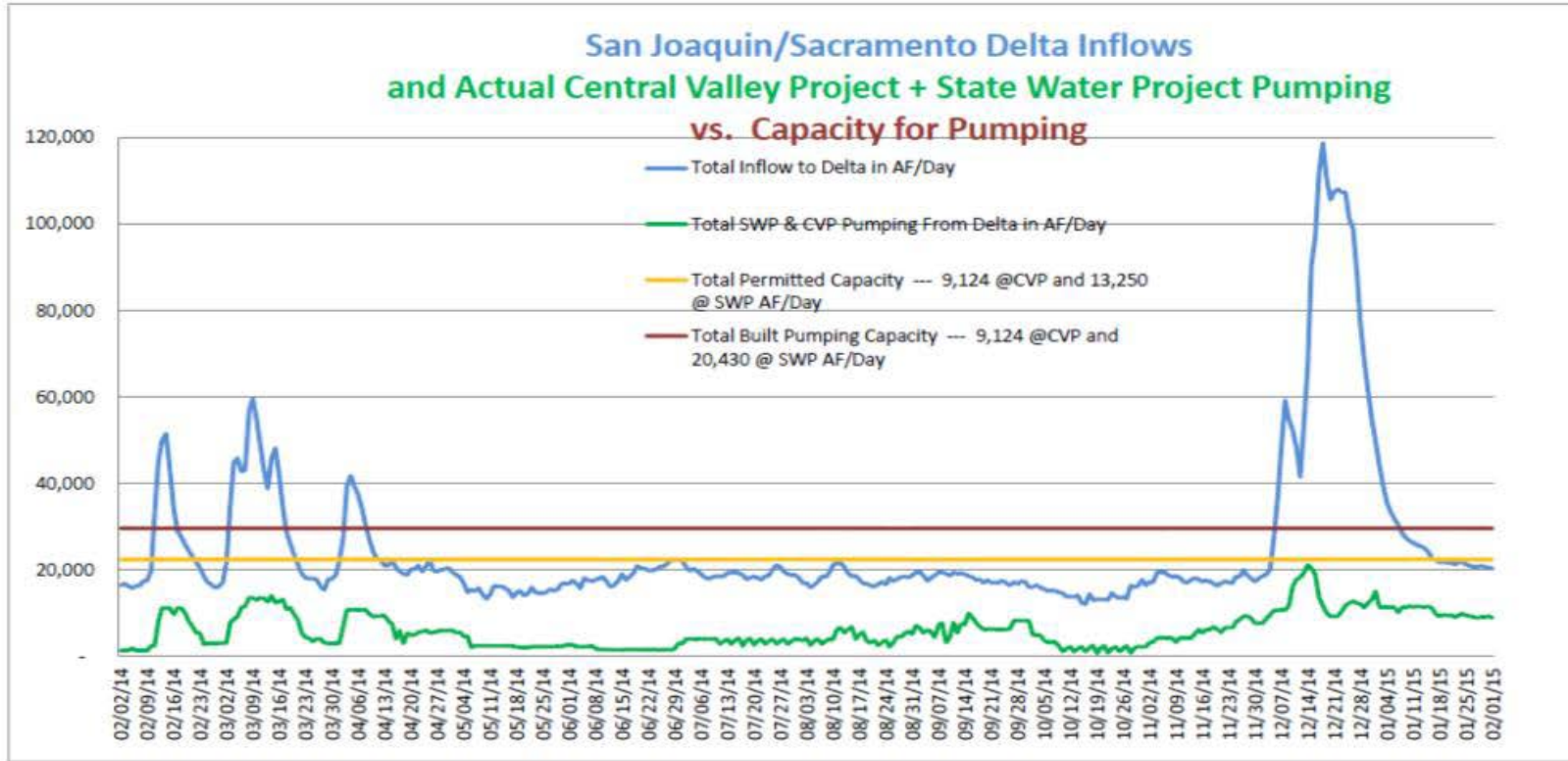
Lost Water: SAC-SJ Delta Operations Rebalancing Conveyance & “Flows”



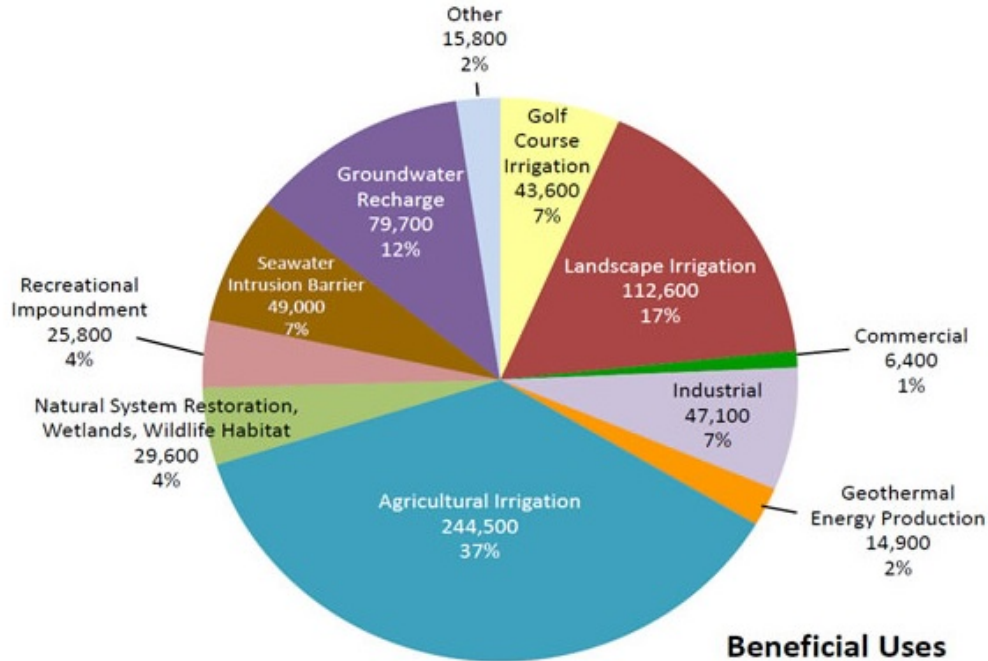
Delta Flows from February 1, 2014 through September 21, 2015



And More Recently, More Lost Opportunity



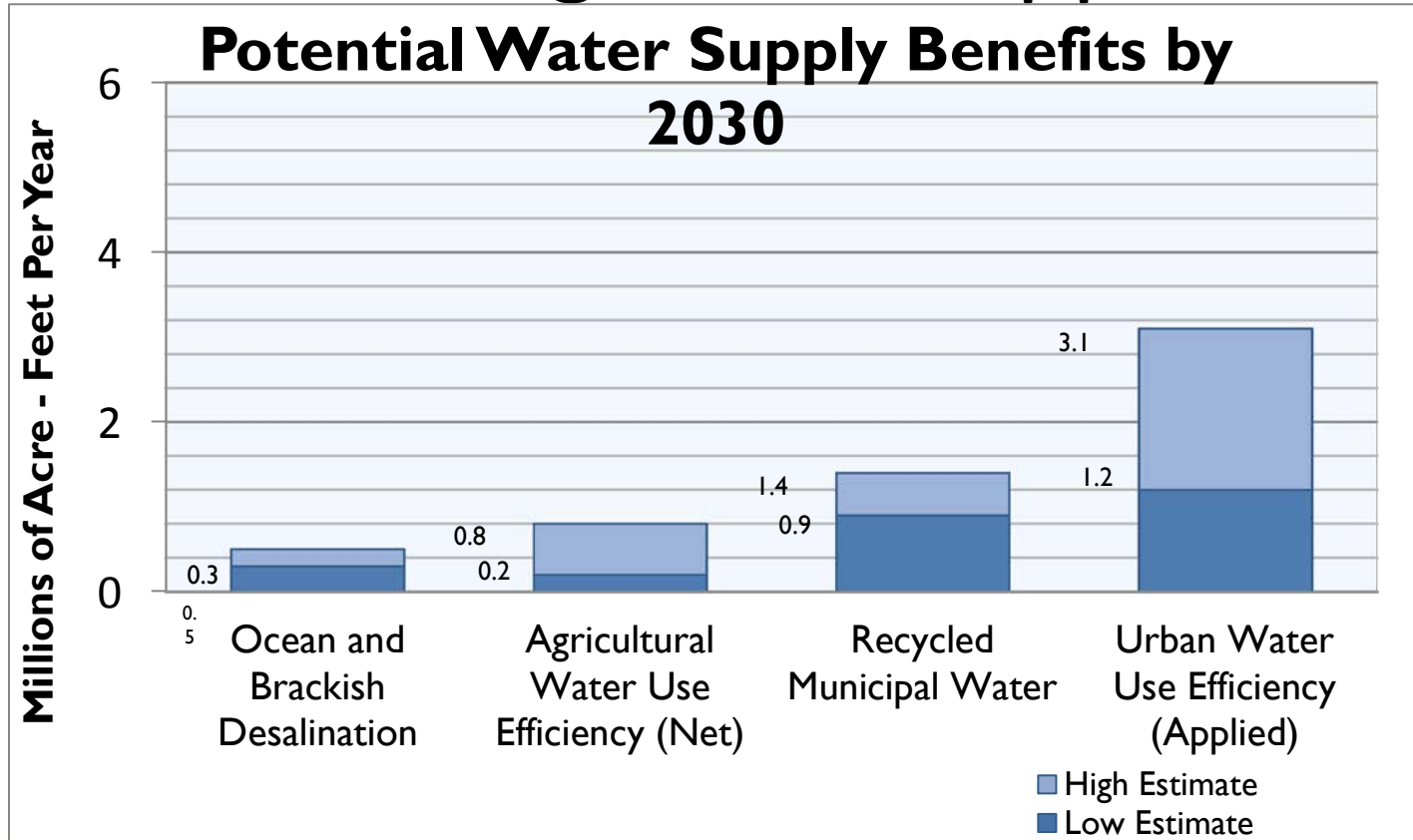
Uses of Reclaimed Water



units in acre-feet
2009 total: 669,000 acre-feet

**Beneficial Uses
of Municipal Recycled
Water in the 2009 Survey**

Stretching Water Supplies





Source Diversification is the Future

- Transparency, environmental concerns, and social contract have changed the equation
- Economic diversity and ag's disconnect from urban population feed perception of supply imbalance
- Making “new” water supplies economically feasible is CA's challenge now
- In time, perhaps a leveling of playing field in other states



What Future for California Agriculture?

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