

Dynamics of Licensed Cultivation and Supply Chain

December 2025

Total Harvest Amounts by License Type

According to the California Track and Trace Program, from January 2019 through July 2024:

- Large cultivation sites harvested 1,974,100 lbs of cannabis, mostly from outdoor farms
- Medium cultivation sites harvested 18,883,069 lbs of cannabis, the majority (about 60%) of which came from outdoor farms
- Small cultivation sites harvested 89,090,019 lbs of cannabis, with over 90% coming from outdoor (45%) and mixed light farms*
- In total, California produce 111,163,523 lbs of cannabis (including from specialty licenses) from 2019-2024



**Many farms hold multiple small and/or medium licenses. A significant portion of small and medium farm harvests comprise large farms.*

Regional Production

California's regions produced varied amounts, with more than half of harvested pounds coming from the Central Coast.

REGION	Number of Harvests	Total Harvested LBs
Central Coast	150,919	64,959,496
North Coast	93,962	11,778,207
San Francisco Bay Area	27,055	1,570,663
Sierra-Foothills/Northern	63,985	23,582,487
Southern California	121,426	7,484,114
Total	457,345	109374968*

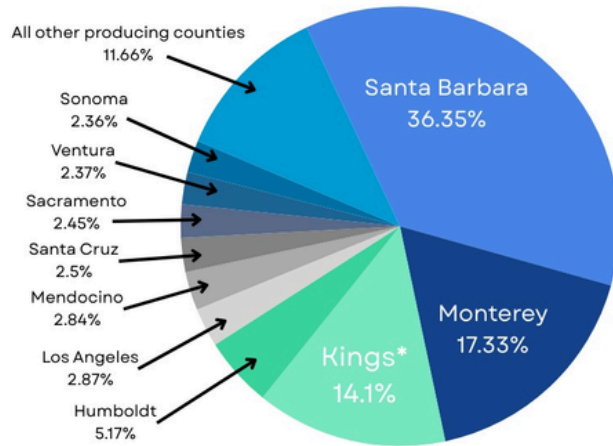


*Counties who were outliers or had data entry anomalies were not included in the regional analysis.

Top Producing Counties & Timing

- While harvests come in throughout the year, the largest peaks are in November and, increasingly since 2019, in July (for light deps)
- Top ten harvest counties, in descending order, are: Santa Barbara, Monterey, Humboldt, Los Angeles, Mendocino, Santa Cruz, Sacramento, Ventura, Sonoma, Riverside**
- Top 3 producers: Santa Barbara produced 36% of California’s cannabis, Monterey 17%, and Humboldt 5%**

PERCENT OF TOTAL LICENSED CULTIVATION: 2019-2024



**Kings County would likely be the 3rd highest producer of cannabis but data was incomplete. Our analysis shows it would constitute about 14% of state production.

Supply Chain Transactions

- Southern California accounted for 47% of product manifests between 2019 and 2023, followed by the Bay Area (15%). (Note: 2022 data was incomplete.)
- Los Angeles and Riverside counties originated the supermajority of manifests (80%) suggesting that most supply chain interactions occur in those counties.
- Los Angeles, Riverside, and San Diego were the destinations of 83% of manifests.

