



# ECONOMIC BASE REPORT: SAN JOAQUIN VALLEY REGION



Prepared for the



DECEMBER 2006

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## **California Economic Strategy Panel**

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## PREFACE

The bipartisan California Economic Strategy Panel (Panel) was established in 1993 to develop an overall economic vision and strategy to guide public policy. The Panel engages in an objective and collaborative biennial planning process that examines economic regions, industry clusters, and cross-regional economic issues. The 15-member Panel is comprised of eight appointees by the Governor, two appointees each by the California Senate President Pro-Tempore and the California Assembly Speaker and one appointee each by the Senate and Assembly Minority Floor Leaders. The Secretary of the California Labor & Workforce Development Agency serves as the Panel Chair.

The California Regional Economies Project is currently the lead research mechanism for the Panel to identify economic policy issues. The project provides the state's economic and workforce development systems with data and information about changing regional economies and labor markets. The information provides a new resource in economic and workforce development planning and a bridge connecting economic and workforce policies and programs at the state and regional levels.

Since 1996, the Panel recognized the rapidly changing nature of the California economy and its economic regions. In order to understand the state's economy and the changes taking place within industry sectors and industry clusters, it is important to recognize the regional nature of the economy and to analyze the economic base by region. To do this, the statewide and nine regional economic base reports analyze the patterns of employment, business establishments, wages, population, unemployment rate and other key factors.

This report presents an in-depth analysis of the San Joaquin Valley Region from 2001 to 2004. The statewide and eight other regional economic base reports are also available at <http://www.labor.ca.gov/panel/>. The previous economic base reports examined the 1990-2002 period, and were the first economic base reports for the regional economies as they are defined today. The Panel's initial work, from 1994-1996, resulted in identification of six regions and provided regional economic base analyses; however, those regions had been significantly redefined by 1998, making comparisons to the early analyses impractical.

The source of the data used for these reports is the official employment and wage information reported by employers to the State. While a variety of other sources provide similar information, they may not capture the official numbers that employers report, or may not include input from all employers. This data source is the most comprehensive and accurate source of information direct from employers, and is therefore the best to use for public policy-making, planning and program administration.

The Panel has taken steps to institutionalize the analysis and preparation of these economic base reports within State government so that this analysis may be provided on a yearly basis. Also, steps have been taken to leverage the body of knowledge that now exists around the study of industry clusters, gained through the California Regional Economies Project.

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First, a non-confidential version of the data series, the *California Regional Economies Employment Series*, has been made available online by the California Employment Development Department's Labor Market Information Division so that regional organizations may access this data at the county level. Second, a step-by-step guide, the *Clusters of Opportunity User Guide*, is available online so that regional organizations can conduct industry cluster studies and work with business and industry to test and apply the findings. With this information, regional organizations may conduct their own economic base and industry cluster analyses down to the county level, and they may combine county data to create their own sub-regional study areas. Training workshops have been held to teach the methodology and processes outlined in the *Clusters of Opportunity User Guide* to representatives from local and regional organizations including Local Workforce Investment Boards, economic development organizations, and community colleges.

The statewide and regional economic base reports, the *Clusters of Opportunity User Guide* and other studies are available on the Panel's website at <http://www.labor.ca.gov/panel/>.

The *California Regional Economies Employment Series* is available online at <http://www.labormarketinfo.edd.ca.gov/cgi/databrowsing/?PageID=173>.

The California Regional Economies Project is sponsored by the California Labor & Workforce Development Agency, California Employment Development Department, and California Workforce Investment Board.

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## **INTRODUCTION**

The California Regional Economies Project provides data and information about changing regional economies and labor markets. The information provides a new resource in economic and workforce development planning, and a bridge connecting economic and workforce policies and programs at the state and regional levels.

In order to understand the state's economy and the changes taking place within industry sectors and industry clusters, it is important to recognize the regional nature of the economy and to analyze the economic base by region. To do this, the statewide and nine regional economic base reports analyze the patterns of employment, business establishments, wages, population, unemployment rate and other key factors.

This report presents an in-depth analysis of the San Joaquin Valley Region's economic base from 2001 to 2004. The previous economic base report examined the 1990-2002 period. The statewide and eight other regional economic base reports are also available at <http://www.labor.ca.gov/panel/>.

### **Data Sources**

The Quarterly Census of Employment and Wages (QCEW) data is the source for the private industry data, which uses the North American Industry Classification System (NAICS) coding system. The Current Employment Statistics (CES) data is the source for all levels of government employment data. The CES data does not offer wage information, so the government wage information in this report was taken from the federal Bureau of Labor Statistics (BLS) QCEW non-confidential data available online. A more detailed explanation of the data sources is available in the statewide report.

### **Industry Clusters versus Sectors**

An industry sector is a group of firms that are doing the same type of work, making the same type of products, or providing the same types of services. Examples include manufacturing, construction, retail trade and health care.

An industry cluster is a group of interdependent industry sectors characterized by competing firms and buyer-supplier relationships, as well as shared labor pools and other specialized infrastructure. They are also geographically concentrated. When identifying "industry clusters of opportunity," the Project adds additional considerations that focus on employment opportunities for regional residents.

### **Definition of the Economic Base Industries**

Economists divide industries into two groups; export-oriented and local-serving (also referred to as population-driven). Export-oriented industries are industries that sell a large portion of their goods and services to people and businesses in markets outside of the region, creating capital (bringing capital into) the region. Local-serving industries are

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industries that sell their goods and services to people and businesses in markets within the region. These industries do not typically create new capital for the region, but recirculate it within the region.

In the previous economic base reports completed in 2004, the two principal researchers who provided the analyses did not agree on a common definition of an area's economic base. One favored the traditional approach, while the researcher analyzing the rural regions felt that there were key local-serving industries that were critical to these regions and should be included in the economic base.

For the current economic base reports, we have chosen to include some industries in our definition of the economic base that are not traditionally included. We do this in part due to the transformations taking place within the industries or regions, and also in recognition of the importance of industries that provide significant employment opportunities for the region, including some high-wage/high-demand sectors and clusters that would otherwise not be included.

While the traditional discussion of an economic base is still the one most used by economists, we feel the other perspective better fits the nature of the California Regional Economies Project, which constantly views the economy in new ways and from new perspectives in order to see transformations taking place. We acknowledge that this use of the term, "economic base," conflicts with the standard definition, and that we are choosing to redefine it for the purpose of these reports. We respect that some will disagree with our use of the term in this way; however, this should not detract from the important economic information presented in the reports. The current reports begin to address the differences in the definition of the regions' economic base industries, which began with the first economic base reports. We plan to revisit this issue again in the future.

A detailed discussion of the definition of the economic base and the differences between the previous and current reports is available in the statewide report.

Definitions by NAICS code for all of the industry sectors and clusters in the statewide overview and regional economic base reports may be found in Appendix A.

## THE SAN JOAQUIN VALLEY REGION



The San Joaquin Valley Region includes eight counties — Fresno, Kern, Kings, Madera, Merced, San Joaquin, Stanislaus and Tulare. This region accounts for 8.7% of California’s jobs and 10.3% of its population. The region’s unemployment rate in 2005 was 8.6%. This region had the highest unemployment rate of the nine regions, well above the state average of 5.4%.

From 1990 to 2003, the San Joaquin Valley Region experienced job growth of 25%, as reported in the first economic base report. Since the recent recession, from 2001 to 2004, job growth has continued, increasing by 3.1%. During this time, private industry jobs increased by 3.5% and Government jobs increased by just 1.5%.

### Characteristics of the San Joaquin Valley Region

(Numbers are in thousands, except for dollar amounts)

	San Joaquin Valley	California	S. J. Valley as % of CA
Population (2006)	3,822	37,172	10%
Labor Force (2005)	1,658	17,696	9%
Unemployment Rate (2005)	8.6%	5.4%	159%
Manufacturing Jobs* (2004)	113	1,507.8	9%
Per Capita Income (2004)	\$ 24,648	\$ 35,219	70%
Average Wage (2004)	\$ 29,562	\$ 43,724	68%

Source: Jobs, Labor Force, Unemployment Rate and Average Wage – California Employment Development Department, Labor Market Information Division; Population and Per Capita Income – U.S. Bureau of Economic Analysis  
 \* Manufacturing Jobs reported here are traditional production jobs (NAICS 31-33).

Entrepreneurship plays a critical role in regional economic development in rural California. It has been the key to increasing the number of establishments in rural regions, as opposed to established businesses moving or expanding into the region, according to the study, *Patterns of Entrepreneurship in Rural California*. The study also showed that the total number of establishments grew by about 18% between 1990 and 2003 across all of the rural regions. (Growth for the San Joaquin Valley Region alone was not cited in the study.)

During the period 2001-2004, the San Joaquin Valley Region reported a net increase of 9,100 private industry establishments (up 11%), from almost 81,600 to 90,700 total establishments. The industry sectors reporting the greatest increase in number of establishments were Private Households (adding 7,200 establishments), Ambulatory Health Care Services (adding over 400), and Specialty Trade Contractors (adding over 300).

## THE ECONOMIC BASE

The economic base is traditionally considered to be made up of export-oriented industries in the study area - industries that sell a large portion of their goods or services to people and businesses in markets outside of the area. For the purpose of this report, we have chosen to include industries in our definition of the economic base that are not traditionally included. We acknowledge that our definition of the economic base differs from standard practice. We do this in part due to the transformations taking place within the industries or region, and also in recognition of the importance of industries that provide significant employment opportunities for the region, including some high-wage/high-demand industries that would otherwise not be included.

Economic base reports also typically look only at industry sectors; however, this analysis will also include industry clusters, where studies by the California Regional Economies Project have defined clusters that provide significant employment for the region<sup>1</sup>.

The criteria for selecting the components of the economic base include the top job providers in 2004, those industries with a high growth rate from 2001 – 2004, and the top job generators from 1990 to 2002, as identified in the previous economic base report. In those cases where industry clusters are examined beginning with the 2001-2004 period, direct comparisons may not be possible with the findings from the first economic base report.

Based on these criteria, the industry clusters and industries included in the San Joaquin Valley Region's economic base for this analysis are the following<sup>2</sup>, listed by NAICS code:

- The Food Chain
- Construction
- Manufacturing Value Chain
- Retail Trade
- Administrative, Support & Waste Management Services
- Health Sciences & Services
- Professional, Scientific, Technical & Management Services
- Entertainment & Tourism
- Other Services
- All Government

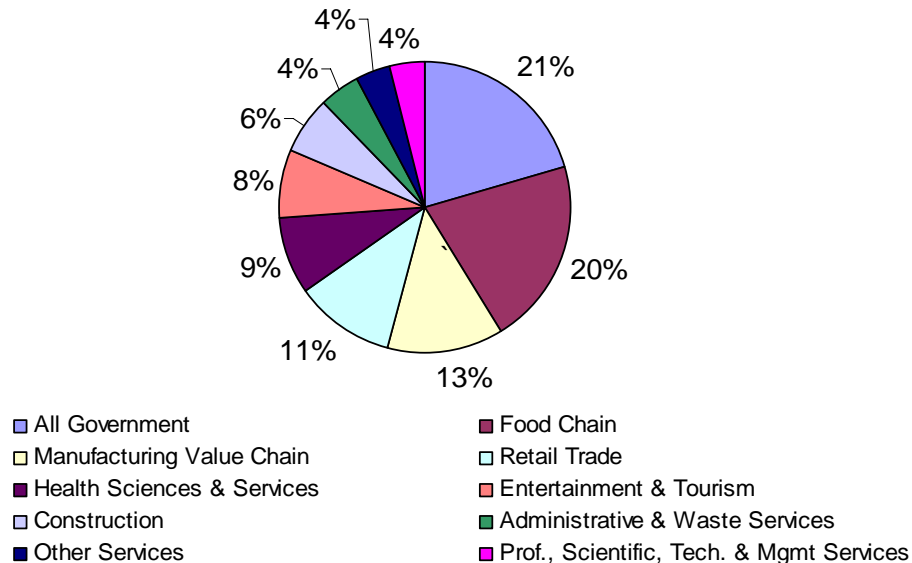
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<sup>1</sup> Industry Clusters of Opportunity are defined by the California Regional Economies Project as geographically-concentrated, and interdependent industry sectors characterized by competing firms and buyer-supplier relationships, as well as shared labor pools and other specialized infrastructure. In addition to export-oriented sectors, they also include population-driven sectors as well as sectors that offer occupations with career potential.

<sup>2</sup> See Appendix A for a complete listing of all sub-sectors included in the economic base industries and industry clusters.

The total jobs reported by the economic base industries and clusters represent 96% of the region's total jobs. From 2001-2004, economic base employment grew by almost 47,300 jobs, or 4%.

### Composition of San Joaquin Valley Economic Base



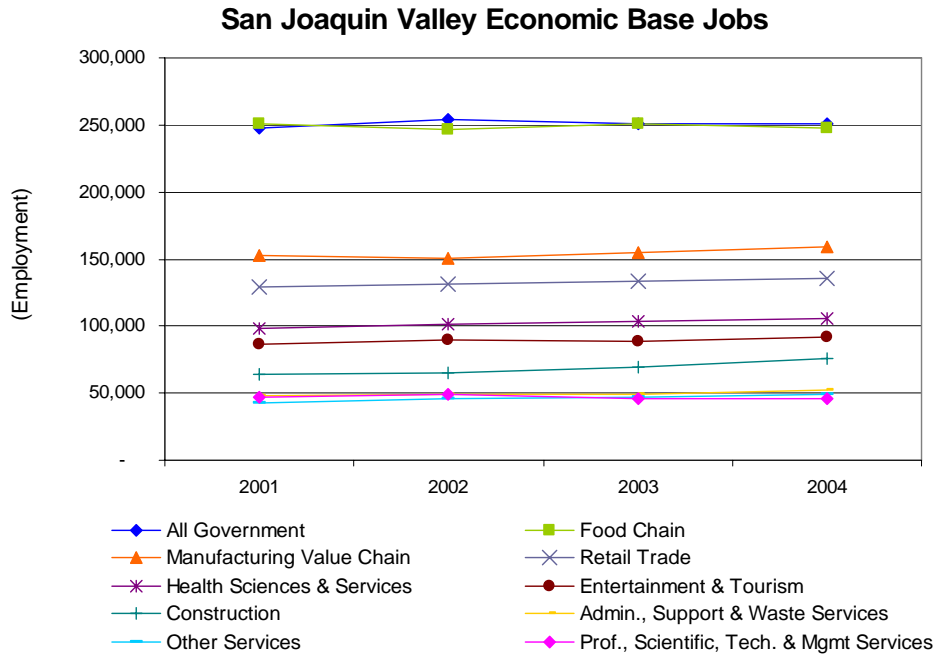
(Industries are listed in order as they appear in the chart, reading left to right across columns.)

All Government provided the most jobs for the region, with 251,000 jobs in 2004. This represents 21% of the economic base jobs, and 10% of the region's total jobs. A close second, the Food Chain provided 247,500 jobs, which was just over 20% of the economic base and almost 20% of all jobs.

The Manufacturing Value Chain was the third largest component of the economic base, with 158,900 jobs in 2004; 13% of the region's economic base jobs. This was followed by Retail Trade, reporting 135,600 jobs (over 11% of the base); and Health Sciences & Services, with over 105,500 jobs (almost 9% of the base).

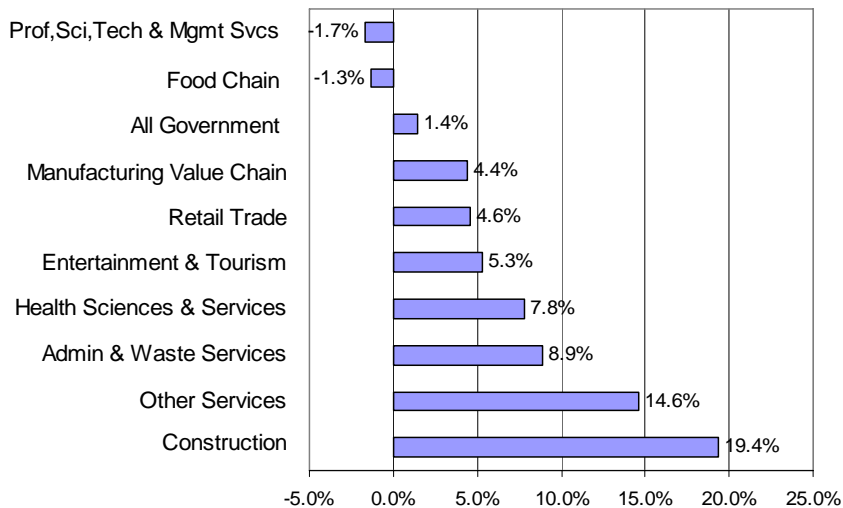
The remaining industries in the economic base are Entertainment & Tourism (almost 89,100 jobs); Construction (76,200 jobs); Administrative & Waste Services (almost 52,800 jobs); Other Services (49,300 jobs); and, Professional, Scientific, Technical & Management Services (almost 46,300 jobs).

The following graph shows employment for the economic base industries and clusters from 2001-2004:



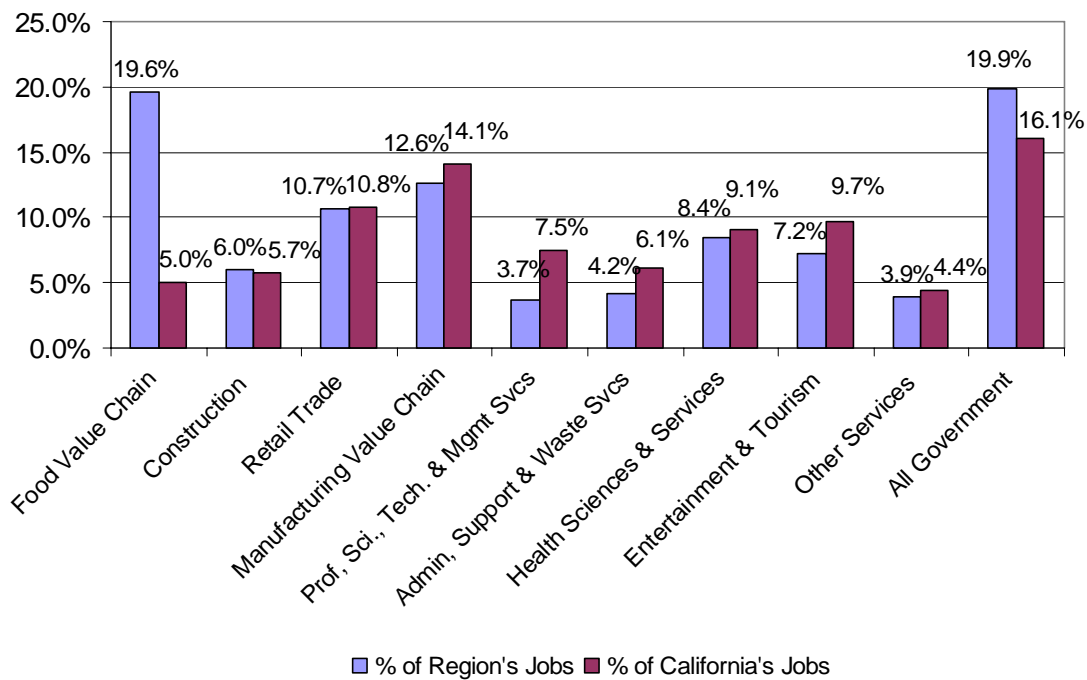
In addition to size, another important measure is job growth. From 2001-2004, eight industries and clusters in the economic base reported job growth. Listed by percentage of growth, these include Construction (up over 19%); Other Services (up almost 15%); Administrative & Waste Services (up almost 9%); Health Sciences & Services (up almost 8%); Entertainment & Tourism (up over 5%); Retail Trade (up almost 5%); Manufacturing Value Chain (up over 4%); and, All Government (up just over 1%). The remaining industries reported job losses between 1% and 2% for the period.

### Economic Base Job Growth 2001-2004



Another factor to consider is the concentration of an industry within a region – the percentage of the region’s jobs that the industry provides – and also how this compares to the concentration within the state or nation. The following graph compares the concentration of the leading employment sectors in the region to the statewide concentration.

**Share of Regional & Statewide Employment  
2004**



The average annual wage<sup>3</sup> for all industries in the San Joaquin Valley Region is \$29,562. This region ranks sixth in overall average wage, of all nine regions. Within the region’s economic base, the average annual wage by industry and cluster ranges from a high of \$43,930 for Professional, Scientific, Technical & Management Services jobs, to a low of \$12,766 for Entertainment & Tourism jobs.

The Professional, Scientific, Technical & Management Services industry reports the highest average wage but provides only 4% of the jobs in the region’s economic base. Entertainment & Tourism reported the lowest average wages and provides 8% of the economic base jobs.

<sup>3</sup> The average annual wage is calculated by dividing the total wages by the total employment (both figures are reported by the employers); the wages and employment data reported do not distinguish between part and full time hours or overtime hours worked. This statistic provides good information for making comparison and tracking trends; however, it may not be the best resource available for employers or researchers and service providers to use when determining a competitive or typical pay scale for employees in a particular industry and/or region.

Health Sciences & Services reported the greatest (percentage) increase in average wages from 2001 to 2004, rising 16.5%, from \$33,775 in 2001 to \$39,339 in 2004; the industry provides 9% of the region's economic base jobs. The second largest increase was reported by the Food Chain cluster, with average wages increasing by 16.4%; the industry provides 20% of the region's economic base jobs. The industry or cluster reporting the least change was Other Services, increasing by almost 5% during this period; the industry provides 4% of the economic base jobs.

The following table provides the average annual wage for each industry and cluster in the region's economic base, and compares these to the statewide averages. It also shows the percentage of the economic base jobs that each industry/cluster provides, to point out the percentage of jobs in the higher and lower paying industries/clusters.

<b>Average Annual Wages 2004</b>	<b>Statewide</b>	<b>San Joaquin Valley Region</b>	<b>% of Region's Economic Base Jobs</b>
ALL INDUSTRIES	\$ 43,724	\$ 29,562	
Food Chain	31,939	25,879	20%
Construction	43,707	36,578	6%
Manufacturing Value Chain	54,162	37,912	13%
Retail Trade	28,546	24,491	11%
Prof, Scientific, Tech. & Mgmt Services	71,904	43,930	4%
Admin & Waste Services	28,923	22,964	4%
Health Sciences & Services	49,205	39,339	9%
Entertainment & Tourism (Rural)*	20,802	12,766	8%
Other Services	23,542	19,496	4%
All Government	47,835	41,630	21%

\* The definition of the Entertainment & Tourism industry differs from urban to rural regions, for the purpose of this report. For urban regions, Entertainment & Tourism combines Arts, Entertainment & Recreation with Accommodation and Motion Picture & Sound Recording Industries; it does not include Food Services. For rural regions, Entertainment & Tourism combines Accommodation & Food Services with Arts, Entertainment & Recreation; it does not include Motion Picture & Sound Recording Industries. For the statewide analysis, the Entertainment & Tourism industry combines Accommodation & Food Services with Arts, Entertainment & Recreation, and also includes Motion Picture & Sound Recording Industries.

\*\* Government average annual wages include the wages for a broad spectrum of jobs, including elected officials and executive branch, judicial, defense, law enforcement, firefighting, education and other public administration jobs. The source for this data is the Bureau of Labor Statistics (BLS) online QCEW data, as the CES data used for the government employment numbers does not include wage information.

The remainder of this report discusses each economic base industry or cluster in further detail.

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## THE FOOD CHAIN

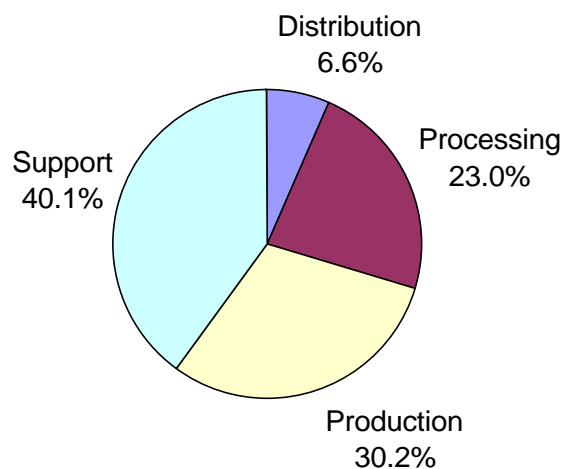
The Food Chain cluster has been defined by the California Regional Economies Project as including not only Production sectors, but also Support, Processing and Distribution sectors. The previous economic base report only looked at agriculture as a part of the Resource Based industries. This report will instead look at the Food Chain cluster.

The Food Chain cluster provides over 20% of the economic base jobs for the San Joaquin Valley Region, and almost 20% of all jobs in the region.

From 1990-2002, the Agriculture, Forestry, Fishing & Hunting industry employment grew by 11,300 jobs, reporting 177,800 jobs in 2002.

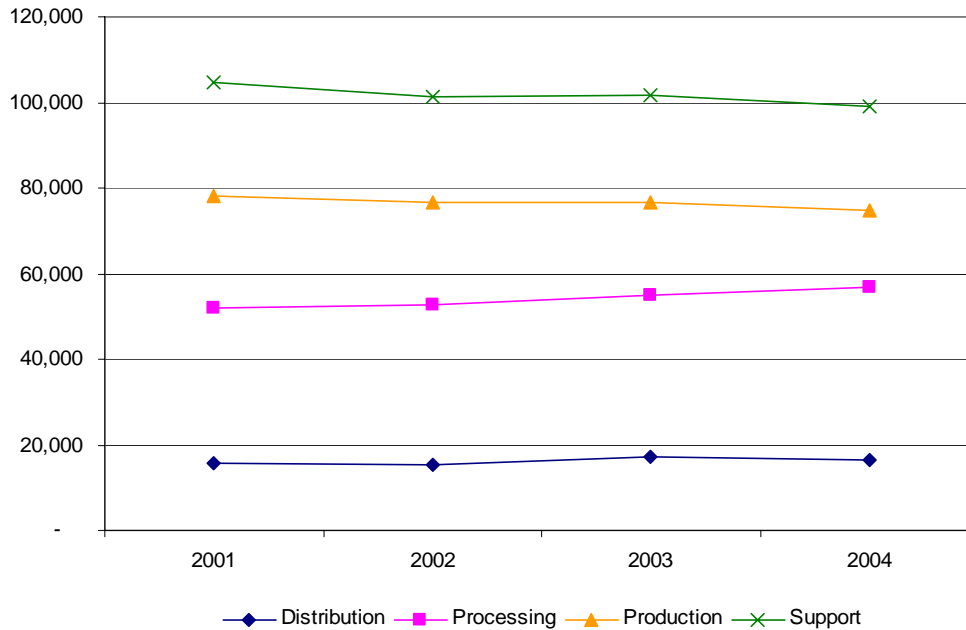
For the 2001-2004 period, the Food Chain cluster experienced job losses of 3,300 jobs, or just over 1%, dropping from 250,800 jobs in 2001 to 247,500 jobs in 2004. In 2004, Support represented 40% of the cluster; Production represented 30%; Processing represented 23%; and, Distribution represented almost 7%.

**The San Joaquin Valley Region Food Chain  
2004**



From 2001-2004, Production and Support reported job losses; Production reported losses of over 3,400 jobs (down over 4%), and Support reported losses of over 5,500 jobs (down over 5%). At the same time, Processing and Distribution experienced job growth; Processing grew by almost 4,900 jobs (up over 9%), and Distribution grew by almost 800 jobs (up 5%).

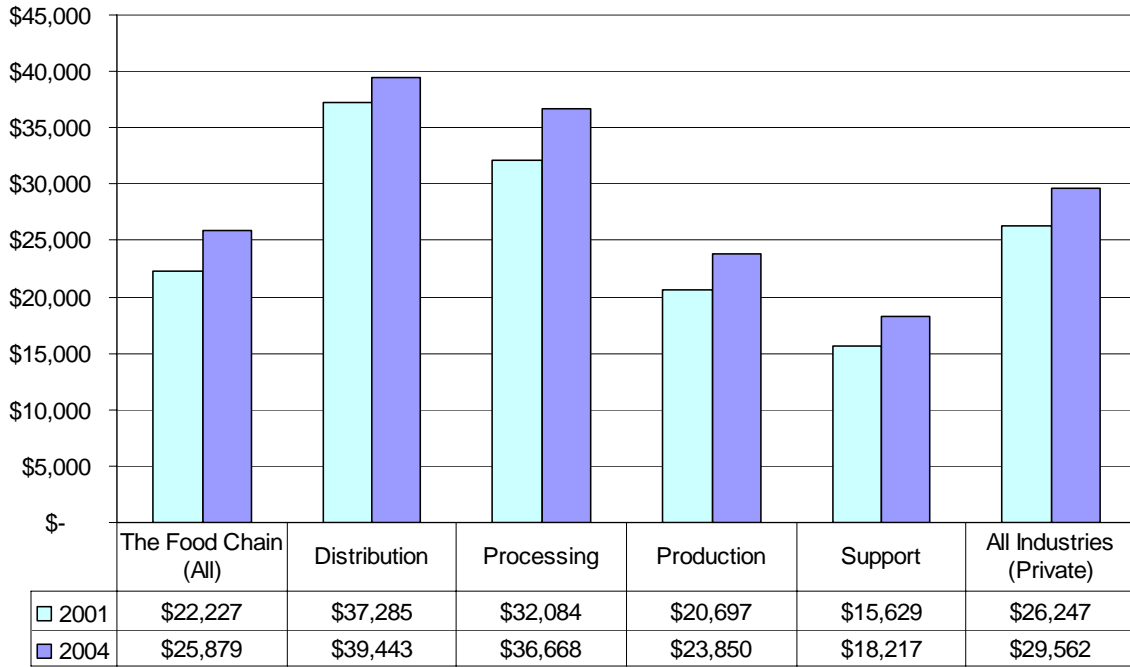
### Food Chain Jobs



Within Support, the largest sub-sector by far is Support Activities for Crop Production, with almost 87,300, compared to the second largest sub-sector, Farm & Garden Machinery & Equipment Merchant Wholesalers, with 2,500 jobs. Within Production, the largest sub-sector is Fruit & Tree Nut Farming, followed by Cattle Ranching & Farming and Vegetable & Melon Farming. Within Processing, the largest sub-sector is Fruit & Vegetable Preserving & Specialty Food Manufacturing, followed by Animal Slaughtering & Processing, Other Food Manufacturing and Dairy Product Manufacturing. Within Distribution, the largest sub-sector is Grocery & Related Product Wholesalers, followed by Specialty Food Stores.

The Food Chain cluster's average annual wage for the region in 2004 was \$25,879. Within the cluster, for Support jobs the average annual wage was \$18,217; for Production jobs the average was \$23,850; for Processing jobs the average was \$36,668; and, for Distribution jobs the average was \$39,443. The Food Chain cluster provides 20% of the region's economic base jobs.

### The Food Chain Wages



The following table provides information on employment by major component:

<b>San Joaquin Valley Region</b>				
<b>Food Chain</b>				
<b>(Thousands of Jobs)</b>				
	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>
Support	104.8	101.3	101.7	99.2
Production	78.3	76.7	76.7	74.9
Processing	52.1	52.8	54.9	57.0
Distribution	15.7	15.5	17.1	16.5

Source: California Employment Development Department

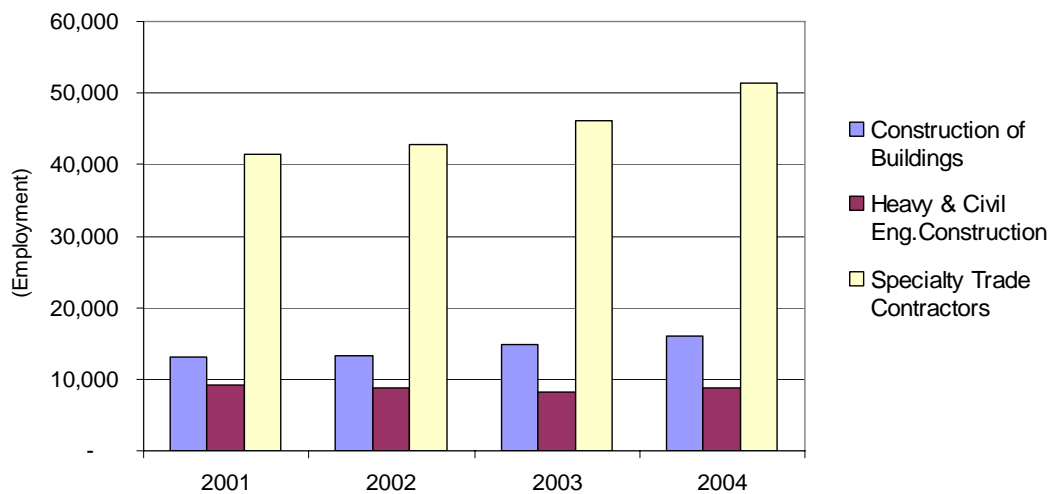
## CONSTRUCTION

The Construction industry provided over 6% of the economic base jobs for the San Joaquin Valley Region in 2004, and 6% of all jobs in the region.

Employment in Construction fell during the first half of the 1990 – 2002 period, but began a steady increase in the latter part of 1995, which continued throughout the rest of the period. Major contributors to the growth were Building Finishing Contractors with 13,200 jobs in 2002; Building Equipment Contractors, with 13,400 jobs in 2002; and Building Foundation & Exterior Contractors, with 10,900 jobs in 2002.

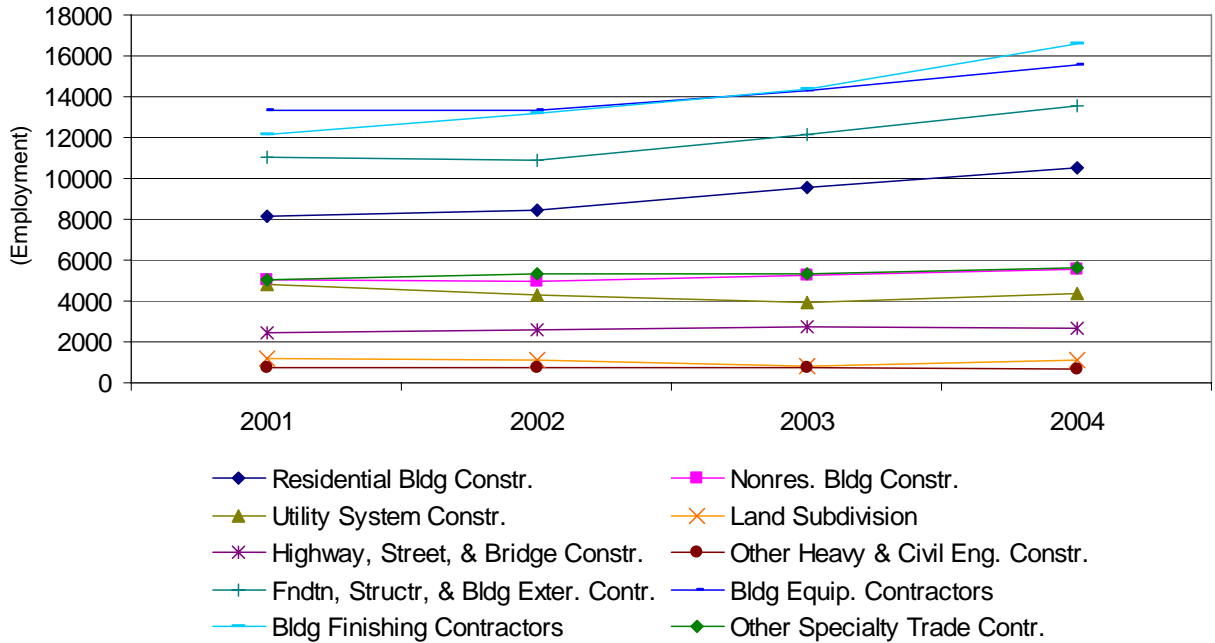
From 2001-2004, Construction grew by almost 12,400 jobs, or over 19%. Of the three main sectors, Specialty Trade Contractors reported the highest employment in 2004, with almost 51,400 jobs, and growth of almost 24%. The second largest sector was Construction of Buildings, with over 16,000 jobs, which grew by almost 22%.

**Construction Jobs  
2001-2004**



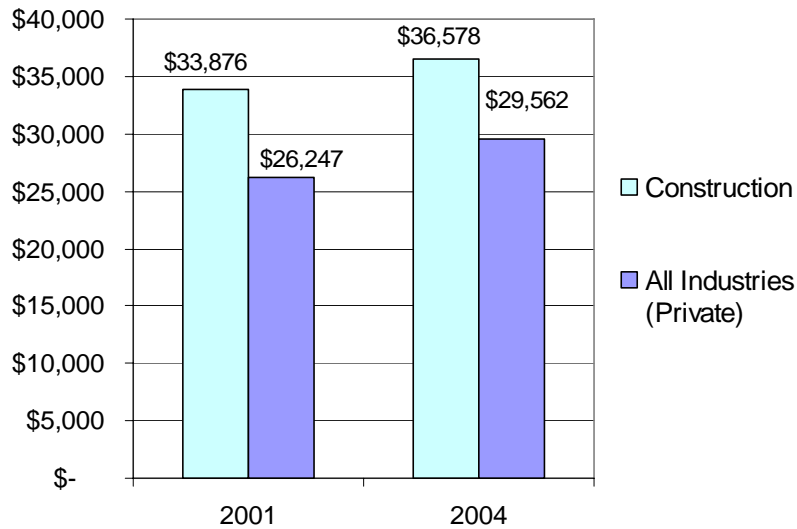
Building Finishing Contractors was the single largest sub-sector in all of the Construction industry in 2004, with almost 16,600 jobs and growth of 36.5% from 2001-2004. Building Equipment Contractors was second, with almost 15,600 jobs in 2004, and 17% growth during this period. The third largest subsector was Foundation, Structure & Building Exterior Contractors, with 13,600 jobs, and fourth was Residential Building Construction, with over 10,500 jobs.

### Construction Sub-sector Jobs



The industry's average annual wage for the region in 2004 was \$36,578, up 8% from the 2001 average of \$33,876. Construction provides 6% of the region's economic base jobs. The following chart shows the changes from 2001 to 2004 and compares the industry's average with the region's overall average wage (all industries).

### Construction Wages



The following table provides information on employment in the Construction industry:

<b>San Joaquin Valley Region</b>					
<b>Construction</b>					
(Thousands of Jobs)					
	<b>1990</b>	<b>1994</b>	<b>2000</b>	<b>2002</b>	<b>2004</b>
Residential Building Construction	8.0	6.0	7.3	8.3	10.5
Nonresidential Building Construction	4.6	3.5	4.4	4.9	5.5
Utility System Construction	4.8	3.9	4.6	4.5	1.3
Land Subdivision	0.7	0.4	1.2	1.1	1.1
Highway, Street & Bridge Construction	1.7	1.8	2.4	2.6	2.7
Other Heavy & Civil Engineering Construction	0.9	0.5	0.8	0.8	0.7
Foundation, Structure, & Exterior Contractors	6.4	6.0	9.8	10.9	13.6
Building Equipment Contractors	11.2	8.4	12.1	13.4	15.6
Building Finishing Contractors	9.3	7.4	10.8	13.2	16.6
Other Specialty Trade Contractors	4.4	3.3	4.6	5.4	5.6

Source: California Employment Development Department. Data for 1990, 1994, 2000 and 2002 are presented from the previous economic base report. Data for 2004 are presented from the current analysis of 2001-2004 data. The data source has changed since the earlier report.

## MANUFACTURING VALUE CHAIN

Manufacturing industries are important for innovation, high wages and exports. Yet, the production component of manufacturing is not likely to be a growing source of job growth for the region or the state.

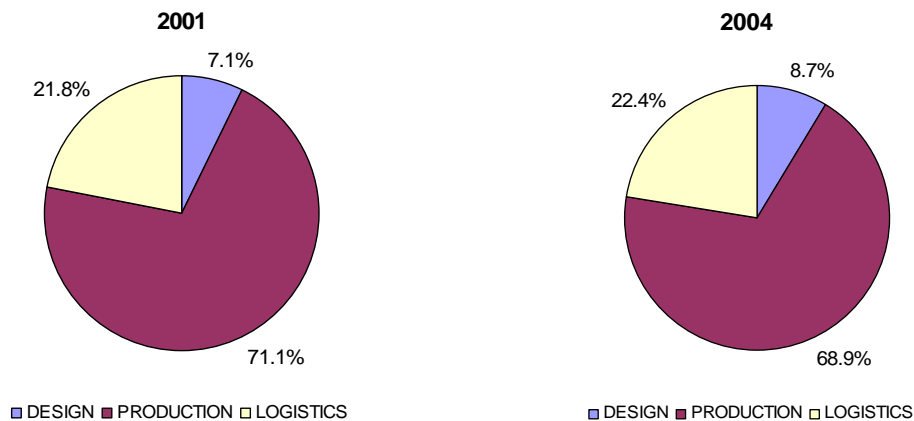
California's manufacturing industry is undergoing a transformation. While traditional manufacturing (production) jobs are declining, job growth is occurring in the design and logistics (warehousing and delivery) phases of manufacturing. Improvements in production technology have impacted the number of production jobs while the "just in time" approach to supply and delivery is lowering warehousing costs and has increased the number and types of jobs in logistics.

The California Regional Economies Project calls this industry cluster the Manufacturing Value Chain. The design and logistics components of manufacturing are providing more middle and higher-level jobs that pay well and offer career development opportunities.

Manufacturing remains an important component of the San Joaquin Valley Region's economy. While Production represents almost 9% of the region's jobs, the combined Manufacturing Value Chain provides almost 13% of the region's jobs, and just over 13% of the jobs in the economic base.

In 2004, Design represented almost 9% of the Manufacturing Value Chain cluster; Production represented almost 69%; and, Logistics represented over 22% of the cluster.

The following graph illustrates how Design, Production and Logistics jobs have changed in the region from 2001 to 2004:



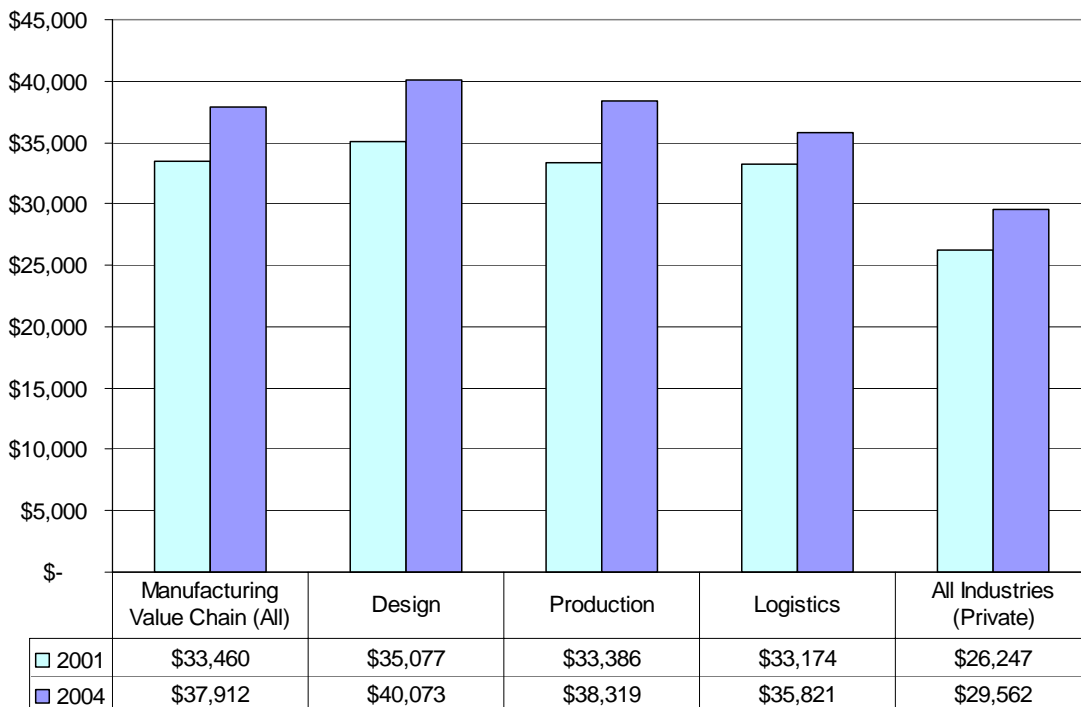
Within the Design component of the Manufacturing Value Chain, the Architectural, Engineering & Related Services sub-sector provided the most jobs in 2004, but the most growth from 2001-2004 took place in Management, Scientific & Technical Consulting Services.

Within Production, the Fruit & Vegetable Preserving & Specialty Food Manufacturing sub-sector reported the most jobs (over 17,100), followed by Animal Slaughtering & Processing (almost 10,800).

Within Logistics, the Warehousing & Storage sub-sector provided the most jobs (almost 10,500), followed by General Freight Trucking (almost 10,000).

The Manufacturing Value Chain cluster's average annual wage for the region in 2004 was \$37,912, up over 13% from the 2001 average of \$33,460. Within the cluster, the component with the highest average annual wage is Design, with an average of \$40,073 in 2004. The Manufacturing Value Chain provides 13% of the region's economic base jobs. The following chart graphs the changes from 2001 to 2004 and compares the industry's average with the region's overall average wage (all industries).

**The Manufacturing Value Chain Wages**



## RETAIL TRADE

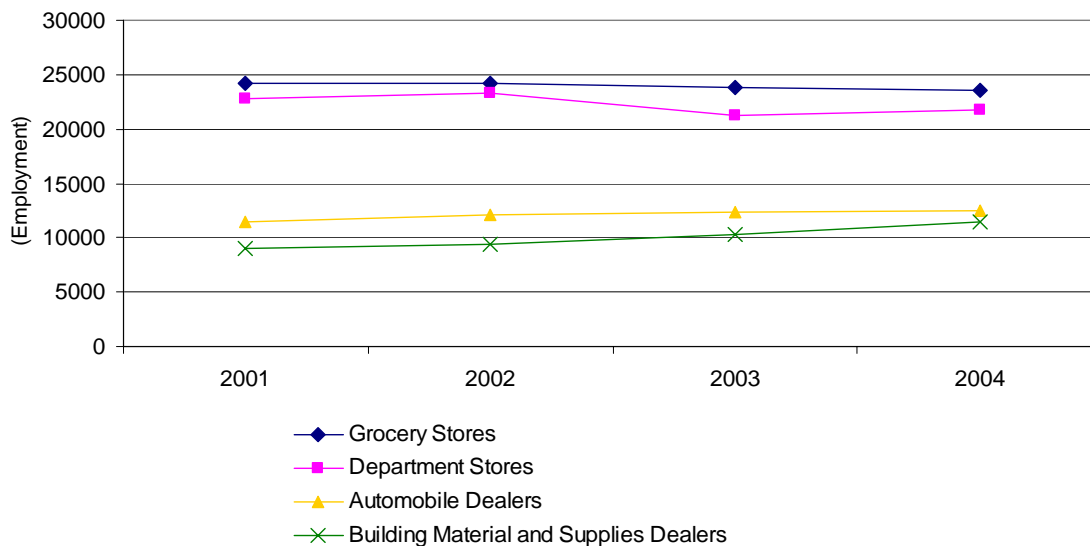
The Retail Trade industry provides over 11% of the jobs in the San Joaquin Valley Region's economic base, and almost 11% of all jobs in the region.

During the period of 1990 – 2002, Retail Trade employment grew steadily, from about 110,000 in 1990 to about 130,000 in 2002. During that time, growth was driven by three sub-sectors: Department Stores, Grocery Stores, and Automobile Dealers. Department Stores provided the greatest expansion in jobs, from 15,700 in 1990 to 23,400 in 2002, an increase of 49%; Grocery Stores increased from 19,900 to 24,000, an increase of 21%; and, Automobile Dealers reported an increase from 8,500 to 12,000 jobs, or 41%.

During the 2001-2004 period, the Retail Trade industry grew by almost 6,000 jobs, or 4.6%, with steady growth. Within the industry, the largest sub-sectors are Grocery Stores (23,500 jobs in 2004), Department Stores (21,700 jobs), Automobile Dealers (12,500 jobs), and Building Material & Supplies Dealers (11,400 jobs). During this time, Building Material & Supplies Dealers reported almost 27% growth and Automobile Dealers reported almost 10% growth. The other two sub-sectors reported job losses; Grocery Stores employment was down almost 3%, and Department Stores employment was down almost 5%.

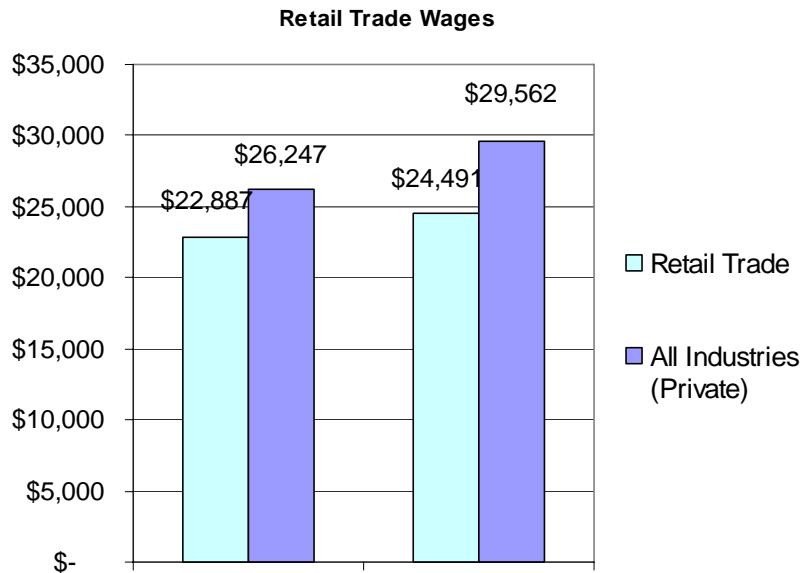
The following graph shows job growth for these four sub-sectors from 2001-2004:

**Jobs in Leading Retail Sectors**



The industry's average annual wage for the region in 2004 was \$24,491, up 7% from the 2001 average of \$22,887. Retail Trade provides 11% of the region's economic base jobs.

The following chart graphs the changes from 2001 to 2004 and compares the industry's average with the region's overall average wage (all industries).



The following table provides employment data for the sub-sectors within the Retail Trade industry, listed by NAICS code.

<b>San Joaquin Valley Region</b>					
<b>Retail Trade</b>					
(Thousands of Jobs)					
	<b>1990</b>	<b>1994</b>	<b>2000</b>	<b>2002</b>	<b>2004</b>
Automobile Dealers	8.5	9.6	10.9	12.0	12.5
Other Motor Vehicle Dealers	1.1	1.1	1.5	1.7	2.2
Auto Parts, Accessories, and Tire Stores	5.5	5.4	6.4	6.3	6.1
Furniture Stores	1.9	1.8	2.1	2.0	2.2
Home Furnishings Stores	1.3	1.5	1.7	1.7	1.9
Electronics & Appliance Stores	2.5	2.9	3.5	3.5	3.9
Building Material & Supplies Dealers	7.3	7.5	8.4	9.4	11.5
Lawn & Garden Equipment & Supplies Stores	2.4	2.2	1.9	1.9	1.7
Grocery Stores	19.9	21.1	22.8	24.0	23.5
Specialty Food Stores	2.8	2.4	2.7	3.1	2.9
Beer, Wine & Liquor Stores	1.5	1.3	1.2	1.2	1.0
Health & Personal Care Stores	6.9	7.6	8.5	8.7	8.8
Gasoline Stations	6.8	7.3	8.2	7.8	7.4
Clothing Stores	5.1	4.8	5.0	5.8	6.3
Shoe Stores	1.5	1.2	1.0	1.1	1.3
Jewelry, Luggage & Leather Goods Stores	1.0	1.2	1.3	1.4	1.3
Sporting Goods, Hobby & Musical Instr. Stores	3.1	3.5	3.6	3.6	3.9

Book, Periodical & Music Stores	1.3	1.2	1.3	1.2	1.1
Department Stores	15.7	21.7	22.9	23.4	21.7
Other General Merchandise Stores	4.2	2.6	2.7	2.8	5.5
Florists	1.2	1.0	0.9	0.9	0.8
Office Supplies, Stationery & Gift Stores	2.4	2.2	3.2	3.0	3.0
Used Merchandise Stores	0.4	0.7	1.1	1.0	1.1
Other Miscellaneous Store Retailers	1.7	1.9	2.0	2.1	2.3
Electronic Shopping & Mail-Order Houses	0.3	0.1	0.1	0.1	0.1
Vending Machine Operators	0.4	0.3	0.2	0.3	0.3
Direct Selling Establishments	1.9	1.1	1.1	0.9	1.1

Source: California Employment Development Department. Data for 2001 and 2004 are presented from the current analysis of 2001-2004 data. The data source has changed since the earlier report.

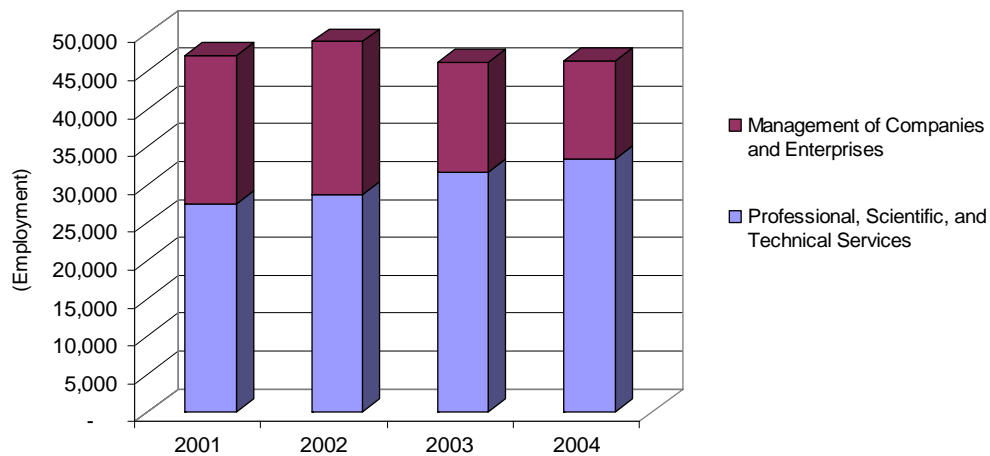
## PROFESSIONAL, SCIENTIFIC, TECHNICAL & MANAGEMENT SERVICES

Professional, Scientific, Technical & Management Services combines two sectors; Professional, Scientific & Technical Services and Management of Companies & Enterprises. In the previous economic base reports for rural regions, these were discussed separately; for this region, only the Management of Companies & Enterprises sector was included.

The Management of Companies and Enterprises sector is a newer category introduced by the NAICS coding system. There appears to have been significant changes in the use of the NAICS codes within this sector since its introduction, where companies originally using this classification may no longer identify themselves in the sector. In some or many cases, they may be identifying themselves within the Professional, Scientific & Technical Services sector.

The Professional, Scientific, Technical & Management Services industry provided almost 4% of the jobs in the San Joaquin Valley Region's economic base in 2004, and almost 4% of all jobs in the region. Within this industry, the Professional, Scientific & Technical Services sector represented over 72% of the industry's jobs; Management of Companies & Enterprises represented almost 28%.

**Professional, Scientific, Technical & Management Services**



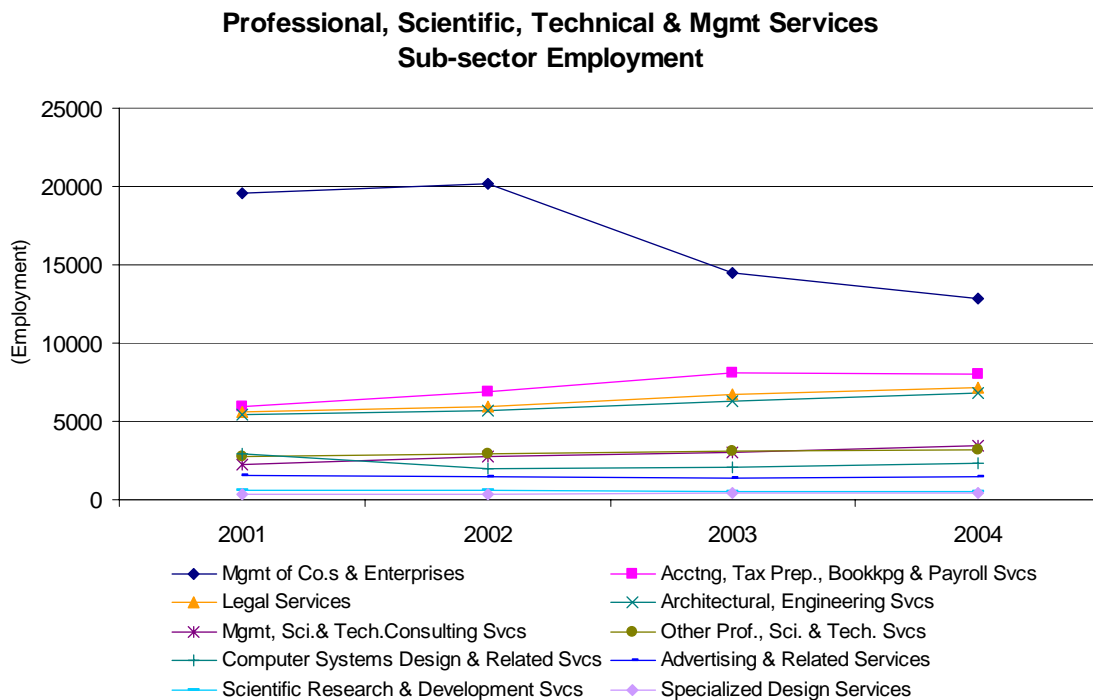
For the period 1990-2002, employment in the Management of Companies & Enterprises sector rose from about 9,000 in 1990 to about 18,000 in 2002. Employment grew from 1990-2000, and then flattened.

For the period 2001 – 2004, the Professional, Scientific, Technical & Management Services (combined) industry reported overall job losses of about 800 jobs. Employment grew by 1,800 jobs from 2001 to 2002, but then fell by 2,700 jobs in 2003; employment was only slightly higher in 2004, at almost 46,300 jobs.

Within the industry, the sub-sectors providing the most jobs in 2004 were Management of Companies & Enterprises (12,800 jobs); Accounting, Tax Preparation, Bookkeeping & Payroll Services (almost 8,100 jobs); Legal Services (almost 7,200 jobs); Architectural, Engineering & Related Services (almost 6,800 jobs); Management, Scientific & Technical Consulting Services (3,400 jobs); and, Other Professional, Scientific & Technical Services (almost 3,200 jobs). All but Management of Companies & Enterprises reported steady or strong job growth, ranging from 16% to 55%.

During this period, the sub-sector Management of Companies & Enterprises reported growth from 2001 to 2002, but then a substantial drop of almost 5,700 jobs in 2003, falling again in 2004 by another 1,600 jobs. As mentioned above, there appears to have been significant changes in the use of the NAICS codes within this sector, which may account for all or a portion of this change.

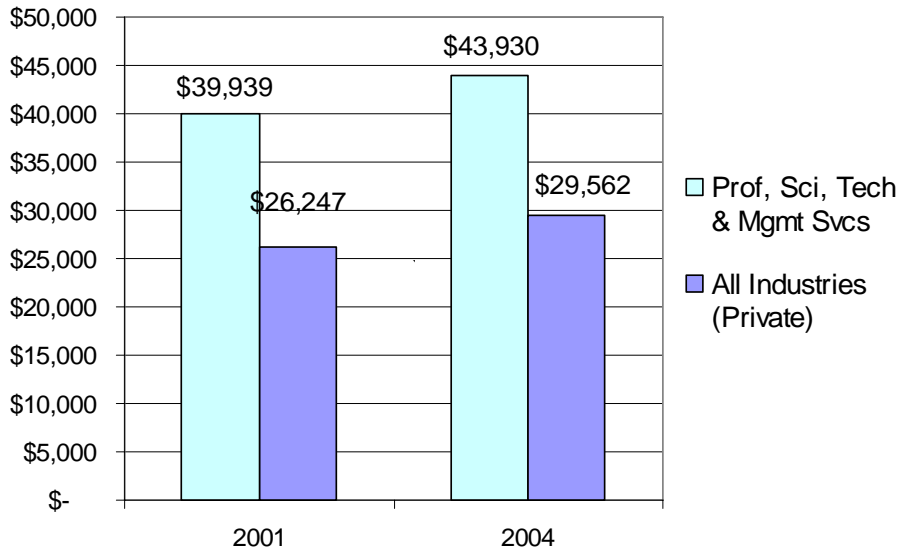
The following graph shows employment for all industry sub-sectors.



The industry's average annual wage for the region in 2004 was \$43,930, up 10% from the 2001 average of \$39,939. Professional, Scientific, Technical & Management Services reported the highest average wage in the region's economic base but provides just 4% of the region's economic base jobs.

The following chart graphs the changes from 2001 to 2004 and compares the industry's average with the region's overall average wage (all industries).

**Professional, Scientific, Technical & Management Wages**



The following table provides information on employment at the sub-sector level, listed in NAICS code order:

<b>San Joaquin Valley Region</b>				
<b>Professional, Scientific, Technical &amp; Management Services</b>				
(Thousands of jobs)				
	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>
Legal Services	5.6	6.0	6.7	7.2
Accounting, Tax Prep, Bookkpg & Payroll	6.0	6.9	8.1	8.1
Architectural, Engineering & Related Svcs	5.5	5.7	6.3	6.8
Specialized Design Services	0.4	0.4	0.4	0.4
Computer Systems Design & Related Svcs	3.0	2.0	2.1	2.3
Mgmt, Sci. & Tech. Consulting Svcs	2.2	2.8	3.0	3.4
Sci. Research & Devel. Svcs	0.6	0.6	0.6	0.6
Advertising & Related Svcs	1.5	1.4	1.4	1.5
Other Prof., Sci. & Tech. Svcs	2.8	3.0	3.1	3.2
Mgmt of Co.s & Enterprises	19.6	20.1	14.4	12.8

Source: California Employment Development Department  
 Data for 1990 – 2002 are presented from the previous economic base report.

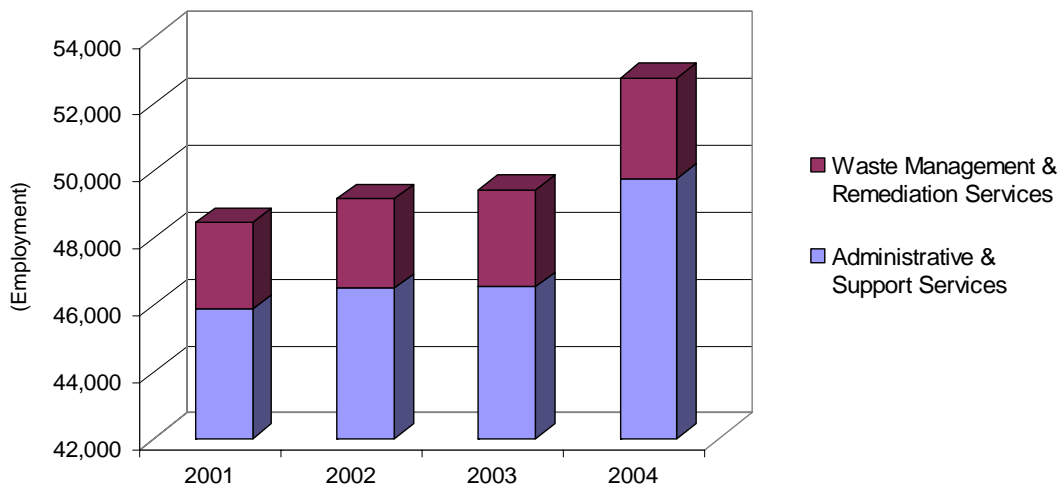
## ADMINISTRATIVE, SUPPORT & WASTE SERVICES

Administrative, Support & Waste Services includes the sectors Administrative & Support Services and Waste Management & Remediation Services. In 2004, this industry provided over 4% of all economic base jobs in the San Joaquin Valley Region, and just over 4% of the region's total jobs.

From 1990-2002, Administrative, Support & Waste Services reported significant net new job growth. Growth continued through 2000, and then dipped in 2001, with a slight rise in 2002. Employment Services showed the fastest rate of growth within the industry. Services to Buildings & Dwellings and Business Support Services also reported growth from 1990 to 2002, but at a less significant rate than Employment Services.

During the period 2001-2004, employment continued to grow, increasing by over 4,300 jobs, or about 9%. The two main sectors, Administrative & Support Services and Waste Management & Remediation Services both reported growth.

**Administrative, Support & Waste Management Services**

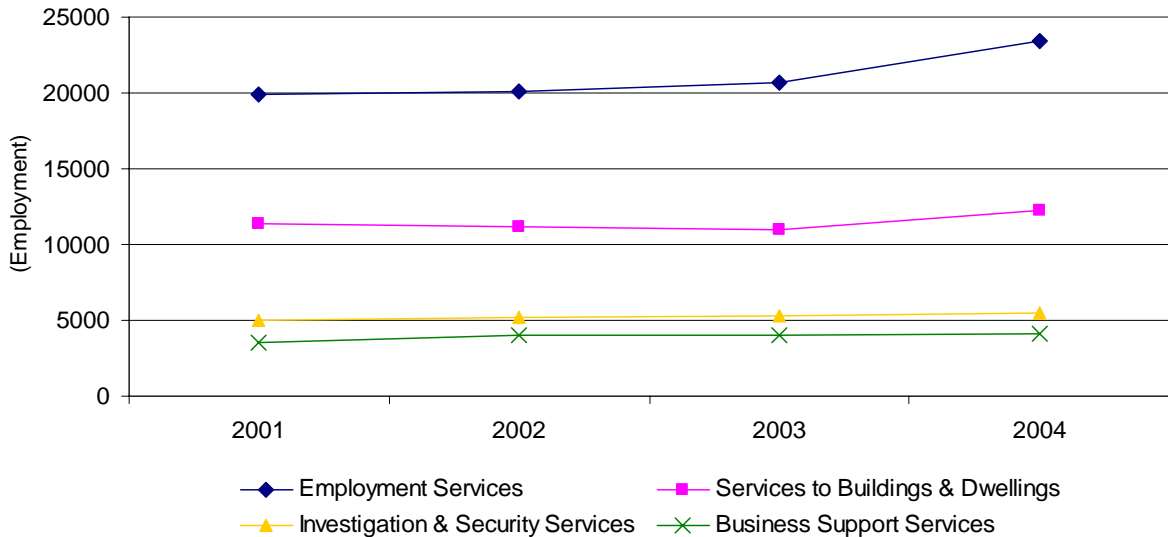


Administrative, Support & Waste Services is made up of eleven sub-sectors. Of these, the largest is Employment Services, which provides over 44% of the industry jobs (almost 23,400 jobs in 2004), and reported job growth of almost 18% from 2001-2004.

The second largest sub-sector in 2004 was Services to Buildings & Dwellings, with 12,200 jobs; third was Investigation & Security Services (5,400 jobs), and fourth was Business Support Services (4,100 jobs).

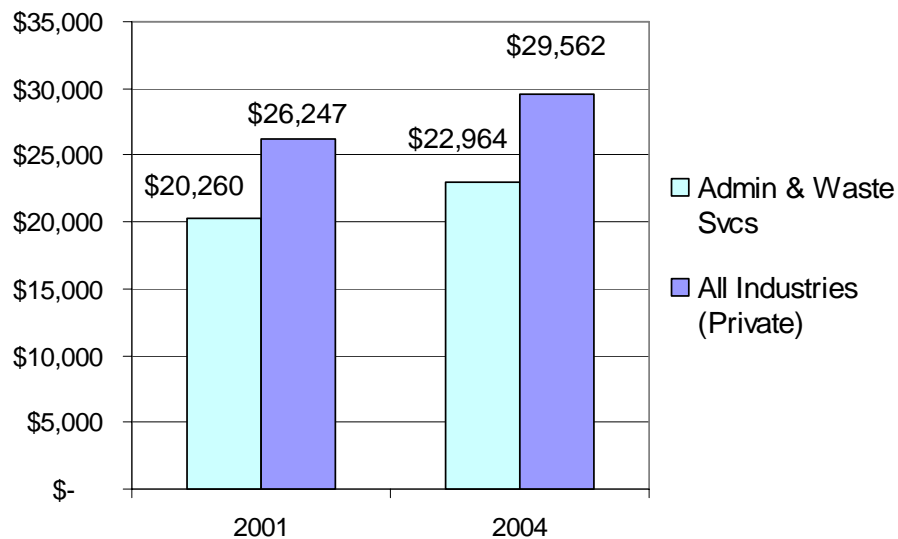
The following graph shows the employment growth from 2001-2004 for the top four sub-sectors, based on employment levels in 2004:

### Admin., Support & Waste Services Top Four Sub-sectors



The industry's average annual wage for the region in 2004 was \$22,964, up over 13% from the 2001 average of \$20,260. Administrative, Support & Waste Services provides 4% of the region's economic base jobs. The following chart graphs the changes from 2001 to 2004 and compares the industry's average with the region's overall average wage (all industries).

### Administrative & Waste Services Wages



The following table provides employment data for all eleven sub-sectors within the industry, listed by NAICS code:

<b>San Joaquin Valley Region</b>					
<b>Administrative, Support &amp; Waste Services</b>					
(Thousands of Jobs)					
	<b>1990</b>	<b>1994</b>	<b>2000</b>	<b>2002</b>	<b>2004</b>
Office Administrative Services	1.5	1.2	1.7	1.7	2.0
Facilities Support Services	0.4	0.3	1.1	1.1	1.0
Employment Services	8.2	10.5	23.8	20.0	23.4
Business Support Services	1.7	1.9	2.8	4.1	4.1
Travel Arrangement & Reservation Services*	4.4	4.4	5.2	5.2	0.7
Investigation & Security Services	0.9	1.3	1.8	2.0	5.4
Services to Buildings & Dwellings	7.4	8.3	11.0	11.3	12.2
Other Support Services	1.1	0.7	1.3	1.2	0.9
Waste Collection	0.7	0.7	0.8	0.8	1.2
Waste Treatment & Disposal	1.3	1.3	1.1	1.2	0.9
Remediation & Other Waste Mgmt Services	0.7	0.6	0.7	0.7	0.9

Source: California Employment Development Department. Data for 2001 and 2004 are presented from the current analysis of 2001-2004 data. The data source has changed since the earlier report.

\* Employment data for 2002 differs significantly for this sub-sector from the original report, with 2,400 fewer jobs according to the current data source.

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## HEALTH SCIENCES & SERVICES

For the previous economic base report, the Health Care & Social Assistance industry was used for studying employment in health care. The industry also included social services. For this and future reports, the Health Sciences & Services industry cluster will be used instead of Health Care & Social Assistance.

The Health Sciences & Services cluster includes health care services, such as offices of physicians, dentists, other health practitioners and other outpatient care facilities; hospitals; laboratories; home health care; nursing care and other residential care facilities. It also includes community, emergency and other relief services; vocational rehabilitation services; and, death care services. Within health sciences, the cluster includes pharmaceutical and medicine manufacturing; medical equipment and supplies manufacturing; and, scientific research and development (R&D) services.

In 2004, the Health Sciences & Services cluster was the fifth largest component of the San Joaquin Valley Region's economic base, providing 105,500 jobs – almost 9% of the economic base jobs, and over 8% of all jobs in the region.

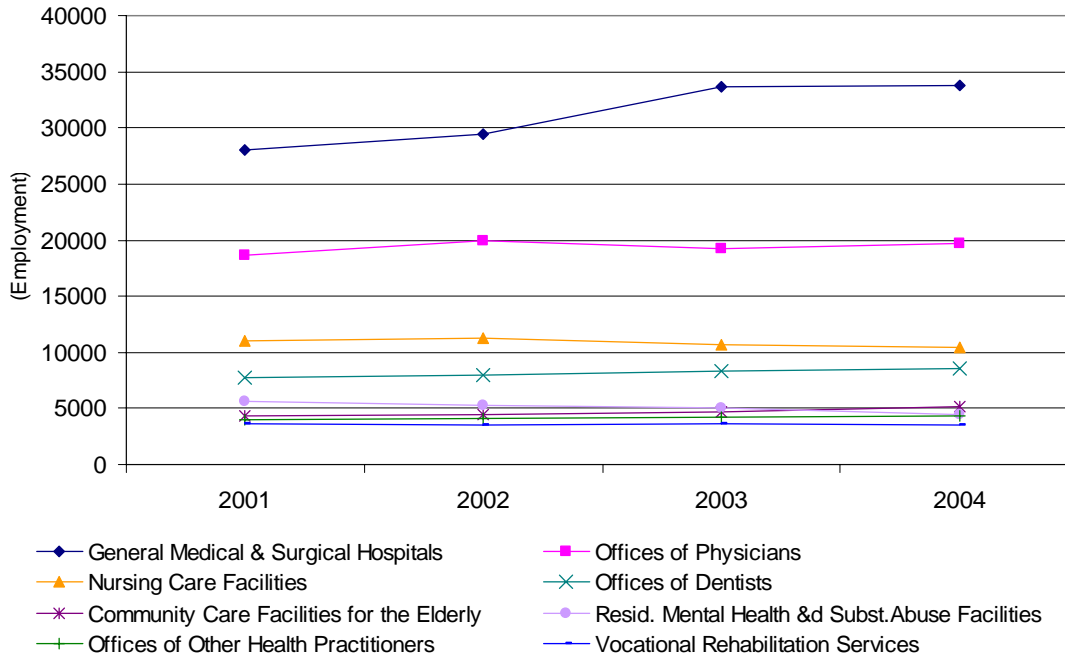
From 1990-2002, the Health Sciences & Services cluster grew steadily at an average annual rate of 3.2%, as reported in the study, *Golden Opportunity, Growing Crisis: The Health Sciences and Services Cluster (September 2004)*. The largest employment sub-sectors were in health services and included General Medical & Surgical Hospitals (over 28,000 jobs in 2002), Offices of Physicians (over 20,000 jobs in 2002), and Residential Nursing Care Facilities (over 11,000 jobs in 2002). Between 2000 and 2002, the strongest areas of growth were in medical testing labs and research and development. Other areas of strong employment growth were in outpatient care facilities, home health, and other health services including residential care, vocational rehabilitation, and emergency relief services.

From 2001-2004, Health Sciences & Services reported steady job growth. Overall, the cluster grew by over 7,600 jobs; an increase of almost 8%. Within the cluster, the General Medical & Surgical Hospitals sub-sector provides the most jobs, with almost 33,800 jobs in 2004; this was an increase of just over 20% from 2001-2004. The second largest sub-sector was Offices of Physicians, reporting 19,700 jobs in 2004, and growth of over 5% during the period. Third was Nursing Care Facilities, with 10,400 jobs (down over 5%), followed by Offices of Dentists, reporting almost 8,600 jobs (up over 11%).

The greatest number of jobs lost was reported by Residential Mental Health & Substance Abuse Facilities, with a loss of 1,200 jobs. Nursing Care Facilities, although the third largest sub-sector in the cluster, was second in job losses, down almost 600 jobs. Next, Psychiatric & Substance Abuse Hospitals reported losses of over 400 jobs.

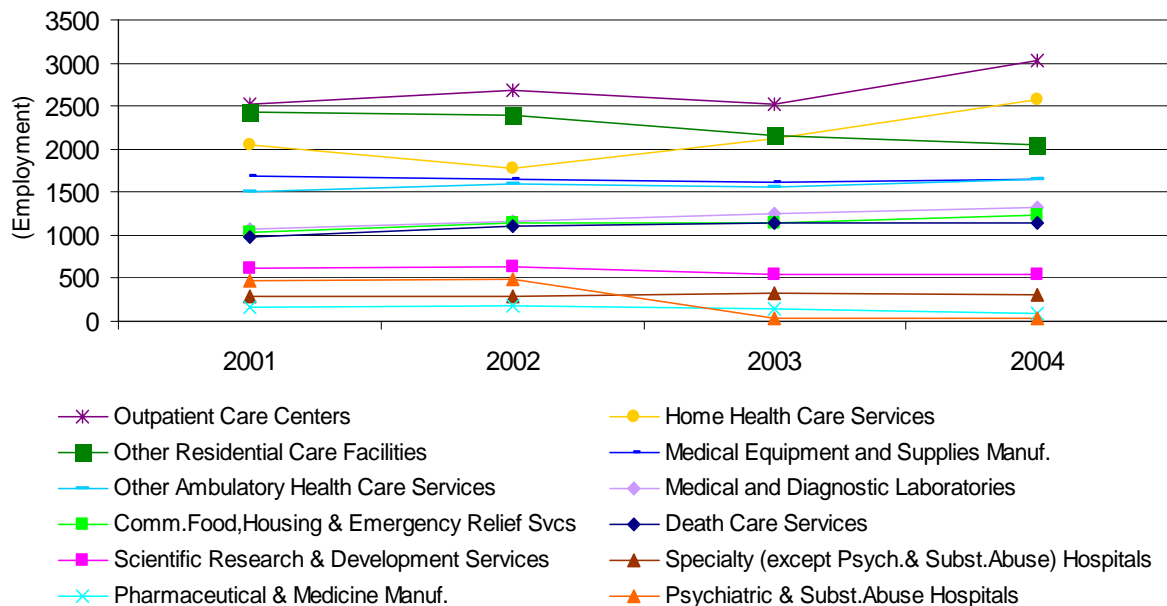
The following graph shows the change in employment from 2001 to 2004 for the top eight sub-sectors, based on 2004 employment levels:

### Health Sciences & Services Jobs Top Eight Sub-sectors

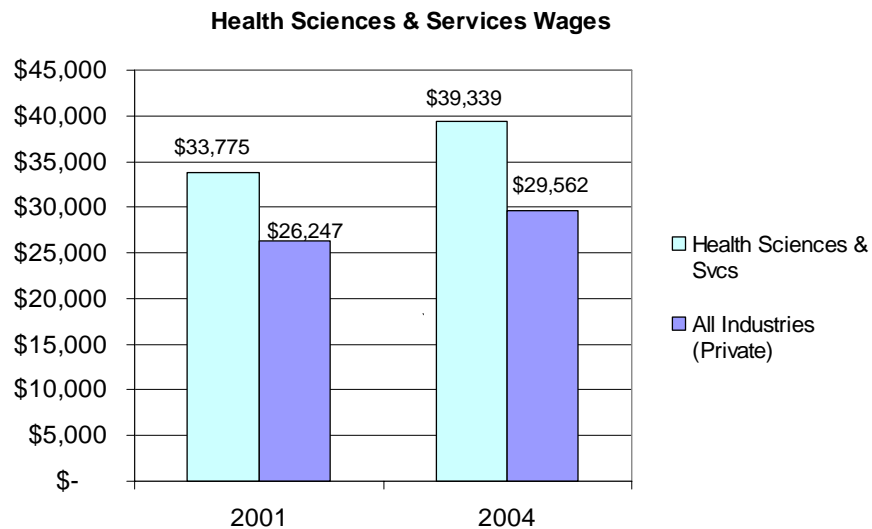


The next graph shows the change in employment from 2001 to 2004 for the remaining sub-sectors:

### More Health Sciences & Services Jobs



The cluster's average annual wage for the region in 2004 was \$39,339, up 16.5% from the 2001 average of \$33,775. Health Sciences & Services provides 9% of the region's economic base jobs. The following chart graphs the changes from 2001 to 2004 and compares the industry's average with the region's overall average wage (all industries).



The following table provides data on cluster employment by sub-sector for 2001-2004:

<b>San Joaquin Valley Region Health Sciences &amp; Services (Thousands of Jobs)</b>				
	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>
Pharmaceutical & Medicine Manufacturing	0.2	0.2	0.1	0.1
Medical Equipment & Supplies Manufacturing	1.7	1.7	1.6	1.7
Scientific Research & Development Services	0.6	0.6	0.6	0.6
Offices of Physicians	18.7	19.9	19.3	19.7
Offices of Dentists	7.7	8.0	8.3	8.6
Offices of Other Health Practitioners	4.0	4.1	4.3	4.4
Outpatient Care Centers	2.5	2.7	2.5	3.0
Medical & Diagnostic Laboratories	1.1	1.2	1.2	1.3
Home Health Care Services	2.0	1.8	2.1	2.6
Other Ambulatory Health Care Services	1.5	1.6	1.6	1.7
General Medical & Surgical Hospitals	28.1	29.5	33.6	33.8
Psychiatric & Substance Abuse Hospitals	0.5	0.5	0.0*	0.0*
Specialty (except Psychiatric & Subst. Abuse) Hospitals	0.3	0.3	0.3	0.3
Nursing Care Facilities	11.0	11.3	10.7	10.4
Residential Mental Health & Subst. Abuse Facilities	5.6	5.3	5.1	4.4
Community Care Facilities for the Elderly	4.3	4.4	4.6	5.1
Other Residential Care Facilities	2.4	2.4	2.2	2.1
Comm. Food, Housing, Emergency & Other Relief Svcs	1.0	1.1	1.1	1.2
Vocational Rehabilitation Services	3.7	3.5	3.7	3.5
Death Care Services	1.0	1.1	1.1	1.1

Source: California Employment Development Department

Data for 1990 – 2002 are presented from the previous economic base report.

\* Employment was reported; however, jobs were less than 50, which rounded to 0.0 thousands.

## ENTERTAINMENT & TOURISM

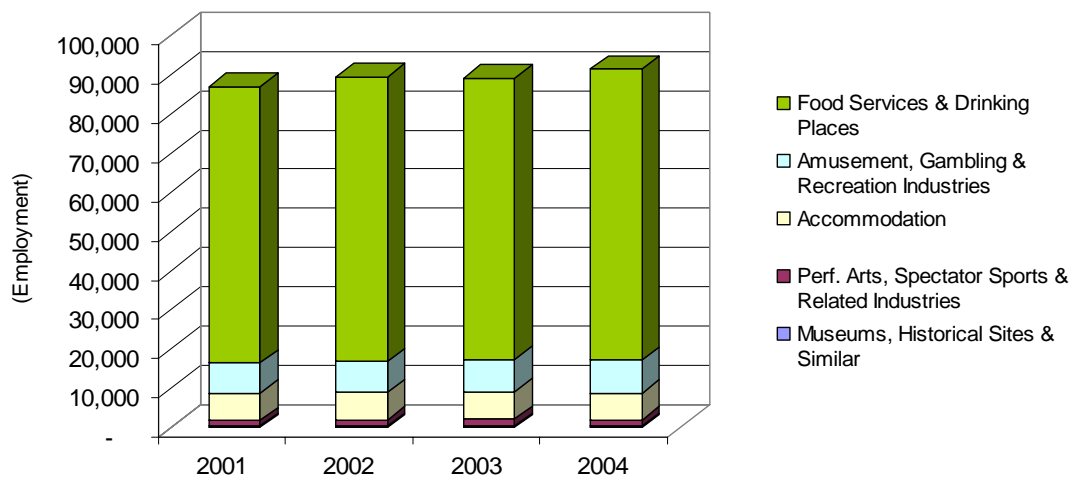
The Entertainment & Tourism industry combines Accommodation & Food Services with Arts, Entertainment & Recreation. For the previous economic base report, only the Accommodation & Food Services sector was discussed.

The Entertainment & Tourism industry is the sixth largest component of the San Joaquin Valley Region's economic base. The industry provides 7.5% of the economic base jobs, and over 7% of all jobs in the region.

From 1990-2002, the Accommodation & Food Services sector showed steady growth. The three sub-sectors driving job growth were Limited-Service Eating Places, which added almost 15,800 jobs during that period; Full Service Restaurants, which added 5,800 jobs; and, Traveler Accommodations, which added almost 400 jobs. In addition to these, two other sub-sectors contributed modestly to the job gains. These were Rooming & Board Houses and RV Parks and Recreational Camps.

During the 2001-2004 period, Entertainment & Tourism grew by almost 2,900 jobs, or over 7%, with a slight dip of 400 jobs in 2003, followed by job gains in 2004. Four of the five major sectors reported job growth. The largest sector, Food Services & Drinking Places, reported almost 74,300 jobs in 2004, and growth of almost 6%; next, the Amusement, Gambling & Recreation Industries sector reported almost 8,500 jobs and 8% growth. The third largest sector, Accommodation, reported almost 6,900 jobs, with minimal growth of 0.2% for the period.

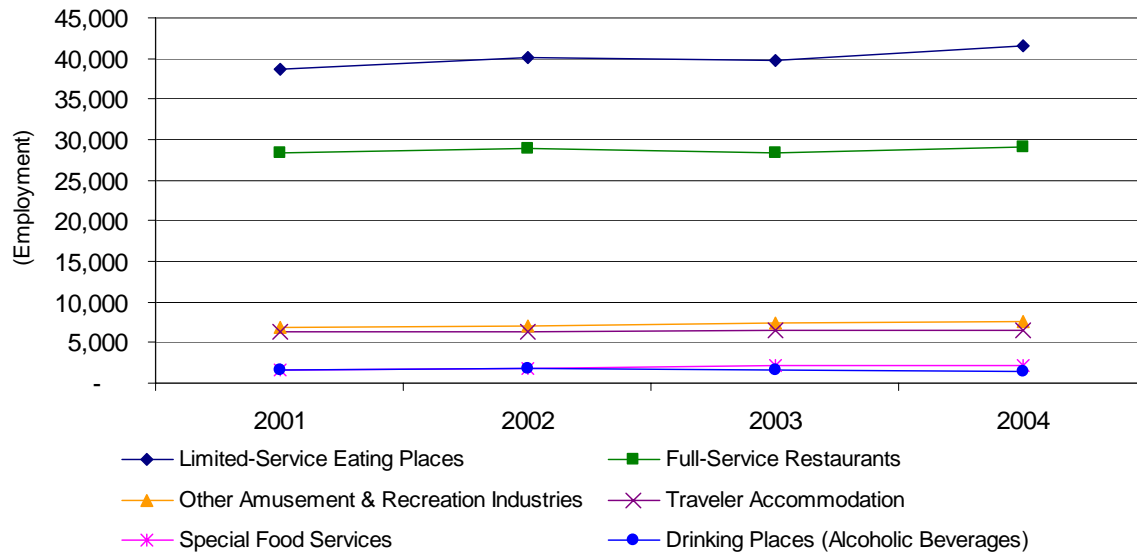
**Entertainment & Tourism Jobs**



Across all sectors, the leading sub-sectors were Limited Service Eating Places (41,500 jobs in 2004); Full Service Restaurants (almost 29,100 jobs); Other Amusement & Recreation Industries (over 7,500 jobs); Traveler Accommodation (6,400 jobs); Special Food Services (2,100 jobs); and, Drinking Places (Alcoholic Beverages) (about 1,500

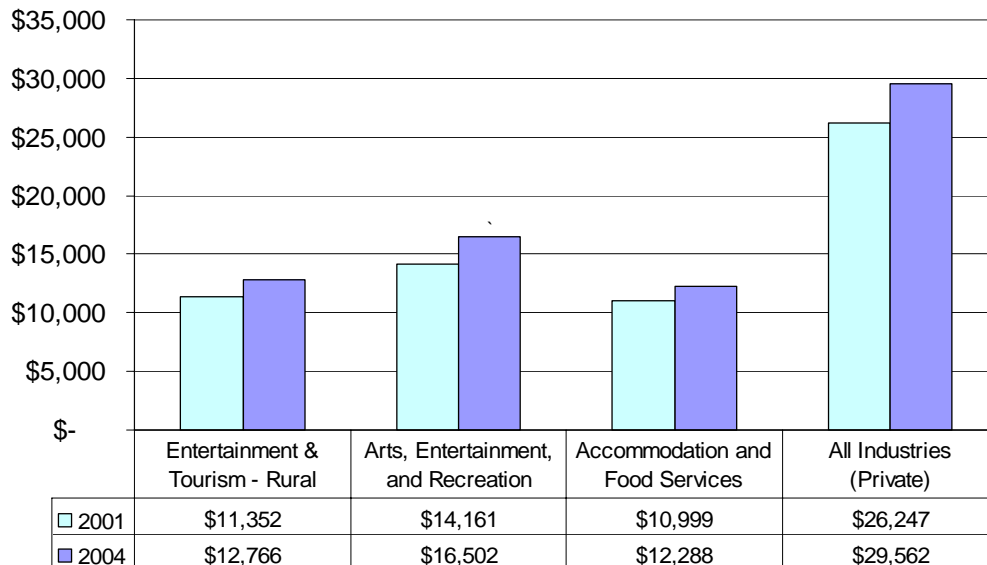
jobs). Taking a closer look at Other Amusement & Recreation Industries, most of this sub-sector's employment comes from two areas; Fitness & Recreational Sports Centers, followed by Golf Courses & Country Clubs. A closer look at the Special Food Services sub-sector shows jobs concentrated in the area of Food Service Contractors.

### Entertainment & Tourism Leading Sub-sectors



The industry's average annual wage for the region in 2004 was \$12,766, up 12.5% from the 2001 average of \$11,352. Entertainment & Tourism provides 8% of the region's economic base jobs. Within the industry, the Arts, Entertainment & Recreation sector reported the highest average wage. The following chart graphs the changes from 2001 to 2004 and compares the industry's average with the region's overall average wage (all industries).

### Entertainment & Tourism Wages



The following table provides data on all sub-sectors in the industry, listed in NAICS code order:

<b>San Joaquin Valley Region Entertainment &amp; Tourism</b>				
(Thousands)				
	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>
Performing Arts Companies	0.5	0.5	0.5	0.5
Spectator Sports	0.7	0.9	0.9	0.8
Promoters of Performing Arts, Sports, & Similar Events	0.1	0.1	0.1	0.1
Agents & Managers for Public Figures	0.1	0.0*	0.0*	0.0*
Independent Artists, Writers, & Performers	0.1	0.1	0.2	0.1
Museums, Historical Sites, & Similar Institutions	0.4	0.4	0.4	0.3
Amusement Parks and Arcades	0.4	0.4	0.4	0.4
Gambling Industries	0.5	0.3	0.4	0.5
Other Amusement & Recreation Industries	6.9	7.0	7.3	7.5
Traveler Accommodation	6.3	6.4	6.5	6.4
RV (Recreational Vehicle) Parks & Rec. Camps	0.4	0.4	0.4	0.4
Rooming and Boarding Houses	0.2	0.2	0.2	0.1
Full-Service Restaurants	28.3	29.0	28.3	29.1
Limited-Service Eating Places	38.7	40.1	39.7	41.5
Special Food Services	1.6	1.8	2.1	2.1
Drinking Places (Alcoholic Beverages)	1.7	1.7	1.6	1.5

Source: California Employment Development Department

\* Employment was reported; however, jobs were less than 50, which rounded to 0.0 thousands.

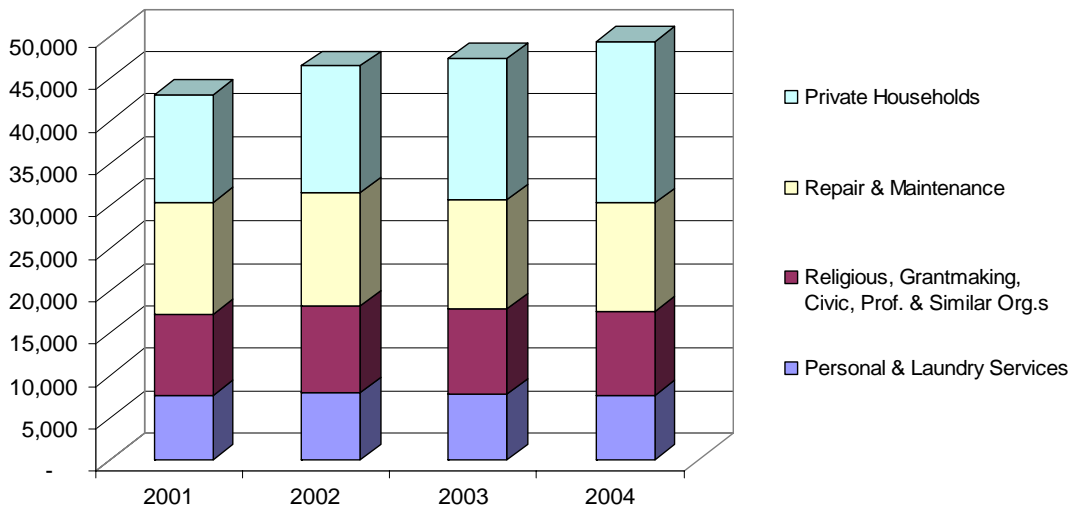
## OTHER SERVICES (Except Public Administration)

The Other Services industry includes a variety of services, such as automotive repair and maintenance, religious and civic organizations, personal care services and professional organizations. Other Services provides 4% of the San Joaquin Valley Region's economic base jobs and almost 4% of all jobs in the region.

From 1990-2002, Other Services showed steady growth, increasing from about 28,000 jobs in 1990 to 37,000 jobs in 2002. The three sub-sectors that led job growth were Automotive Repair & Maintenance, Religious Organizations and Grantmaking & Giving Services. All sub-sectors in the industry showed job growth during the period, with the exception of two; Electronic & Precision Equipment Repair & Maintenance, and Personal & Household Goods Repair & Maintenance.

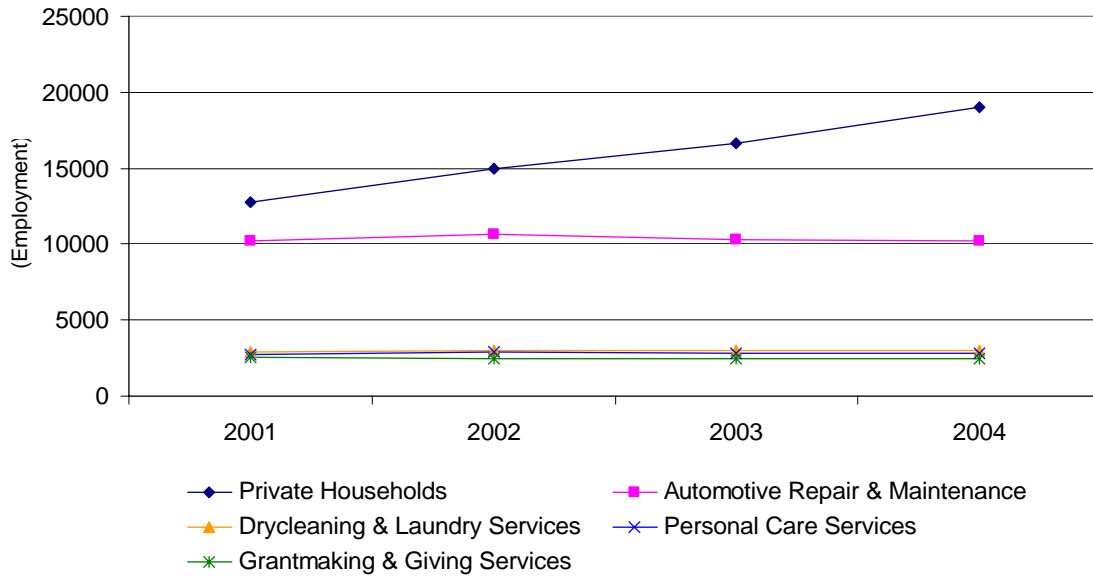
During 2001-2004, Other Services employment grew steadily, from 43,000 jobs to 49,300 jobs; an increase of almost 15%. In 2004, the largest sector was Private Households, with almost 19,100 jobs. Second, the Repair & Maintenance sector reported over 12,800 jobs. Third was Religious, Grantmaking, Civic, Professional & Similar Organizations, with over 9,800 jobs, followed by Personal & Laundry Services, with 7,600 jobs.

Other Services Jobs



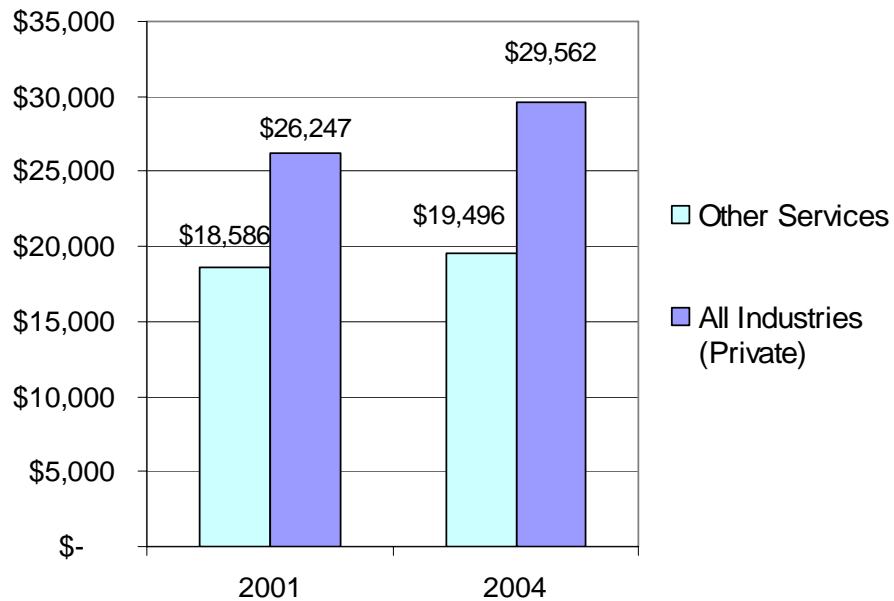
The largest sub-sector was Private Households, which reported almost 19,100 jobs in 2004, and significant growth of almost 50% from 2001-2004. Next, Automotive Repair & Maintenance reported almost 10,300 jobs, with a gain of less than 1%. The third largest sub-sector was Drycleaning & Laundry Services (almost 3,000 jobs), followed by Personal Care Services (2,800 jobs) and Grantmaking & Giving Services (almost 2,500 jobs).

### Other Services Leading Sub-sectors



The industry's average annual wage for the region in 2004 was \$19,496, up almost 5% from the 2001 average of \$18,586. Other Services provides 4% of the region's economic base jobs. The following chart graphs the changes from 2001 to 2004 and compares the industry's average with the region's overall average wage (all industries).

### Other Services Wages



The following table provides data on employment by sub-sector:

<b>San Joaquin Valley Region</b>					
<b>Other Services</b>					
(Thousands)					
	1990	1994	2000	2002	2004
Automotive Repair & Maintenance	7.2	7.6	9.5	10.8	10.3
Electronic & Precision Equip. Repair & Maint.	0.7	0.9	0.7	0.6	0.2
Commercial & Industrial Machinery & Equipment	1.7	2.0	1.8	2.1	1.9
Personal & Household Goods Repair & Maintenance	0.6	0.4	0.3	0.3	0.5
Personal Care Services	2.3	2.2	2.6	2.9	2.8
Death Care Services	1.8	1.6	1.8	2.0	1.1
Drycleaning & Laundry Services	2.8	2.9	2.9	3.0	3.0
Other Personal Services*	1.9	1.6	2.0	2.0*	0.7
Religious Organizations**	5.2	5.5	6.3	7.0**	1.6
Grantmaking & Giving Services	1.0	0.8	1.7	2.0	2.5
Social Advocacy Organizations	1.5	1.8	2.3	2.5	2.0
Civic & Social Organizations	0.7	0.9	1.0	1.1	1.8
Business, Professional, Labor, Political Org.s	0.9	1.0	0.9	1.0	2.0
Private Households	—	—	—	16.7	19.1

Source: California Employment Development Department

Data for 1990 – 2002 are presented from the previous economic base report, except for Private Households.

Totals from the previous report were not available; using current data for the 2002 total.

\* The current data source shows significantly different employment data for Other Personal Services, reporting only about 1,000 jobs for 2002.

\*\* The current data source shows significantly different employment data for Religious Organizations, reporting only about 1,700 jobs for 2002.

## ALL GOVERNMENT

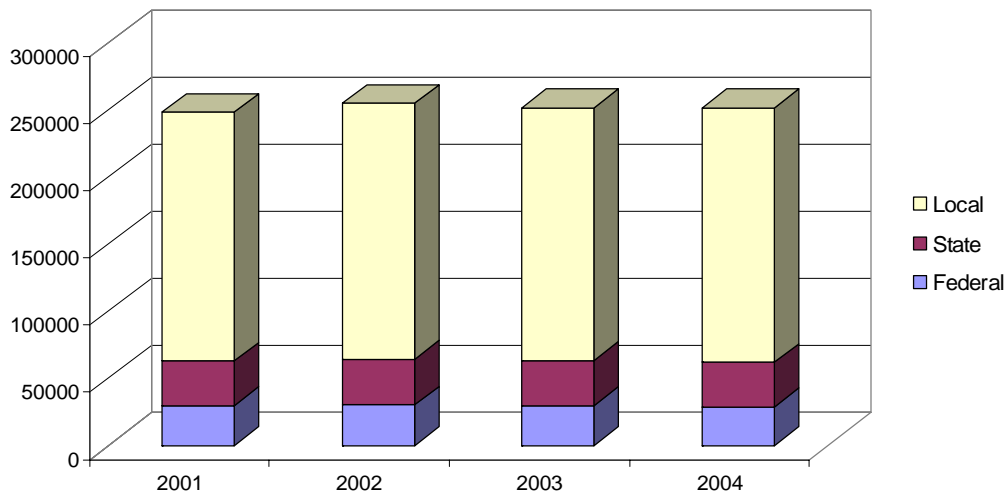
All Government includes federal, state and local government jobs. Jobs in public education are reported in the state and local government sectors. Government jobs also include defense (reported at the federal level), law enforcement, firefighting and public services.

All Government continues to provide the greatest number of jobs for the San Joaquin Valley Region, although by a narrow margin. This industry provided 21% of the economic base jobs in the region in 2004, and 20% of all jobs in the region.

From 1990-2002, All Government jobs grew steadily from about 200,000 to 250,000 jobs. Job growth was led by Local Government (including education), which grew from about 140,000 jobs in 1990 to 190,000 jobs in 2002 – an increase of almost 36%. State Government (including education) rose from about 17,000 jobs in 1990 to 27,000 in 2002, while Federal Government (including Defense) jobs dropped from about 33,000 jobs in 1990 to 30,000 jobs in 2002. Within State Government, State Education grew modestly from 5,500 jobs in 1990 to 6,400 jobs in 2002.

During the period 2001-2004, All Government grew by just over 1%, from 247,500 jobs to 251,000 jobs. Growth was only within Local Government (including education), which grew from about 184,800 jobs in 2001 to 189,400 in 2004; an increase of 2.5%. During this same time, Federal Government reported job losses of over 3%, and State Government reported no net growth.

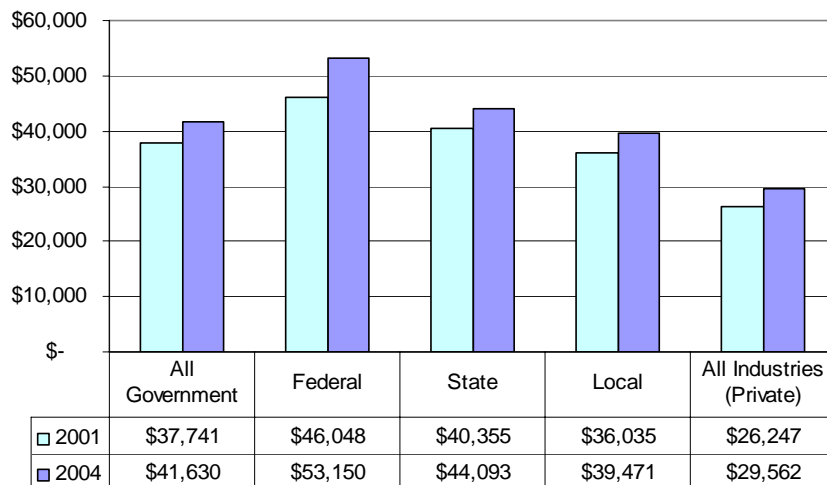
All Government Jobs



Local Government (including Local Education) represents almost 76% of all government jobs in the San Joaquin Valley Region; Local Government Education alone represents almost 36%. State Government (including Education) represents 13% of the government jobs, and Federal Government represents over 11%.

All Government average annual wages include the wages for a broad spectrum of jobs, including elected officials and executive branch, judicial, defense, law enforcement, firefighting, education and other public administration jobs. The industry's average annual wage for the region in 2004 was \$41,630, up over 10% from the 2001 average of \$37,741. Within All Government, the average annual wage for Federal Government was \$53,150; the average for State Government was \$44,093; and, the average annual wage for Local Government was \$39,471. The following chart graphs the changes from 2001 to 2004 and compares the industry's average with the region's overall average wage (all industries).

**All Government Wages**



The following table shows employment for each level of government from 2001-2004:

<b>San Joaquin Valley Region All Government</b> (Thousands of Jobs)				
	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>
Federal Government (includes Defense)	29.7	30.2	29.8	28.7
Federal Government Defense	7.8	8.0	8.1	8.1
State Government (includes Education)	33.1	33.8	33.3	33.1
State Government Education	6.3	6.5	6.2	5.9
Local Government (includes Education)	184.8	190.3	188.1	189.4
Local Government Education	87.8	90.8	89.0	89.5

Source: California Employment Development Department  
Some government employment may be suppressed due to confidentiality requirements.

## **APPENDIX A: Definition of Industry Sectors and Clusters by NAICS Codes**

The following lists the major industries and clusters included in the economic base reports, and defines them by NAICS code and classification. Most of these are defined at the three-digit and/or four-digit NAICS code levels, but some are defined at the five-digit and/or six-digit NAICS code levels.

### **THE FOOD CHAIN**

#### **Distribution**

4244	Grocery and Related Product Wholesalers
4245	Farm Product Raw Material Merchant Wholesalers
4248	Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers
42491	Farm Supplies Merchant Wholesalers
4452	Specialty Food Stores
49313	Farm Product Warehousing and Storage

#### **Processing**

3111	Animal Food Manufacturing
3112	Grain and Oilseed Milling
3113	Sugar and Confectionery Product Manufacturing
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing
3115	Dairy Product Manufacturing
3116	Animal Slaughtering and Processing
3117	Seafood Product Preparation and Packaging
3118	Bakeries and Tortilla Manufacturing
3119	Other Food Manufacturing
322215	Nonfolding Sanitary Food Container Manufacturing
32616	Plastics Bottle Manufacturing
327213	Glass Container Manufacturing
332115	Crown and Closure Manufacturing
332431	Metal Can Manufacturing
31211	Soft Drink and Ice Manufacturing
31212	Breweries
31213	Wineries
31214	Distilleries

#### **Production**

1111	Oilseed and Grain Farming
1113	Fruit and Tree Nut Farming
11141	Food Crops Grown Under Cover
11193	Sugarcane Farming
11194	Hay Farming
111991	Sugar Beet Farming
111992	Peanut Farming

- 1112 Vegetable and Melon Farming
- 111998 All Other Miscellaneous Crop Farming
- 1121 Cattle Ranching and Farming
- 1122 Hog and Pig Farming
- 1123 Poultry and Egg Production
- 1124 Sheep and Goat Farming
- 1125 Animal Aquaculture
- 1129 Other Animal Production
- 1141 Fishing
- 1142 Hunting and Trapping

## **Support**

- 1151 Support Activities for Crop Production
- 1152 Support Activities for Animal Production
- 22131 Water Supply and Irrigation Systems
- 23711 Water and Sewer Line and Related Structures Construction
- 32192 Wood Container and Pallet Manufacturing
- 3253 Pesticide, Fertilizer, and Other Agricultural Chemical Manufacturing
- 33311 Agricultural Implement Manufacturing
- 333294 Food Product Machinery Manufacturing
- 42382 Farm and Garden Machinery and Equipment Merchant Wholesalers
- 54194 Veterinary Services

## **CONSTRUCTION**

- 236 Construction of Buildings
- 2361 Residential Building Construction
- 2362 Nonresidential Building Construction
- 237 Heavy and Civil Engineering Construction
- 2371 Utility System Construction
- 2372 Land Subdivision
- 2373 Highway, Street, and Bridge Construction
- 2379 Other Heavy and Civil Engineering Construction
- 238 Specialty Trade Contractors
- 2381 Foundation, Structure, and Building Exterior Contractors
- 2382 Building Equipment Contractors
- 2383 Building Finishing Contractors
- 2389 Other Specialty Trade Contractors

## **MANUFACTURING VALUE CHAIN**

### **Design**

- 5413 Architectural, Engineering, and Related Services
- 5414 Specialized Design Services
- 5416 Management, Scientific, and Technical Consulting Services
- 5419 Other Professional, Scientific, and Technical Services

## Production

3111	Animal Food Manufacturing
3112	Grain and Oilseed Milling
3113	Sugar and Confectionery Product Manufacturing
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing
3115	Dairy Product Manufacturing
3116	Animal Slaughtering and Processing
3117	Seafood Product Preparation and Packaging
3118	Bakeries and Tortilla Manufacturing
3119	Other Food Manufacturing
3121	Beverage Manufacturing
3122	Tobacco Manufacturing
3131	Fiber, Yarn, and Thread Mills
3132	Fabric Mills
3133	Textile and Fabric Finishing and Fabric Coating Mills
3141	Textile Furnishings Mills
3149	Other Textile Product Mills
3151	Apparel Knitting Mills
3152	Cut and Sew Apparel Manufacturing
3159	Apparel Accessories and Other Apparel Manufacturing
3161	Leather and Hide Tanning and Finishing
3162	Footwear Manufacturing
3169	Other Leather and Allied Product Manufacturing
3211	Sawmills and Wood Preservation
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing
3219	Other Wood Product Manufacturing
3221	Pulp, Paper, and Paperboard Mills
3222	Converted Paper Product Manufacturing
3231	Printing and Related Support Activities
3241	Petroleum and Coal Products Manufacturing
3251	Basic Chemical Manufacturing
3252	Resin, Synthetic Rubber, and Artificial Synthetic Fibers and Filaments M
3253	Pesticide, Fertilizer, and Other Agricultural Chemical Manufacturing
3255	Paint, Coating, and Adhesive Manufacturing
3256	Soap, Cleaning Compound, and Toilet Preparation Manufacturing
3259	Other Chemical Product and Preparation Manufacturing
3261	Plastics Product Manufacturing
3262	Rubber Product Manufacturing
3271	Clay Product and Refractory Manufacturing
3272	Glass and Glass Product Manufacturing
3273	Cement and Concrete Product Manufacturing
3274	Lime and Gypsum Product Manufacturing
3279	Other Nonmetallic Mineral Product Manufacturing
3311	Iron and Steel Mills and Ferroalloy Manufacturing
3312	Steel Product Manufacturing from Purchased Steel
3313	Alumina and Aluminum Production and Processing
3314	Nonferrous Metal (except Aluminum) Production and Processing
3315	Foundries
3321	Forging and Stamping

- 3322 Cutlery and Handtool Manufacturing
- 3323 Architectural and Structural Metals Manufacturing
- 3324 Boiler, Tank, and Shipping Container Manufacturing
- 3325 Hardware Manufacturing
- 3326 Spring and Wire Product Manufacturing
- 3327 Machine Shops-Turned Product- and Screw, Nut, and Bolt Manufacturing
- 3328 Coating, Engraving, Heat Treating, and Allied Activities
- 3329 Other Fabricated Metal Product Manufacturing
- 3331 Agriculture, Construction, and Mining Machinery Manufacturing
- 3332 Industrial Machinery Manufacturing
- 3333 Commercial and Service Industry Machinery Manufacturing
- 3334 Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing
- 3335 Metalworking Machinery Manufacturing
- 3336 Engine, Turbine, and Power Transmission Equipment Manufacturing
- 3339 Other General Purpose Machinery Manufacturing
- 3341 Computer and Peripheral Equipment Manufacturing
- 3342 Communications Equipment Manufacturing
- 3343 Audio and Video Equipment Manufacturing
- 3344 Semiconductor and Other Electronic Component Manufacturing
- 3345 Navigational, Measuring, Electromedical, and Control Instruments Manufacturing
- 3346 Manufacturing and Reproducing Magnetic and Optical Media
- 3351 Electric Lighting Equipment Manufacturing
- 3352 Household Appliance Manufacturing
- 3353 Electrical Equipment Manufacturing
- 3359 Other Electrical Equipment and Component Manufacturing
- 3361 Motor Vehicle Manufacturing
- 3362 Motor Vehicle Body and Trailer Manufacturing
- 3363 Motor Vehicle Parts Manufacturing
- 3364 Aerospace Product and Parts Manufacturing
- 3371 Household and Institutional Furniture and Kitchen Cabinet Manufacturing
- 3372 Office Furniture (including Fixtures) Manufacturing
- 3379 Other Furniture Related Product Manufacturing

## Logistics

- 4811 Scheduled Air Transportation
- 4812 Nonscheduled Air Transportation
- 4821 Rail Transportation
- 4831 Deep Sea, Coastal, and Great Lakes Water Transportation
- 4832 Inland Water Transportation
- 4841 General Freight Trucking
- 4842 Specialized Freight Trucking
- 4861 Pipeline Transportation of Crude Oil
- 4862 Pipeline Transportation of Natural Gas
- 4869 Other Pipeline Transportation
- 4881 Support Activities for Air Transportation
- 4882 Support Activities for Rail Transportation
- 4883 Support Activities for Water Transportation
- 4884 Support Activities for Road Transportation
- 4885 Freight Transportation Arrangement

- 4889 Other Support Activities for Transportation
- 4911 Postal Service
- 4921 Couriers
- 4922 Local Messengers and Local Delivery
- 4931 Warehousing and Storage

## **WHOLESALE TRADE**

- 423 Merchant Wholesalers, Durable Goods
- 424 Merchant Wholesalers, Nondurable Goods
- 425 Wholesale Electronic Markets & Agents & Brokers

## **RETAIL TRADE**

- 441 Motor Vehicle and Parts Dealers
- 4411 Automobile Dealers
- 4412 Other Motor Vehicle Dealers
- 4413 Automotive Parts, Accessories, and Tire Stores
- 442 Furniture and Home Furnishings Stores
- 4421 Furniture Stores
- 4422 Home Furnishings Stores
- 443 Electronics and Appliance Stores
- 4431 Electronics and Appliance Stores
- 444 Building Material and Garden Equipment and Supplies Dealers
- 4441 Building Material and Supplies Dealers
- 4442 Lawn and Garden Equipment and Supplies Stores
- 445 Food and Beverage Stores
- 4451 Grocery Stores
- 4452 Specialty Food Stores
- 4453 Beer, Wine, and Liquor Stores
- 446 Health and Personal Care Stores
- 4461 Health and Personal Care Stores
- 447 Gasoline Stations
- 4471 Gasoline Stations
- 448 Clothing and Clothing Accessories Stores
- 4481 Clothing Stores
- 4482 Shoe Stores
- 4483 Jewelry, Luggage, and Leather Goods Stores
- 451 Sporting Goods, Hobby, Book, and Music Stores
- 4511 Sporting Goods, Hobby, and Musical Instrument Stores
- 4512 Book, Periodical, and Music Stores
- 452 General Merchandise Stores
- 4521 Department Stores
- 4529 Other General Merchandise Stores
- 453 Miscellaneous Store Retailers
- 4531 Florists
- 4532 Office Supplies, Stationery, and Gift Stores
- 4533 Used Merchandise Stores
- 4539 Other Miscellaneous Store Retailers
- 454 Nonstore Retailers

- 4541 Electronic Shopping and Mail-Order Houses
- 4542 Vending Machine Operators
- 4543 Direct Selling Establishments

## **BASIC INFORMATION SERVICES**

- 511 Publishing Industries (except Internet)
- 515 Broadcasting (except Internet)
- 516 Internet Publishing and Broadcasting
- 517 Telecommunications
- 518 Internet Service Providers, Web Search Portals, and Data Processing Serv
- 519 Other Information Services
  
- 5111 Newspaper, Periodical, Book, and Directory Publishers
- 5112 Software Publishers
- 5151 Radio and Television Broadcasting
- 5152 Cable and Other Subscription Programming
- 5161 Internet Publishing and Broadcasting
- 5171 Wired Telecommunications Carriers
- 5172 Wireless Telecommunications Carriers (except Satellite)
- 5173 Telecommunications Resellers
- 5174 Satellite Telecommunications
- 5175 Cable and Other Program Distribution
- 5179 Other Telecommunications
- 5181 Internet Service Providers and Web Search Portals
- 5182 Data Processing, Hosting, and Related Services
- 5191 Other Information Services

## **REAL ESTATE & RENTAL & LEASING**

- 531 Real Estate
- 5311 Lessors of Real Estate
- 5312 Offices of Real Estate Agents and Brokers
- 5313 Activities Related to Real Estate
- 532 Rental and Leasing Services
- 5321 Automotive Equipment Rental and Leasing
- 5322 Consumer Goods Rental
- 5323 General Rental Centers
- 5324 Commercial and Industrial Machinery and Equipment Rental and Leasing
- 533 Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)
- 5331 Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)

## **PROFESSIONAL, SCIENTIFIC, TECHNICAL & MANAGEMENT SERVICES**

- 541 Professional, Scientific, and Technical Services
- 5411 Legal Services
- 5412 Accounting, Tax Preparation, Bookkeeping, and Payroll Services
- 5413 Architectural, Engineering, and Related Services
- 5414 Specialized Design Services

- 5415 Computer Systems Design and Related Services
- 5416 Management, Scientific, and Technical Consulting Services
- 5417 Scientific Research and Development Services
- 5418 Advertising and Related Services
- 5419 Other Professional, Scientific, and Technical Services
- 551 Management of Companies and Enterprises
- 5511 Management of Companies and Enterprises

## **ADMINISTRATIVE & SUPPORT & WASTE SERVICES**

- 561 Administrative and Support Services
- 5611 Office Administrative Services
- 5612 Facilities Support Services
- 5613 Employment Services
- 5614 Business Support Services
- 5615 Travel Arrangement and Reservation Services
- 5616 Investigation and Security Services
- 5617 Services to Buildings and Dwellings
- 5619 Other Support Services
- 562 Waste Management and Remediation Services
- 5621 Waste Collection
- 5622 Waste Treatment and Disposal
- 5629 Remediation and Other Waste Management Services

## **HEALTH SCIENCES & SERVICES**

- 3254 Pharmaceutical and Medicine Manufacturing
- 3391 Medical Equipment and Supplies Manufacturing
- 5417 Scientific Research and Development Services
- 6211 Offices of Physicians
- 6212 Offices of Dentists
- 6213 Offices of Other Health Practitioners
- 6214 Outpatient Care Centers
- 6215 Medical and Diagnostic Laboratories
- 6216 Home Health Care Services
- 6219 Other Ambulatory Health Care Services
- 6221 General Medical and Surgical Hospitals
- 6222 Psychiatric and Substance Abuse Hospitals
- 6223 Specialty (except Psychiatric and Substance Abuse) Hospitals
- 6231 Nursing Care Facilities
- 6232 Residential Mental Retardation, Mental Health and Substance Abuse Facilities
- 6233 Community Care Facilities for the Elderly
- 6239 Other Residential Care Facilities
- 6242 Community Food and Housing, and Emergency and Other Relief Services
- 6243 Vocational Rehabilitation Services
- 8122 Death Care Services

## **ENTERTAINMENT & TOURISM – URBAN REGIONS**

- 512 Motion Picture and Sound Recording Industries
- 711 Performing Arts, Spectator Sports, and Related Industries
- 712 Museums, Historical Sites, and Similar Institutions
- 713 Amusement, Gambling, and Recreation Industries
- 721 Accommodation

## **ENTERTAINMENT & TOURISM – RURAL REGIONS**

- 711 Performing Arts, Spectator Sports, and Related Industries
- 712 Museums, Historical Sites, and Similar Institutions
- 713 Amusement, Gambling, and Recreation Industries
- 721 Accommodation
- 722 Food Services and Drinking Places

## **OTHER SERVICES (EXCEPT PUBLIC ADMINISTRATION)**

- 811 Repair and Maintenance
  - 8111 Automotive Repair and Maintenance
  - 8112 Electronic and Precision Equipment Repair and Maintenance
  - 8113 Commercial and Industrial Machinery and Equipment
  - 8114 Personal and Household Goods Repair and Maintenance
- 812 Personal and Laundry Services
  - 8121 Personal Care Services
  - 8122 Death Care Services
  - 8123 Drycleaning and Laundry Services
- 8129 Other Personal Services
- 813 Religious, Grantmaking, Civic, Professional, and Similar Organizations
  - 8131 Religious Organizations
  - 8132 Grantmaking and Giving Services
  - 8133 Social Advocacy Organizations
  - 8134 Civic and Social Organizations
  - 8139 Business, Professional, Labor, Political, and Similar Organizations
- 814 Private Households
  - 8141 Private Households

## **ALL GOVERNMENT**

- Federal Government
  - Department of Defense
  - Other Federal Government
- State Government
  - State Government Education
  - Other State Government
- Local Government
  - Local Government Education
  - Other Local Government



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