

**San Joaquin Valley
Regional Planning Unit**

**Data Analysis for Regional Plan
PY 2025-28**

Prepared for Stanislaus County Workforce Development

By the Workforce Investment Board of Tulare County

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Executive Summary

The San Joaquin Valley Regional Planning Unit (RPU) presents this comprehensive analysis of the region's labor market and economic trends to inform workforce development strategies for the coming years. This report highlights a resilience in recovering from the pandemic, showcasing significant job growth and economic gains across key sectors and industries. Between 2019 and 2024, total nonfarm employment grew by 9.67%, with sectors like Educational and Health Services (+19.55%) and Trade, Transportation, and Utilities (+12.77%) leading this expansion. However, the region continues to see weakness relative to the rest of the state when it comes to high wage employment in sectors such as technology, media, and other higher end service and manufacturing.

The region has taken advantage of its geographic endowments to support the emerging logistics and e-commerce economy. Affordable land and the central location of the region relative to the rest of the state have led to strong job growth in associated industries. These growth sectors are driven by increased consumer demand for healthcare and logistics services, positioning the San Joaquin Valley as a critical hub for e-commerce and community services. Conversely, traditional sectors like agriculture experienced job losses, with Crop Production declining by 7,531 jobs (-12%). This trend reflects broader challenges such as water scarcity, advancements in automation, and SGMA related water conservation, underscoring the importance of adapting workforce strategies to these economic shifts.

Despite these advancements, challenges remain in addressing structural employment disparities and workforce skill gaps. The region is undereducated and earns less relative to the rest of the state. Addressing these educational and skill deficits is critical to unlocking the full potential of the region's diverse workforce, where over 50% identify as Hispanic or Latino. By investing in targeted training programs and educational initiatives, the region can bridge these gaps, ensuring sustained economic growth and a more equitable labor market.

Introduction

The Workforce Investment Board (WIB) of Tulare County presents this regional data analysis, prepared in collaboration with and for the use of the San Joaquin Valley Regional Planning Unit (SJV RPU) and the Local Workforce Development boards of which it is comprised. This report serves as a critical tool to support workforce planning and strategic decision-making aimed at fostering economic growth and addressing workforce challenges within the region.

The San Joaquin Valley is a region of immense potential, characterized by its diverse industries, robust agricultural economy, and growing urban centers. However, it also faces unique challenges, including persistently high unemployment rates, educational attainment gaps, and the need to adapt to emerging industry demands. Understanding these dynamics is essential for developing targeted workforce strategies that empower individuals, support employers, and strengthen the regional economy.

This report follows guidance from California EDD Directive WSD24-09 “Regional and Local Planning Guidance for PY 2025-28” and strives to address the following analyses:

- Current status of the Regional Workforce
- Current Employment and Unemployment Data
- Economic conditions and trends in the region
- Industry and Occupations in the Region
- Industry Projections
- Demographics, Educational Attainment, and Special Populations

Data Analysis Methodology

The data presented in this report is intended to guide conversation and development of the Regional Planning process as required by Workforce Innovation and Opportunity Act (WIOA) Section 106. WIB staff used publicly available data from several Federal agencies including the Bureau of Labor Statistics, Bureau of Economic Analysis, and the Bureau of the Census, as well as from Lightcast, a paid data analytics service that provides additional analysis using public data sets, private sources, and proprietary data analytics.

Aside from Decennial Census data, of which this report only contains embedded in survey benchmarks and other data smoothing methods, all data analysis is based on survey methods and derivations of those outputs. The main survey used is US Census Bureau's American Community Survey. This is a yearly survey on a wide-reaching array of economic, social, demographic, and employment topics. Survey results are presented in 1-year estimates (ACS 1-year) and 5-year estimates (ACS 5-year). We have generally used ACS 2023 1-year data as it presents the most current data available. In some instances, that will be noted in the graphs or tables, ACS 5-year estimates were presented. ACS 5-year estimates cannot and should not be directly compared with ACS 1-year estimates.

In addition, we used EDD developed Industry and Occupational data for our Unemployment and Industry level analysis. These EDD reports also use a combination of Department of Labor's Current Population Survey (CPS) and Current Employment Statistics (CES). EDD generally rounds figures to the nearest -100 and the estimates presented should not be interpreted as a census of workers.

Projections of employment or industry activity are derived using myriad of methods. No single method, combination of methods, or algorithm can be used to predict the future. However major industry trends should be considered when devising workforce development strategies.

Lightcast publishes its methodology publicly and is available for free to read through and examine. A non-comprehensive list of resources will be attached to this report for readers to use to examine any data they would like to at their leisure.

Labor Market Conditions in the San Joaquin Valley Region

Post Pandemic Return to Previous Trendlines

Despite the gravity and seriousness of the acute public health crisis that the COVID-19 pandemic presented the labor market and regional economy showed remarkable resiliency. As seen in the table below, except for Financial Activities, all baseline NAICS 2-digit industry categories showed expansion.

TABLE 1

San Joaquin RPU Nonfarm Jobs by Industry Sector During the Pandemic-Induced Business

September 2024; Not Seasonally Adjusted Data;

	February 2020	April 2020	September 2024	Recession (Feb. 20-Apr. 20)		Expansion (Apr. 20-Sep. 24)	
				Number	Percent	Number	Percent
Total Nonfarm Jobs	1,379,220	1,224,130	1,506,220	-155,090	-11.24%	282,090	23.04%
Mining, Logging, and Construction	81,770	72,520	88,660	-9,250	-11.31%	16,140	22.26%
Manufacturing	110,150	105,470	123,410	-4,680	-4.25%	17,940	17.01%
Trade, Transportation, and Utilities	287,260	257,660	324,200	-29,600	-10.30%	66,540	25.82%
Information	9,150	7,440	7,550	-1,710	-18.69%	110	1.48%
Financial Activities	43,200	40,830	40,230	-2,370	-5.49%	-600	-1.47%
Professional and Business Services	123,470	106,130	122,150	-17,340	-14.04%	16,020	15.09%
Educational and Health Services	236,230	216,950	277,920	-19,280	-8.16%	60,970	28.10%
Leisure and Hospitality	136,130	85,630	150,770	-50,500	-37.10%	65,140	76.07%
Other Services	42,680	32,320	47,190	-10,360	-24.27%	14,870	46.01%
Government	309,200	299,200	324,140	-10,000	-3.23%	24,940	8.34%

Source: Employment Development Department

As the economy bounced back more quickly than originally anticipated, the original labor data trajectories become more apparent. A previous regional analysis done in 2021 noted the emergence of several key industries along with the potential weakening of the total farm labor employment (this will be addressed in a later section). **Trade, Transportation, and Utilities** has shown strong growth for the region. This is owed to the region’s relatively inexpensive land, access to major highway arteries, and an increasing share of retail trade being conducted online and with fast delivery guarantees.

Other notable gains are found in **Mining, Logging, and Construction, Educational and Health Services, and Leisure and Hospitality**. Wildfires in 2021 and 2022 have left large areas of timber within various public and private jurisdictions that will continue to take many years to evaluate and conduct clean up activities. While state and local governments have taken recent steps to limit the expansion of fossil fuel extraction, there remains a robust extractives industry, namely in Kern County. Public Health outcomes for much of the San Joaquin Valley region are lower relative to the rest of the state owing to poverty, lack of health care access, environmental pollutants, and other reasons specific to the geography and economy of the region.

TABLE 2

Changes in San Joaquin Valley RPU Total Nonfarm and Industry Sector Jobs Over the Last Five Years and Last Year

September 2024; Thousands of Jobs

	September 2019	September 2023	September 2024	Five-Year Change			Year-Over Change	
				Number	Percent	Annualized (Percent)	Number	Percent
Total Nonfarm Jobs	1,373,400	1,469,390	1,506,220	132,820	9.67%	1.93%	36,830	2.51%
Mining, Logging, and Construction	83,760	88,060	88,660	4,900	5.85%	1.17%	600	0.68%
Manufacturing	120,360	125,370	123,410	3,050	2.53%	0.51%	-1,960	-1.56%
Trade, Transportation, and Utilities	287,480	322,380	324,200	36,720	12.77%	2.55%	1,820	0.56%
Information	9,340	7,740	7,550	-1,790	-19.16%	-3.83%	-190	-2.45%
Financial Activities	43,280	40,220	40,230	-3,050	-7.05%	-1.41%	10	0.02%
Professional and Business Services	117,820	118,590	122,150	4,330	3.68%	0.74%	3,560	3.00%
Educational and Health Services	232,480	265,080	277,920	45,440	19.55%	3.91%	12,840	4.84%
Leisure and Hospitality	136,520	149,020	150,770	14,250	10.44%	2.09%	1,750	1.17%
Other Services	42,180	46,510	47,190	5,010	11.88%	2.38%	680	1.46%
Government	300,190	306,430	324,140	23,950	7.98%	1.60%	17,710	5.78%

Source: Employment Development Department, Employment by Industry report

There are some variances in the total job gains within the eight Local Workforce Development Areas (LDWAs) that make up the San Joaquin Valley RPU, but notably all have shown substantial gains. This, despite having a slightly higher unemployment rate compared to the rest of the state, suggests a robust labor market that has approached all-time highs in many of the region’s counties.

TABLE 3

Five-Year and Year-Over Changes in Total Nonfarm Jobs in San Joaquin RPU LDWAs

September 2024: Not Seasonally Adjusted Data

	September 2019	September 2023	September 2024	Five-Year Change (Sept. 19-Sept. 24)		Year-Over Change (Sept. 23-Sept. 24)	
				Number	Percent	Number	Percent
<u>LDWAs</u>							
San Joaquin	249,200	277,800	290,200	41,000	16.45%	12,400	4.46%
Stanislaus	184,400	191,400	195,600	11,200	6.07%	4,200	2.19%
Merced	72,200	75,200	77,000	4,800	6.65%	1,800	2.39%
Madera	40,900	44,100	45,200	4,300	10.51%	1,100	2.49%
Fresno	365,600	388,100	397,500	31,900	8.73%	9,400	2.42%
Kings	41,900	43,300	44,100	2,200	5.25%	800	1.85%
Tulare	129,200	143,200	145,700	16,500	12.77%	2,500	1.75%
Kern/Inyo/Mono ¹	290,000	306,290	310,920	20,920	7.21%	4,630	1.51%

Source: Employment Development Department

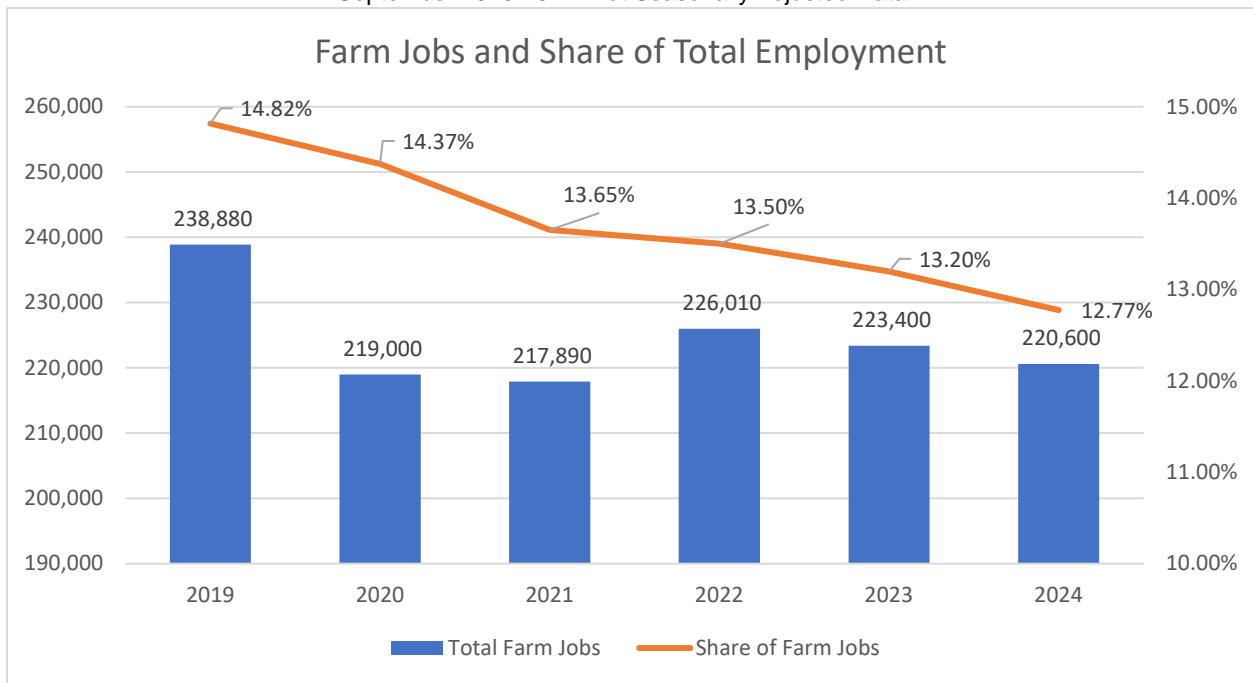
¹Kern, Inyo, and Mono counties are combined into a single Local Workforce Development Area

Farm Jobs: A Slow Decline

The Agriculture Sector has long been the economic engine that has powered the San Joaquin Valley RPU. However, Farm Jobs in the San Joaquin Valley RPU have been declining both in total number and as a share of employment due to several interconnected factors. Advances in agricultural technology, such as automation and mechanization, have reduced the need for manual labor while increasing productivity. A long-term change in the makeup of planted acreage towards crops that increasingly offer labor productivity gains can also be pointed to. Additionally, shifting water availability due to persistent droughts and environmental regulations as well as the Sustainable Groundwater Management Act (SGMA) have already led to some reduction of acreage under cultivation compared to historical highs, further shrinking the demand for farmworkers. Economic diversification in the region has also contributed, as sectors like logistics, manufacturing, and services have grown, offering alternative employment opportunities. Rising labor costs and policy changes have further impacted the availability and affordability of agricultural labor. These factors collectively reshape the labor landscape, reducing the role of farm jobs in the Central San Joaquin Valley's economy. As shown later in industry projections, this dynamic is expected to continue.

Graph 1

2019-2024 Farm Jobs Trend- San Joaquin Valley RPU
September 2019-2024: Not Seasonally Adjusted Data



Source: Employment Development Department, Employment by Industry Data

Unemployment in the SJV RPU

Generally, unemployment rates in the San Joaquin RPU can be several percentage points higher than the California State average. Much of this discrepancy is due to the high share of Farm Jobs relative to the rest of the economy as well as lower skilled type of employment that can lead to lower perceived or real job security. Table 4 shows that unemployment rate the overall unemployment rate is higher than it was 5 years ago, but this does not necessarily reflect a weakening of the overall labor market which continues to show expansion. A larger share of population entering the workforce and searching for jobs as well as persons switching careers or positions looking for higher pay or better opportunities can also explain this rise.

In comparison to the whole of California, the SJV RPU has a slightly higher base unemployment rate but largely mirrors the changes over the 5-year period.

TABLE 4
Unemployment rates in San Joaquin RPU
September 2024: Not Seasonally Adjusted Data

Local Workforce Development Area (LWDA)	September 2019	September 2023	September 2024	Sept. 2019-Sept. 2024 Change	Year-Over Change (Sept. 23-Sept. 24)
California	4.0%	5.0%	5.3%	1.3%	0.3%
SJV RPU	5.87%	6.68%	7.14%	1.27%	0.46%
<u>LWDAs</u>					
San Joaquin	5.0%	5.8%	6.2%	1.2%	0.4%
Stanislaus	4.9%	5.8%	6.3%	1.4%	0.5%
Merced	5.9%	7.5%	7.8%	1.9%	0.3%
Madera	5.3%	6.2%	6.7%	1.4%	0.5%
Fresno	5.7%	6.3%	6.9%	1.2%	0.6%
Kings	6.1%	6.9%	7.3%	1.2%	0.4%
Tulare	8.2%	8.9%	9.3%	1.1%	0.4%
Kern/Inyo/Mono ¹	6.2%	7.0%	7.5%	1.3%	0.5%

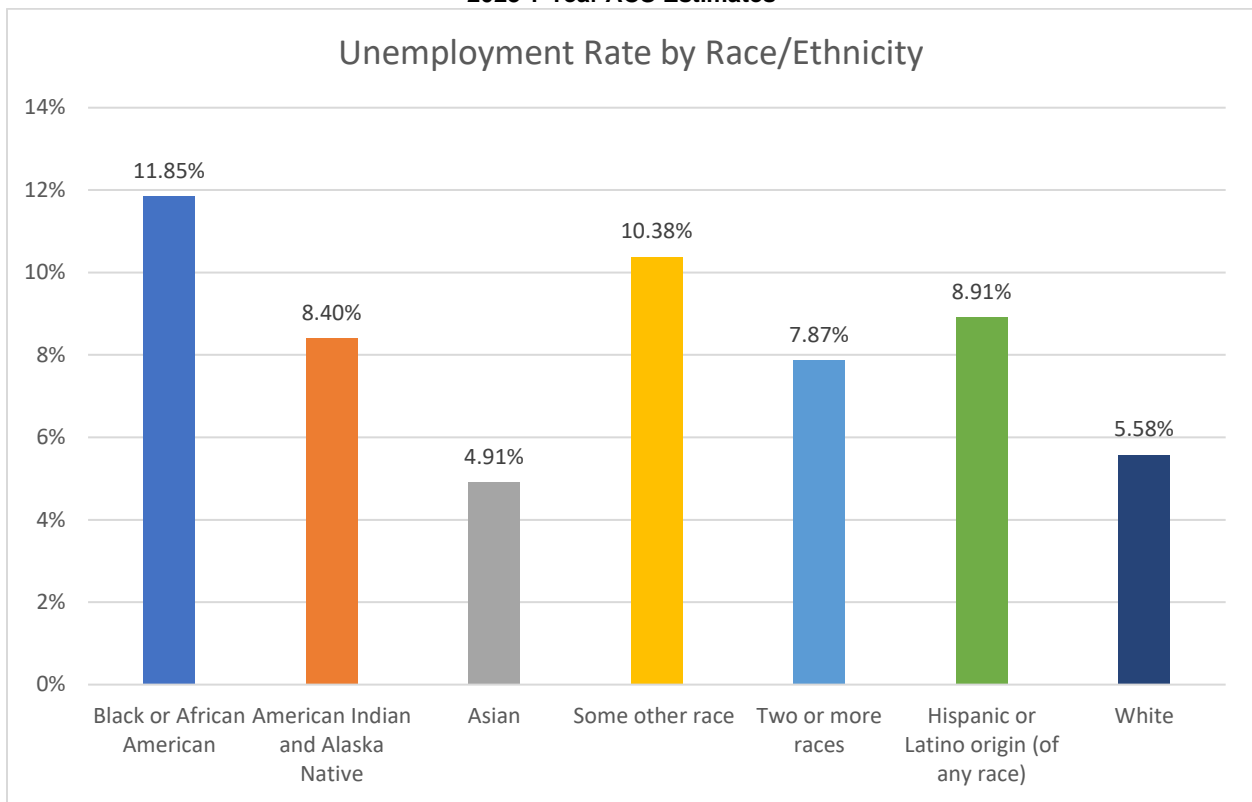
Source: Employment Development Department

¹Kern, Inyo, and Mono counties are combined into a single Local Workforce Development Area

A Closer Look at Unemployment Rates – Race/Ethnicity

The below graph uses ACS 1-Year data to examine differences in Unemployment status among self-reported race/ethnic groups. White and Asian subgroups performed best with other minorities or self-identified racial groups having higher rates of unemployment. Black, American Indian, and Hispanic/Latino (see note below) showed much higher rates of unemployment. These systemic inequities can be tied to factors such as educational attainment, language barriers, and their over-representation in low-wage, high turnover industries. Workforce Boards and Educational Institutions will need to continue targeted outreach and investments into these communities to continue closing the gap.

Graph 2
Estimated Unemployment rates, by Race/Ethnicity
San Joaquin Valley RPU
2023 1-Year ACS Estimates



Source: ACS 1-Year Estimates, S2301 Employment Status

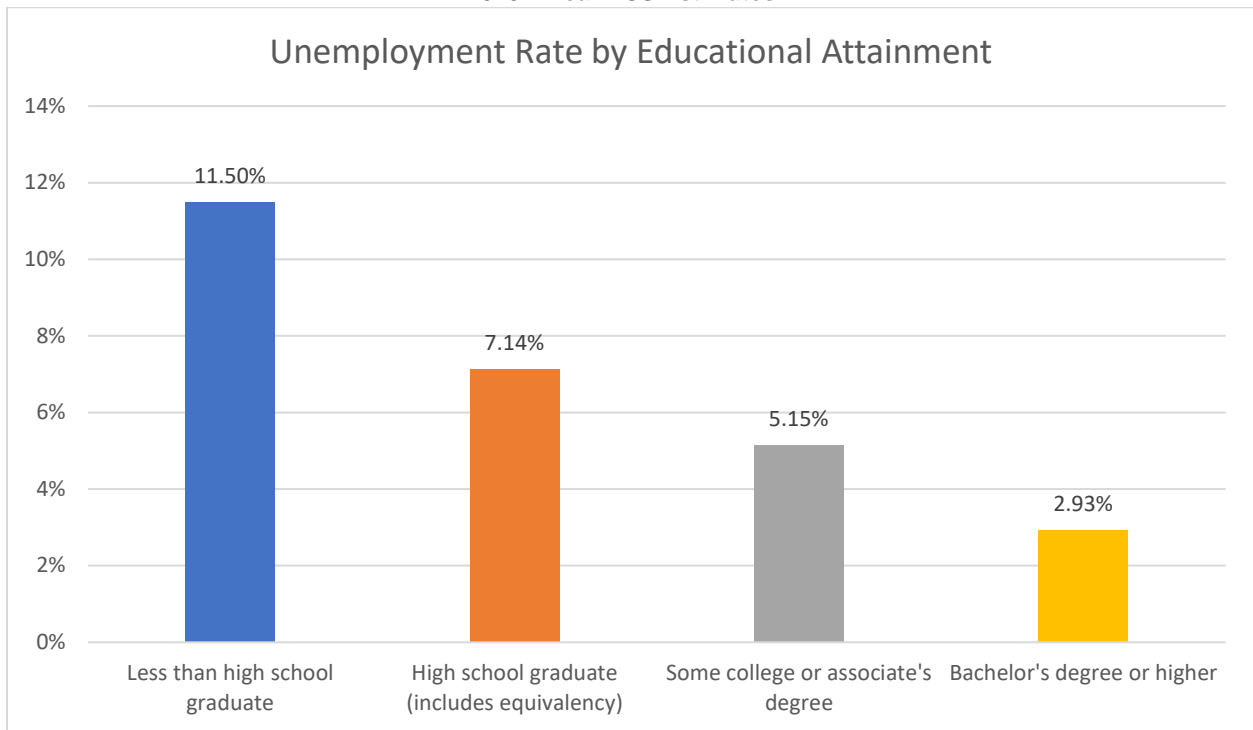
Does not include Mono/Inyo counties. County populations are too small to have accurate estimates for 1-Year Estimates

A note on Race and Ethnicity: The large number of people who identify as some other race reflects a survey method decision in way the U.S. Census Bureau classifies individuals by race. The Bureau classifies Hispanics/Latinos as an ethnic group instead of a racial group and considers ethnicity and race not to be mutually exclusive. As such one can be Hispanic ethnically and White or Black simultaneously and the Census has different variables to reflect this. However, this ethnicity and race distinction appears to be blurred among ACS respondents. The Census Bureau reports that the vast majority of respondents who identify as some other race were Hispanics/Latinos. This same blurring of race and ethnicity may also inflate the two or more race count.

A Closer Look at Unemployment Rates – Educational Attainment

Graph 3 below illustrates the power that progressive levels of education play in providing job security and lower rates of unemployment. More on this subject will be elaborated on in a later section, but the types of occupations that different educational attainment allow stabilizes and otherwise provides job security in a way that those without a high school degree do not experience.

Graph 3
Estimated Unemployment rates, by Educational Attainment
San Joaquin Valley RPU
2023 1-Year ACS Estimates



Source: ACS 1-Year Estimates, S2301 Employment Status

Labor Force Participation

Labor Force Participation is a measure of the population of those working, or seeking working, as a ratio to the full population size of a given area. The United States experienced a severe dip in Labor Force Participation during the pandemic, but it has largely recovered to previous trendlines, last estimated at 63.8%. According to those same estimates, the state of California recorded a Labor Force Participation of 64.3% and the SJV RPU in the same snapshot stood at 61.3%.

Table 5
Labor Force Participation
ACS 1-Year Estimates

	2021	2022	2023
United States	63.00%	63.50%	63.80%
California	63.40%	63.90%	64.30%
SVU RPU	59.38%	61.17%	61.30%

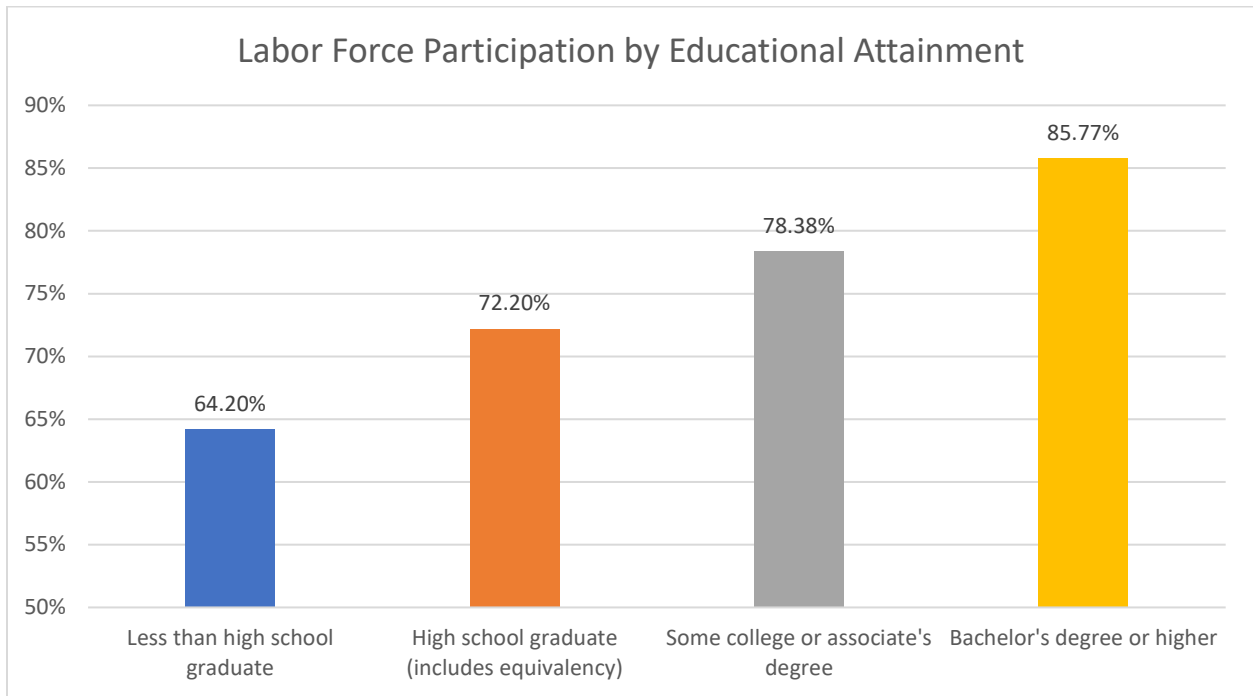
Source: 2023 ACS 1-Year estimates, S2301 Employment Status

While the region has generally lagged behind in Labor Force Participation rates, it should be taken within the context of historical baselines as well as the growth in population the SJV RPU is experience relative to both the state and the rest of the country. Total labor force is growing and remains robust, despite higher baseline levels of unemployment

A Closer Look at Labor Force Participation - Educational Attainment

The below graph shows further strong evidence that employment is easier to gain and keep as educational attainment increases. An increase in education significantly enhances labor force participation in part because higher educational attainment equips individuals with skills and qualifications that improve employability. Education often leads to better access to job opportunities, higher wages, and more stable employment. It also provides workers with the adaptability needed to navigate disruptions and economic shifts.

Graph 4
Estimated Labor Force Participation, by Educational Attainment
San Joaquin Valley RPU
2023 1-Year ACS Estimates

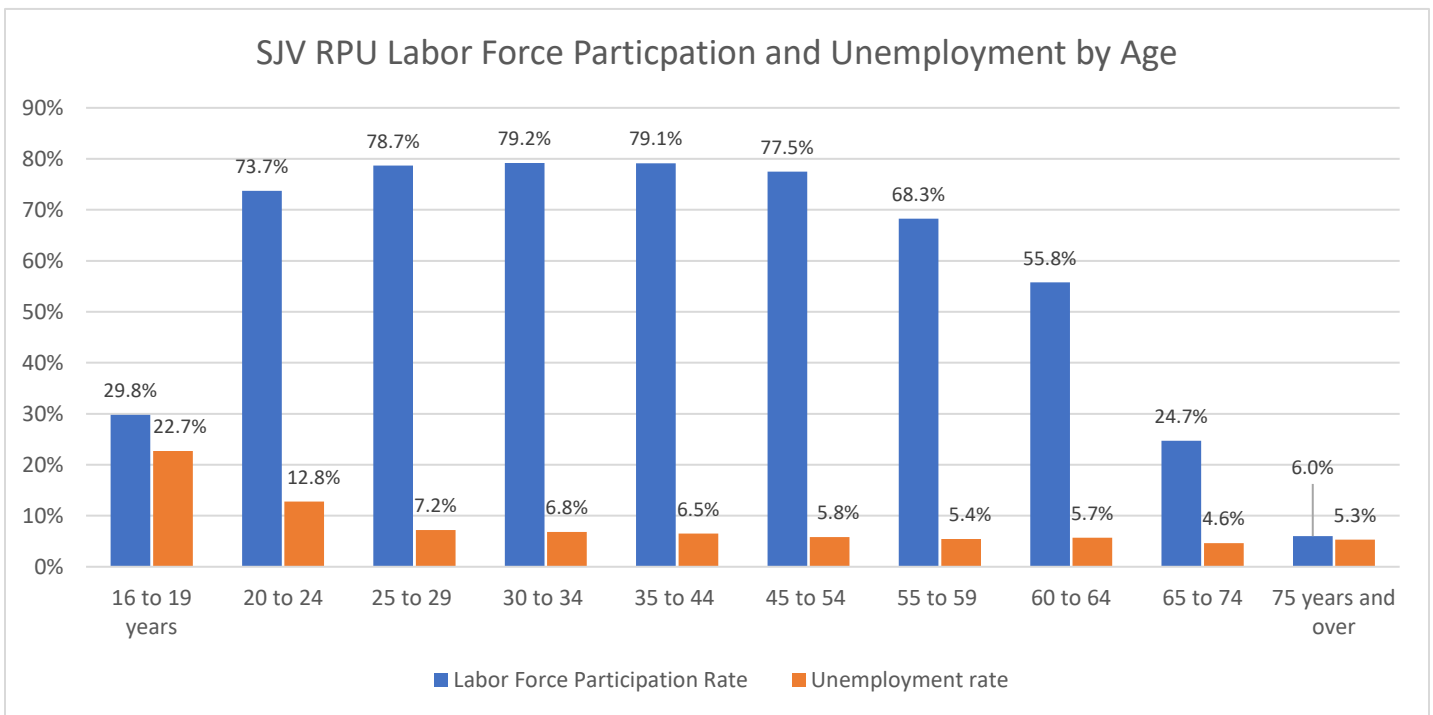


Source: ACS 1-Year Estimates, S2301 Employment Status

A Closer Look at Labor Force by Age

Labor force participation rates vary significantly by age group, reflecting differences in life stages, priorities, and economic circumstances. Younger individuals, particularly those aged 16-24, often have lower participation rates as many are pursuing education or gaining initial work experience. The prime working age group, 25-54, typically has the highest participation rates due to career-building and income-earning responsibilities. We see a gradual and then sharp decline for those aged 55-64 and then after the age of 65 as many begin transitioning to retirement or face health-related challenges that limit their ability to work. The share of manual labor that is largely reflective of the SJV RPU relative to the rest of the state can result in the lower labor force participation rate at older age bands as age related injuries, capabilities, and slowing productivity begin to surface.

Graph 5
Estimated Labor Force Participation, by Age Group
San Joaquin Valley RPU
2023 1-Year ACS Estimates

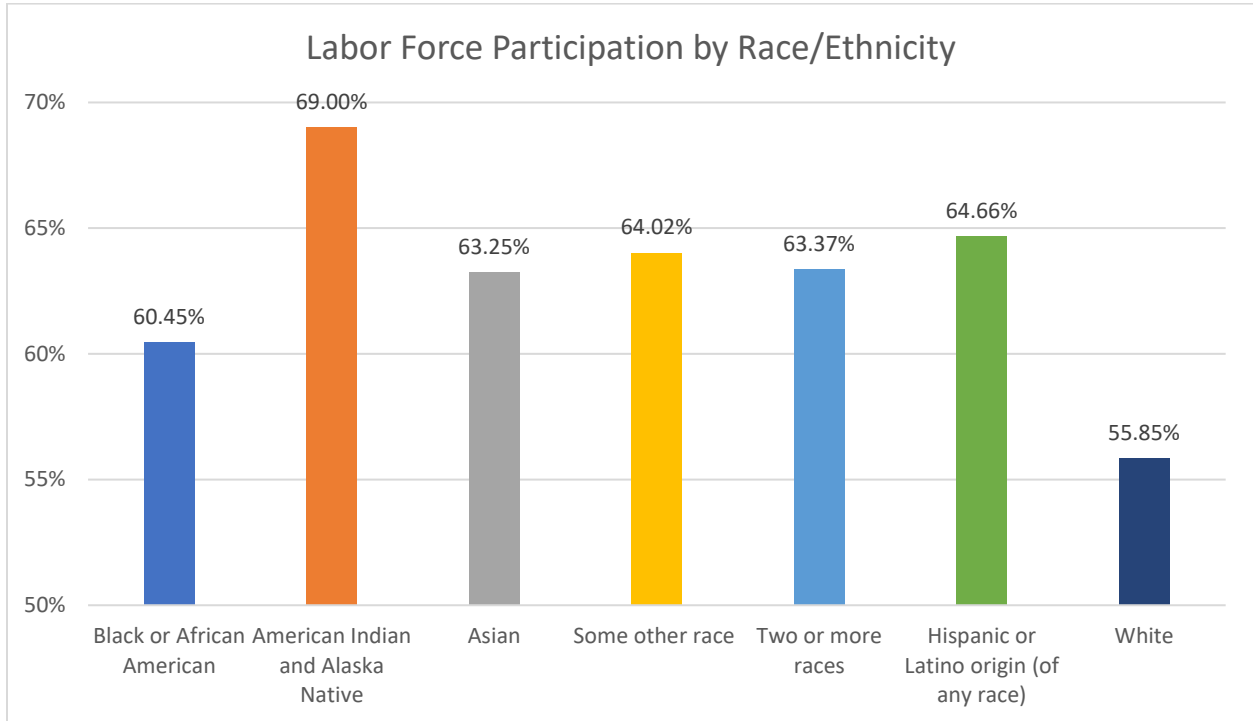


Source: ACS 1-Year Estimates, S2301 Employment Status

A Closer Look at Labor Force Participation – Race/Ethnicity

The below graph uses ACS 1-Year data to examine differences in Labor Force Participation among self-reported race/ethnic groups. Interestingly, White, no Hispanic, has the lowest participation rate of all the ethnic groups.

Graph 6
Estimated Labor Force Participation, by Race/Ethnicity
San Joaquin Valley RPU
2023 1-Year ACS Estimates



Source: ACS 1-Year Estimates, S2301 Employment Status

A note on Race and Ethnicity: The large number of people who identify as some other race reflects a survey method decision in way the U.S. Census Bureau classifies individuals by race. The Bureau classifies Hispanics/Latinos as an ethnic group instead of a racial group and considers ethnicity and race not to be mutually exclusive. As such one can be Hispanic ethnically and White or Black simultaneously and the Census has different variables to reflect this. However, this ethnicity and race distinction appears to be blurred among ACS respondents. The Census Bureau reports that the vast majority of respondents who identify as some other race were Hispanics/Latinos. This same blurring of race and ethnicity may also inflate the two or more race count.

Industry Trends over the Last 5 Years- LWDA Level

Expanding on the earlier Table 2, Table 4 shows each LWDA's 5-year and Year-over changes in industry employment.

TABLE 4

Five-Year and Year-Over Changes in Total Nonfarm and Industry Sector Jobs in San Joaquin RPU LWDA's

September 2024; Not Seasonally Adjusted Data

Local Workforce Development Area (LWDA)	September 2019	September 2023	September 2024	Five-Year Change		Year-Over Change	
				Number	Percent	Number	Percent
<u>San Joaquin</u>							
Total Nonfarm Jobs	249,200	277,800	290,200	41,000	16.45%	12,400	4.46%
Mining, Logging, and Construction	13,600	14,300	14,100	500	3.68%	-200	-1.40%
Manufacturing	21,600	24,500	23,700	2,100	9.72%	-800	-3.27%
Trade, Transportation, and Utilities	69,900	86,000	86,800	16,900	24.18%	800	0.93%
Information	1,600	1,100	1,000	-600	-37.50%	-100	-9.09%
Financial Activities	8,000	7,900	8,000	0	0.00%	100	1.27%
Professional and Business Svcs.	20,500	24,200	24,200	3,700	18.05%	0	0.00%
Educational and Health Services	38,500	43,000	45,600	7,100	18.44%	2,600	6.05%
Leisure and Hospitality	22,600	24,800	25,300	2,700	11.95%	500	2.02%
Other Services	7,900	8,300	8,300	400	5.06%	0	0.00%
Government	45,000	43,700	53,200	8,200	18.22%	9,500	21.74%
<u>Stanislaus</u>							
Total Nonfarm Jobs	184,400	191,400	195,600	11,200	6.07%	4,200	2.19%
Mining, Logging, and Construction	10,700	11,100	11,500	800	7.48%	400	3.60%
Manufacturing	23,800	26,400	26,100	2,300	9.66%	-300	-1.14%
Trade, Transportation, and Utilities	37,700	38,700	39,300	1,600	4.24%	600	1.55%
Information	1,000	700	800	-200	-20.00%	100	14.29%
Financial Activities	5,300	4,800	4,800	-500	-9.43%	0	0.00%
Professional and Business Svcs.	15,700	14,500	15,000	-700	-4.46%	500	3.45%
Educational and Health Services	35,100	37,600	39,500	4,400	12.54%	1,900	5.05%
Leisure and Hospitality	19,200	20,800	20,500	1,300	6.77%	-300	-1.44%
Other Services	6,000	6,200	6,300	300	5.00%	100	1.61%
Government	29,900	30,600	31,800	1,900	6.35%	1,200	3.92%
<u>Merced</u>							
Total Nonfarm Jobs	72,200	75,200	77,000	4,800	6.65%	1,800	2.39%
Mining, Logging, and Construction	3,100	3,600	3,700	600	19.35%	100	2.78%
Manufacturing	11,200	11,200	10,900	-300	-2.68%	-300	-2.68%
Trade, Transportation, and Utilities	14,000	14,100	14,100	100	0.71%	0	0.00%
Information	300	300	300	0	0.00%	0	0.00%
Financial Activities	1,900	1,800	1,800	-100	-5.26%	0	0.00%
Professional and Business Svcs.	3,900	3,600	3,700	-200	-5.13%	100	2.78%
Educational and Health Services	10,600	12,100	12,800	2,200	20.75%	700	5.79%
Leisure and Hospitality	6,200	7,200	7,500	1,300	20.97%	300	4.17%
Other Services	1,700	2,400	2,400	700	41.18%	0	0.00%
Government	19,300	18,900	19,800	500	2.59%	900	4.76%

Local Workforce Development Area (LWDA)	September 2018	September 2022	September 2023	Five-Year Change Number	Five-Year Change Percent	Year-Over Change Number	Year-Over Change Percent
<u>Madera</u>							
Total Nonfarm	40,900	44,100	45,200	4,300	10.51%	1,100	2.49%
Mining, Logging, and Construction	2,000	2,400	2,400	400	20.00%	0	0.00%
Manufacturing	3,800	3,400	3,300	-500	-13.16%	-100	-2.94%
Trade, Transportation, and Utilities	5,900	6,800	6,900	1,000	16.95%	100	1.47%
Information	300	300	300	0	0.00%	0	0.00%
Financial Activities	800	800	800	0	0.00%	0	0.00%
Professional and Business Svcs.	2,900	3,100	3,200	300	10.34%	100	3.23%
Educational and Health Services	8,900	9,100	9,600	700	7.87%	500	5.49%
Leisure and Hospitality	3,900	4,300	4,400	500	12.82%	100	2.33%
Other Services	1,100	1,200	1,200	100	9.09%	0	0.00%
Government	11,300	12,700	13,100	1,800	15.93%	400	3.15%

<u>Fresno</u>							
Total Nonfarm	365,600	388,100	397,500	31,900	8.73%	9,400	2.42%
Mining, Logging, and Construction	19,900	23,300	23,800	3,900	19.60%	500	2.15%
Manufacturing	27,900	27,900	27,300	-600	-2.15%	-600	-2.15%
Trade, Transportation, and Utilities	70,500	76,400	76,900	6,400	9.08%	500	0.65%
Information	3,400	2,800	2,600	-800	-23.53%	-200	-7.14%
Financial Activities	14,100	12,600	12,300	-1,800	-12.77%	-300	-2.38%
Professional and Business Svcs.	34,600	32,500	34,100	-500	-1.45%	1,600	4.92%
Educational and Health Services	73,100	84,400	87,900	14,800	20.25%	3,500	4.15%
Leisure and Hospitality	35,900	38,100	38,800	2,900	8.08%	700	1.84%
Other Services	12,400	14,400	14,900	2,500	20.16%	500	3.47%
Government	73,800	75,700	78,900	5,100	6.91%	3,200	4.23%

<u>Kings</u>							
Total Nonfarm	41,900	43,300	44,100	2,200	5.25%	800	1.85%
Mining, Logging, and Construction	1,000	1,200	1,200	200	20.00%	0	0.00%
Manufacturing	5,600	5,100	5,400	-200	-3.57%	300	5.88%
Trade, Transportation, and Utilities	6,800	6,400	6,500	-300	-4.41%	100	1.56%
Information	200	200	200	0	0.00%	0	0.00%
Financial Activities	900	800	800	-100	-11.11%	0	0.00%
Professional and Business Svcs.	1,200	1,900	2,000	800	66.67%	100	5.26%
Educational and Health Services	6,700	7,700	8,100	1,400	20.90%	400	5.19%
Leisure and Hospitality	3,700	4,100	3,900	200	5.41%	-200	-4.88%
Other Services	700	700	700	0	0.00%	0	0.00%
Government	15,100	15,200	15,300	200	1.32%	100	0.66%

Local Workforce Development Area (LWDA)	September 2018	September 2022	September 2023	Five-Year Change		Year-Over Change	
				Number	Percent	Number	Percent
Total Nonfarm	129,200	143,200	145,700	16,500	12.77%	2,500	1.75%
Mining, Logging, and Construction	6,600	7,500	7,500	900	13.64%	0	0.00%
Manufacturing	12,900	13,900	13,800	900	6.98%	-100	-0.72%
Trade, Transportation, and Utilities	27,700	31,200	30,900	3,200	11.55%	-300	-0.96%
Information	700	600	600	-100	-14.29%	0	0.00%
Financial Activities	4,000	3,500	3,600	-400	-10.00%	100	2.86%
Professional and Business Svcs.	11,000	11,100	11,200	200	1.82%	100	0.90%
Educational and Health Services	17,400	22,400	24,000	6,600	37.93%	1,600	7.14%
Leisure and Hospitality	12,300	14,100	14,600	2,300	18.70%	500	3.55%
Other Services	3,500	3,900	3,900	400	11.43%	0	0.00%
Government	33,100	35,000	35,600	2,500	7.55%	600	1.71%
<u>Kern/Inyo/Mono¹</u>							
Total Nonfarm	290,000	306,290	310,920	20,920	7.21%	4,630	1.51%
Mining, Logging, and Construction	26,860	24,660	24,460	-2,400	-8.94%	-200	-0.81%
Manufacturing	13,560	12,970	12,910	-650	-4.79%	-60	-0.46%
Trade, Transportation, and Utilities	54,980	62,780	62,800	7,820	14.22%	20	0.03%
Information	1,840	1,740	1,750	-90	-4.89%	10	0.57%
Financial Activities	8,280	8,020	8,130	-150	-1.81%	110	1.37%
Professional and Business Svcs.	28,020	27,690	28,750	730	2.61%	1,060	3.83%
Educational and Health Services	42,180	48,780	50,420	8,240	19.54%	1,640	3.36%
Leisure and Hospitality	32,720	35,620	35,770	3,050	9.32%	150	0.42%
Other Services	8,880	9,410	9,490	610	6.87%	80	0.85%
Government	72,690	74,630	76,440	3,750	5.16%	1,810	2.43%

¹ Figures in this table are summed from EDD Industry estimates for Kern, Inyo, and Mono counties. Because of EDD rounding methodology, figures may not total correctly.

Source: Employment Development Department, Employment by Industry

Income and the Economy

Economic Growth and Income

The SJV RPU has generally seen positive economic growth in the five years from 2019 to 2024, the last year of available county level data that the Bureau of Economic Analysis (BEA) has released. Historically, the agriculture industry has been a major share of economic activity for much of the region. Economic output from this sector, along with the extractives sector, relies heavily on worldwide commodity markets and is subject to pricing swings year to year. This can have the effect of clouding overall growth numbers and masking growth in the non-farm economy. Still, the agricultural economic base is the bedrock for the region and a bad year for agricultural output will have spillover effects in tax revenue, public services, and other closely related industries.

Since 2019, the region has seen a slower cumulative growth in economic output compared to the rest of the state, although that trend was reversed in 2023. A slowdown in the technology sector, the entertainment industry, and other high value economic activities present in other regions of the state can help to explain.

TABLE 5
Real Gross Domestic Product, by County (2019-2023)

Thousands of chained (2017) dollars

Counties in RPU	2019	2022	2023	2019-2023 Economic Growth (5-year)	2023 Economic Growth (1 year)
California	2,969,609,000	3,184,007,800	3,248,656,600	9.3%	2.0%
SJV RPU ¹	187,698,433	190,837,086	195,682,118	4.25%	2.54%
Counties¹					
San Joaquin	31,274,535	33,301,759	33,097,405	5.83%	-0.6%
Stanislaus	23,329,680	23,803,366	24,067,824	3.16%	1.1%
Merced	9,251,024	9,511,320	9,548,937	3.22%	0.4%
Madera	6,222,075	6,043,485	6,226,914	0.08%	3.0%
Fresno	45,018,790	46,107,283	47,612,742	5.76%	3.3%
Kings	6,457,601	6,868,202	7,041,297	9.04%	2.5%
Tulare	18,480,075	18,399,182	18,824,792	1.87%	2.3%
Kern	45,410,206	44,626,843	46,941,848	3.37%	5.2%
Inyo	1,223,022	1,089,927	1,141,849	-6.64%	4.8%
Mono	1,031,425	1,085,719	1,178,510	14.26%	8.5%

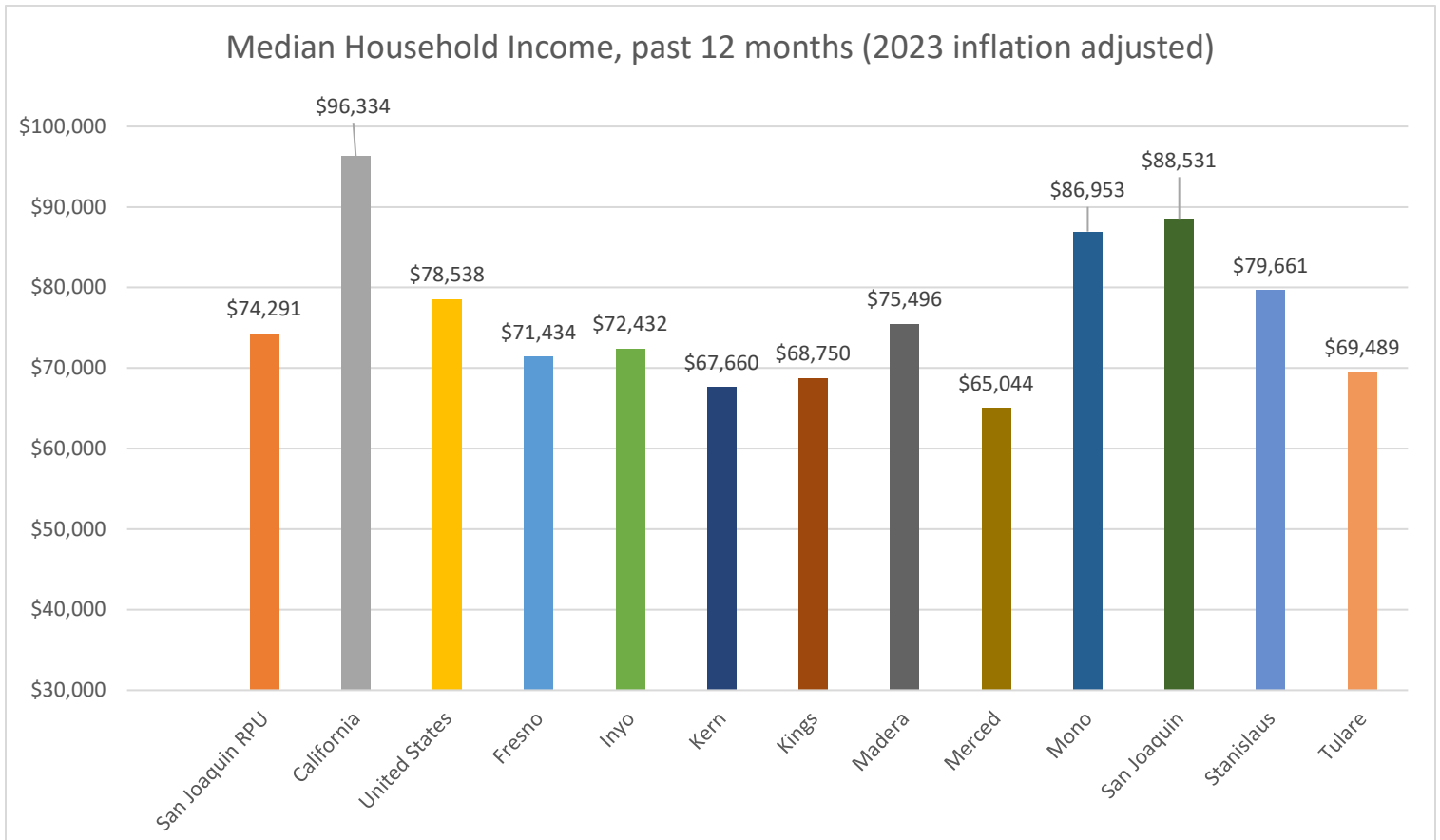
¹ Bureau of Economic Analysis data is collected and presented by county. For this section we have broken out the different counties in the Kern/Inyo/Mono LDWA consortium. Figures for the RPU were developed from BEA county-level data.

Source: U.S. Bureau of Economic Analysis

Household Income in and across the SJV RPU

Household income in the SJV RPU tend to be lower than the statewide and national averages, reflecting the region's unique economic and demographic characteristics. The region is a hub for agriculture and related industries and often features jobs that are lower-paying and more labor-intensive compared to the technology, entertainment, and finance sectors driving higher incomes in the higher population centers of California. Median household income for the region typically lags behind California's statewide median, which is among the highest in the nation, due in part to the state's robust urban economies. However, compared to the national average, the Central Valley's household income is closer, highlighting the economic disparities within California itself.

Graph 7
Median Household Income
San Joaquin Valley RPU
2023 5-Year ACS Estimates



Source: ACS 5-Year Estimates, B19013 Median Household Income in the Past 12 Months (in 2023 Inflation-Adjusted Dollars)

A Closer Look at Household Income- Race/Ethnicity

Household income in SJV RPU varies significantly by race and ethnicity, reflecting inequalities and differences in access to resources and opportunities. According to recent data, Asian households tend to have the highest median incomes, often attributed to higher educational attainment and concentration in high-paying industries. White households also typically report above-average incomes. In contrast, Hispanic/Latino and Black households often have lower median incomes due to factors such as disparities in education, employment opportunities, and other barriers. Addressing these gaps requires targeted policies that promote equitable access to education, job training, and affordable housing.

Table 6
Household Income By Race/Ethnicity
ACS 1- Year Estimates 2023

Race/Ethnicity	Household Income
White	\$ 85,416
Hispanic or Latino origin (of any race)	\$ 64,864
Black or African American	\$ 64,293
American Indian and Alaska Native	\$ 79,117
Asian	\$ 101,841
Some other race	\$ 62,535
Two or more races	\$ 69,879

Source: ACS 1-Year Estimates, S1903 Median Household Income in the Past 12 Months (in 2023 Inflation-Adjusted Dollars)

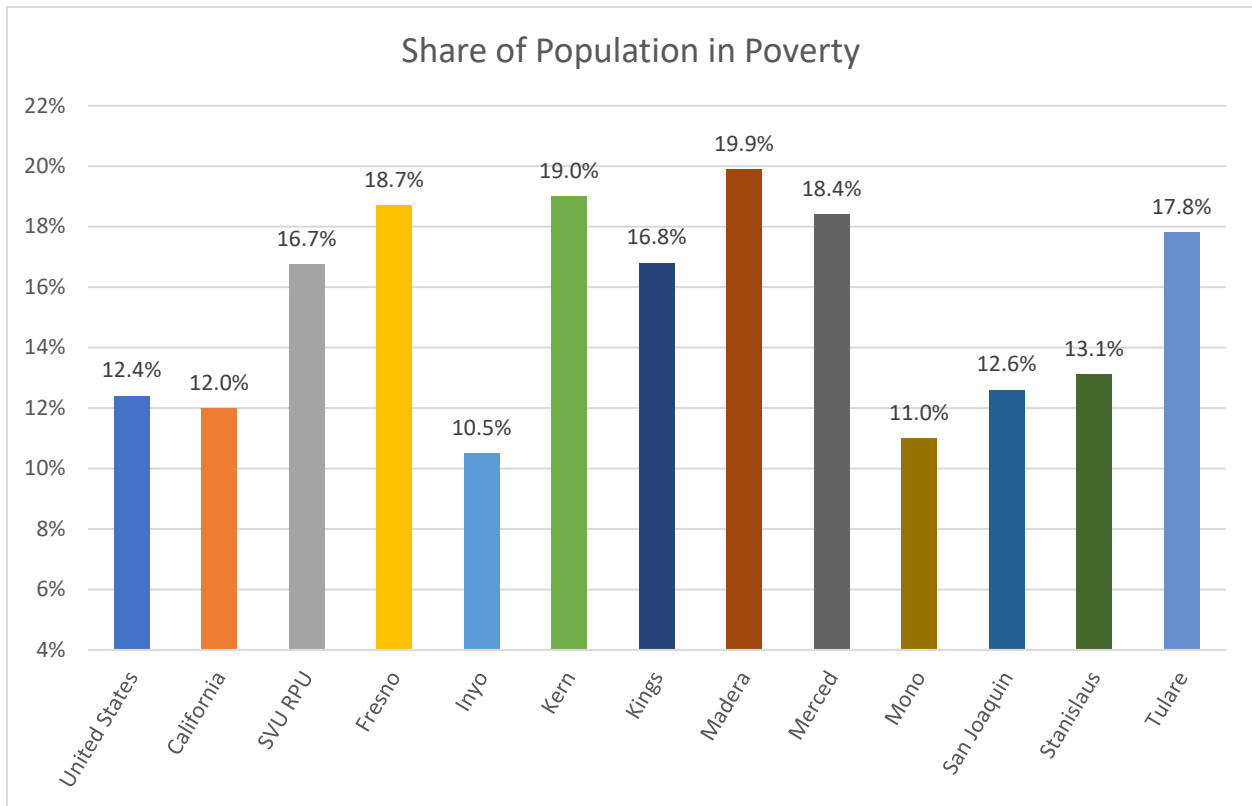
A note on Race and Ethnicity: The large number of people who identify as some other race reflects a survey method decision in way the U.S. Census Bureau classifies individuals by race. The Bureau classifies Hispanics/Latinos as an ethnic group instead of a racial group and considers ethnicity and race not to be mutually exclusive. As such one can be Hispanic ethnically and White or Black simultaneously and the Census has different variables to reflect this. However, this ethnicity and race distinction appears to be blurred among ACS respondents. The Census Bureau reports that the vast majority of respondents who identify as some other race were Hispanics/Latinos. This same blurring of race and ethnicity may also inflate the two or more race count.

Poverty in the SJV RPU

Poverty rates in the SJV RPU, as one would expect from seeing the median earnings above, are higher than the State of California as a whole. Interestingly, poverty measures higher in the southern portion of the region more than the northern. This may be due to the proximity to the greater Bay Area and Sacramento economies that they share, but there are certain to be other underlying factors as well.

Regardless, poverty rates have been going down for most of the region over the last several years due to a number of economic and policy factors including the post-pandemic labor shortage, changes in minimum wage and farm worker pay structures.

Graph 8
Share of Population in Poverty
Country, State, San Joaquin Valley RPU, and Counties
2023 5-Year ACS Estimates

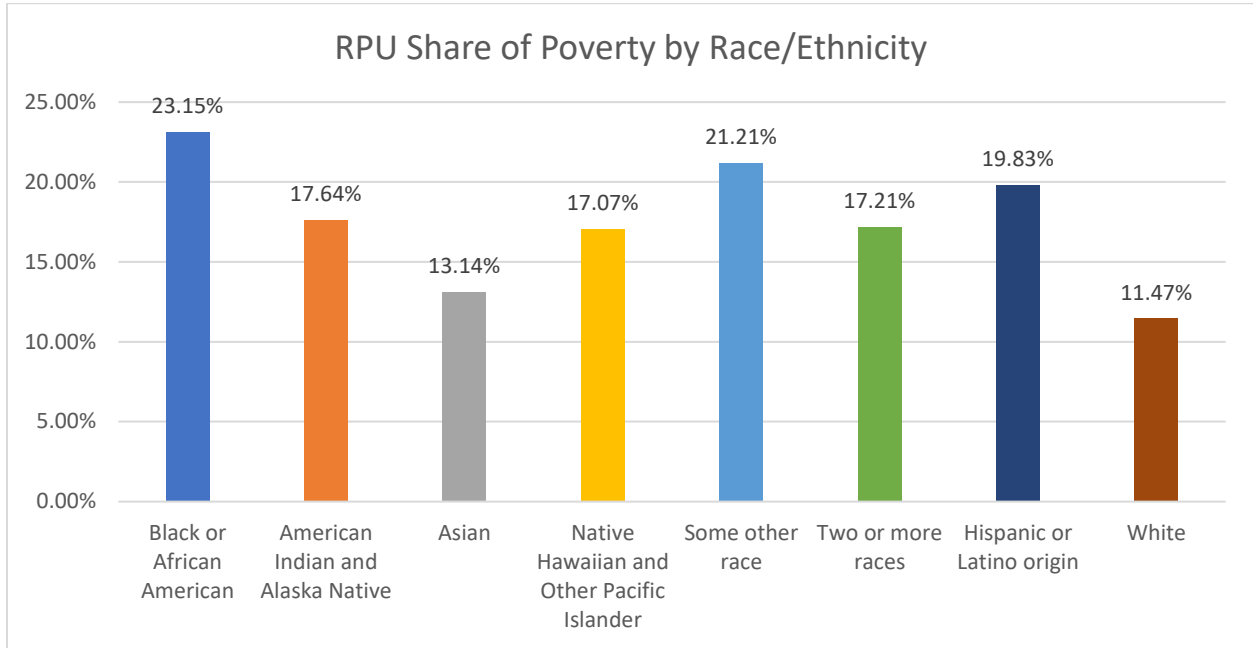


Source: ACS 5-Year Estimates, S1701 Poverty Status in the Past 12 Months

A Closer Look at Poverty – Race/Ethnicity

As one might expect the racial makeup of poverty is not evenly experienced. White, non-Hispanic, populations outperform all other recorded ethnic or race categories collected by the American Community Survey with the lowest estimated poverty rates. This tracks largely with educational attainment and unemployment statistics across the different ethnic and race groups.

Graph 9
Share of Population in Poverty, by Race/Ethnicity
San Joaquin Valley RPU
2023 1-Year ACS Estimates



Source: ACS 1-Year Estimates, S1701 Poverty Status in the Past 12 Months

A note on Race and Ethnicity: The large number of people who identify as some other race reflects a survey method decision in way the U.S. Census Bureau classifies individuals by race. The Bureau classifies Hispanics/Latinos as an ethnic group instead of a racial group and considers ethnicity and race not to be mutually exclusive. As such one can be Hispanic ethnically and White or Black simultaneously and the Census has different variables to reflect this. However, this ethnicity and race distinction appears to be blurred among ACS respondents. The Census Bureau reports that the vast majority of respondents who identify as some other race were Hispanics/Latinos. This same blurring of race and ethnicity may also inflate the two or more race count.

Industry and Occupational Analysis

Industry Sector Growth

Table 5 on the following page lists industries (using 4-digit NAICS coding) that have gained jobs over the past 5 years. The left column organizes industries based on estimated total jobs gained and the right column organizes industries based on a percent change, to attempt to capture industries that are quickly expanding. We filtered out industries with fewer than 1,000 jobs AND a 5-year growth of less than 7% in an effort to filter out small industries that can skew data analysis.

- **Transportation, Warehousing, Logistics:** This collection of industries displayed strong growth in the region appeared at or near the top of both largest and fastest growth. This is a continuing economic development that does not show signs of relenting, although it may slow as markets become more saturated.
- **Healthcare and Social Services:** Hospitals, doctors offices, social services, and other public health and social services are large and important employers. This industry, especially with skilled nursing, offers the most direct path to high wages and social mobility
- **Construction and Related Industries:** While representing a smaller portion of the labor market, this is an important sector to invest in and keep a close eye on, given its status as a leading economic indicator as well as offering high wages for skilled trade work.
- **Education and other Public Sectors:** In many areas of the region, especially in rural towns, this sector is the highest paying and requires the most education. Teachers, public administrators, and public safety are vital skills and resources to the region's communities and a lack of investment can risk atrophying already stressed public entities.
- **Restaurants and Recreation:** While not an industry that is seen as a lynchpin of economic activity, it does suggest a robust economy with spending money that can support and expand these offerings. Another contributing factor can be found in an increase in outdoor tourism driven by the pandemic and supported by the many public lands, national parks, and other natural outdoor tourism activities in the SJV RPU.
- **Manufacturing:** Manufacturing, outside of post-harvest processing, remains a niche industry with low demand. It remains to be seen what public investments from Federal and State levels as well as an increased emphasis on domestic manufacturing can manifest within our region.

TABLE 7

(continued on next page)

2019-2024 Growth for Industry Sector Jobs in San Joaquin RPU

Lightcast database analysis using QCEW, ACS, BEA, and other publicly available data. 4-digit NAICS classification 2019-2024

<u>Industries That Added the Most Jobs</u> (2019-2024 Change in Number)	<u>Jobs Gained</u>	<u>Industries That Grew the fastest</u> (2019-2024 Change in Percent)	<u>Percent Change</u>
Total Jobs	116,645	Total Jobs	7%
Warehousing and Storage	22,375	Local Messengers and Local Delivery	170%
Individual and Family Services	16,986	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing	160%
Restaurants and Other Eating Places	13,068	Couriers and Express Delivery Services	83%
Education and Hospitals (Local Government)	10,848	Specialty (except Psychiatric and Substance Abuse) Hospitals	72%
General Freight Trucking	8,142	Warehousing and Storage	65%
Outpatient Care Centers	6,438	Other Miscellaneous Retailers	50%
Building Equipment Contractors	5,389	Special Food Services	44%
Couriers and Express Delivery Services	5,357	General Freight Trucking	37%
Warehouse Clubs, Supercenters, and Other General Merchandise Retailers	3,112	Home Health Care Services	37%
Services to Buildings and Dwellings	2,618	Outpatient Care Centers	36%
Grocery Stores	2,586	Computer Systems Design and Related Services	29%
Special Food Services	2,518	Individual and Family Services	28%
Dairy Product Manufacturing	2,293	Management, Scientific, and Technical Consulting Services	27%
Offices of Physicians	2,275	Building Equipment Contractors	26%
Personal Care Services	2,151	Natural Gas Distribution	25%
Home Health Care Services	2,026	Dairy Product Manufacturing	25%
Management, Scientific, and Technical Consulting Services	2,010	Offices of Other Health Practitioners	19%
Automotive Repair and Maintenance	1,999	Gasoline Stations	18%
Offices of Other Health Practitioners	1,784	Personal Care Services	17%
Other Miscellaneous Retailers	1,716	Other Food Manufacturing	16%
Gasoline Stations	1,697	Investigation and Security Services	14%
Local Messengers and Local Delivery	1,683	Automotive Repair and Maintenance	13%
Residential Building Construction	1,521	Warehouse Clubs, Supercenters, and Other General Merchandise Retailers	12%
Navigational, Measuring, Electromedical, and Control Instruments Manufacturing	1,286	Restaurants and Other Eating Places	12%
Other Food Manufacturing	1,282	Other Amusement and Recreation Industries	11%
Animal Slaughtering and Processing	1,245	Residential Building Construction	11%
Other Amusement and Recreation Industries	1,235	Animal Slaughtering and Processing	10%

Computer Systems Design and Related Services	1,189		Grocery Stores	9%
Natural Gas Distribution	1,174		Offices of Physicians	9%
Foundation, Structure, and Building Exterior Contractors	1,084		Services to Buildings and Dwellings	9%
Investigation and Security Services	1,082		Building Material and Supplies Dealers	9%
Specialty (except Psychiatric and Substance Abuse) Hospitals	1,078		Foundation, Structure, and Building Exterior Contractors	9%
Building Material and Supplies Dealers	1,062		Education and Hospitals (Local Government)	7%

Source: Lightcast Industry Table, SJV RPU, 4 Digit NAICS

Industry Sector Losses

Table 8 on the following page lists industries (using 4-digit NAICS coding) that have lost jobs over the past 5 years. The left column organizes industries based on estimated total jobs gained and the right column organizes industries based on a percent change, to attempt to capture industries that are quickly expanding. We filtered out industries with job changes over 5 years that were higher than -2%

- **Agriculture:** The largest employer for most of the region is the agricultural industry and it continues to show a decline in employment. Despite these job losses, agricultural output has remained steady which suggests an improvement in labor productivity. The industry continues to see automation innovations as well as shifts in crop planting to take advantage. These factors, along with uncertainty and expected contraction in farmed area due to climate change and public policy (namely SGMA), may lead to a further contraction in the farm labor market.
- **Retail and related in person commerce:** While logistics, home delivery, and transportation have expanded in the SJV RPU, in-person commerce and retail establishments have shown large declines. Some of this can be attributed to the direct competition e-commerce offers, other automation activities can also be explanatory.
- **Federal and State Government:** In comparison to the expansion and immediate requirements of local government employment, certain state and federal employment has been pulled back in the past 5 years. This may be a shift of certain public administration from those authorities down to the local level as well as efficiency gains made by state and federal officials, but it is a cautionary sign of reduced public investment into the region.

TABLE 8

2019-2024 Losses for Industry Sector Jobs in San Joaquin RPU

Lightcast database analysis using QCEW, ACS, BEA, and other publicly available data. 4-digit NAICS classification

<u>Industries That Lost the Most Jobs</u> (2019-2024 Change in Number)	<u>Jobs Lost</u>	<u>Industries That Declined Fastest</u> (2019-2024 Change in Percent)	<u>Percent Change</u>
Crop Production	(7,531)	Business Support Services	(57%)
Support Activities for Crop Production	(3,948)	Insurance Carriers	(50%)
Business Support Services	(3,345)	Facilities Support Services	(39%)
Insurance Carriers	(2,804)	Vocational Rehabilitation Services	(33%)
Clothing and Clothing Accessories Retailers	(2,588)	Furniture and Home Furnishings Retailers	(25%)
Employment Services	(2,534)	Clothing and Clothing Accessories Retailers	(23%)
Private Households	(2,100)	Wired and Wireless Telecommunications (except Satellite)	(23%)
State Government, Excluding Education and Hospitals	(1,700)	Support Activities for Air Transportation	(20%)
Vocational Rehabilitation Services	(1,531)	Private Households	(19%)
Depository Credit Intermediation	(1,221)	Support Activities for Mining	(19%)
Support Activities for Mining	(1,206)	Nondepository Credit Intermediation	(17%)
Animal Production	(1,139)	Printing and Related Support Activities	(16%)
Utility System Construction	(1,084)	Colleges, Universities, and Professional Schools	(15%)
Furniture and Home Furnishings Retailers	(946)	Depository Credit Intermediation	(14%)
Facilities Support Services	(928)	Utility System Construction	(14%)
Wired and Wireless Telecommunications (except Satellite)	(819)	Crop Production	(12%)
Education and Hospitals (State Government)	(816)	Employment Services	(9%)
Grocery and Related Product Merchant Wholesalers	(810)	Taxi and Limousine Service	(9%)
Colleges, Universities, and Professional Schools	(790)	Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers	(7%)
Department Stores	(730)	Department Stores	(7%)
Federal Government, Civilian	(677)	Grocery and Related Product Merchant Wholesalers	(6%)
Support Activities for Air Transportation	(477)	Education and Hospitals (State Government)	(6%)
Management of Companies and Enterprises	(437)	State Government, Excluding Education and Hospitals	(5%)
Child Day Care Services	(427)	Highway, Street, and Bridge Construction	(5%)
Printing and Related Support Activities	(427)	Animal Production	(5%)
Nondepository Credit Intermediation	(390)	Miscellaneous Nondurable Goods Merchant Wholesalers	(4%)
Religious Organizations	(279)	Child Day Care Services	(4%)
Miscellaneous Nondurable Goods Merchant Wholesalers	(201)	Management of Companies and Enterprises	(4%)
Taxi and Limousine Service	(181)	Sporting Goods, Hobby, and Musical Instrument Retailers	(3%)

Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers	(171)		Support Activities for Crop Production	(3%)
Sporting Goods, Hobby, and Musical Instrument Retailers	(169)		Specialty Food Stores	(2%)
Highway, Street, and Bridge Construction	(119)		Federal Government, Civilian	(2%)
Other Wood Product Manufacturing	(74)		Other Wood Product Manufacturing	(2%)
Specialty Food Stores	(72)		Religious Organizations	(2%)

Source: Lightcast Industry Table, SJV RPU, 4 Digit NAICS

Occupational Gains

Occupational data differs from industry data in certain categorical and survey-design choices but attempts to get at similar information. In the below table, we have presented the occupational data showing the highest and fastest gains. We have filtered out Industries with fewer than 1,000 employees and a 5-year growth of less than 7%.

The main takeaways align largely with those of the industry level data shown on previous pages, but gives additional detail on the types of jobs that those industries have been hiring for.

TABLE 9

2019-2024 Growth for Occupational Data in San Joaquin RPU

Lightcast database analysis using QCEW, ACS, BEA, and other publicly available data. 4-digit SOC classification

<u>Occupations That Added the Most Jobs</u> (Five-Year Change in Number)		<u>Occupations That Grew the fastest</u> (Five-Year Change in Percent)		<u>Percent Change</u>
Total Jobs		Total Jobs		
Home Health and Personal Care Aides	24,628	Couriers and Messengers		117%
Laborers and Material Movers	18,908	Training and Development Specialists		84%
Driver/Sales Workers and Truck Drivers	10,228	Logisticians and Project Management Specialists		66%
Cooks	6,515	Transportation, Storage, and Distribution Managers		59%
General and Operations Managers	5,126	Miscellaneous Personal Appearance Workers		45%
Counselors	3,239	Home Health and Personal Care Aides		44%
Logisticians and Project Management Specialists	2,876	Bartenders		42%
Miscellaneous Business Operations Specialists	2,793	Marketing and Sales Managers		41%
Elementary and Middle School Teachers	2,513	Medical and Health Services Managers		41%
Shipping, Receiving, and Inventory Clerks	2,393	Software and Web Developers, Programmers, and Testers		40%
Marketing and Sales Managers	2,297	Human Resources Workers		38%
Physicians	2,214	Physicians		34%
Registered Nurses	2,209	Miscellaneous Business Operations Specialists		32%
Miscellaneous Healthcare Support Occupations	2,115	Shipping, Receiving, and Inventory Clerks		32%
Industrial Truck and Tractor Operators	1,968	First-Line Supervisors of Transportation and Material Moving Workers		32%
Miscellaneous Managers	1,889	General and Operations Managers		32%
Security Guards and Gambling Surveillance Officers	1,827	First-Line Supervisors of Mechanics, Installers, and Repairers		32%
Human Resources Workers	1,807	Special Education Teachers		32%
First-Line Supervisors of Transportation and Material Moving Workers	1,782	Food Service Managers		31%
Substitute Teachers, Short-Term	1,731	Counselors		28%
Training and Development Specialists	1,697	Miscellaneous Managers		26%
Bartenders	1,591	Construction Managers		26%

Therapists	1,575	First-Line Supervisors of Construction Trades and Extraction Workers	25%
First-Line Supervisors of Construction Trades and Extraction Workers	1,505	Therapists	25%
Medical and Health Services Managers	1,497	Cooks	23%
Miscellaneous Personal Appearance Workers	1,462	Laborers and Material Movers	21%
Software and Web Developers, Programmers, and Testers	1,455	Driver/Sales Workers and Truck Drivers	20%
First-Line Supervisors of Mechanics, Installers, and Repairers	1,415	Security Guards and Gambling Surveillance Officers	19%
Special Education Teachers	1,412	Industrial Machinery Installation, Repair, and Maintenance Workers	18%
Couriers and Messengers	1,397	Butchers and Other Meat, Poultry, and Fish Processing Workers	18%
Butchers and Other Meat, Poultry, and Fish Processing Workers	1,374	Accountants and Auditors	15%
Supervisors of Food Preparation and Serving Workers	1,293	Substitute Teachers, Short-Term	13%
Accountants and Auditors	1,268	Industrial Truck and Tractor Operators	12%
Food Service Managers	1,186	Supervisors of Food Preparation and Serving Workers	11%
Transportation, Storage, and Distribution Managers	1,178	Miscellaneous Healthcare Support Occupations	10%
Secondary School Teachers	1,104	Elementary and Middle School Teachers	10%
Industrial Machinery Installation, Repair, and Maintenance Workers	1,071	Secondary School Teachers	9%
Construction Managers	1,045	Registered Nurses	8%

Source: Lightcast Occupation Table, SJV RPU, 4 Digit SOC

Occupational Losses

Occupational data differs from industry data in certain categorical and survey-design choices but attempts to get at the same information. In the below table, we have presented the occupational data showing the occupations with the largest losses and fastest declines. We have filtered out Industries with fewer than 1,000 employees.

The main takeaways align largely with those of the industry level data shown on previous pages, but gives additional detail on the types of jobs that those industries have lost over the past 5 years.

TABLE 10

Five-Year Losses for Occupational Data in San Joaquin RPU

Lightcast database analysis using QCEW, ACS, BEA, and other publicly available data. 4-digit SOC classification

<u>Occupations That Lost the Most Jobs</u> (Five-Year Change in Number)		<u>Occupations That Declined Fastest</u> (Five-Year Change in Percent)	<u>Percent Change</u>
Miscellaneous Agricultural Workers	(19,263)	Radio and Telecommunications Equipment Installers and Repairers	(53%)
Cashiers	(6,032)	Tellers	(42%)
Retail Salespersons	(4,003)	Crushing, Grinding, Polishing, Mixing, and Blending Workers	(26%)
Childcare Workers	(2,570)	Graders and Sorters, Agricultural Products	(25%)
Waiters and Waitresses	(2,055)	Childcare Workers	(19%)
Bailiffs, Correctional Officers, and Jailers	(1,793)	Claims Adjusters, Appraisers, Examiners, and Investigators	(18%)
Graders and Sorters, Agricultural Products	(1,421)	Bailiffs, Correctional Officers, and Jailers	(16%)
Radio and Telecommunications Equipment Installers and Repairers	(1,412)	Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	(16%)
Tellers	(1,407)	Engineering Technologists and Technicians, Except Drafters	(15%)
Construction Laborers	(1,100)	Derrick, Rotary Drill, and Service Unit Operators, Oil and Gas	(15%)
Farmers, Ranchers, and Other Agricultural Managers	(1,087)	Miscellaneous Teachers and Instructors	(14%)
First-Line Supervisors of Sales Workers	(1,043)	Medical Records Specialists	(14%)
Office Clerks, General	(1,021)	Credit Counselors and Loan Officers	(14%)
Receptionists and Information Clerks	(657)	Cashiers	(14%)
Miscellaneous Teachers and Instructors	(652)	Miscellaneous Agricultural Workers	(12%)
Crushing, Grinding, Polishing, Mixing, and Blending Workers	(612)	Waiters and Waitresses	(12%)
Hosts and Hostesses, Restaurant, Lounge, and Coffee Shop	(594)	Retail Salespersons	(11%)
Engineering Technologists and Technicians, Except Drafters	(593)	Insurance Claims and Policy Processing Clerks	(11%)
Counter and Rental Clerks and Parts Salespersons	(530)	Billing and Posting Clerks	(10%)
Inspectors, Testers, Sorters, Samplers, and Weighers	(521)	Painters and Paperhangers	(10%)
Billing and Posting Clerks	(474)	Clinical Laboratory Technologists and Technicians	(10%)
Dishwashers	(470)	Dishwashers	(9%)

Painters and Paperhangers	(432)	Inspectors, Testers, Sorters, Samplers, and Weighers	(9%)
Derrick, Rotary Drill, and Service Unit Operators, Oil and Gas	(415)	Receptionists and Information Clerks	(8%)
Claims Adjusters, Appraisers, Examiners, and Investigators	(372)	Construction Laborers	(8%)
Medical Records Specialists	(302)	Tax Examiners, Collectors and Preparers, and Revenue Agents	(8%)
Credit Counselors and Loan Officers	(280)	First-Line Supervisors of Sales Workers	(6%)
Insurance Claims and Policy Processing Clerks	(236)	Counter and Rental Clerks and Parts Salespersons	(6%)
Welding, Soldering, and Brazing Workers	(207)	Drywall Installers, Ceiling Tile Installers, and Tapers	(5%)
Recreation and Fitness Workers	(206)	Farmers, Ranchers, and Other Agricultural Managers	(5%)
Tax Examiners, Collectors and Preparers, and Revenue Agents	(202)	Welding, Soldering, and Brazing Workers	(4%)
Clinical Laboratory Technologists and Technicians	(195)	Helpers, Construction Trades	(4%)
Drywall Installers, Ceiling Tile Installers, and Tapers	(171)	Office Clerks, General	(4%)
Helpers, Construction Trades	(87)	Clergy	(3%)
Securities, Commodities, and Financial Services Sales Agents	(74)	Securities, Commodities, and Financial Services Sales Agents	(3%)
Clergy	(69)	Recreation and Fitness Workers	(3%)
Carpet, Floor, and Tile Installers and Finishers	(46)	Carpet, Floor, and Tile Installers and Finishers	(2%)

Source: Lightcast Occupation Table, SJV RPU, 4 Digit SOC

Industry Employment Projections

EDD 2020-2030 Projections – 2-digit NAICS

The Employment Development Department (EDD) creates industry employment projections. The current iteration uses a Base Year 2020 Employment estimate and projects employment growth out 10 years. Below is a table with the calculated SJV RPU projections at the 2-digit NAICS level.

TABLE 11

EDD 2020-2030 Industry Employment Projections¹

LMID Published May 2023, NAICS 2-digit codes

	Baseline 2020	Projection 2030	Numeric Change 2020-2030	Percentage Change 2020-2030
Total Self-Employment	99,600	102,400	2,800	2.81%
Total Farm	197,300	209,800	12,500	6.34%
Total Nonfarm Jobs	1,294,300	1,499,000	204,700	15.82%
Mining, Logging, and Construction	78,000	86,600	8,600	11.03%
Manufacturing	109,800	114,700	4,900	4.46%
Trade, Transportation, and Utilities	285,900	325,000	39,100	13.68%
Information	7,700	8,300	600	7.79%
Financial Activities	40,800	44,800	4,000	9.80%
Professional and Business Services	114,100	129,400	15,300	13.41%
Educational and Health Services	227,200	265,400	38,200	16.81%
Leisure and Hospitality	109,000	136,900	27,900	25.60%
Other Services	36,600	41,400	4,800	13.11%
Government	285,200	300,600	15,400	5.40%

¹Inyo and Mono counties projections are not included as EDD created a single industry employment projection for several counties in the Eastern Sierra - Mother Lode Region

Lightcast - NAICS 4 Digit Industry Projections

In addition to the EDD created Industry projections, we used Lightcast to conduct Industry Employment Projections for the 4-digit NAICS level of detail. This deeper dive allows us to see a more granular projection and includes Lightcast calculated Average Earnings per job.

If there were NAICS codes that returned an industry with less than 10 jobs, it was excluded from our database query and is not present here. For each of the standard EDD categories (2 digit, NAICS) we have provided additional industry projections with detail as well as average yearly earnings. The tables are sorted from high to low on the gross number of projected job changes.

Farm Jobs Crop, Animal, and Forestry related employment (11)

As has been described in earlier sections of this report, the Agriculture industry is in a labor transition. Automation and technology advancements along with choices of crop due to market and environmental forces have led to a decline in direct employment for Crop and Animal Production. However, Support Activities for Crop Production shows a slight increase, but not enough to offset the losses in 1110 and 1120. The great challenge for Workforce Development systems will be to understand and program for this shift in employment.

NAICS	Description	2020 Jobs	2030 Jobs	2020 - 2030 Change	2020 - 2030 % Change	Avg. Earnings Per Job
1151	Support Activities for Crop Production	123,838	135,343	11,505	9%	\$46,279
1142	Hunting and Trapping	13	32	19	140%	\$51,015
1153	Support Activities for Forestry	313	330	17	5%	\$71,256
1141	Fishing	36	48	12	34%	\$51,730
1152	Support Activities for Animal Production	737	731	(5)	(1%)	\$61,955
1132	Forest Nurseries and Gathering of Forest Products	97	51	(46)	(47%)	\$61,984
1120	Animal Production	25,636	21,806	(3,829)	(15%)	\$68,974
1110	Crop Production	61,007	49,281	(11,726)	(19%)	\$61,772

Mining, Logging, and Construction (1133,21,23)

Construction jobs are pivotal to the region and the state’s economic health. There will continue to be a strong focus on aligning the education sector with training in the trades to allow for greater talent pipeline management. Of note, Oil and Gas Extraction are projected to decline by a large margin. Areas will need to keep a close eye on both industry and employment statistics as well as policy changes at Federal and State levels.

NAICS	Description	2020 Jobs	2030 Jobs	2020 - 2030 Change	2020 - 2030 % Change	Avg. Earnings Per Job
2382	Building Equipment Contractors	21,131	28,852	7,721	37%	\$85,873
2381	Foundation, Structure, and Building Exterior Contractors	12,080	14,303	2,224	18%	\$71,892
2361	Residential Building Construction	13,838	15,757	1,920	14%	\$64,879
2362	Nonresidential Building Construction	5,709	7,016	1,307	23%	\$99,140
2379	Other Heavy and Civil Engineering Construction	789	1,986	1,197	152%	\$120,021
2389	Other Specialty Trade Contractors	9,926	10,694	768	8%	\$78,859
2383	Building Finishing Contractors	14,154	14,481	328	2%	\$62,154
2122	Metal Ore Mining	219	372	153	70%	\$105,340
2131	Support Activities for Mining	4,734	4,866	132	3%	\$108,709
2372	Land Subdivision	288	292	3	1%	\$115,784
1133	Logging	120	119	(2)	(1%)	\$70,044
2373	Highway, Street, and Bridge Construction	2,467	2,310	(158)	(6%)	\$130,650
2123	Nonmetallic Mineral Mining and Quarrying	1,278	1,064	(214)	(17%)	\$116,385
2371	Utility System Construction	6,998	6,614	(384)	(5%)	\$100,301
2111	Oil and Gas Extraction	1,785	1,025	(760)	(43%)	\$191,320

Manufacturing (31,32,33)

Agriculture based manufacturing and food supply chain activities fare strongest in this set of projections. It will be incumbent on LWDA's with strong local economies based in agriculture to better understand the manufacturing and supply chain presence in their localities as well as make partnerships with those industry partners to make sure that residents entering the job market are trained and ready to contribute.

NAICS	Description	2020 Jobs	2030 Jobs	2020 - 2030 Change	2020 - 2030 % Change	Avg. Earnings Per Job
3115	Dairy Product Manufacturing	9,257	12,342	3,085	33%	\$91,778
3116	Animal Slaughtering and Processing	12,890	15,189	2,299	18%	\$58,561
3345	Navigational, Measuring, Electromedical, and Control Instruments Manufacturing	941	2,805	1,863	198%	\$102,416
3119	Other Food Manufacturing	8,753	10,312	1,559	18%	\$78,604
3121	Beverage Manufacturing	8,846	10,264	1,418	16%	\$100,335
3323	Architectural and Structural Metals Manufacturing	3,836	4,988	1,152	30%	\$85,489
3359	Other Electrical Equipment and Component Manufacturing	15	1,090	1,074	6996%	\$86,319
3361	Motor Vehicle Manufacturing	615	1,473	858	140%	\$100,963
3364	Aerospace Product and Parts Manufacturing	1,515	2,350	835	55%	\$133,836
3339	Other General Purpose Machinery Manufacturing	1,885	2,325	441	23%	\$83,154
3111	Animal Food Manufacturing	2,258	2,697	439	19%	\$91,571
3352	Household Appliance Manufacturing	61	468	407	662%	\$105,191
3272	Glass and Glass Product Manufacturing	1,823	2,204	381	21%	\$107,489
3114	Fruit and Vegetable Preserving and Specialty Food Manufacturing	13,566	13,933	366	3%	\$73,564
3251	Basic Chemical Manufacturing	497	851	355	71%	\$117,172
3118	Bakeries and Tortilla Manufacturing	2,831	3,174	344	12%	\$53,763
3314	Nonferrous Metal (except Aluminum) Production and Processing	468	794	326	70%	\$77,012
3399	Other Miscellaneous Manufacturing	1,088	1,390	302	28%	\$61,658
3261	Plastics Product Manufacturing	4,406	4,704	299	7%	\$81,323
3222	Converted Paper Product Manufacturing	4,804	5,089	285	6%	\$84,581
3334	Ventilation, Heating, Air-Conditioning, and Commercial Refrigeration Equipment Manufacturing	446	726	279	63%	\$82,684
3315	Foundries	214	426	212	99%	\$65,351
3211	Sawmills and Wood Preservation	209	392	183	88%	\$67,402
3149	Other Textile Product Mills	262	439	176	67%	\$49,559
3363	Motor Vehicle Parts Manufacturing	708	830	122	17%	\$66,030
3351	Electric Lighting Equipment Manufacturing	48	163	116	243%	\$71,282
3255	Paint, Coating, and Adhesive Manufacturing	756	867	111	15%	\$92,185
3332	Industrial Machinery Manufacturing	811	918	107	13%	\$82,769
3253	Pesticide, Fertilizer, and Other Agricultural Chemical Manufacturing	1,094	1,194	100	9%	\$104,412

NAICS	Description	2020 Jobs	2030 Jobs	2020 - 2030 Change	2020 - 2030 % Change	Avg. Earnings Per Job
3333	Commercial and Service Industry Machinery Manufacturing	186	286	100	54%	\$86,785
3113	Sugar and Confectionery Product Manufacturing	153	249	97	63%	\$70,316
3279	Other Nonmetallic Mineral Product Manufacturing	559	639	80	14%	\$95,775
3327	Machine Shops; Turned Product; and Screw, Nut, and Bolt Manufacturing	1,533	1,607	74	5%	\$68,655
3254	Pharmaceutical and Medicine Manufacturing	165	238	73	44%	\$85,379
3372	Office Furniture (including Fixtures) Manufacturing	183	254	71	39%	\$65,146
3331	Agriculture, Construction, and Mining Machinery Manufacturing	2,475	2,546	71	3%	\$80,289
3262	Rubber Product Manufacturing	651	719	68	10%	\$75,522
3346	Manufacturing and Reproducing Magnetic and Optical Media	59	126	67	113%	\$52,731
3252	Resin, Synthetic Rubber, and Artificial and Synthetic Fibers and Filaments Manufacturing	64	126	62	96%	\$76,033
3341	Computer and Peripheral Equipment Manufacturing	16	59	43	266%	\$117,159
3326	Spring and Wire Product Manufacturing	275	312	38	14%	\$73,253
3366	Ship and Boat Building	213	249	36	17%	\$68,662
3312	Steel Product Manufacturing from Purchased Steel	81	116	35	43%	\$80,273
3141	Textile Furnishings Mills	66	100	33	50%	\$43,349
3159	Apparel Accessories and Other Apparel Manufacturing	30	52	21	71%	\$47,018
3161	Leather and Hide Tanning and Finishing	17	37	20	118%	\$85,849
3311	Iron and Steel Mills and Ferroalloy Manufacturing	45	62	17	38%	\$73,076
3362	Motor Vehicle Body and Trailer Manufacturing	1,739	1,755	17	1%	\$75,611
3325	Hardware Manufacturing	15	30	16	106%	\$110,292
3274	Lime and Gypsum Product Manufacturing	21	33	11	52%	\$76,614
3336	Engine, Turbine, and Power Transmission Equipment Manufacturing	10	15	5	48%	\$81,143
3169	Other Leather and Allied Product Manufacturing	17	22	4	25%	\$36,621
3328	Coating, Engraving, Heat Treating, and Allied Activities	770	771	1	0%	\$64,270
3335	Metalworking Machinery Manufacturing	333	326	(7)	(2%)	\$73,817
3379	Other Furniture Related Product Manufacturing	153	140	(13)	(8%)	\$57,253
3343	Audio and Video Equipment Manufacturing	132	119	(13)	(10%)	\$134,293
3322	Cutlery and Handtool Manufacturing	84	68	(17)	(20%)	\$65,762
3353	Electrical Equipment Manufacturing	155	138	(17)	(11%)	\$81,884
3152	Cut and Sew Apparel Manufacturing	186	164	(22)	(12%)	\$43,978

NAICS	Description	2020 Jobs	2030 Jobs	2020 - 2030 Change	2020 - 2030 % Change	Avg. Earnings Per Job
3133	Textile and Fabric Finishing and Fabric Coating Mills	70	37	(33)	(47%)	\$51,142
3271	Clay Product and Refractory Manufacturing	98	64	(33)	(34%)	\$48,526
3313	Alumina and Aluminum Production and Processing	328	289	(39)	(12%)	\$81,393
3371	Household and Institutional Furniture and Kitchen Cabinet Manufacturing	1,482	1,443	(39)	(3%)	\$62,156
3329	Other Fabricated Metal Product Manufacturing	983	936	(47)	(5%)	\$78,367
3273	Cement and Concrete Product Manufacturing	2,258	2,199	(59)	(3%)	\$90,532
3256	Soap, Cleaning Compound, and Toilet Preparation Manufacturing	237	178	(59)	(25%)	\$84,488
3369	Other Transportation Equipment Manufacturing	123	56	(68)	(55%)	\$69,681
3259	Other Chemical Product and Preparation Manufacturing	364	293	(71)	(20%)	\$87,868
3219	Other Wood Product Manufacturing	3,391	3,267	(124)	(4%)	\$69,086
3342	Communications Equipment Manufacturing	244	105	(139)	(57%)	\$113,944
3344	Semiconductor and Other Electronic Component Manufacturing	455	309	(146)	(32%)	\$76,704
3324	Boiler, Tank, and Shipping Container Manufacturing	776	618	(158)	(20%)	\$99,394
3391	Medical Equipment and Supplies Manufacturing	1,027	867	(159)	(16%)	\$73,870
3112	Grain and Oilseed Milling	747	511	(236)	(32%)	\$87,135
3241	Petroleum and Coal Products Manufacturing	925	685	(241)	(26%)	\$202,870
3212	Veneer, Plywood, and Engineered Wood Product Manufacturing	896	593	(303)	(34%)	\$72,257
3321	Forging and Stamping	832	395	(437)	(52%)	\$87,694
3231	Printing and Related Support Activities	2,546	1,947	(600)	(24%)	\$63,575

Trade, Transportation, and Utilities (22, 42-49)

Logistics and transportation show strong projected gains out to 2030. Unfortunately, many of the jobs being created are lower wage positions that could face certain automation advancements in the coming years. Workforce Boards and community leaders will need to work with employers to better understand and program for skill advancements and career ladder development.

NAICS	Description	2020 Jobs	2030 Jobs	2020 - 2030 Change	2020 - 2030 % Change	Avg. Earnings Per Job
4931	Warehousing and Storage	41,128	65,136	24,008	58%	\$71,155
4841	General Freight Trucking	24,406	34,055	9,649	40%	\$77,501
4921	Couriers and Express Delivery Services	8,599	14,737	6,137	71%	\$49,487
4552	Warehouse Clubs, Supercenters, and Other General Merchandise Retailers	25,672	31,529	5,856	23%	\$43,731
4451	Grocery Stores	28,726	31,255	2,529	9%	\$44,552
4571	Gasoline Stations	9,736	11,682	1,946	20%	\$42,581
4492	Electronics and Appliance Retailers	5,055	6,828	1,773	35%	\$56,898
4244	Grocery and Related Product Merchant Wholesalers	11,153	12,819	1,666	15%	\$80,193
4599	Other Miscellaneous Retailers	4,072	5,622	1,550	38%	\$44,550
4411	Automobile Dealers	10,991	12,536	1,545	14%	\$87,950
4922	Local Messengers and Local Delivery	1,859	3,242	1,383	74%	\$37,670
4413	Automotive Parts, Accessories, and Tire Retailers	7,443	8,813	1,369	18%	\$49,456
4561	Health and Personal Care Retailers	10,635	11,873	1,238	12%	\$53,723
4238	Machinery, Equipment, and Supplies Merchant Wholesalers	7,534	8,529	995	13%	\$92,650
4884	Support Activities for Road Transportation	1,909	2,766	857	45%	\$60,184
4842	Specialized Freight Trucking	9,267	10,104	838	9%	\$84,130
4246	Chemical and Allied Products Merchant Wholesalers	912	1,733	821	90%	\$111,008
2212	Natural Gas Distribution	5,402	6,182	781	14%	\$218,624
4242	Drugs and Druggists' Sundries Merchant Wholesalers	862	1,564	702	81%	\$64,847
2213	Water, Sewage and Other Systems	543	1,189	646	119%	\$105,081
4239	Miscellaneous Durable Goods Merchant Wholesalers	2,039	2,649	609	30%	\$68,452
4234	Professional and Commercial Equipment and Supplies Merchant Wholesalers	1,741	2,312	570	33%	\$83,368
4582	Shoe Retailers	1,546	2,092	546	35%	\$28,223
4237	Hardware, and Plumbing and Heating Equipment and Supplies Merchant Wholesalers	1,835	2,379	544	30%	\$90,367
4583	Jewelry, Luggage, and Leather Goods Retailers	1,217	1,643	426	35%	\$54,303
4236	Household Appliances and Electrical and Electronic Goods Merchant Wholesalers	1,326	1,733	407	31%	\$102,922
4851	Urban Transit Systems	544	890	346	64%	\$59,860
4885	Freight Transportation Arrangement	1,255	1,594	339	27%	\$89,575
NAICS	Description	2020 Jobs	2030 Jobs	2020 - 2030 Change	2020 - 2030 % Change	Avg. Earnings Per Job

4231	Motor Vehicle and Motor Vehicle Parts and Supplies Merchant Wholesalers	3,540	3,871	332	9%	\$79,333
4859	Other Transit and Ground Passenger Transportation	1,573	1,894	321	20%	\$49,539
4595	Used Merchandise Retailers	1,982	2,297	315	16%	\$34,143
4591	Sporting Goods, Hobby, and Musical Instrument Retailers	4,774	5,026	252	5%	\$33,622
4233	Lumber and Other Construction Materials Merchant Wholesalers	1,607	1,836	228	14%	\$86,140
4442	Lawn and Garden Equipment and Supplies Retailers	1,647	1,854	208	13%	\$53,057
4412	Other Motor Vehicle Dealers	1,279	1,463	185	14%	\$72,226
4889	Other Support Activities for Transportation	1,221	1,395	175	14%	\$103,425
4911	Postal Service	186	354	168	91%	\$54,058
4821	Rail Transportation	1,659	1,822	163	10%	\$105,454
4853	Taxi and Limousine Service	2,039	2,191	152	7%	\$34,033
4247	Petroleum and Petroleum Products Merchant Wholesalers	1,509	1,658	149	10%	\$103,357
4232	Furniture and Home Furnishing Merchant Wholesalers	433	547	114	26%	\$72,751
2211	Electric Power Generation, Transmission and Distribution	1,524	1,619	95	6%	\$182,391
4883	Support Activities for Water Transportation	186	269	83	45%	\$126,332
4811	Scheduled Air Transportation	464	531	68	15%	\$94,157
4882	Support Activities for Rail Transportation	303	371	67	22%	\$80,126
4441	Building Material and Supplies Dealers	13,033	13,073	40	0%	\$51,522
4871	Scenic and Sightseeing Transportation, Land	70	108	37	53%	\$45,312
4862	Pipeline Transportation of Natural Gas	47	69	23	49%	\$153,010
4248	Beer, Wine, and Distilled Alcoholic Beverage Merchant Wholesalers	2,147	2,168	21	1%	\$86,211
4453	Beer, Wine, and Liquor Retailers	1,324	1,341	17	1%	\$36,987
4812	Nonscheduled Air Transportation	239	255	15	6%	\$89,004
4869	Other Pipeline Transportation	51	63	12	23%	\$133,750
4831	Deep Sea, Coastal, and Great Lakes Water Transportation	17	25	8	49%	\$119,148
4832	Inland Water Transportation	18	21	3	20%	\$91,942
4852	Interurban and Rural Bus Transportation	110	113	3	3%	\$48,724
4452	Specialty Food Stores	2,888	2,885	(3)	(0%)	\$39,913
4872	Scenic and Sightseeing Transportation, Water	23	19	(4)	(17%)	\$37,502
4855	Charter Bus Industry	165	142	(23)	(14%)	\$80,103
4235	Metal and Mineral (except Petroleum) Merchant Wholesalers	1,376	1,313	(63)	(5%)	\$88,652
4243	Apparel, Piece Goods, and Notions Merchant Wholesalers	710	615	(95)	(13%)	\$65,398
4861	Pipeline Transportation of Crude Oil	131	32	(99)	(76%)	\$201,963
4572	Fuel Dealers	508	396	(112)	(22%)	\$76,958
4245	Farm Product Raw Material Merchant Wholesalers	1,237	1,116	(121)	(10%)	\$81,249

NAICS	Description	2020 Jobs	2030 Jobs	2020 - 2030 Change	2020 - 2030 % Change	Avg. Earnings Per Job
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4241	Paper and Paper Product Merchant Wholesalers	738	608	(130)	(18%)	\$112,366
4593	Florists	692	549	(144)	(21%)	\$35,894
4592	Book Retailers and News Dealers	570	377	(193)	(34%)	\$35,026
4249	Miscellaneous Nondurable Goods Merchant Wholesalers	4,775	4,571	(204)	(4%)	\$96,675
4881	Support Activities for Air Transportation	2,218	1,934	(284)	(13%)	\$97,502
4594	Office Supplies, Stationery, and Gift Retailers	1,541	1,234	(307)	(20%)	\$39,722
4251	Wholesale Electronic Markets and Agents and Brokers	1,489	1,117	(372)	(25%)	\$115,499
4581	Clothing and Clothing Accessories Retailers	8,705	8,180	(525)	(6%)	\$26,852
4854	School and Employee Bus Transportation	1,082	469	(614)	(57%)	\$66,859
4491	Furniture and Home Furnishings Retailers	3,157	2,385	(771)	(24%)	\$55,179
4551	Department Stores	8,502	7,625	(877)	(10%)	\$33,734

Information (51)

The Information Sector continues to be a minor industry. The largest employers are the Motion Picture and Video Industry and Radio and Television Broadcasting. Salaries range from very low to quite high, but the small number of jobs that are being created are expected to be in 5121 and have low wages.

NAICS	Description	2020 Jobs	2030 Jobs	2020 - 2030 Change	2020 - 2030 % Change	Avg. Earnings Per Job
5121	Motion Picture and Video Industries	1,077	2,554	1,477	137%	\$33,748
5182	Data Processing, Hosting, and Related Services	296	413	117	39%	\$94,648
5192	Web Search Portals, Libraries, Archives, and Other Information Services	91	205	114	125%	\$55,000
5122	Sound Recording Industries	141	246	105	74%	\$58,546
5161	Radio and Television Broadcasting Stations	1,452	1,532	80	6%	\$137,638
5174	Satellite Telecommunications	41	49	8	19%	\$204,446
5178	All Other Telecommunications	80	77	(3)	(4%)	\$109,767
5162	Media Streaming Distribution Services, Social Networks, and Other Media Networks and Content Providers	1,033	817	(216)	(21%)	\$89,618
5132	Software Publishers	427	208	(220)	(51%)	\$101,183
5131	Newspaper, Periodical, Book, and Directory Publishers	846	566	(280)	(33%)	\$61,303
5171	Wired and Wireless Telecommunications (except Satellite)	3,206	2,611	(596)	(19%)	\$113,835

Financial Activities (52,53)

Real Estate and the Insurance Industry continue to make up the largest share of jobs in the Financial Activities sector. Growth in Real Estate activities is expected to grow, however caution must be paid to the velocity of real estate transactions. The boom period of the low-interest rate environment during the pandemic does not appear to be returning anytime soon. Insurance related activities are also a strong performer in both number of jobs and earnings. Workforce Boards would do well to pay attention to the local state of their insurance industry especially after Southern California Wildfire claims that will test the insurance and reinsurance regime in the state when settled and paid.

NAICS	Description	2020 Jobs	2030 Jobs	2020 - 2030 Change	2020 - 2030 % Change	Avg. Earnings Per Job
5313	Activities Related to Real Estate	5,568	6,935	1,367	25%	\$61,343
5324	Commercial and Industrial Machinery and Equipment Rental and Leasing	1,682	2,685	1,003	60%	\$95,547
5321	Automotive Equipment Rental and Leasing	1,880	2,251	371	20%	\$75,341
5239	Other Financial Investment Activities	1,263	1,594	331	26%	\$118,537
5312	Offices of Real Estate Agents and Brokers	5,132	5,333	201	4%	\$80,592
5242	Agencies, Brokerages, and Other Insurance Related Activities	11,808	11,917	109	1%	\$94,926
5251	Insurance and Employee Benefit Funds	60	90	30	50%	\$64,214
5259	Other Investment Pools and Funds	14	13	(1)	(6%)	\$173,229
5322	Consumer Goods Rental	797	774	(24)	(3%)	\$47,166
5311	Lessors of Real Estate	6,356	6,314	(42)	(1%)	\$67,309
5331	Lessors of Nonfinancial Intangible Assets (except Copyrighted Works)	121	36	(85)	(71%)	\$73,663
5323	General Rental Centers	316	220	(96)	(30%)	\$73,010
5231	Securities and Commodity Contracts Intermediation and Brokerage	763	598	(165)	(22%)	\$211,262
5223	Activities Related to Credit Intermediation	1,296	816	(479)	(37%)	\$73,161
5222	Nondepository Credit Intermediation	2,386	1,698	(688)	(29%)	\$108,113
5221	Depository Credit Intermediation	8,114	6,567	(1,547)	(19%)	\$90,381
5241	Insurance Carriers	5,256	2,269	(2,987)	(57%)	\$114,732

Professional and Business Services (54, 55, 56)

The professional and business services sector remains a catchall industry category with a wide range of industry services and occupations. Lightcast projections show a generally robust services sector but many of the jobs within these descriptions are lower paying and may not contain the career ladder necessary to flourish and get ahead.

NAICS	Description	2020 Jobs	2030 Jobs	2020 - 2030 Change	2020 - 2030 % Change	Avg. Earnings Per Job
5617	Services to Buildings and Dwellings	28,558	33,094	4,536	16%	\$43,034
5416	Management, Scientific, and Technical Consulting Services	7,641	10,469	2,828	37%	\$83,337
5616	Investigation and Security Services	7,462	9,497	2,035	27%	\$45,615
5415	Computer Systems Design and Related Services	4,107	6,079	1,971	48%	\$93,197
5619	Other Support Services	1,952	2,858	906	46%	\$55,745
5611	Office Administrative Services	3,324	4,226	902	27%	\$90,213
5413	Architectural, Engineering, and Related Services	9,156	9,879	723	8%	\$96,995
5621	Waste Collection	2,663	3,208	545	20%	\$78,683
5629	Remediation and Other Waste Management Services	1,463	1,898	435	30%	\$70,550
5418	Advertising, Public Relations, and Related Services	1,157	1,560	403	35%	\$64,961
5622	Waste Treatment and Disposal	996	1,265	269	27%	\$102,371
5419	Other Professional, Scientific, and Technical Services	5,312	5,470	158	3%	\$61,835
5414	Specialized Design Services	1,386	1,501	115	8%	\$55,090
5417	Scientific Research and Development Services	1,097	1,196	98	9%	\$76,980
5411	Legal Services	7,027	7,054	28	0%	\$104,243
5615	Travel Arrangement and Reservation Services	694	644	(50)	(7%)	\$59,915
5612	Facilities Support Services	1,668	1,313	(355)	(21%)	\$66,780
5511	Management of Companies and Enterprises	11,575	11,179	(396)	(3%)	\$122,789
5412	Accounting, Tax Preparation, Bookkeeping, and Payroll Services	9,804	9,030	(773)	(8%)	\$70,803
5613	Employment Services	26,619	24,507	(2,112)	(8%)	\$47,052
5614	Business Support Services	5,009	2,230	(2,780)	(55%)	\$56,028

Educational Services (Private), Health Care, and Social Assistance (61, 62)

The Educational and Health Services sectors have a wide range of job descriptions and outcomes, but of note these are only jobs that are privately employed. Many employees of public state or district hospitals as well as public school employees are contained in a later category.

NAICS	Description	2020 Jobs	2030 Jobs	2020 - 2030 Change	2020 - 2030 % Change	Avg. Earnings Per Job
6241	Individual and Family Services	61,275	97,690	36,415	59%	\$29,380
6214	Outpatient Care Centers	19,132	30,093	10,961	57%	\$116,576
6211	Offices of Physicians	23,887	28,191	4,304	18%	\$124,322
6213	Offices of Other Health Practitioners	8,930	12,346	3,417	38%	\$61,887
6216	Home Health Care Services	5,887	8,962	3,075	52%	\$63,392
6212	Offices of Dentists	9,994	12,565	2,572	26%	\$72,176
6231	Nursing Care Facilities (Skilled Nursing Facilities)	13,713	16,223	2,510	18%	\$59,061
6221	General Medical and Surgical Hospitals	39,896	42,134	2,237	6%	\$109,628
6116	Other Schools and Instruction	3,684	5,651	1,968	53%	\$26,683
6111	Elementary and Secondary Schools	9,257	10,999	1,742	19%	\$45,133
6223	Specialty (except Psychiatric and Substance Abuse) Hospitals	1,737	3,264	1,527	88%	\$100,628
6233	Continuing Care Retirement Communities and Assisted Living Facilities for the Elderly	8,764	10,206	1,442	16%	\$47,408
6242	Community Food and Housing, and Emergency and Other Relief Services	1,859	2,949	1,090	59%	\$58,755
6117	Educational Support Services	846	1,580	735	87%	\$44,474
6232	Residential Intellectual and Developmental Disability, Mental Health, and Substance Abuse Facilities	5,570	6,128	558	10%	\$53,613
6215	Medical and Diagnostic Laboratories	2,161	2,620	459	21%	\$82,659
6115	Technical and Trade Schools	946	1,337	391	41%	\$56,149
6219	Other Ambulatory Health Care Services	4,247	4,551	304	7%	\$83,357
6112	Junior Colleges	731	926	196	27%	\$51,981
6114	Business Schools and Computer and Management Training	178	306	128	72%	\$68,336
6222	Psychiatric and Substance Abuse Hospitals	441	535	94	21%	\$75,249
6239	Other Residential Care Facilities	1,430	1,266	(164)	(11%)	\$57,972
6244	Child Day Care Services	10,082	9,878	(204)	(2%)	\$36,819
6113	Colleges, Universities, and Professional Schools	4,940	4,514	(426)	(9%)	\$60,263
6243	Vocational Rehabilitation Services	3,710	2,533	(1,177)	(32%)	\$44,998

Leisure and Hospitality (71, 72)

This sector has seen incredible growth across the board, unfortunately almost all of the jobs being created are for lower wages. With some of the most well known and frequently visited National Parks and Wilderness areas are within or a short drive from the SVU RPU, the workforce system should look at what ways to engage with and encourage the hospitality industry to grow both its own economic output and its utilization of higher skilled labor.

Of note, 7225 Restaurants and Other Eating Places have seen robust growth post-pandemic and it is projected to continue. It is unclear how recent and upcoming changes to minimum wage will affect the food and service industry in the coming years.

NAICS	Description	2020 Jobs	2030 Jobs	2020 - 2030 Change	2020 - 2030 % Change	Avg. Earnings Per Job
7225	Restaurants and Other Eating Places	93,689	128,643	34,953	37%	\$29,113
7139	Other Amusement and Recreation Industries	7,138	13,457	6,319	89%	\$30,923
7223	Special Food Services	5,239	9,449	4,211	80%	\$38,553
7211	Traveler Accommodation	8,464	11,844	3,381	40%	\$39,136
7224	Drinking Places (Alcoholic Beverages)	1,075	2,282	1,207	112%	\$26,219
7115	Independent Artists, Writers, and Performers	1,528	2,564	1,036	68%	\$40,022
7131	Amusement Parks and Arcades	187	946	759	406%	\$29,332
7132	Gambling Industries	920	1,473	553	60%	\$43,986
7113	Promoters of Performing Arts, Sports, and Similar Events	258	785	526	204%	\$40,140
7112	Spectator Sports	617	1,077	459	74%	\$41,105
7121	Museums, Historical Sites, and Similar Institutions	542	874	332	61%	\$43,041
7212	RV (Recreational Vehicle) Parks and Recreational Camps	523	706	183	35%	\$43,229
7111	Performing Arts Companies	531	707	176	33%	\$30,711
7213	Rooming and Boarding Houses, Dormitories, and Workers' Camps	82	91	9	11%	\$43,740
7114	Agents and Managers for Artists, Athletes, Entertainers, and Other Public Figures	57	19	(38)	(67%)	\$53,403

Other Services (81)

NAICS	Description	2020 Jobs	2030 Jobs	2020 - 2030 Change	2020 - 2030 % Change	Avg. Earnings Per Job
8121	Personal Care Services	12,276	16,880	4,604	38%	\$33,724
8111	Automotive Repair and Maintenance	15,416	18,754	3,339	22%	\$53,114
8134	Civic and Social Organizations	1,612	3,105	1,493	93%	\$29,342
8129	Other Personal Services	2,384	3,597	1,213	51%	\$36,342
8123	Drycleaning and Laundry Services	2,682	3,712	1,030	38%	\$61,370
8113	Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance	3,617	4,380	763	21%	\$78,231
8133	Social Advocacy Organizations	1,537	2,113	576	37%	\$55,919
8131	Religious Organizations	12,762	13,278	516	4%	\$28,726
8132	Grantmaking and Giving Services	1,823	2,255	432	24%	\$55,070
8139	Business, Professional, Labor, Political, and Similar Organizations	1,777	1,974	196	11%	\$67,720
8122	Death Care Services	1,289	1,430	140	11%	\$60,354
8112	Electronic and Precision Equipment Repair and Maintenance	724	772	48	7%	\$63,344
8114	Personal and Household Goods Repair and Maintenance	1,295	1,202	(93)	(7%)	\$46,181
8141	Private Households	9,678	7,898	(1,780)	(18%)	\$16,937

Government (All Levels)

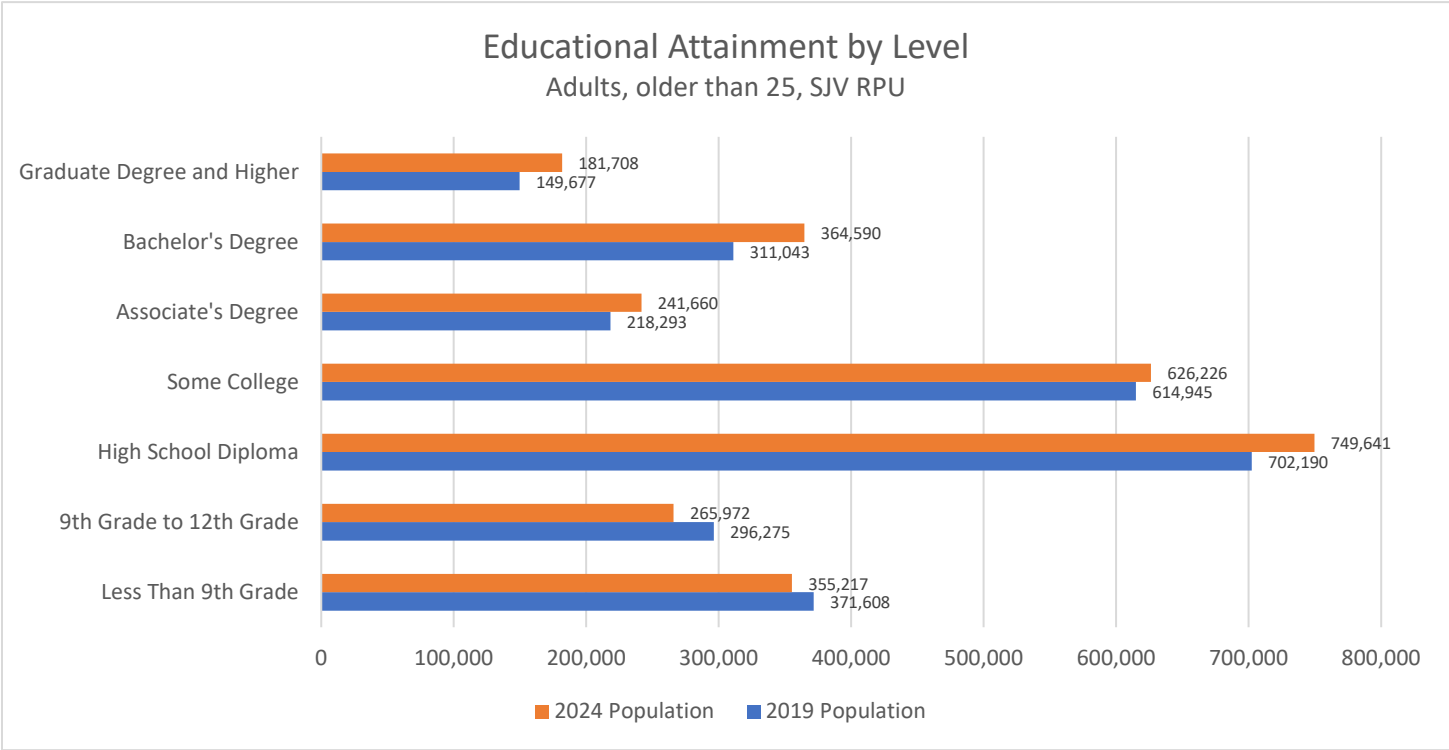
NAICS	Description	2020 Jobs	2030 Jobs	2020 - 2030 Change	2020 - 2030 % Change	Avg. Earnings Per Job
9036	Education and Hospitals (Local Government)	141,112	177,098	35,986	26%	\$91,892
9039	Local Government, Excluding Education and Hospitals	69,904	82,080	12,176	17%	\$106,533
9012	Federal Government, Military	16,465	18,004	1,539	9%	\$60,206
9026	Education and Hospitals (State Government)	14,199	14,324	125	1%	\$89,352
9029	State Government, Excluding Education and Hospitals	30,870	30,965	95	0%	\$102,729
9011	Federal Government, Civilian	30,762	27,771	(2,991)	(10%)	\$123,452

Demographics, Education, and Special Populations

Educational Attainment

Overall, Educational Attainment has improved for the RPU over the last five years. As seen in Graph 1 the below graph, high school diplomas, those attending college, and college degrees all increased, while those with less than a high school education decreased. With continuing emphasis on high school graduation and different technical pathways programs, the trends seen here should continue.

Graph 10
Educational Attainment, by level
San Joaquin Valley RPU, adults older than 25
2023 1-Year ACS Estimates



Source: ACS 2023 1-Year Data, EDD RPU Data Portal

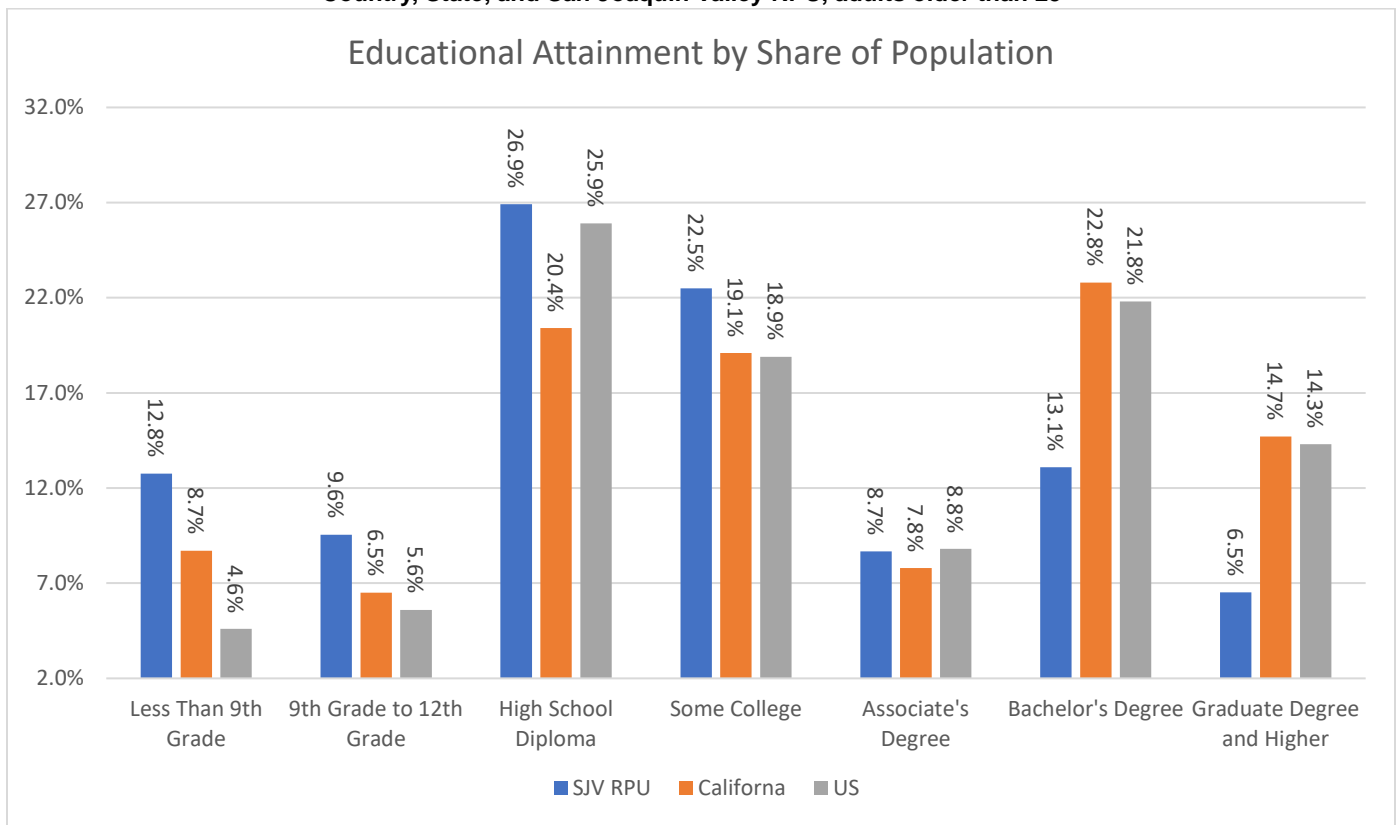
Educational Attainment – Missed Opportunities

Despite these gains, the SVU RPU still lags behind the rest of the state and the nation in overall education levels as seen in Graph 11. One major weakness in the region is the lack of post-secondary education options. Currently, the region is served by three California State University campuses (Stanislaus, Fresno, and Bakersfield) and one University of California (Merced). There are no public, 4-year degree offering institutions in 6 of the SJV RPU’s 10 counties.

There is a robust community college system that has increasingly taken a leading role in post-secondary education and licensing, but the Bachelor’s and Graduate degree seekers are continually underserved and often seek education outside of the region, contributing to a human capital flight.

Additionally, rural communities often face barriers like long travel distances to colleges, fewer advanced placement courses, and lower internet connectivity, which can hinder educational progress. These disparities are critical, as they limit workforce opportunities and economic development in rural California, perpetuating cycles of lower income and reduced mobility. Addressing these challenges requires targeted investments in educational infrastructure, digital access, and community support programs to ensure rural residents can compete on an equal footing with their urban counterparts.

Graph 11
Educational Attainment, by share of population
Country, State, and San Joaquin Valley RPU, adults older than 25

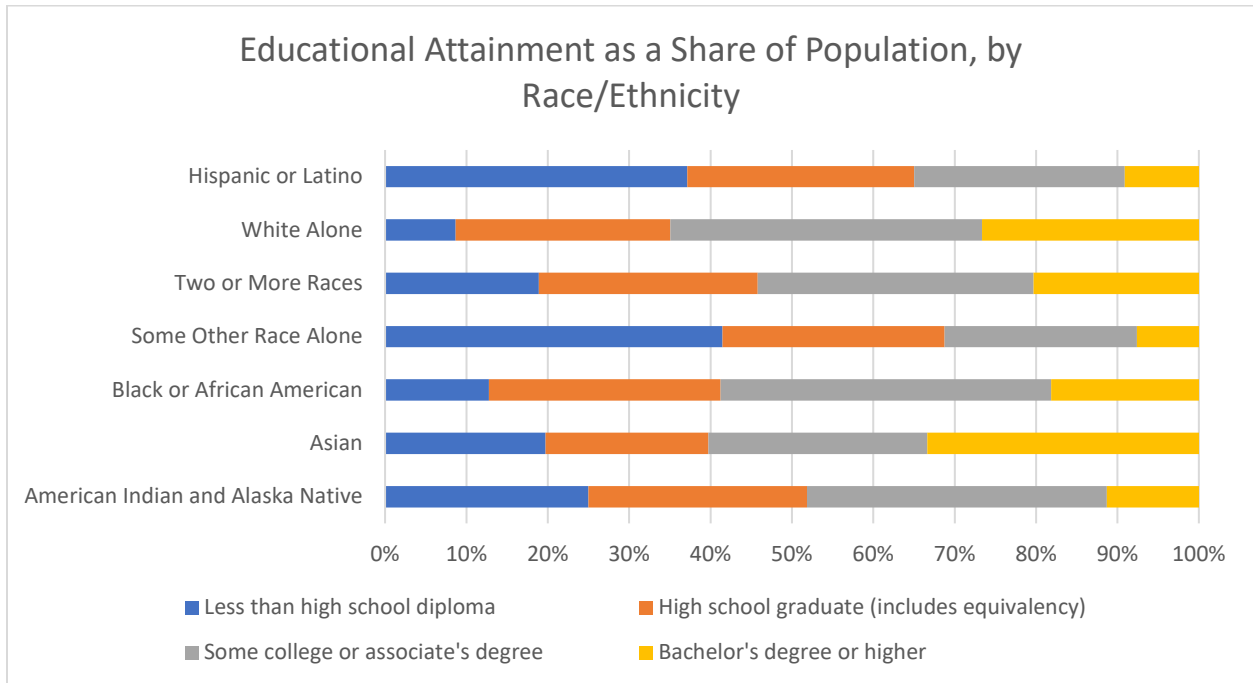


Source: EDD RPU Data Portal, Educational Attainment

A Closer Look at Educational Attainment – Race/Ethnicity

The stacked bar chart below compares the differences of educational attainment between race/ethnic groups as a ratio. Overall we can see that those identifying as Hispanic or Latino have the largest share of their population not possessing a high school diploma or equivalency. This can be due to the large relative share of foreign-born population that come to the United States as adults. However, at the other end of the educational attainment spectrum, they are also one of the demographic groups most underrepresented with higher education degrees such as bachelor’s or graduate/professional degrees.

Graph 12
Educational Attainment as a share of population, by Race/Ethnicity
EDD Statistics (from ACS 5-Year Data 2022)



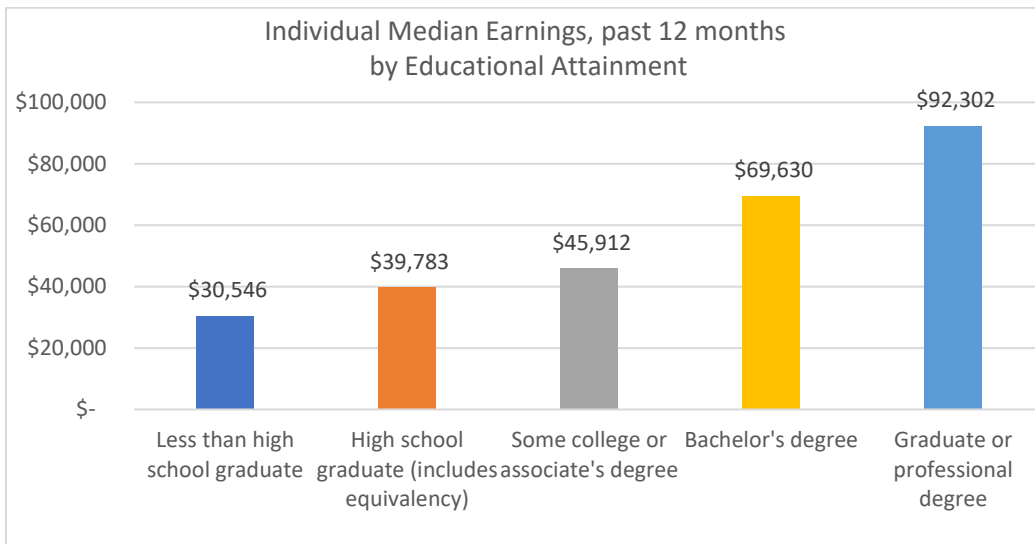
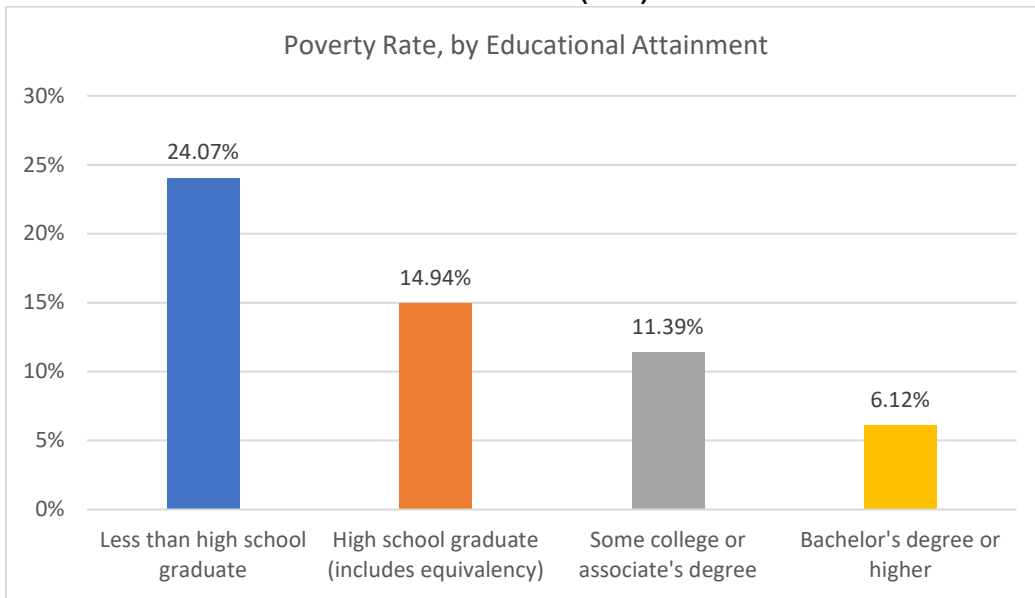
Source: EDD RPU Data Portal, Race/Ethnicity

A note on Race and Ethnicity: The large number of people who identify as some other race reflects a survey method decision in way the U.S. Census Bureau classifies individuals by race. The Bureau classifies Hispanics/Latinos as an ethnic group instead of a racial group and considers ethnicity and race not to be mutually exclusive. As such one can be Hispanic ethnically and White or Black simultaneously and the Census has different variables to reflect this. However, this ethnicity and race distinction appears to be blurred among ACS respondents. The Census Bureau reports that the vast majority of respondents who identify as some other race were Hispanics/Latinos. This same blurring of race and ethnicity may also inflate the two or more race count.

A Closer Look at Educational Attainment – The Key Antipoverty Program

Educational Attainment significantly increase access to better-paying and more stable job opportunities. Individuals with a high school diploma or higher are more likely to secure employment with benefits, while those with college degrees often access higher-paying professions in industries like healthcare, technology, and finance. Education also provides critical skills such as problem-solving, communication, and adaptability, which are increasingly valued in today’s economy.

Graph 13 and 14
Poverty Rate, by Educational Attainment
Individual Median Earnings, by Educational Attainment
San Joaquin Valley RPU
ACS 1-Year Data (2023)



Source, both graphs: ACS 2023 1-Year Data, San Joaquin Valley RPU Weighted Averages

Demographic Characteristics

The demography of the San Joaquin Valley RPU differs in several ways from the state of California as a whole. With an estimated population of just under 4.5 million residents, it is one of the few regions of California growing in population and as seen from the table below, population growth outpaced the whole of the United States over the last 5 years.

TABLE 12
Population and Growth
RPU, State, and Country

	2019 Population	2024 Population	Change	% Change
SJV RPU	4,292,829	4,417,341	124,512	2.90%
California	39,437,610	38,776,275	(661,335)	(1.68%)
United States	328,329,953	336,486,167	8,156,214	2.48%

Source: ACS 1-Year Data 2023, Lightcast

TABLE 12
Population by Race/Ethnicity

Race/Ethnicity	2019 Population	2024 Population	% Change	% of Total
White, Hispanic	2,021,354	2,171,780	7%	49.16%
White, Non-Hispanic	1,351,623	1,235,819	(9%)	27.98%
Asian, Non-Hispanic	346,414	404,266	17%	9.15%
Black, Non-Hispanic	191,848	195,205	2%	4.42%
Two or More Races, Non-Hispanic	97,356	105,988	9%	2.40%
American Indian or Alaskan Native, Hispanic	90,569	95,567	6%	2.16%
Two or More Races, Hispanic	62,209	69,152	11%	1.57%
Black, Hispanic	46,374	50,261	8%	1.14%
Asian, Hispanic	37,760	41,230	9%	0.93%
American Indian or Alaskan Native, Non-Hispanic	26,988	26,237	(3%)	0.59%
Native Hawaiian or Pacific Islander, Non-Hispanic	12,893	14,091	9%	0.32%
Native Hawaiian or Pacific Islander, Hispanic	7,441	7,744	4%	0.18%
Total	4,292,829	4,417,341	3%	100.00%

Source: ACS 1-Year Data 2023, Lightcast

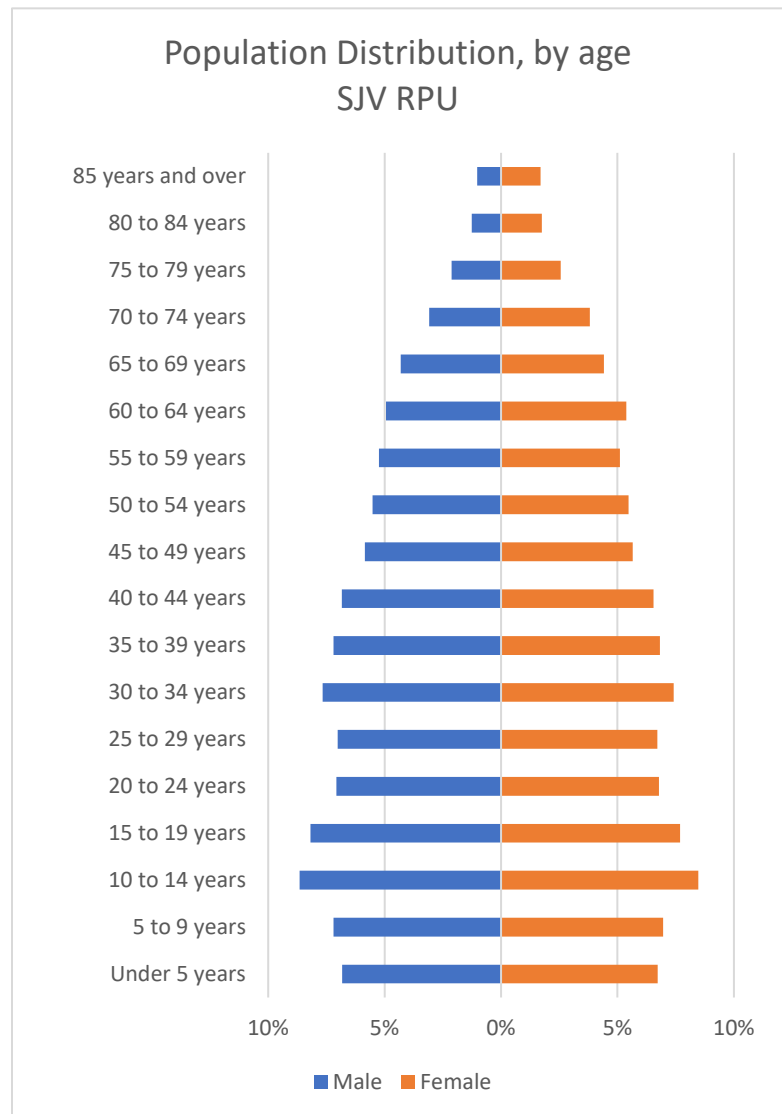
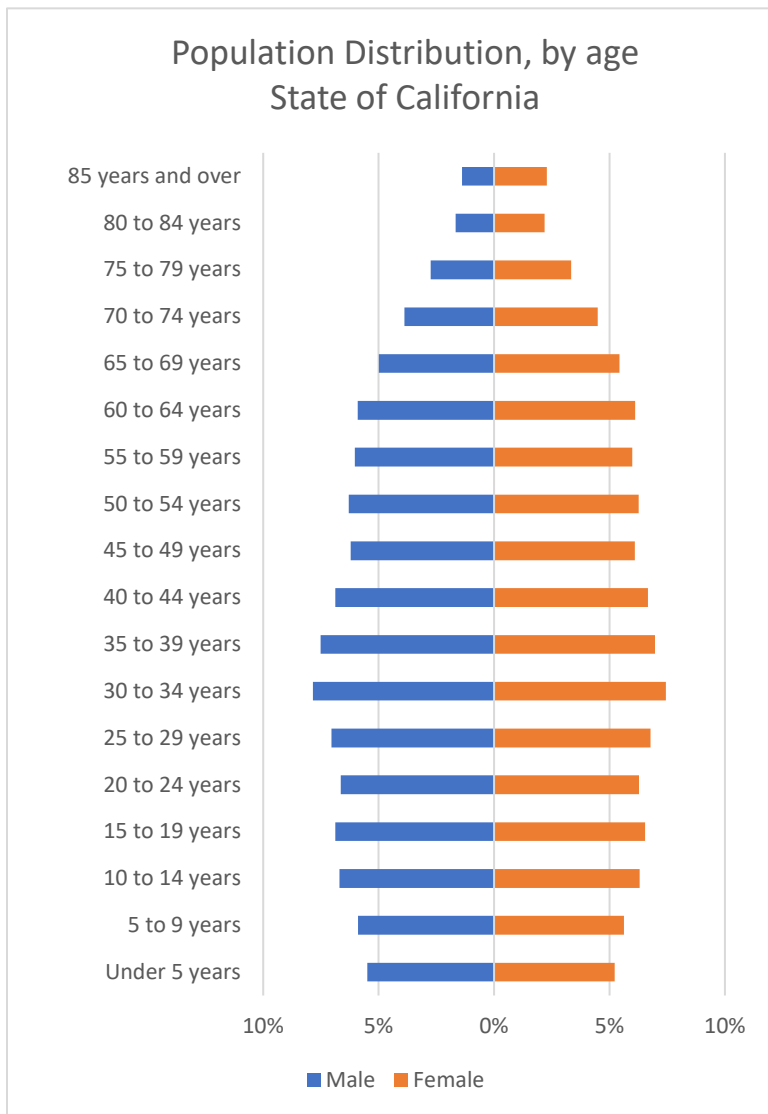
Source note: The above table from Lightcast attempts to display a disaggregated race/ethnicity demography in an attempt to better understand the different population growth changes occurring. Other notes have pointed out the confusing way that US Census Bureau accounts for Race and Ethnicity. For other Race/Ethnic analysis, counting statistics were not used. In this case, population is a counting statistic and is being summed.

Special Populations: A Youth Advantage

The above population pyramids demonstrate the demographic advantage that the San Joaquin Valley RPU has vis-à-vis the rest of the state. While the rest of the state gets older, the SJV RPU has a younger population overall and a larger cohort of youth comparatively. This demographic advantage can manifest in a larger pool of available workforce for a growing economy and new business formation. As the economy shifts and changes, these youthful cohorts will be more adaptable and able to acquire new skills to navigate this new reality.

It is an asset that will require coordination and communication to harness a fully realized economic potential, but one that the region and its workforce boards are eager to undertake.

Graph 15 and 16
Population Pyramids, State and San Joaquin Valley RPU
ACS 1-Year Data (2023)

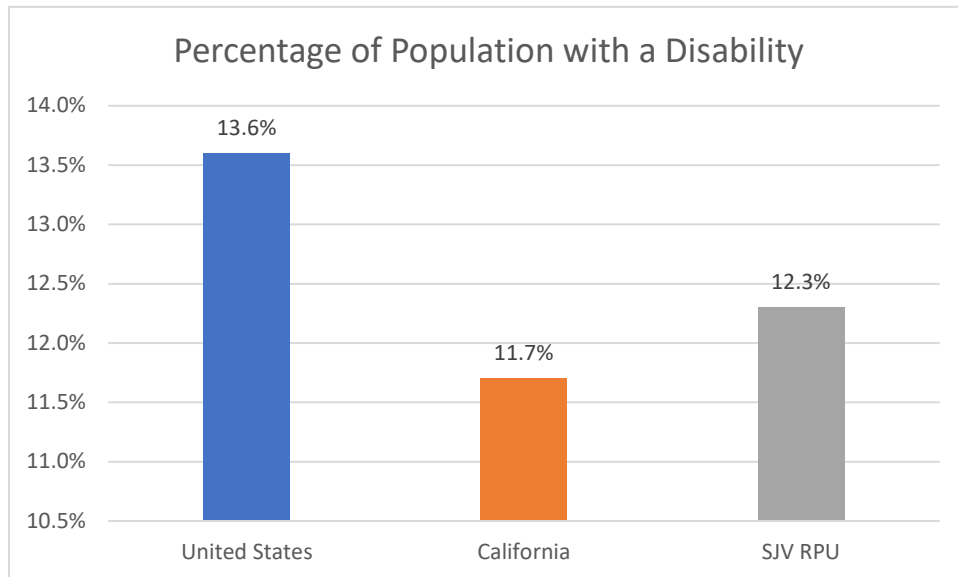


Source, both graphs: ACS 1-Year Estimates, S0101 Age and Sex

Special Populations: Residents with a Disability

Disability rates have a significant impact on workforce development, as individuals with disabilities often face unique barriers to employment. According to 2023 1-Year ACS data, approximately 11.7% of Californians live with some form of disability, with higher rates in rural and economically disadvantaged areas like the SJV RPU. These barriers include physical accessibility challenges, limited availability of accommodations, and societal stigmas, all of which can hinder workforce participation. Additionally, individuals with disabilities may have lower educational attainment due to systemic inequities in access to resources and support services, further impacting their job opportunities. This underutilization of a capable and diverse workforce represents a lost opportunity for economic growth. Addressing these challenges requires targeted workforce efforts and cooperation of partner agencies to see sustained success.

Graph 17
Population with a disability
Country, State, and San Joaquin RPU
ACS 1-Year Data 2023



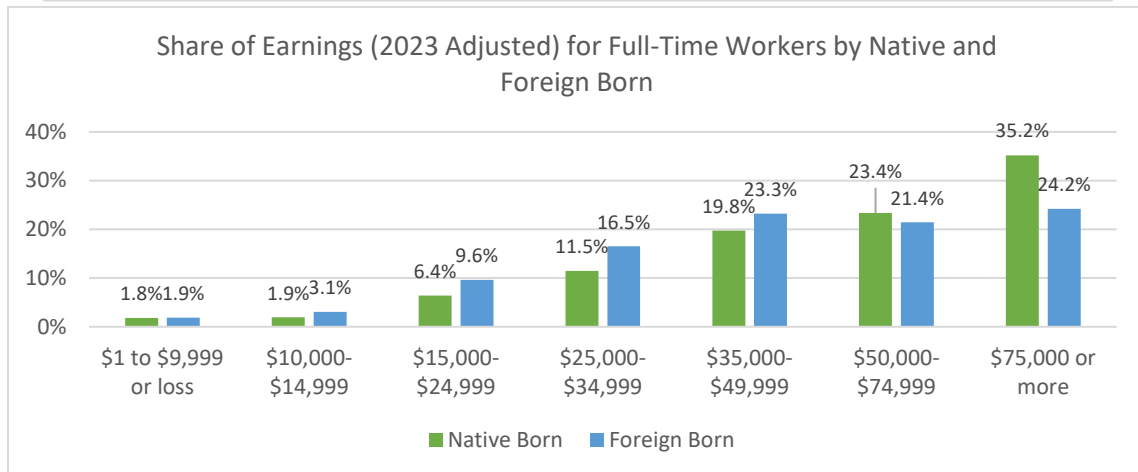
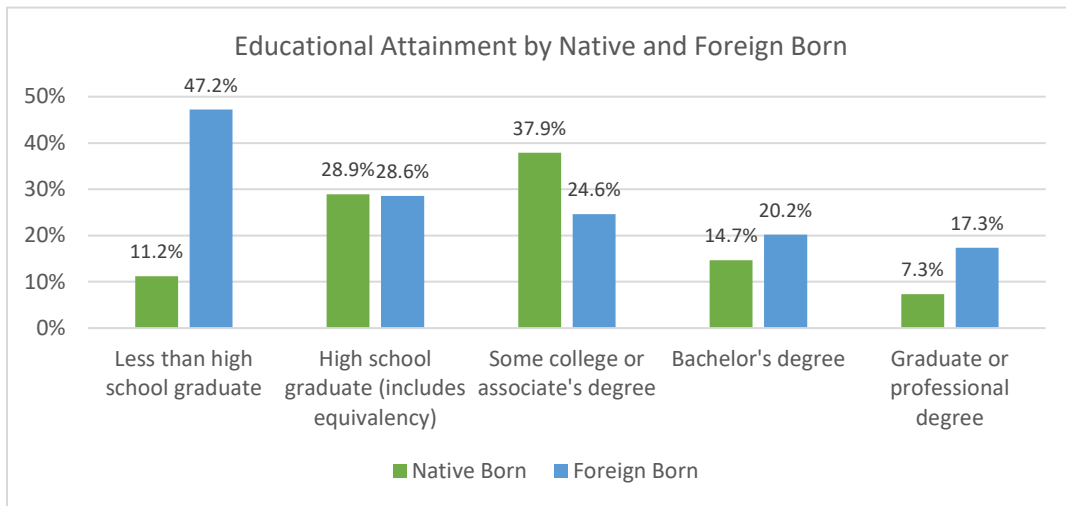
Source: ACS 1-Year Estimates, S1810 Disability Characteristics

Special Populations: Foreign Born Residents

The U.S. Census Bureau uses the term foreign-born to refer to anyone who is not a U.S. citizen at birth. This includes naturalized U.S. citizens, lawful permanent residents (immigrants), temporary migrants (such as foreign students), humanitarian migrants (such as refugees), and unauthorized migrants. As shown in the two figures below, Foreign-Born residents occupy both ends of the educational and earnings spectrum. This may be due to the bifurcation of foreign-born populations into educated, high paying often health care centered jobs (such as nurses, doctors, or other medical professionals) and the migrant farm working population. Foreign-born residents have a higher share of population not holding high school diplomas as well as a higher share of bachelor and graduate degrees. In general, foreign-born residents may earn less on average than native born residents, but with the recognition that many of the highest earners such as doctors or nurses in the SJV RPU are foreign-born.

Graph 18 and 19

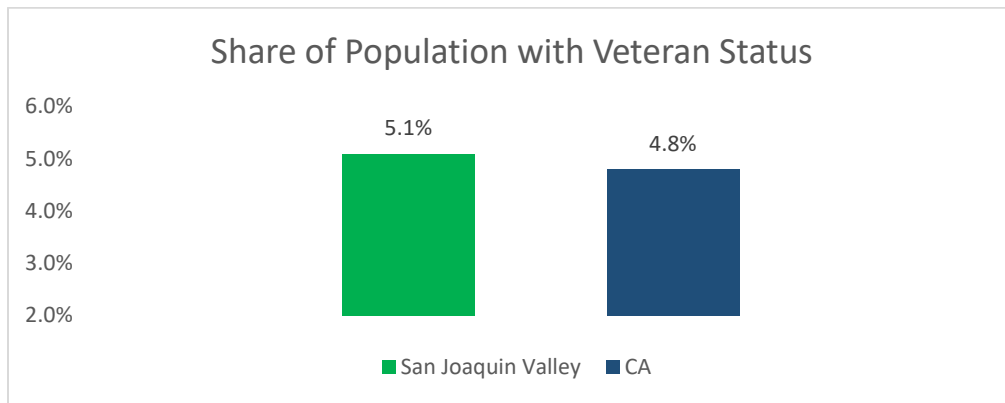
**Educational Attainment by Native and Foreign Born
Earnings for Full Time Workers, by share, Native and Foreign Born
San Joaquin RPU
ACS 1-Year Estimates (2023)**



Source, both graphs: ACS 1-Year Estimates, S0502 Selected Characteristics of the Foreign-Born Population by Period of Entry Into the United States

Special Populations: Veteran Status

The San Joaquin Valley RPU is home to a significant population of veterans, reflecting the region's strong military presence and contributions. The slightly higher than the state share of Veteran status in the region belies the reality that a much higher proportion of our youth join the military branches and settle elsewhere into civilian employment, based upon their service location(s). Translating military expertise into civilian career pathways can be a common hurdle, particularly in areas with economies focused on agriculture and limited high-skill industries. Workforce development efforts in the San Joaquin Valley RPU, such as veteran priority of service, targeted outreach and programming, and educational resources, are essential to address these gaps. By investing in targeted support for veterans, the region can tap into their unique skills and leadership qualities, contributing to local economic growth and creating more inclusive opportunities for employment.



Additional Resources

Department of Labor – Bureau of Labor Statistics

<https://www.bls.gov/>

Department of Commerce – Bureau of Economic Analysis

<https://www.bea.gov/>

Department of Commerce – Bureau of the Census

<https://www.census.gov/en.html>

<https://data.census.gov/>

Employment Development Department –

Labor Market Information Division

<https://labormarketinfo.edd.ca.gov/>

Lightcast Methodology

<https://kb.lightcast.io/en/collections/3904183-data-methodology>